

2015 User Guide

Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2015

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This user guide is for people who prefer a print version of CRM Online and CRM 2015 (on-premises) Help and for those who want to customize the content for their organization. For videos, quick reference cards, eBooks, and for up-to-date information, visit the Customer Center at [www.CRMCustomerCenter.com](http://www.CRMCustomerCenter.com).

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Welcome to the User Guide

This user’s guide covers the following releases:

* Microsoft Dynamics CRM 2015 (on-premises)
* Microsoft Dynamics CRM Online up to 2015 Update

What's new

We’re excited to tell you about the many new features available in Microsoft Dynamics CRM Online 2015 Update and Microsoft Dynamics CRM 2015 (on-premises)!

Manage the sales cycle

Sales walkthrough

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](#z8c65b7d5b1bc4dd7bf10c8bdc6334491)  [Qualify a lead and convert it to an opportunity](#z476a128461e54eb29bd4b95d111cf82e) |
|  | In this stage, you identify stakeholders, competitors, and sales team members and come up with a proposed solution. | [Create or edit an opportunity](#z692b7303d9e143239e81ab0dee4cfd2d) |
|  | Now it’s time to present your proposal to your potential customer. | [Create or edit an opportunity](#z692b7303d9e143239e81ab0dee4cfd2d)  [Create or edit a quote](#z9881bdf589224cb6b2df544286e56400) |
|  | 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](#z19543bce32284723825f2358c4b18ff7)  [Create or edit an invoice](#zb58780fa4e39492599ade2e1bbfb5fa4)  [Close an opportunity as won or lost](#zbe3ff5e6019b4c07aebbe5792af19b4d) |

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 2015, 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.

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[Edit a lead](#z2)

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[Typical next steps](#z5)

Create a lead

1. Go to Sales > Leads. (In Microsoft Dynamics CRM for Outlook, go to Sales > Customers > Leads.)

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](#z0c6df1176f5544e4a7513b3786cccb0a)

6. Choose the Save button on the bottom right of the screen.

Edit a lead

1. Go to Sales > Leads. (In CRM for Outlook, go to Sales > Customers > Leads.)

2. Choose the lead 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

 Nurture your leads through a CRM marketing campaign. More information: [Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

 Automate your lead generation with coordinated marketing campaigns. More information: [Microsoft Dynamics Marketing](http://go.microsoft.com/fwlink/p/?LinkID=393622)

 Research leads through social media channels like LinkedIn and Twitter. More information: [InsideView](http://go.microsoft.com/fwlink/p/?LinkId=511655)

 Find out more about what your leads are saying about your company and your competitors through social media channels like Twitter and Facebook. Also get a better idea about what their real needs are and how well their current solutions are working for them. More information: [Microsoft Social Listening](http://go.microsoft.com/fwlink/p/?LinkId=511656)

Tips and tricks

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

 [Quick create--Enter new contacts (or other data)--fast!](#z201e9f6656e74f58b51e9c73cf5f50b8)

 [Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Typical next steps

**** [Qualify a lead and convert it to an opportunity](#z476a128461e54eb29bd4b95d111cf82e)

**** [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)—learn about the sales process

See Also

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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 timeframe they need it.

On this page:

[Qualify a single lead](#z6)

[Qualify multiple leads](#z7)

[Additional considerations](#z8)

[Typical next steps](#z9)

Qualify a single lead

1. Go to Sales > Leads. (In Microsoft Dynamics CRM for Outlook, go to Sales > Customers > Leads.)

2. Choose the lead you want to qualify.

3. In the Qualify section of the sales process bar, type in all applicable information.

4. Choose Qualify at the top of the Lead screen.

5. Choose the Save button at the bottom right of the screen.

Qualify multiple leads

1. Go to Sales > Leads. (In CRM for Outlook, go to Sales > Customers > Leads.)

2. Select the check box next to all leads that you want to qualify.

3. Choose Qualify at the top of the screen.

Additional considerations

 Nurture your leads through a CRM marketing campaign. More information: [Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

 Automate your lead qualification process with Microsoft Dynamics Marketing. More information: [Microsoft Dynamics Marketing](http://go.microsoft.com/fwlink/p/?LinkID=393622)

 Research leads through social media channels like LinkedIn and Twitter. More information: [InsideView](http://go.microsoft.com/fwlink/p/?LinkId=511655)

 Find out more about what your leads are saying about your company and your competitors through social media channels like Twitter and Facebook. Also get a better idea about what their real needs are and how well their current solutions are working for them. More information: [Microsoft Social Listening](http://go.microsoft.com/fwlink/p/?LinkId=511656)

Typical next steps

**** [Create or edit an opportunity](#z692b7303d9e143239e81ab0dee4cfd2d)

**** [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)—learn about the sales process

See Also

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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: [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)

On this page:

[Create an opportunity](#z10)

[Edit an opportunity](#z11)

[Additional considerations](#z12)

[Tips and tricks](#z13)

[Typical next steps](#z14)

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: [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)

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

1. Go to Sales > Opportunities. (In Microsoft Dynamics CRM for Outlook, go to Sales > Customers > Opportunities.)

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](#z0c6df1176f5544e4a7513b3786cccb0a)

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](#z9881bdf589224cb6b2df544286e56400)

11. Choose the Save button on the bottom right of the screen.

Edit an opportunity

1. Go to Sales > Opportunities. (In CRM for Outlook, go to Sales > Customers > Opportunities.)

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](#zaa14c110056b4eddb8dfb1eae71a1ccb)

Tips and tricks

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

 [Quick create--Enter new contacts (or other data)--fast!](#z201e9f6656e74f58b51e9c73cf5f50b8)

 [Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Typical next steps

**** [Create or edit a quote](#z9881bdf589224cb6b2df544286e56400)

**** [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)—learn about the sales process

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Use Bing Maps to view a location](#z6182c02d6d684190bbc059b1d846af81)

[Assign a record to a user or team](#z0fff48c9f5654a7aa63295142177902d)

[Stay up-to-date with customer news with the activity feed](#z2396d3f3ca6b4a4499ddbdbaf9b22a58)

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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](#z15)

[Create a quote](#z16)

[Edit a quote](#z17)

[Typical next steps](#z18)

Create a quote from an opportunity

1. Go to Sales > Opportunities.

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.

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.

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](#z19543bce32284723825f2358c4b18ff7)

**** [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)—learn about the sales process

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Assign a record to a user or team](#z0fff48c9f5654a7aa63295142177902d)

[Keep track of notes, tasks, calls, or email with activities](#z0c6df1176f5544e4a7513b3786cccb0a)

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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](#z19)

[Create an order](#z20)

[Edit an order](#z21)

[Typical next steps](#z22)

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.

2. Choose the quote you want to create an order from.

3. Choose 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 choose OK.

5. To add products from your opportunity to your quote, choose Get Products at the top of the screen, select your opportunity, and choose OK.

6. Choose 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.

2. Choose New.

3. Add your customer’s contact information.

4. To add products from your opportunity to your order, choose Get Products at the top of the screen, select your opportunity, and choose 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. Choose 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.

2. Select the order you want to edit.

3. Add or change any details about your order.

4. Choose the Save button at the bottom right corner of the screen.

Typical next steps

**** [Create or edit an invoice](#zb58780fa4e39492599ade2e1bbfb5fa4)

**** [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)—learn about the sales process

See Also

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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](#z23)

[Create an invoice](#z24)

[Edit an invoice](#z25)

[Typical next steps](#z26)

Create an invoice from an order

1. Go to Sales > Orders. (In Microsoft Dynamics CRM for Outlook, go to Sales > Collateral > Orders.)

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.

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.

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](#zbe3ff5e6019b4c07aebbe5792af19b4d)

**** [Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)—learn about the sales process

See Also

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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 and choose the opportunity you want to edit.

2. 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

[Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

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, 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.



|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. On the nav bar, choose the plus sign , and then choose the item you want.  For an activity:   |  |  | | --- | --- | | Choose… | To create a new… | |  | Task | |  | Phone call | |  | Email | |  | Appointment |   2. Fill in the fields, and then choose Save.  3. If you would like to continue adding information, choose View Record. To create another one, choose 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.

Use Bing Maps to view a location

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

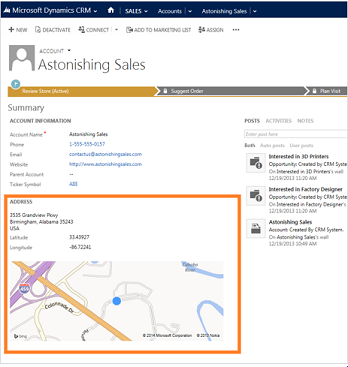
Important

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

View a Bing map for a contact, lead or account



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



See Also

[Create or edit a lead](#z8c65b7d5b1bc4dd7bf10c8bdc6334491)

[Create or edit a contact](#za24dc692096c4ba6995b80f682018007)

[Create or edit an account](#z6d662e1bc9164e19b2f8098cd89c5029)

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

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

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



|  |  |  |
| --- | --- | --- |
| 1. Navigate to the contact or account you want create an activity for.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Accounts or Contacts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then click or tap Contracts or Accounts. |   2. In the list of contacts or accounts, click or tap a name, and then click or tap Activities.  3. To create a new phone call or task, click or tap Add Phone Call, or click or tap Add Task. Or, to create a new email or appointment, click or tap the More Command (), then click or tap Email or Appointment.  - OR -  To edit an existing activity, in the list of activities, click or tap the activity, and then click or tap Open this activity. (Point to the area to the right of the activity to see the command.)  4. Fill in your information. Use the handy tooltips as a guide.  5. Click or tap OK to save a new activity or click or tap Save to save an updated activity. |

Note

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

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

To create the same activity for multiple records, use a quick campaign. More information: [Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

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

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

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

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

Like or unlike a post in the activity feed



|  |
| --- |
| 1. Under What’s new, point to the post.  2. Click or tap Like or Unlike. |

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

Comment on someone’s post in the activity feed



|  |
| --- |
| 1. Under What’s new, point to the post.  2. Click or tap Reply.  Type your comment. You can use up to 250 characters. |

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

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



|  |
| --- |
| 1. Open the contact, account, lead, or other type of record you want to follow.  2. Click or tap the More Command ().  3. Click or tap Follow or Unfollow. |

Follow or unfollow a colleague



|  |
| --- |
| 1. On your dashboard, click or tap Advanced Find.  2. In the Look for drop-down list, click or tap Users.  3. In the Show group, click or tap Results.  4. Click or tap the person’s name.  5. Click or tap the More Command ().  6. Click or tap Follow or Unfollow. |

Control which types of posts you see in the activity feed

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



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

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

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



|  |
| --- |
| 1. Under What’s new, click or tap All records.  2. Click or tap Modify this list (  ).  3. In the Filters My Filters dialog box, select the record types you want to change.  4. Click or tap Move Up or Move Down to change the order the record types are displayed.  5. Close the dialog box. |

Use keyboard shortcuts in activity feeds

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

See Also

[Display your picture on the activity feed](#zdf7b76fae87b4861bc4c236fcc5722fd)

Display your picture on the activity feed

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



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

See Also

[Administer the activity feed](#z9665a0ee959842d9a304206b5fe6740b)

[Stay up-to-date with customer news with the activity feed](#z2396d3f3ca6b4a4499ddbdbaf9b22a58)

Create or edit an account

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

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

View your accounts



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. You’ll see a list of your active accounts. You may need to scroll to see the whole list.  Tip  It’s easy to get back to the customer data you were working with most recently. On the nav bar, next to Accounts, click or tap . Choose a name, and then get right back to what you were doing. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then click or tap Accounts.  You’ll see a list of your active accounts. You may need to scroll to see the whole list. |   2. Click or tap an account name to see the details of the account. |

Create an account



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Accounts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then click or tap Accounts. |   2. Click or tap New.  3. Fill in your information. Use the handy tooltips as a guide.  4. Choose Save. |

Edit an account



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Accounts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then click or tap Accounts. |   2. Open the account and change the information that you want.  3. Choose Save. |

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Use Bing Maps to view a location](#z6182c02d6d684190bbc059b1d846af81)

[Assign a record to a user or team](#z0fff48c9f5654a7aa63295142177902d)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

[Deactivate or activate an account or contact](#z71b20ebb7ecd44e98de21db070cf30cf)

[Quick create--Enter new contacts (or other data)--fast!](#z201e9f6656e74f58b51e9c73cf5f50b8)

[Keep track of notes, tasks, calls, or email with activities](#z0c6df1176f5544e4a7513b3786cccb0a)

[Stay up-to-date with customer news with the activity feed](#z2396d3f3ca6b4a4499ddbdbaf9b22a58)

Create or edit a contact

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

View a contact

|  |  |  |
| --- | --- | --- |
| 1. Navigate to your area.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Contacts.  You’ll see a list of your active contacts. You may need to scroll to see the whole list.  Tip  It’s easy to get back to the customer data you were working with most recently. On the nav bar, next to Contacts, click or tap . Choose a name, and then get right back to what you were doing. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, then select your work area: Sales, Service, or Marketing.  b. Expand Customers, then click or tap Contacts.  You’ll see a list of your active contacts. You may need to scroll to see the whole list. |   2. Click or tap a person’s name to see the details for the contact. |

Create a contact

|  |  |  |
| --- | --- | --- |
| 1. Navigate to your area.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Contacts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, then select your work area: Sales, Service, or Marketing.  b. Expand Customers, then click or tap Contacts. |   2. Click or tap New.  3. Fill in your information. Use the handy tooltips as a guide.  4. Choose Save. |

Edit a contact

|  |  |  |
| --- | --- | --- |
| 1. Navigate to your area.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Contacts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, then select your work area: Sales, Service, or Marketing.  b. Expand Customers, then click or tap Contacts. |   2. Open the contact and change the information that you want.  3. Choose Save. |

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Use Bing Maps to view a location](#z6182c02d6d684190bbc059b1d846af81)

[Assign a record to a user or team](#z0fff48c9f5654a7aa63295142177902d)

[Deactivate or activate an account or contact](#z71b20ebb7ecd44e98de21db070cf30cf)

[Quick create--Enter new contacts (or other data)--fast!](#z201e9f6656e74f58b51e9c73cf5f50b8)

[Keep track of notes, tasks, calls, or email with activities](#z0c6df1176f5544e4a7513b3786cccb0a)

[Stay up-to-date with customer news with the activity feed](#z2396d3f3ca6b4a4499ddbdbaf9b22a58)

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. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Accounts or Contacts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Sales or Service or Marketing, and then click or tap either Accounts or Contacts. |   2. Select the active account or contact that you want to deactivate, click or tap Deactivate, and then confirm the deactivation. |

Activate an account or contact



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Accounts or Contacts. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Sales or Service or Marketing, click or tap Customers, and then click or tap either Accounts or Contacts. |   2. To view a deactivated account or contact, in the System Views list, select Inactive Accounts or Inactive Contacts.  3. Select the inactive accounts or contacts you want to activate, click or tap Activate, and then confirm the activation. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Create or edit a contact](#za24dc692096c4ba6995b80f682018007)

[Create or edit an account](#z6d662e1bc9164e19b2f8098cd89c5029)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Sales.  Sales appears on the nav bar.  b. Choose Sales > Goals.  c. Click or tap New. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Sales, and then click or tap Goals.  b. In the Records group, click or tap New. |   3. On the New Goal form, enter information or observe any noted restrictions or requirements as needed. Use the handy tooltips as a guide.  4. Click or tap Save or Save and Close. |

Edit a goal



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Sales.  Sales appears on the nav bar.  b. Choose Sales > Goals.  c. Click or tap Edit. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Sales, and then click or tap Goals.  b. In the Records group, click or tap Edit. |   3. Fill in your information. Use the handy tooltips as a guide.  4. Choose Save and Close. |

Create or edit a competitor record

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



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Sales.  b. Choose Sales > Competitors.  c. On the command bar, click or tap + New. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Sales > Sales > Competitors.  b. In the Records group, click or tap New. |   2.  Fill in your information. Use the handy tooltips as a guide.  3. Click or tap Save.  4. To associate a competitor with an opportunity, in the Opportunity area, click or tap . In the Search box, click or tap the Lookup icon, and then select an opportunity from the results. |

See Also

[Competitor Win Loss report](#zd8029ee86c194ce896eb3a74b48c4d37)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Sales or Service.  b. Then, click or tap Sales or Service > Rollup Queries.  c. To create a new rollup query, on the command bar, click or tap New.  -OR-  To edit a rollup query, open the query from the list. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Sales > Goals > Rollup Queries.  b. To create a new rollup query, in the Records group, click or tap New.  -OR-  To edit a rollup query, click or tap Edit. |   3. Fill in your information. Use the handy tooltips as a guide.  Name. Enter a name between 1 and 50 characters.  Entity Type. Select the record type.  Owner. Click or tap the Lookup icon, and select the user or team who will own this query.  Note  If you change this selection after you add your query criteria in the Query section, your query criteria will be deleted.  4. In the Query section, add the criteria for your query. The criteria you can add depends on the record type.  5. To see the results for the query, click or tap View Records.  6. Click or tap Save, Save and Close, or, to create a new rollup query, Save and New.  7. To view the data for a goal, on the nav bar, click or tap Sales, and then click or tap Goals.  8. Select the goal you want, then click or tap More Commands , and then click or tap Recalculate.  The values of the actuals are recalculated. You can see the recalculated values in the Percentage Achieved, Actual, and In-Progress columns. If you open the goal, under Actuals, you can see the Last Rolled Up Date. |

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

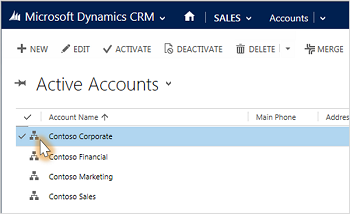
For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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.



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 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 CRM for Outlook, choose File > Print.)

3. Choose Print preview.

4. Choose Print….

5. Select the print options you want and then choose Print.

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Work with mail merge templates](#z3b9afe9fcd044543998e558f61e9ebf4)

[Sales walkthrough](#z512ad50d6dda42b9832df72adf923821)

Sales search

Set up security roles for salespeople

See [Create or edit a security role](http://go.microsoft.com/fwlink/p/?LinkID=317684) in the Administration Guide.

Manage 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](#z7515e700487b4d79b7f570eedf0f0e52) |
| 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](#zb72fe4a330b84dc49b93e87e5cdb7ef0) |
| 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 back to the support queue | [Create and manage a case](#z60efedee23d544568b9445f145d49c0c)  Quick ref card: [For customer service reps](http://go.microsoft.com/fwlink/p/?LinkID=330911)  eBook: [Give create customer service](http://go.microsoft.com/fwlink/p/?LinkId=393634)  Video: [How to create, reactivate, and reassign a case (1:47)](http://go.microsoft.com/fwlink/p/?LinkID=394984) |
| 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](#z5d5a9f62acc548858fd1cc9985dbca9b)  eBook: [Use KB articles to help your customers](http://go.microsoft.com/fwlink/p/?LinkId=394983) |
| Get reports on support trends | View reports to manage your work and identify trends and issues. | [Case Summary Table report](#z541595fb8b5c4f76bdd180dd2ca3d8d2)  [Neglected Cases report](#z8d6574f6879744208d1a48949f235333)  [Top knowledge base articles report](#zf6f721a29e0443a7931b78d0d9c1382b) |  |
|  |  |  |

See Also

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

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](#z53a455a1a1074a709971c6a5d59fda7a)

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](#z93c1613107ba413ba2e20f51ca1dfe07)

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](#z5e46183729ca4d769231cbf7423c5c7d)

Test your service

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

1. Click or tap Microsoft Dynamics CRM > Service > Service Calendar.

2. Click or tap Service Activity. This bypasses the scheduling form.

3. Select the service to test.

4. Click or tap Find Available Times.

See Also

[Key steps to get started with customer service](#z9127b674602f4aef9587b088aa2c83af)

[Create a service activity without checking for conflicts](#ze2050e363e9549b19f2bf0025eb7022c)

[Schedule a service activity](#z9b1ae6b18f4647ccb3394e13a6ce9a8a)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

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 SLAs, entitlements, and parent and child cases are available if you've applied product updates for CRM Online Spring ‘14, or if you’ve installed the CRM Online 2015 Update. For on-premises CRM organizations, these features are available if you've installed CRM 2013 Service Pack 1 (on-premises), or if you’ve updated to CRM 2015. Interested in getting this feature? [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Case settings

[Create or edit a queue](#zc81b3c1b3b83409eb569a4b4c0a3245e)

[Define settings for parent and child cases](#zc919d10e88814ba9a60940b11b555648)

[Create rules to automatically route cases](#z85a8e762c06348a5bf38ffc4df6a7c79)

[Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

Service terms

[Define service level agreements (SLAs)](#z75c6bab854d84410b210003953aa4b53)

[Create an entitlement to define the support terms for a customer](#z9384cb0a64ec424dbf737010997c4d4e)

[Set up a holiday schedule](#z7bb3b4c08ffb42c3aeccc730bdad2e5e)

[Create a customer service schedule and define the work hours](#zee605a894bd54b938d452ec9ca0a9b8a)

Templates

[Set up entitlements quickly with templates](#zdadea8f7c9314cdc881532f8c0f89b51)

[Create templates for email](#zb47eec74e83c4cfeb7a0a9195a3ac4da)

[Create templates for articles](#zacaff4e51b6846308d7222e6f3c66e89)

[Create templates for contracts](#z8d08bb4c88044e37a15b257bd47e43f4)

Service scheduling

[Set when your business is closed](#z0b050a0276544c0d803b1c2c74711230)

[Create or edit a service](#z93c1613107ba413ba2e20f51ca1dfe07)

[Add facilities and equipment for service scheduling](#zf50d894b1d7f430599245957e78eed6c)

[Create or edit a resource group](#z5e46183729ca4d769231cbf7423c5c7d)

[Create or edit site records](#z2b0f8bb9548f498a83b8d7fbf3c05884)

See Also

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

[eBook: Use KB articles to help your customers](http://go.microsoft.com/fwlink/p/?LinkId=394983)

Configure the process flow for customer service

The process flow bar organizes tasks under various stages, which are used to easily lead you through the process of case resolution. The process flow bar also highlights the stages and tasks that you’ve already completed. You can configure the bar to add or update the stages, steps, and fields to suit your business needs.

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

|  |  |
| --- | --- |
| 1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. From the case form, choose the More Commands  button, and then choose Edit Process.  3. To add a new stage, choose the plus sign (+) next to Stages. You can add up to 30 stages, and each stage can contain up to 30 steps and fields.  4. Name the stage anything you like, and then add steps. To move the stage to where you want it to appear in the process, choose the up and down arrows at the bottom of the form.  5. To add a step within a stage, follow the same process: Choose the plus sign (+) next to Steps, name the stage, and then move it to the desired place in the order.  6. Fields appear automatically next to each new step. To select the type of field you want for a step, choose the field and select from the drop-down list.  7. Choose Save. |

See Also

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

Improve customer service with better automation and tracking

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

Create queue and route cases

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

Note

The routing rules feature is only available in organizations that have applied product updates for CRM Online Spring ‘14 or have installed the CRM Online 2015 Update. For CRM on-premises organizations, the routing rules feature is available if you've installed CRM 2013 Service Pack 1 (on-premises) or if you have updated to CRM 2015. Interested in getting this feature? More information: [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

More information: [Set up queues to manage activities and cases](#zdeef5606bbd9452abc0c63abdd658a81)

Automatically create cases from email or social records

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

You can save your CSRs from having to manually create cases that come in from email or social records by setting up Microsoft Dynamics CRM to automatically create cases from multiple channels. You can create automatic case creation rules that convert incoming email or social posts targeted to specific queues. For cases that are created from email messages, you can also choose to send a response to the customer with case details by using a default template. More information: [Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

Track service levels through SLAs

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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)](#z75c6bab854d84410b210003953aa4b53)

Define service terms through entitlements

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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](#z9384cb0a64ec424dbf737010997c4d4e)

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](#z2ec0426ed1ea40fa940a7e6d3da7ca3b)

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](#zc919d10e88814ba9a60940b11b555648)

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](#z60efedee23d544568b9445f145d49c0c)

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](#z5d5a9f62acc548858fd1cc9985dbca9b)

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](#z93c1613107ba413ba2e20f51ca1dfe07), [Basics of service and service scheduling](#z7904d0f062954feca843f1ee5267536b)

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](#zea98ae5e5dbc4c23b4c6513774997226)

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](http://go.microsoft.com/fwlink/p/?LinkID=393186)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

Use articles in the knowledge base

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

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

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

A typical knowledge management consists of the following stages:

Create and update articles

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



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  Then, choose Service > Articles. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Collateral > Articles. |   2. To create a new article: Click or tap +New.  To edit an article, open the article from the list.  3. If you are creating a new article, in the Select Template dialog box, select a language and template that you want to use to create the article, and click or tap OK.  Note  If you need other templates, you can request your system administrator or customizer.  4. Type or modify information in the text boxes.  Hovertips provide hints about what to enter.  All articles are initially created in a Draft state. To publish the articles, a manager must approve these.  5. In the Actions group, click or tap Submit. |

Edit, reject, or approve an article

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

 To view or edit an unapproved article, on the nav bar, click or tap Microsoft Dynamics CRM > Service > Articles, and open the Unapproved Articles view, and then click or tap the article. To add comments to the article, in the Actions group, click or tap Add Comments.

 To reject an article, open the article and in the Actions group, click or tap Reject. Rejected articles are returned to the Unapproved Articles view for revision.

 To approve an article, in the list of unapproved articles, select the article, and then on the command bar, click or tap APPROVE.

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

Find an article

Microsoft Dynamics CRM provides several ways to look for articles that people in your organization have created. You can search by using keywords, titles, or the text from a published article. If you know the exact article number, you can quickly open the article that you need. But if you are not sure what text to use before you begin looking, you can also browse through articles by subject.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  Then, choose Service > Articles. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Collateral > Articles. |   2. In the Search box, type the keyword, and then click or tap the Search icon.  3. To filter search results, click or tap the Search Tool icon and select one of the following:   Full-Text Search. Looks at all the published articles for the specified keyword.   Keyword Search. Compares the keyword that you specified with alternate terminology assigned to an article to find articles. For example, an article about bicycles might use keywords such as "bike" or "cycle."   Title Search. Looks at the title of all published articles for the keyword that you specified.   Subject Search. Looks at the subject of all published articles for the keyword that you specified.   Article Number Search. Looks for the number that is assigned to the article when it is published.   Subject: ‘None’. Looks for articles that have None selected as the subject.  Select Exact Text to search for the exact words that you enter in the Search for box, or select Use Like Words to search for similar words. For example, if you enter "run," the search would include "running" and "runs." |

See Also

[eBook: Use KB articles to help your customers](http://go.microsoft.com/fwlink/p/?LinkId=394983)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

View, block, or deactivate a social profile

Track the high influencers, and the customers for your business, and save them as contacts in Microsoft Dynamics CRM with their social profile information. You may want to get in touch with these resources later, for marketing or brand building purposes.

With the social care sample, you can create a social profile and a corresponding contact automatically, every time you create a case. You can also choose to create social profiles for the authors of the posts who have large number of followers or likes. These social profiles can be viewed in the Services area. If a social profile exists for the author of the post, a new profile is not created.

Every social profile has a corresponding contact in Microsoft Dynamics CRM. A contact can have several social profiles, but a social profile can’t have several contacts.

Note

The social profile data in Microsoft Dynamics CRM is read-only. You can only view, block, define a workflow, or change the owner of the record.

View a social profile



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Click or tap Service > Social Profiles. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. In the Navigation Pane, expand your organization, and then click or tap Service > Customers.  c. Click or tap Social Profile.  The list of social profiles that are created in Microsoft Dynamics CRM appears.  Note  Social profiles aren’t available in Microsoft Dynamics CRM for Outlook with Offline Access. |   2. Double-click any social profile to view the complete details.  The social profile form shows the name, profile link of the contact and the cases associated with this social profile. You can also view the influencer score if it is included as part of the social feed. |

Block a social profile

To make sure that you receive only actionable social posts and avoid case creation for any unnecessary information, based on the social posts, you can block certain social profiles in Microsoft Dynamics CRM.



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| 1. Open the social profile that you want to block.  2. In the Blocked drop-down menu, select Yes.  3. Click or tap the Save icon at the bottom-right corner of the window. |

Deactivate a social profile

If you no longer work with a social profile, you can deactivate the profile temporarily. To do this, from the list of social profiles, select a profile, and click Deactivate on the command bar.

You can reactivate the profile by selecting it and clicking Activate on the command bar.

Set up service terms

Define service level agreements (SLAs)

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

You can associate an SLA with an entitlement so that when an entitlement is added to a case, the associated SLA is also applied. More information: [Create an entitlement to define the support terms for a customer](#z9384cb0a64ec424dbf737010997c4d4e)

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

Important

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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

Microsoft Dynamics CRM lets you create two types of SLAs: Standard and Enhanced. Enhanced SLAs 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



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Go to Settings > Service Management > Service Level Agreements.  (In Microsoft Dynamics CRM for Outlook, go to Settings > Business > Service Management > Service Level Agreements.)  3. To create a new SLA, choose + New.  -OR-  To edit an SLA, in the list of records, select the SLA, and on the command bar, choose Edit.  4. 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 choose 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.  5. Choose Save.  6. To add SLA details, in the SLA Details section, choose Add .  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: [Creating or editing processes](http://go.microsoft.com/fwlink/?LinkId=392801)  7. 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.  For example, the conditions could be:    Note  If there are multiple clauses, and you don’t use And or OR grouping, by default the clauses will use the AND grouping.   In the Success Criteria section, specify the conditions to define when the KPI will be considered as met. For example, the conditions could be:    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, choose 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 choose 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, choose 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, choose 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.  8. Choose 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



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Go to Settings > Service Management > Service Level Agreements.  (InCRM for Outlook, go to Settings > Business > Service Management > Service Level Agreements.)  3. To create a new SLA, choose + New.  -OR-  To edit an SLA, in the list of records, select the SLA, and on the command bar, choose Edit.  4. 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.  5. Choose Save.  6. To add SLA details, in the SLA Details section, choose Add .  7. 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.  For example, the conditions could be:     In the Success Criteria section, specify the conditions to define when the KPI will be considered as met. For example, the conditions could be:    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, choose 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, choose Add Step > Update Record. Then select Case, and choose 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, choose 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, choose Add Step > Send Email. Then select Create New Message, and choose 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. You can’t apply an SLA to a case unless it’s set as the default or it’s associated with an entitlement.

To set an SLA as default, select an active SLA from the list, and choose 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.

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](#z134d9bde67cc418e9c7b802c46fd0a9c) | 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](#zee605a894bd54b938d452ec9ca0a9b8a)

[Create an entitlement to define the support terms for a customer](#z9384cb0a64ec424dbf737010997c4d4e)

[Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

[Create rules to automatically route cases](#z85a8e762c06348a5bf38ffc4df6a7c79)

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

Disable or enable Service Level Agreements (SLAs) for cases

If your organization has installed and applied updates from Microsoft Dynamics CRM Online Spring ‘14 or Microsoft Dynamics CRM 2013 Service Pack 1 (SP1), or if your organization is using the Microsoft Dynamics CRM Online 2015 Update or Microsoft Dynamics CRM 2015, you can define service level agreements (SLAs) for your customers. SLAs include the metrics or key performance indicators (KPIs) required for an agreed-upon service level.

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

Note

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

Disable or enable SLAs



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings. |   3. On the General tab, under Disable SLAs, select Yes to disable SLAs. To enable SLAs, select No.  4. Click or tap OK. |

See Also

[Define service level agreements (SLAs)](#z75c6bab854d84410b210003953aa4b53)

[Create an entitlement to define the support terms for a customer](#z9384cb0a64ec424dbf737010997c4d4e)

Create an entitlement to define the support terms for a customer

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

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you're using:  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management.  c. Choose Entitlements. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Entitlements. |   3. To create a new entitlement from a template, choose + New > From Template. In the Select Template dialog box, choose the entitlement template, and choose Select.  To create a new entitlement from scratch, choose + New > Blank Entitlement.  -OR-  To edit an entitlement, in the list of records, choose the entitlement, and then on the command bar, choose Edit.  4. Fill in your information. Use the handy tooltips as a guide.   Name. Give the entitlement a meaningful name.   Primary Customer. Choose the customer you are creating this entitlement for.   Start Date. Choose the date from which the customer will be entitled for support.   End Date. Choose the date until which the customer will be entitled for support.   Restrict based on entitlement terms. To make sure no cases are created when the entitlement term is over, choose Yes. When you choose Yes, a customer service agent won’t be able to create a case when Remaining Terms is less than 0 OR when the term remaining for a channel is less than 0.   SLA. Choose an SLA record to associate the service levels or key performance indicators for the support you are providing with this entitlement.  Under Entitlement Terms, specify the term details for the entitlement:   Allocation Type. Choose whether the entitlement is for number of hours or number of cases.   Decrease Remaining On. Choose whether to decrease the remaining term on case creation or resolution.  If you choose to decrease the remaining term based on case creation:   Creating or updating a case with the associated entitlement decreases entitlement terms   Canceling a case with the associated entitlement increases entitlement terms   Reactivating a canceled case with the associated entitlement decreases the entitlement terms  If you choose to decrease the remaining term based on case resolution:   Resolving a case with the associated entitlement decreases the entitlement terms   Reactivating a resolved case with the associated entitlement increases the entitlement terms.   Total Term. Specify the total amount of support the customer is entitled for with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total Term, then the customer is entitled for support up to 100 cases.   The Remaining Term shows the total number of hours or cases remaining for the customer’s entitlement. The value decrements every time a case is created or resolved (depending on what you select in Decrease Remaining On) against the entitlement.  5. Choose Save. |

Add an entitlement channel term

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

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

Note

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



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| 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

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, choose +.  2. In the Search box, type the first few letters of the name of the product that you want to associate with the entitlement.  If a product isn’t available, to create a new product record, choose + New. |

Associate a customer contact with the entitlement

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

Note

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



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| 1. While in the entitlement record, in the Contacts section, choose +.  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, choose + 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, choose Activate.  2. In the Confirm Activation dialog box, choose 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, choose Deactivate.

Associate entitlements to cases

In a case record, in the Entitlement field, choose 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](#z60efedee23d544568b9445f145d49c0c)

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, choose Cancel.

Renew an entitlement

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

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

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

See Also

[Define service level agreements (SLAs)](#z75c6bab854d84410b210003953aa4b53)

[Set up entitlements quickly with templates](#zdadea8f7c9314cdc881532f8c0f89b51)

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

Create a customer service schedule and define the work hours

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

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

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Create a customer service schedule



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you're using  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management > Customer Service Schedule. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Customer Service Schedule. |   3. To create a new customer service schedule, choose + New.  -OR-  To edit a schedule that you already have, in the list of records, select the schedule, and on the command bar, choose Edit.  4. In the Create Customer Service Schedule dialog box, in the Name box, type a meaningful name for the schedule, like “APAC Customer Schedule”, and choose Create.  5. In the Weekly Schedule dialog box, under Set the recurring weekly schedule section, follow these steps:    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, choose Set Work Hours.  To set the work hours for the days, choose 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](#z7bb3b4c08ffb42c3aeccc730bdad2e5e)  6. Under Select the time zone, in the Time Zone drop-down box, select the time zone in which your customer support resources will work.  7. Choose Save and Close. |

Define the work hours for the schedule

In the Set Work Hours dialog box, complete the following fields, and then choose 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, choose Add Break, and then select the start and end time of the break.

See Also

[Set up a holiday schedule](#z7bb3b4c08ffb42c3aeccc730bdad2e5e)

[Define service level agreements (SLAs)](#z75c6bab854d84410b210003953aa4b53)

[Create an entitlement to define the support terms for a customer](#z9384cb0a64ec424dbf737010997c4d4e)

Use the workplace calendar

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



|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Choose the work area > Calendar.  3. On the calendar, change the view by doing any of the following:   To change the calendar view, under Calendar Views, choose 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, choose the appointment link. The appointment form opens.  4. To change the dates displayed on the calendar, on the calendar control, choose the arrows to navigate to different months or choose a specific date.  5. To view today's appointments and service activities, on the calendar control, choose Today. The calendar displays the hourly list for today. |

Note

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

You can create an appointment or service activity from a normal calendar as well as a service calendar. More information: [Create or edit an appointment](#z50af7faf857842449710f05544b97f38),

See Also

[Create a service activity without checking for conflicts](#ze2050e363e9549b19f2bf0025eb7022c)

[Schedule a service activity](#z9b1ae6b18f4647ccb3394e13a6ce9a8a)

Set up a holiday schedule

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

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

Important

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)



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| --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9). 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. Choose Settings > Service Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Business > Service Management. |   3. Click or tap Holiday Schedule.  4. Click or tap (+)New and in the Create Holiday Schedule dialog box, enter a name and description for the holiday, and then click or tap Create.  5. In the list of holidays, click or tap the holiday you created.  6. Once the holiday is open, click or tap New to add the holiday to your customer service calendar.  7. In the Add a Holiday dialog box, specify the name and select the time of the holiday, and then click or tap OK.  The holiday is created and associated to your customer service calendar. Once the customer service schedule is associated to an SLA, then your SLA during business hours is not affected. More information: [Define service level agreements (SLAs)](#z75c6bab854d84410b210003953aa4b53) |

See Also

[Create a customer service schedule and define the work hours](#zee605a894bd54b938d452ec9ca0a9b8a)

[Get started with service management](#zfbf7f81b5c9240a58579711027c4d8ad)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

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.



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Service Management > Business Closure. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Business Closures. |   3. To create a new business closure, on the command bar, choose New.  -OR-  To edit an existing business closure record, open it from the list.  4. In the Schedule a Business Closure dialog box, type or modify information in the text boxes:  a. In the Name box, type a name that describes the purpose of the closure.  The first 12 characters of the name appear on each day of the closure on the calendar view of the affected resource's Work Hours.  b. In the Start Time and End Time boxes, enter the start and end date for the closure.  c. If you want to enter duration instead of an end time, select the length of the closure in the Duration box. Microsoft Dynamics CRM automatically calculates the end time for you.  d. If the closure is an all-day event, select the All Day Event check box. Microsoft Dynamics CRM automatically enters the duration of 1 day.  If you want to enter a specific time period, clear the All Day Event check box. You can then specify the hours during which your organization will be closed.  5. To save this business closure, choose OK. |

See Also

[Set work hours of a resource](#z97634d1f1e314f0ea7f082b4940aeee9)

[Set up a holiday schedule](#z7bb3b4c08ffb42c3aeccc730bdad2e5e)

[Create a customer service schedule and define the work hours](#zee605a894bd54b938d452ec9ca0a9b8a)

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.



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings. Then click or tap Administration > Users.  Settings appears on the nav bar.  b. Choose Settings > Administration.  c. Click or tap Users.  - OR - On the nav bar, choose Microsoft Dynamics CRM > Settings. Then click or tap Settings > Business Management > Facilities/Equipment.  i. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Administration > Users.  - OR -  In the Navigation Pane, click or tap Settings > Business > Business Management > Facilties/Equipment. |   3. In the list, open the resource you want to modify.  4. Under Common, click or tap Work Hours.  5. On the Monthly View tab, select a date on the calendar.  6. On the Actions toolbar, click or tap Set Up > Time Off, and then in the Schedule Time Off dialog box, enter the following details:   Reason. Type a short explanation for the resource’s absence.   All Day Event. Select this check box if the resource is unavailable for the entire day (midnight to midnight) of all of the days,   Start Time and End Time.If you have not selected the All Day Event check box, you can set specific start and end times. When the end date is reached, the previous schedule continues.   Duration.If you do not want to calculate the end date, select the number of days the resource is unavailable.   Time Zone.If the resource is in a different time zone, select the time zone. Microsoft Dynamics CRM automatically adjusts the times on the calendars.  7. Click or tap OK.  In the working hours calendar, affected days are marked with a red block. In the Service calendar the time appears as a white block and cannot be scheduled.  You can update your own working hours or time off, and add yourself to teams and resource groups. On the Tools menu, click or tap Options. On the General tab, at the bottom of the page, click or tap the user information link. |

See Also

[Set work hours of a resource](#z97634d1f1e314f0ea7f082b4940aeee9)

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.



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Navigate to the Business Management area.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Service Management > Services. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Services. |   3. To create a new service, choose New.  -OR-  To edit a service, open a service from the list.  4. Type or modify information in the text boxes.  a. Under General, enter a name and description to reflect the specifics of the service and describe what the service is. Also, specify the initial status of the service activity when it is created. If your organization prefers to approve all service activities before committing them to the schedule, you can select Requested or Tentative.  b. Under Scheduling, in Default Duration, select how long the service lasts. This can be changed when the service activity is created. The maximum duration of an appointment or service activity is 10 days.  c. In Start Activities Every, select how often service activities can start. This allows the start times of service activities to be staggered.  d. In Beginning At, select the time when the service activities must begin.  5. In the Required Resources area, define a selection rule:  a. 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](#za149f37f170d47f1b22a23ef62b3aea4)  6. When you’re ready to save your data, chooseap 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 choose More Actions > Activate or More actions > Deactivate.

See Also

[Set the capacity required for a service or resource](#z6a67450bdccc471c9e0913a169f497cf)

[Create or edit a selection rule](#za149f37f170d47f1b22a23ef62b3aea4)

[Create or edit a resource group](#z5e46183729ca4d769231cbf7423c5c7d)

[Set work hours of a resource](#z97634d1f1e314f0ea7f082b4940aeee9)

Create or edit a contract

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

Create a contract

Note

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



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Service appears on the nav bar.  c. Then, choose Service > Contracts. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Collateral > Contracts. |   2. Click or tap +New.  3. In the Select Template dialog box, select a template to base the new contract on.  4. Type or modify information in the text boxes.  Hovertips provide hints on what to enter.  a. In the Header section, enter the details of a contract such as contract name, customer, and contract start and end date.  When you save the contract, Microsoft Dynamics CRM automatically assigns the Contract ID and calculates the duration, in days, based on the contract start and end dates.  b. In the Contract Type section, enter the discount and service level of a contract.  Discounts for contract lines are given the same discount type that you select here. Service levels are defined by your business's guidelines.  c. In the History section, the following fields are filled automatically   Originating Contract. This is set when you renew an existing contract.   Contract Template. This is set based on what you select in the Select Template dialog box.   Owner  d. In the Billing Information section, Microsoft Dynamics CRM automatically completes the most of the fields when the fields in the Header section are entered; however, you can change or enter the information as required. Bill To Address is required to change the status of the contract to invoiced.  5. To add activities or notes, click or tap Activities or Notes. More information: [Add a phone call, task, email, or appointment activity to a case or record](#zb72fe4a330b84dc49b93e87e5cdb7ef0)  Note   The contract becomes active once it is invoiced and the start date is reached.   You can edit an existing draft contract, but not invoiced, active, expired, canceled, or on hold contracts.   The default days and hours of service are defined in the contract template. To change the days and hours of service, open the contract and on the command bar, click or tap Set Calendar. |

Add a contract line to a contract

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



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| 1. In the contract record, in the Contract Lines section, click or tap +.  -OR-  In the contract record, on the nav bar, click or tap the arrow next to the contract name > Contract Lines, and then click or tap Add New Contract Lines.  2. Type or modify information in the text boxes.  Hovertips provide hints about what to enter  a. Under General, enter details about the contract line item such as the line item name and the product that is eligible for service under the contract.  The start date and end date for the line item is automatically filled based on the contract dates; however, you can change the dates as needed.  b. Under Pricing, type or modify information about the pricing of the contract such as the quantity of product or service, total price, and discount.  c. Under Administration, the customer field is automatically populated with the contract’s customer. You can change it if required. Enter the serial number of a product.  d. Under Allotment Details, type or modify information about the allotment such as the total allotment, and the used and remaining allotments.  The contract template determines the type of allotment (cases or minutes). As cases are opened against this contract, Microsoft Dynamics CRM displays the allotments used in the Allotments Used box.  3. Click or tap Save.  4. To add a note, under Notes, click or tap Enter a note, type the details, and click or tap Done.  Note  You cannot delete a contract line once it is active; instead, you can cancel it.  You can cancel a contract line only when it is set to Active. By canceling a contract line instead of deleting it, you can reuse the contract lines later if you renew the contract or create a new contract based on it. In the list of contract lines, select the contract line, and on the command bar, click or tap CANCEL CONTRACT LINE. |

Invoice a contract

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

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

Hold, renew, or release a contract

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

 To put an invoiced contract on hold, in the contract record, on the command bar, click or tap Hold Contract.

 To release the contract that’s on hold, in the contract record, on the command bar, click or tap Release Hold.

 To renew a canceled contract, in the contract record, on the command bar, click or tap Renew Contract.

See Also

[Define support terms for customers by using contracts](#z2ec0426ed1ea40fa940a7e6d3da7ca3b)

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](#z8b15a78733c7433cbe202c5b8f642f4b)

[Create templates for contracts](#z8d08bb4c88044e37a15b257bd47e43f4)

[Improve customer service with better automation and tracking](#z00f8a65ff7364e3d9aeae50de8b015b4)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

Set up and define rules for service

Define subjects to categorize cases, products, and articles

Subjects are used in cases, sales literature, products, and articles.

Create a simple selection rule

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



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. In the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears in the nav bar.  b. Choose Settings > Business Management > Services. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, choose Settings > Business Management, and then choose Services. |   3. In the list of services, open the service to which you want to add a selection rule.  4. On the Service form, choose 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 .  5. In the Edit a Selection Rule dialog box, enter the following information:   Quantity  Select the number of resources required for the service. If you select All, all the selected resources are included in the service activity.   Description  Enter any additional information about the scheduling rule you want to include.   Selection Site  This option defines whether the resources must all be from the same site or if they can be from any site in the business unit. This option is available only in the top-level selection rule.  6. Choose OK.  7. Under Common Tasks, you can add resources:   To add individual users, facilities, equipment or teams to the selection rule, choose 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, choose 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 choose OK, the Save the selection as a Resource Group dialog box opens. If you want to create a resource group from the selected resources, choose Yes, save the selection as a resource group with the name, enter a name in the box, and then choose OK. The new resource group appears in the selection tree.  8. Choose OK.  9. Choose 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](#za149f37f170d47f1b22a23ef62b3aea4)

[Schedule a service activity](#z9b1ae6b18f4647ccb3394e13a6ce9a8a)

[Create or edit a resource group](#z5e46183729ca4d769231cbf7423c5c7d)

Create or edit a resource group

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

Create a resource group

|  |  |  |
| --- | --- | --- |
| 1. Navigate to your area.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Business Management > Resource Groups. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then expand Settings.  b. Expand Business, and then click or tap Business Management > Resource Groups. |   2. On the Actions toolbar, click or tap New.  3. In the Resource Groups form, enter information in the following fields:   Name  You must enter a name for the resource group. Microsoft Dynamics CRM does not check that the name is unique.   Business Unit  To locate and select a business unit, click or tap the Lookup button .   Description  You can add a detailed description of this resource group, including the criteria that you used to determine which resources to add to the resource group.  4. Click or tap Save.  After you save the record, Resources appears under Common.  5. Click or tap Resources, and then on the Actions toolbar, click or tap Add Resources.  6. In the Look Up dialog box, select the users, facilities/equipment, teams, or other resource groups to add to this resource group.  Adding other resource groups to a resource group is a good way to manage large numbers of resources. For example, you could add the resource groups of "senior technicians" and "junior technicians" to a resource group of "technicians."  7. Click or tap OK to add the selected resources to the resource group.  8. Click or tap Save or Save and Close. |

Edit a resource group

|  |  |  |
| --- | --- | --- |
| 1. Navigate to your area.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Business Management > Resource Groups. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then expand Settings.  b. Expand Business, and then click or tap Business Management > Resource Groups. |   2. Open the resource group you want to change.  3. In the Resource Groups form, change the information.  4. Click or tap Save or Save and Close. |

Note

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

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

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

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](#z6f8a783f2cb242929318b0cedc9fb5f9). |   2. Go to Settings > Business Management > Sites.  (In Microsoft Dynamics CRM for Outlook, go to Settings > Business > Business Management > Sites.)  3. On the Actions toolbar, choose New.  4. Fill in your information. Use the handy tooltips as a guide.  5. Choose Save.  6. To add resources, under Common, choose Resources, and then choose Add Resources.  7. In the Look Up Records dialog box, in the Look For drop-down list, choose if you want to add facilities/equipment or users as resources.  8. From the list of records, double-click a resource, and choose Add.  9. Choose Save and Close. |

See Also

[Create or edit a service](#z93c1613107ba413ba2e20f51ca1dfe07)

[Create a service activity without checking for conflicts](#ze2050e363e9549b19f2bf0025eb7022c)

[Find the next available time before creating a service activity](#ze23ae2ff620a449897dc6d3a93813166)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Navigate to the Business Management area.  If using the CRM web application   |  | | --- | | a. Choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Business Management. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, choose Settings > Business > Business Management. |   3. Choose 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. Choose 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Navigate to the Users or Facilities/Equipment area.  If using the CRM web application   |  | | --- | | a. Choose Microsoft Dynamics CRM > Settings. Then, choose Settings > Administration > Users.  -OR-  Choose Microsoft Dynamics CRM > Settings. Then chooseSettings > Business Management > Facilities/Equipment. |   If using CRM for Outlook   |  | | --- | | a. Choose your organization.  b. Choose Settings > System > Administration. Then choose Users.  -OR-  Choose Settings > Business > Business Management. Then chooseFacilities/Equipment. |   3. In the list of records, open the record you want to set the capacity for.  4. In the user record, on the nav bar, choose the chevron button next to the record name, and then Work Hours.  -OR-  In the Facilities/Equipment record, under Common, choose Work Hours.  5. On the Monthly View tab, double-click the date on the calendar that is the first day you want the new schedule to start, or any date that will be affected by this edit.  6. In the Edit Schedule dialog box, select one of the following and then choose OK:  a. This date only. This option changes only the date selected. If you select this option, skip to step 8.  b. From <this date> onward. This option changes only the schedule going forward.  c. Entire recurring weekly schedule from start to end. This option changes this entire schedule from the start to end date. Selecting this option might change past days, which might affect reports regarding hours worked in the past.  7. In the Weekly Schedule dialog box, choose the work hours link for the schedule you want to edit.  If working hours have not been set previously, the link is displayed as "Set Working Hours." You must set up a schedule for a user, facility, or equipment before you can continue. More information: [Set work hours of a resource](#z97634d1f1e314f0ea7f082b4940aeee9)  8. In the Set Work Hours and Service Restrictions dialog box, choose Show Capacity, and then in the Capacity column, enter the capacity.  9. Choose OK.  10. Choose Save & Close. |

See Also

[Create or edit a selection rule](#za149f37f170d47f1b22a23ef62b3aea4)

Set work hours of a resource

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

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



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > Users.  - OR -  Click or tap Settings > Business Management > Facilities/Equipment.  c. In the list, open the resource record you want modify.  d. On the nav bar, click or tap the arrow next to name of the resource you opened. Select Work Hours. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > System > Administration > Users.  - OR -  In the Navigation Pane, expand your organization if necessary, click or tap Settings > Business > Business Management > Facilities/Equipment.  b. In the list, open the resource record you want modify.  c. Under Common, click or tap Work Hours. |   3. On the Monthly View tab, double-click a date on the calendar that is the first day you want the new schedule to start, or any date that will be affected by the new schedule.  4. In the Edit Schedule dialog box, select one of the following and then click or tap OK.   This date only  This option changes only the date selected.  Skip to step 7.   From <this date> onward  This option changes only the schedule going forward.   Entire recurring weekly schedule from start to end  This option changes this entire schedule from the start to end date.  Selecting this option might change past days, which might affect reports regarding hours worked in the past.  5. In the Weekly Schedule dialog box, in the Set the recurring weekly schedule section, select one of the following:   Are the same each day  The new schedule is the same for every day of the week. After you select this option, select the days of the week that the resource is available.   Vary by day  The new schedule is different for one or more days of the week. After you select this option, select the days of the week that the resource is available.   None. Resource is not working  The new schedule includes time that the resource is not working.  In the Weekly Schedule dialog box, you can also do any of the following:   If the schedule is for more than one day, select the days of the week that this schedule is effective.   If the resource does not work during business closures, select the Observe option.   Under Date Range, in the Starting on box, you can change the date the schedule starts.  You cannot change the date the schedule ends. To end a schedule, you must define a new schedule on that date.  6. Click or tap the work hours link for the schedule you want to modify.  If work hours have not been set previously, the link is displayed as "Set Work Hours."  7. In the Set Work Hours and Service Restrictions dialog box, complete the following fields, and then click or tap OK:   Date  Select a date from which the work hours for services are to be considered.   Start  Select the time the work day starts.   End  Select the time the work day ends.  To add a break in the work hours, such as a lunch break, click or tap Add Break, and then select the start and end time of the break.  8. To define a time when a service will not be available, click or tap the Service Restrictions tab, and then click or tap New. In the Edit a Service Restriction dialog box, select the service, and select the start and end time between which the service will be unavailable, and then click or tap OK.  9. Click or tap Save and Close to close the Weekly Schedule dialog box. |

Note

 You can set the work hours for a single day by double-clicking the day, and then in the Edit Schedule dialog box, select This date only, then click or tap OK. Then, perform step 6 in the procedure.

 All of the options may not be available to you for selecting how much of the schedule you want to edit. The available options are based on the schedules that are already set up.

See Also

[Set the capacity required for a service or resource](#z6a67450bdccc471c9e0913a169f497cf)

[Set when your business is closed](#z0b050a0276544c0d803b1c2c74711230)

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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the step for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > Users.  c. In the list, open the resource record you want to modify. The resource name appears in the nav bar. Click or tap the arrow beside the resource name and select Work hours. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Administration > Users.  b. In the list, open the resource record you want to modify.  c. Under Common, click or tap Work Hours. |   3. On the Monthly View tab, double-click a date on the calendar that is either the first day you want to restrict the resource from performing the service or a date in a recurring schedule.  4. On the Edit Weekly Schedule dialog box, select one of the following options and then click or tap OK.   This date only  This option changes only the date selected.  If you select this option, skip to step 8.   From <this date> onward  This option changes only the schedule going forward.   Entire recurring weekly schedule from start to end  This option changes this entire schedule from the start to end date.  Selecting this option might change past days, which might affect reports regarding hours worked in the past.  5. On the Weekly Schedule dialog box, click or tap the work hours link for the schedule you want to modify.  6. On the Work Day dialog box, click or tap the Service Restrictions tab.  7. On the Actions toolbar, click or tap New.  8. On the Service Restrictions dialog box, locate and select a Service. Click or tap the Lookup button  to search for a record.  9. In the Start time and End time lists, set the time when the facility or equipment is not available, and then click or tap OK.  10. Click or tap OK, to close the Work Day dialog box.  11. Click or tap Save or Save and Close. |

Note

 You can set up service restrictions in your own work schedule.

 All of the options may not be available to you for selecting how much of the schedule you want to edit. The available options are based on the schedules that are already set up.

See Also

[Set work hours of a resource](#z97634d1f1e314f0ea7f082b4940aeee9)

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](#z53a455a1a1074a709971c6a5d59fda7a)

[Set the capacity required for a service or resource](#z6a67450bdccc471c9e0913a169f497cf)

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

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Set parent and child case attributes



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9). 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 or tap Parent and Child case settings.  4. On the Case Settings dialog box, select the attributes that the child case will be inherit from the parent case.  5. 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 or tap OK. |

See Also

[Get started with service management](#zfbf7f81b5c9240a58579711027c4d8ad)

[Create and manage parent and child cases](#z785241ef65694d8082cc831ac2215622)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

Create rules to automatically route cases

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

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Create a routing rule set



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you're using  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management.  c. Choose Routing Rule Sets. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Routing Rule Sets. |   3. To create a new routing rule set, choose New.  -OR-  To edit a routing rule set that you already have, in the list of records, choose the rule, and then on the command bar, choose Edit.  4. Fill in your information. Use the handy tooltips as a guide.  5. After you enter information in all the required fields, choose Save.  6. In the Rule Items section, choose 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 which the case will be routed.  For example, to route all cases that have the IsEscalated field set to Yes to the Tier 2 support queue, specify the conditions as shown here:    c. Under Then Conditions, specify the queue to which the cases will be routed or the user or team to which the cases will be assigned if the conditions in the If Conditions section are met. |   Tip  To group conditions in the criteria, use the Group And or Group Or options.  7. Choose Save and Close.  8. In the Routing Rule Set record, choose Activate so that the rule set is applied to the cases matching the conditions in the rule. |

Note

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

Apply a routing rule set

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

To manually apply the rule to existing or manually-created cases, in the list of cases, select the cases that you want to route using this rule, and on the command bar, choose 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](#z60efedee23d544568b9445f145d49c0c)

[Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

[Create or edit a queue](#zc81b3c1b3b83409eb569a4b4c0a3245e)

Automatically create cases from email or social monitoring

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

Note

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Use rules to create cases automatically

Create automatic case-creation rules

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you're using:  If using the Microsoft Dynamics CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management > Automatic Case Creation Rules. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Automatic Case Creation Rules. |   3. To create a new case creation rule, choose New.  -OR-  To edit an existing rule, in the list of rules, select a rule, and then on the command bar, choose Edit.  4. Type or modify information in the fields.  Hover over the field labels to see what to enter.   Name. Type the name of the queue the rule is defined for.   Source Type. Select Email or Social Monitoring to indicate whether the case is to be automatically created from email or social messages.   Queue. Select the queue that the rule applies to. For example, if you want to convert email messages or social posts sent to the Support queue, select that queue here.  Note  You can associate only one rule per source type to a specific queue. If you’re creating a rule to convert email to case, make sure you specify an email address for this queue. Otherwise, automatic case creation for email won’t work. More information: [Create or edit a queue](#zc81b3c1b3b83409eb569a4b4c0a3245e)  5. In the Specify Conditions for Case Creation section, select the conditions for creating the case automatically. You can add multiple conditions here and arrange them in the desired order. The conditions are considered in the same order. Only one item that has conditions matching the incoming email or social posts is applied.  Specify conditions for email to case creation   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | a. Create cases for email from unknown senders. If you select this check box, all email messages from unknown senders (a sender whose email address is not present in any CRM records) are converted to cases. A contact record is also created for this unknown sender.  Note  If this option is not selected, cases are created only for email messages that have a CRM contact or account as the senders. Email messages from sender that are present as other record types in CRM won’t be converted to cases.  This option, in conjunction with the Automatically create records in Microsoft Dynamics CRM option in the rule owner’s Personal Options, determines whether a case and contact record is created (see [Set personal options](#z10711d140a844b76b9e9572ab3113c50)):  This table shows if a contact and case record is created based on the values set for the Automatically create records in Microsoft Dynamics CRM field in Personal Options and the Create cases for email from unknown senders check box in the automatic case creation rule:   |  |  |  | | --- | --- | --- | | “Automatically create records in Microsoft Dynamics CRM” option is set to: | If “Create case from unknown sender” option in this rule is set to: | Contact or case created? | | Create Lead | Selected | Both, contact and case, created | | Create Lead | Not selected | None | | Create Contact | Selected | Both, contact and case, created | | Create Contact | Not selected | Only contact created | | None | Selected | Both, contact and case, created | | None | Not selected | None |   b. Create case if a valid entitlement exists for the customer. If you select this check box, Microsoft Dynamics CRM creates a case only if an active entitlement exists for the customer.  If the sender of the email is a contact with a parent account, Microsoft Dynamics CRM creates a case if the contact’s parent account has a valid entitlement, and the contact is listed in the Contacts section of the entitlement or if the Contacts section is empty (which means the entitlement is applicable to all contacts for the customer).  c. Create cases for activities associated with a resolved case. If you select this check box, Microsoft Dynamics CRM creates a case if the email is related to a resolved case. If the email is related to an active case, a new case won’t be created.  d. Create case when the case associated with the activity is resolved since. If you select the Create cases for activities associated with a resolved case check box, select the duration here. Microsoft Dynamics CRM creates a case only if the case is resolved earlier than the duration you specify. If the incoming email is related to a case resolved later than the specified duration, Microsoft Dynamics CRM only associates the incoming email with the existing resolved case; a new case won’t be created.  e. Under Specify Autoresponse Settings, select the Send automatic email response to customer on case creation check box if you want to automatically send email responses to the sender of the email after a case for the email is created.  Select email template to respond to customer. If you select the Send automatic email response to customer on case creation check box, select an email template (global email template or email template of case entity type). If you don’t select a template, an automatic response won’t be sent. |   Specify conditions for social to case creation   |  | | --- | | a. Create cases for blocked social profile. If you select this check box, Microsoft Dynamics CRM creates a case for the social posts (social activities) from social profiles that are blocked by you.  Note  Social posts enter in Microsoft Dynamics CRM as social activities.  b. Create cases for direct messages only. If you select this check box, Microsoft Dynamics CRM creates a case only when the social posts are sent as direct or private messages to the queue specified in the case conversion rule. If the check box is cleared, cases will be created for all social posts including public messages (timeline). |   6. Choose Save.  7. In the Specify Case Details section, define the conditions for creating a case and specify the case properties.  By default, the Title field of the new case is set to the subject of the email and the Customer field is set to the sender of the email. If the sender of the email is a contact with a parent account, the Customer field is set to the parent account, and the Contact field is set to the sender of the email.  Specify case details   |  | | --- | | a. In the Specify Case Details section, choose +, and define the conditions for creating a case and specify the case properties.  b. In the Conditions section, specify when the case should be created.  Here’s how:    c. In the Case Properties section, set the properties for the case. The following example shows how to set the priority of all the automatically created cases to High: | |

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

Note

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

Activate or deactivate the case creation rule

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

Once the rule is active, you can’t change it. To change a rule, open the rule and on the command bar, choose Deactivate.

Manage automatic case creation from a queue form

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

See Also

[Create rules to automatically route cases](#z85a8e762c06348a5bf38ffc4df6a7c79)

[Create or edit a queue](#zc81b3c1b3b83409eb569a4b4c0a3245e)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

Create or edit a queue

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

Queues can be useful in:

 Having a centralized list of pending work that needs attention

 Sorting tasks by type or by the people assigned to complete them

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

 Different products or services

 Different subscription levels (regular, premium customers)

 Various case categories

 Different geography

Create or edit a queue



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management.  c. Choose Queues. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Queues. |   3. To create a new queue, choose New.  -OR-  To edit a queue, in the list of queues, choose the queue, and then on the command bar, choose Edit.  4. Type or change information in the text boxes.  Hovertips provide hints about what to enter.   In the Summary section, complete the required fields.  Note  The email address that you enter in the Incoming Email field receives all messages sent to the queue.   In the Type field, choose if the queue is a private or public queue. You can use a private queue to allow only a specific set of people to work on cases in this queue. If you’re creating a private queue, you’ll have to add members to this queue manually (see step 6).   In the Email Settings section, in the Convert to email activities drop-down box, choose which messages to track as activities.   In the Mailbox field, a mailbox record for the queue is automatically created and selected as soon as you save the queue record. To update the mailbox details, choose the mailbox name. More information: [Create forward mailboxes or edit mailboxes](http://go.microsoft.com/fwlink/?LinkId=517005)  5. Choose Save.  6. If you’re creating a private queue, in the Members section, choose the Add button + to add members to the queue. Only these members will be able to work on the items in this queue. |

View queue items

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

Additional actions

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

More information: [Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

See Also

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

[Find what's assigned to you in a queue](#z7515e700487b4d79b7f570eedf0f0e52)

[Set up queues to manage activities and cases](#zdeef5606bbd9452abc0c63abdd658a81)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

Set up queues to manage activities and cases

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

Note

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 have installed the CRM Online 2015 Update. For CRM on-prem organizations, these features are available if they have installed CRM 2013 Service Pack 1 (on-premises), or have updated to CRM 2015. Interested in getting this feature? More information: [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Create queues

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

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

Route items to queues

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

Assign items in the queue to work

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

See Also

[Create or edit a queue](#zc81b3c1b3b83409eb569a4b4c0a3245e)

[Find what's assigned to you in a queue](#z7515e700487b4d79b7f570eedf0f0e52)

[Create rules to automatically route cases](#z85a8e762c06348a5bf38ffc4df6a7c79)

[Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

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:

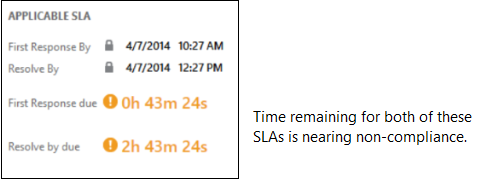
 If the CSR completes the task within the time remaining, the control shows the word Succeeded.

 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



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9). |   2. On the nav bar, click or tap Microsoft Dynamics CRM > Settings. Then click or tap Customizations > Customize the System.  3. In the solution explorer, in the left navigation pane, expand Entities, expand the Case entity, click or tap Forms, and then open the Case form.  4. Click or tap on the form where you want to place the control. You can add it anywhere except the form header or footer.  5. On the Insert tab, in the Control group, click or tap Timer.    6. In the Timer Control dialog box:     |  | | --- | | a. In the General section, enter a name and label for the control.  b. Under Data Source, next to Failure Time Field, select the date-time field that represents the time when a milestone should be completed. For example, select the First Response By field.  c. Next to Success Condition, select a field to use to evaluate the success of the milestone, and then choose the condition that indicates success. For example, select the First Response Sent field, and then select Yes to indicate the success criteria of the First Response metric. This setting is required.  d. Next to Warning Condition, enter the condition that will cause the timer control to display a warning when the time is about to expire. For example, in the first list next to Warning Condition, select First Response SLA Status. In the list to the right, select Nearing Noncompliance. This setting is optional.  e. Next to Cancel Condition, select a field to evaluate whether the achievement of the milestone should be canceled. Then choose the option that indicates the milestone is canceled. This setting is optional. |   7. Click or tap OK to add the control to the form. |

Notes

 The timer control refreshes on the OnChange form event, and also when the form is loaded.

 You can add a timer control to a form based on any record type (entity), including custom record types.

 You can add multiple timer controls for different key performance indicators (KPIs).

 You can add a timer control to any Main form, but timer controls are not displayed in Microsoft Dynamics CRM for tablets.

See Also

[Define service level agreements (SLAs)](#z75c6bab854d84410b210003953aa4b53)

[Common field properties](http://go.microsoft.com/fwlink/?LinkID=322065#BKMK_FieldProperties)

[Special field properties](http://go.microsoft.com/fwlink/?LinkID=322065#BKMK_SpecialFieldProperties)

Define status reason transitions for incident (case) management

Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) and the CRM Online Spring ‘14 release include a new capability to specify status reason transitions for the Case record type (entity) or custom record types.

Important

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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.





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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9). |   2. On the nav bar, click or tap Microsoft Dynamics CRM > Settings. Then click or tap Customizations > Customize the System.  3. In the solution explorer, in the left navigation pane, expand Entities, expand the Case entity, and then double-click or tap Fields.  4. Go to the second page of fields, and then open the statuscode (Status Reason of Case) field.  5. In the Field: Status Reason dialog box, click or tap Edit Status Reason Transitions at the top of the dialog box.    6. In the Status Reason Transitions dialog box, under New Status Reasons, click or tap one of the Enter Value buttons  corresponding with one of the existing status reasons.  7. In the Select Status Reason dialog box, in the Available Values list, select the values you want to add, and then click or tap the chevron button  to add to the Selected Values list. Click or tap OK when you’re done with that status reason.  8. Click or tap another Enter Value button  to modify other status reasons. When you’re done, click or tap OK.  Note  Each status reason option for an active status must allow at least one path to an inactive status. Otherwise, you could create a condition where it would not be possible to resolve or cancel a case.  9. In the Status Reason Transitions dialog box, select the Enable Status Reason Transitions check box to apply the defined status reason transitions to case records. The list of available status reasons will be filtered for each case record based on the defined transitions. |

See Also

[Learn more about defining status reason transitions](http://go.microsoft.com/fwlink/?LinkID=394821)

[Create or edit entity fields](#zaeab7223b9734b279dc681e3cb0a38af)

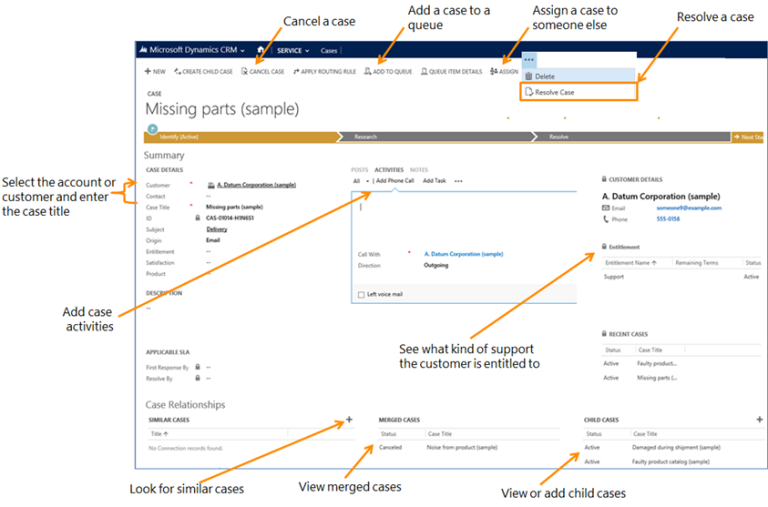
Work with cases

Create and manage a case

Keep track of your customer requests and issues by creating support cases in Microsoft Dynamics CRM. When a customer contacts support with a question or problem, you can quickly check if there is an existing case or open a new case and start tracking the issue. You can also escalate, reassign, or put a case back into the service queue if you don’t have enough information or time to work on it.

Before you provide support, you can also check the customer’s entitlements. Entitlements are like contracts that tell you what kind of support a customer is eligible for. You can see if the support terms are based on number of hours or cases, support channel, or based on the product or service that the customer has purchased.

To help you choose the right status of a case, your admin may have set things up so that you only see a limited set of statuses to choose from based on the current status of a case. For more information on the available list of case statuses, contact your administrator.



Create a case



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. Click or tap New Case.  3. Find the customer:  a. Click or tap the Customer lookup button. By default, this field shows both account and contact records. Or, type a few letters and press Enter to search for records that contain the letters. When you select an existing customer, the customer details will show the contact details, along with recent cases and activities for the customer.  b. If a customer record doesn’t exist, click or tap New in the inline lookup results to create a new record.  4. Click or tap the Contact lookup button and select an existing contact for the case or click or tap New in the inline lookup results to create a new contact record.  5. Before you create a new case, check if there is an existing case:  a. From the Identify area of the process bar, click or tap the Find Case lookup button and then select a case from the list of cases.  b. If a case does not exist, click or tap New in the inline lookup results to create a new case record.  6. In the Case title field, type a subject or descriptive name to identify the case.  7. To track your conversation with the customer, add activities. For more information, see [Add a phone call, task, email, or appointment activity to a case or record](#zb72fe4a330b84dc49b93e87e5cdb7ef0).  8. To see what kind of support you should provide the customer, click or tap the Entitlements lookup button and select an active entitlement.  9. Fill in the other details that apply to the case, and then click or tap Save. |

Find a solution from similar cases

You can look at resolved cases to see if they can help you resolve the open case you’re working on. For example, if the subject of the case you’re working on is “Service outage”, then you could look for resolved cases with the same subject to get help with your current case.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. In the list of active cases, open the case you’re looking for.  3. When the case is open, to find similar cases, click or tap Case Relationships to expand the menu.  4. For Similar Cases, click or tap (+) Add Connection record.  5. From the Find Similar Cases dialog box, use the search to find similar cases.  Select a different subject to see the cases with that subject. You can also search for cases by typing the keyword in the Search box, and then click or tap the Search button. When you use a search keyword, it searches on the title of the case and shows the matching results.  6. When you find a similar case, click or tap the case to review the case activities, posts, and notes.  Typically, a phone call, task, or case resolution activity has the information about how the case was resolved.  7. Once you find the case that has the information you need, click or tap the case, and then click or tap Found a Solution.  The case you select is added to the Similar Cases area for the case you’re working on. |

Resolve a case

For information about how to resolve parent and child cases, see “Resolve a case with a parent and child relationship” section in [Create and manage parent and child cases](#z785241ef65694d8082cc831ac2215622).



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. In the list of active cases, open the one you want to resolve.  3. On the command bar, click or tap Resolve case.  Important  Before you resolve a case, make sure that all the case activities are closed. Otherwise, you’ll get a message saying that you still have open activities associated with the case, which will be canceled if the case is resolved.  4. In the Resolve Case dialog box, in the Resolution Type list, select how the case was resolved.  5. In the Resolution box, type a short explanation of the resolution.  The actual time spent on all activities for this case, as recorded in the Duration box in each activity, is filled out automatically in the Total Time box.  6. In the Billable Time list, select the amount of time spent on the case to be billed to the customer.  If this case is linked to a contract or entitlement, the billable time will be subtracted from the allotted minutes for that contract.  7. Click or tap Resolve.  A case resolution activity is created and shown in the Activities area. The resolution activity contains information about a resolved case, including the resolution and total time spent on the case. You can reactivate a resolved case at any time. |

Edit a case



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Service appears on the nav bar.  c. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. From the list of cases, open the case you want to edit.  3. When the case is open, make the necessary updates to the case.  4. When you’re done, click or tap Save. |

Cancel a case

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



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. In the list of active cases, open the case that you want to cancel, and then on the command bar, click or tap Cancel Case.  3. In the Confirm Cancellation dialog box, select the case status:   Canceled: This means the case is canceled. It will no longer be assigned to you.   Merged: This means the case is merged into another case. When the case is merged, the case activities will be moved to the case it was merged into.  4. Click or tap Confirm. |

Reassign a case

If you don’t have enough information to resolve a case, or if you think another member in your team has expertise on the subject, you can assign the case to another user or team.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  b. Then, choose Service > Cases.  c. Select the case that you want to reassign.  d. On the command bar, click or tap More Commands  and select Assign. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Service, and then click or tap Cases.  b. Select the case that you want to reassign.  c. In the Collaborate group, click or tap Assign. |   2. Click or tap the Lookup button , and select who you want to assign the case to.  3. Click or tap Assign. |

Add a case to a queue

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



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. In the nav bar, click or tap Microsoft Dynamics CRM > Service.  Service appears in the nav bar.  b. Click or tap Service > Cases.  c. Select the case that you want to add to a queue.  d. Click or tap the More Commands icon , and select Add to Queue. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Service, and then click or tap Cases.  b. Select the cases that you want to add to a queue.  c. In the Collaborate group, click or tap Add to Queue. |   2. Click or tap the Lookup button, and select the queue that you want to add the case to and then click or tap Add. |

See Also

[Video: How to create, reactivate, and reassign a case (1:47)](http://go.microsoft.com/fwlink/p/?LinkID=394984)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

[Quick ref card for customer service reps](http://go.microsoft.com/fwlink/p/?LinkID=330911%20)

[Merge similar cases](#zf7855c3164c34bf59e4684a443c3ed6b)

[Create and manage parent and child cases](#z785241ef65694d8082cc831ac2215622)

[Find what's assigned to you in a queue](#z7515e700487b4d79b7f570eedf0f0e52)

Merge similar cases

Eliminate redundancies between similar cases in Microsoft Dynamics CRM by merging them into one case. When a customer opens multiple cases about the same issue (through different support channels) or when multiple customers from the same account call in about the same issue, you can merge those cases into one case so everything’s visible in one place.

For example, when a customer or multiple customers from the same account submit a case on the web and also call in about the same issue, you can merge the cases into one case instead of keeping track of multiple cases.

When a case is merged, the state of the case is changed to canceled and the status is changed to merged. This is because it is merged into another case and all of the open case activities, emails, and attachments are now associated with the case it was merged into. By default you can merge up to 10 cases at a time.

A few things to remember when you merge cases with parent and child relationships:

 When you merge a case that has child cases, then those child cases become child cases of the parent case they were merged into.

 You can only merge a child case into another child case if both of the child cases have the same parent case.

More information: [Create and manage parent and child cases](#z785241ef65694d8082cc831ac2215622)

Important

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. In the list of active cases, select the cases that you want to merge. You must select at least two active cases.  3. On the command bar, click or tap Merge Cases.  4. In the Merge Cases dialog box, from the list of cases, select the case that the other cases will be merged into and then click or tap Merge.  5. To see the merged case, open the case it was merged into, and you’ll find the merged case listed under Case Relationships > Merged Cases. |

See Also

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

[Create and manage parent and child cases](#z785241ef65694d8082cc831ac2215622)

[Video: How to create, reactivate, and reassign a case (1:47)](http://go.microsoft.com/fwlink/p/?LinkID=394984)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

[Quick ref card for customer service reps](http://go.microsoft.com/fwlink/p/?LinkID=330911%20)

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.

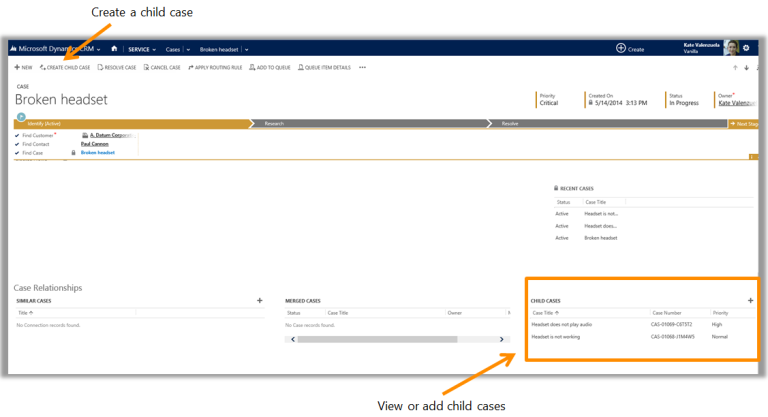
For example, if you get a service request to install new electrical and gas connections, this requires work to be done separately by the gas and electric department. In this situation, you can open two child cases, one for the gas and the other for the electric department. The original case is marked 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

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)



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.



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. When the case form is open, do one of the following:   On the command bar at the top, click or tap Create Child Case.   Or, click or tap to expand Case Relationships, and next to Child Case, click or tap (+) Add Case record.  3. Next, fill in the necessary case information for the child case, and then click or tap Save.  4. To see the child case that was just created, from the parent case, click or tap Case Relationships, and you’ll see the child case listed under Child Cases. |

Associate a parent case to a child case

You can create a case and then associate it as child case.

Note

A child case can’t have a child case.



|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. Then, do one of the following:  From your active list of cases, do this:   |  | | --- | | a. Select the cases that you want to associate as parent and child case(s). You must select at least two cases.  b. On the command bar at the top, click or tap Associate Child Cases.  c. In the Set Parent Child Relationship dialog box, from the list of cases, select the case that you want to make the parent case, and then click or tap Set. |   From an open case, do this:   |  | | --- | | a. From the open case form, click or tap to expand Case Relationships, and next to Child Case, click or tap (+) Add Case record.  b. Click or tap the Lookup button, and then find the case you want associate as the child case. | |

Associate a child case to a parent case

You can associate a parent case to a case from the case form.



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  b. Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. Open the case that you want to link a parent case to.  3. From the case form, click or tap the Parent Case and use the search to find a case that you want to associate as the parent case for this case. |

Resolve a case with a parent and child relationship

Depending on your settings, a case with a parent and child relationship can be closed in one of the following ways:

Important

Sometimes, resolving a case action might be blocked based on your current case status. This is because your admin may have set things up so that you only see a limited set of statuses to choose from based on the current status of a case. For more information about the available list of case statuses, contact your administrator.

 When all the child cases are resolved, you can then close the parent case.

 When you resolve the parent case, it will then resolve all the active associated child cases.

 A parent and child case can be closed independently of each other. This is the default setting.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  Then, choose Service > Cases. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Cases. |   2. In the list of active cases, open the one you want to resolve.  3. On the command bar, click or tap Resolve case.  Important  Before you resolve a parent case with active child cases, make sure that all the case activities are closed. Otherwise, you’ll get a warning stating that you need to manually close the open activities or the system will automatically cancel the open activities when the case is resolved. Also, performance may be slow when you close a parent case with lots of active child case associated with it.  4. In the Resolve Case dialog box, in the Resolution Type list, select how the case was resolved.  5. In the Resolution box, type a short explanation of the resolution.  The actual time spent on all activities for this case, as recorded in the Duration box in each activity, is filled out automatically in the Total Time  6. In the Billable Time list, select the amount of time spent on the case to be billed to the customer.  If this case is linked to a contract or entitlement, the billable time will be subtracted from the allotted minutes for that contract.  7. Click or tap Resolve.  A case resolution activity is created and shown in the Activities area. A case resolution activity contains information about a resolved case, including the resolution and total time spent on the case. You can reactivate a resolved case at any time. |

See Also

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

[Merge similar cases](#zf7855c3164c34bf59e4684a443c3ed6b)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

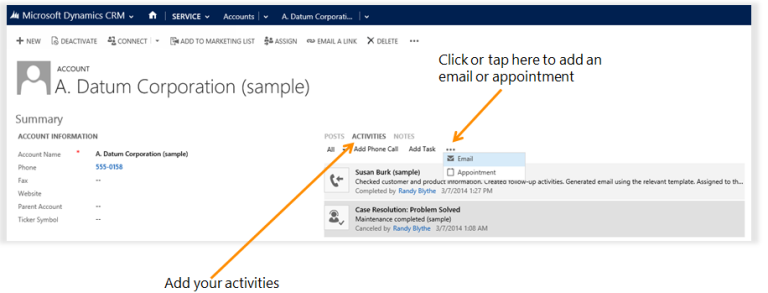
[Quick ref card for customer service reps](http://go.microsoft.com/fwlink/p/?LinkID=330911%20)

[Video: How to create, reactivate, and reassign a case (1:47)](http://go.microsoft.com/fwlink/p/?LinkID=394984)

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

The activity feed helps you keep track of all the interactions with your customers. You don’t have open up other windows or apps – you see everything in one place. Whether you or one of your colleagues has contact with a customer, you’ll see a record of it in the feed.

Activities are actions or tasks you do when you contact a customer, for example, sending email, making phone calls, taking notes, adding tasks, or setting up appointments. You can create an activity and associate it with a customer, or if you’re working on a customer record, you can create an activity that is automatically associated with that customer.



Add a phone call

If using the CRM web application

|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the work area name, and then click or tap Accounts or Contacts. |

If using CRM for Outlook

|  |
| --- |
| 1. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  2. Expand Customers, and then click or tap Contract or Accounts. |

3. Open the record you want to add the activity to.

4. If you do not see the Add Phone Call area open in the middle of the page, click or tap Activities > Add Phone Call.

5. In the Description area, provide a summary of the conversation with the customer. You must fill in this area before you can save the phone call.

The Call With field is automatically populated with the customer name you select in the account or contact field. You can select a different contact, account, lead, or user record if required.

6. By default, the direction is set to Outgoing. You can change it to Incoming by clicking or tapping the Phone Support button in the list of case records. To select multiple records, click or tap Look Up More Records, and then in the Look Up Records dialog box, select the records.

7. Select the Left voice mail check box if you make an outgoing call to a customer and leave a voice mail for them. You can also select this check box if a customer leaves a voice mail message when they call you.

8. Click or tap OK to save the activity.

Note

By default, every phone call activity that you add in context of a record is marked Completed when the record is saved at least once. However, if you add a phone call activity to an unsaved record, or if you create a new activity and then set the Regarding field of the activity to another entity record, the activity is set to an Open state. You can click or tap the Complete link to close the activity as Completed. The Complete link is available only after you save the case record at least once.

Add a task

If using the CRM web application

|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the work area name, and then click or tap Accounts or Contacts. |

If using CRM for Outlook

|  |
| --- |
| 1. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  2. Expand Customers, and then click or tap Contract or Accounts. |

3. Open the record you want to add the activity to.

4. In the middle of the page, click or tap Activities > Add Task.

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

6. The Owner field is set to the current user by default. If you want to reassign the task, click or tap the lookup icon, and then select another user or team.

7. Click or tap OK to save the task.

Add an email

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

If using the CRM web application

|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the work area name, and then click or tap Accounts or Contacts. |

If using CRM for Outlook

|  |
| --- |
| 1. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  2. Expand Customers, and then click or tap Contract or Accounts. |

3. Open the record you want to add the activity to.

4. In the middle of the page, click or tap Activities > More Commands  > Email.

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

6. To save the record, click or tap Save.

7. To add an attachment to the email, under Attachments, on the right, click or tap +.

8. To use a template for the email body, in the email editor, click or tap Insert Template, and then select the template.

9. To attach an article to the email, in the email editor, click or tap Insert Article, and then add the article.

10. Click or tap Save.

Add an appointment

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

If using the CRM web application

|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the work area name, and then click or tap Accounts or Contacts. |

If using CRM for Outlook

|  |
| --- |
| 1. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  2. Expand Customers, and then click or tap Contract or Accounts. |

3. Open the record you want to add the activity to.

4. In the middle of the page, click or tap Activities > More Commands  > Appointment.

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

6. To save the record, click or tap Save.

Create an activity and associate it with a customer

You can also create an activity from the Activity area and then link it to a customer or support case.

1. Click or tap Microsoft Dynamics CRM. Then select a work area: Sale, Service, or Marketing, and then select Activities.

2. On the command bar, select and add an activity. Fill in your information. Use the handy tooltips as a guide.

3. Use the Regarding field on the activity form to associate it with a customer or support case

See Also

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

[Video: How to create, reactivate, and reassign a case (1:47)](http://go.microsoft.com/fwlink/p/?LinkID=394984)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

[Quick ref card for customer service reps](http://go.microsoft.com/fwlink/p/?LinkID=330911%20)

Create or edit an appointment

Block time to meet or talk to your customers by using appointments in Microsoft Dynamics CRM. You can modify any of the information in an open appointment. If you change the date and times of the appointment, Microsoft Dynamics CRM will recheck for schedule conflicts.

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

Create or edit an appointment

|  |
| --- |
| 1. Do one of the following:   To create an appointment or a recurring appointment on the Service Calendar, on the nav bar, choose Microsoft Dynamics CRM > Service. Then choose Service > Service Calendar. (In Microsoft Dynamics CRM for Outlook, choose Service > Service > Service Calendar).   To create an appointment or recurring appointment in the Activities area, on the nav bar, choose Microsoft Dynamics CRM, select a work area (Sales, Service, or Marketing), and then choose Activities. (In CRM for Outlook, choose a work area, and then choose My Work > Activities).  2. On the command bar, choose Appointment.  3. Type or change information in the text boxes. You can hover the mouse pointer over a field to get a tip on what data to enter.  4. If this is a recurring appointment, choose Recurrence and select the time, pattern, and date range you want.  5. Choose Save.  If any participants have a schedule conflict, a warning appears. You can choose Ignore and Save to save the appointment anyway.  6. If you want to add an attachment, make sure you save the appointment first. Then, in the Attachments section, choose 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](#z7ffc3f1566244718ab775bcb5360943a)  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 CRM for Outlook in addition to the web application:

 If you’re using the Microsoft Dynamics CRM Online 2015 Update, Microsoft Dynamics CRM 2015, or Microsoft Dynamics CRM 2015 for Outlook, you can synchronize appointment attachments between Microsoft Dynamics CRM and CRM for Outlook if your system administrator has enabled attachment synchronization. You can insert the attachments in CRM or CRM for Outlook.

 Appointments created in the web application and synchronized with CRM for Outlook automatically set a 15-minute reminder and appear on the Microsoft Outlook calendar. You can change the reminder in CRM for Outlook.

 Service calendar items aren’t added to your Outlook calendar.

See Also

[Navigate the service calendar](#z9b3b827947b247c6b3904af0289ceca1)

[Keep track of notes, tasks, calls, or email with activities](#z0c6df1176f5544e4a7513b3786cccb0a)

[Track Outlook appointments in CRM for Outlook](#z430d8700ae2749b7a4c10e0fcc49fa50)

Create and manage activities

Schedule a service activity

Use this form to search for an available time for a service activity. You can either search for an open time using search criteria that, at a minimum, includes selecting a service, or you can define a more complex set of criteria. You can also create a service activity without checking for conflicts in the scheduled service. The service activity appears as a color block on the service calendar

You can’t create a recurring service activity. Create individual service activities as needed.

See Also

[Find the next available time before creating a service activity](#ze23ae2ff620a449897dc6d3a93813166)

[Create a service activity without checking for conflicts](#ze2050e363e9549b19f2bf0025eb7022c)

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. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. In the nav bar, click or tap Microsoft Dynamics CRM > Service.  Service appears in the nav bar.  b. Click or tap Service > Service Calendar. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Service > Service Calendar. |   2. A list of resources is displayed on the left side of the calendar in alphabetical order. To view the resources, appointments, and service activities for anyone in your organization, in the Type list, select Resource, and then in the View list select the resource view.  3. To find a specific resource, in the Search box, enter the first few letters of a name.  4. To view the details of any resource, appointment, or service activity, select the record in the list to the left of the calendar, and then at the bottom of the calendar, under the Zoom scale, click or tap the Expand button  to expand the preview pane. You can also double-click a record to open it.  5. The Calendar pane appears on the right side of the calendar. It can be collapsed or expanded. To change the date, click or tap a date in the calendar. Use the arrows on either side of the month to change the month displayed.  6. To change the number of days that are displayed in the linear calendar, click or tap any of the calendar options in the Calendar pane.  7. To change how much of the calendar is available to view, use the Zoom scale. Select specific date ranges to view in the From and To lists. |

Legend of colors and statuses

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

See Also

[Create a service activity without checking for conflicts](#ze2050e363e9549b19f2bf0025eb7022c)

[Schedule a service activity](#z9b1ae6b18f4647ccb3394e13a6ce9a8a)

[Create or edit an appointment](#z50af7faf857842449710f05544b97f38)

[Basics of service and service scheduling](#z7904d0f062954feca843f1ee5267536b)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Navigate to the service calendar, and open the Schedule Service Activity dialog box.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service. Then, click or tap Service > Service Calendar.  b. On the command bar, click or tap Schedule. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Service Calendar.  c. In the Actions group, click or tap Schedule. |   3. On the Schedule Service Activity form, type or change information in the text boxes.  Hovertips provide hints about what to enter.   Under Requested Time, select criteria for the times you want:   To search for a time on a specific date, in Start Date, select Specific Date, and then enter the date you want.   To search within a range of dates, select Range of Dates, and then enter the On or After and On or Before dates. You can also select specific days of the week.   You can also search for times based on dates relative to the current date, such as Today, Tomorrow, This Week, Next Week, or Next Month.   Similarly, to search within specific range of time, in Start Time, select Specific Time, Range of Times, or Morning, Evening, Afternoon.   Do not clear the Use Default Duration check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.  4. Click or tap Find Available Times. The next available times are shown.  5. Under Available Times, select the time for which you want to schedule the service activity, and then click or tap Schedule.  The Schedule Service Activity form closes, and Microsoft Dynamics CRM fills in the information from the selected time in the Service Activity form.  6. Type or modify information in other text boxes, as required.  Hovertips provide hints about what to enter.  7. When you’re ready to save your data, click or tap Save.  The service activity appears as a color block on the Service calendar. |

Tip

If you want to find an available time without any time restriction, do not specify any criteria under Requested Time, and click or tap Find Available Times.

See Also

[Create a service activity without checking for conflicts](#ze2050e363e9549b19f2bf0025eb7022c)

[Navigate the service calendar](#z9b3b827947b247c6b3904af0289ceca1)

Create a service activity without checking for conflicts

Make sure you provide timely and efficient service to your customers by creating a service activity that defines who will perform the service and when. In Microsoft Dynamics CRM, a service activity uses one or more resources to perform a service at a specific time and place. You can create a service activity by finding the next available times of resources for a service or simply without checking for conflicts.

You can force a service activity into a time slot to squeeze another service activity into the leftover time from a previous service activity.

If you save a service activity without finding available times in the schedule, then Microsoft Dynamics CRM displays the service activity in the schedule without checking for conflicts.

One reason to force a service activity into a time slot is to squeeze another service activity into the leftover time from a previous service activity.



|  |  |  |
| --- | --- | --- |
| 1. Make sure you have the Scheduler security role or equivalent permissions in Microsoft Dynamics CRM.  2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Service.  Service appears on the nav bar.  b. Then, choose Service > Service Calendar. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Service > Service > Service Calendar. |   3. On the command bar, click or tap Service Activity.  4. On the Service Activity form, type or change information in the text boxes.  Hovertips provide hints on what to enter.  5. When you’re ready to save your data, click or tap Save. |

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the Administration tab. As you are scheduling a service activity, the customer's preference is displayed in the Form Assistant pane.

Note

 If at any time before you save this service activity you want to search the schedule for an available time, you can click or tap Schedule in the Actions group to open the Schedule Service Activity dialog box.

 To check the schedule for conflicts, in Service Calendar, in the Actions group, click or tap Conflicts.

See Also

[Navigate the service calendar](#z9b3b827947b247c6b3904af0289ceca1)

[Find the next available time before creating a service activity](#ze23ae2ff620a449897dc6d3a93813166)

[Basics of service and service scheduling](#z7904d0f062954feca843f1ee5267536b)

[Create or edit a service](#z93c1613107ba413ba2e20f51ca1dfe07)

Manage queues items

Assign an activity to a user or queue

If you would like another person in your organization to work on an activity, you can assign the activity to that person or move it to another queue.

Assign to other user or team



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap Activities.  c. In the list of activities, select the activity that you want, and on the command bar, click or tap More Commands (), and then click or tap Assign. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand My Work, and then click or tap Activities.  c. In the list of records, click or tap the record that you want.  d. In the Collaborate group, click or tap Assign. |   2. In the Assign to another user or team field, click or tap Lookup, and select the user or team you want to assign the activity to.  If you don’t see the user or team you are looking for, click or tap Lookup, and then click or tap Look Up More Records. From the Look for drop-down list, select User or Team. In the Search box, type the name, click or tap the search button, and then click or tap the name to select it. Click or tap Add.  3. Click or tap Assign. |

Add to a queue



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap Activities.  c. In the list of activities, select the activity that you want, and on the command bar, click or tap More Commands (), and then click or tap Add to Queue. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand My Work, and then click or tap Activities.  c. In the list of records, click or tap the record that you want.  d. In the Collaborate group, click or tap Add to Queue. |   2. In the Queue field, click or tap Lookup, and select the queue you want to route the activity to, and click Add. |

Find what's assigned to you in a queue

Quickly see the items assigned to you or that are available to work on by using queues in Microsoft Dynamics CRM. Think of them as 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 if you’ve installed the CRM Online 2015 Update. For on-premises CRM organizations, these features are available if you've installed CRM 2013 Service Pack 1 (on-premises), or if you’ve updated to CRM 2015.

Interested in getting this feature? [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Find the queue items

Use the View list and Queue list to filter and find items in queues.



|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM > Service.  2. Choose Service > Queues.  3. Select a view and a filter to see the items that you want.    Find all cases in selected queues   |  | | --- | | a. To see all cases from the selected queue, in the View list, choose 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, choose 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, choose 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, choose 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, choose 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, choose Items I am working on.  b. In the Queue list, choose one of the following options to filter items: | |

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, choose 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



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| 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 choose 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



|  |
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| 1. Select the case that you want to move to another queue, and on the command bar choose Route.  2. To move an activity or case to a different queue, choose Route, and select a queue.  -OR-  To assign the activity or case to another user or team to work on, choose 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



|  |
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| 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, choose Remove. |

See Also

[Create and manage a case](#z60efedee23d544568b9445f145d49c0c)

[Add a phone call, task, email, or appointment activity to a case or record](#zb72fe4a330b84dc49b93e87e5cdb7ef0)

[Video: How to create, reactivate, and reassign a case (1:47)](http://go.microsoft.com/fwlink/p/?LinkID=394984)

[eBook: Give great customer service with CRM](http://go.microsoft.com/fwlink/p/?LinkId=393634)

[Quick ref card for customer service reps](http://go.microsoft.com/fwlink/p/?LinkID=330911%20)

Use the Unified Service Desk

Unified Service Desk Base package

Unified Service Desk (USD) is a desktop application that helps your customer service agents provide phone, email, and chat support to your customers. USD provides a configurable framework to quickly build an Agent Desktop application that’s integrated with Microsoft Dynamics CRM. With USD you can quickly make a customized agent desktop application by leveraging the User Interface Integration (UII) framework.

With the Unified Service Desk Base package, the following components are installed:

 User Interface Integration Solution

 Unified Service Desk Solution

 Data required for Microsoft Dynamics CRM and customizations

For more information on how to set up and administer USD see the, [Unified Service Desk Administration guide](http://go.microsoft.com/fwlink/?LinkId=394402).

Here’s what you’ll see when you install the Base package:

1. Left Nav: Opens the left navigation area that you can open or collapse.

2. Dashboards: Opens the CRM customer service dashboard.

3. My Work: Shows a list of all the active cases assigned to a service rep.

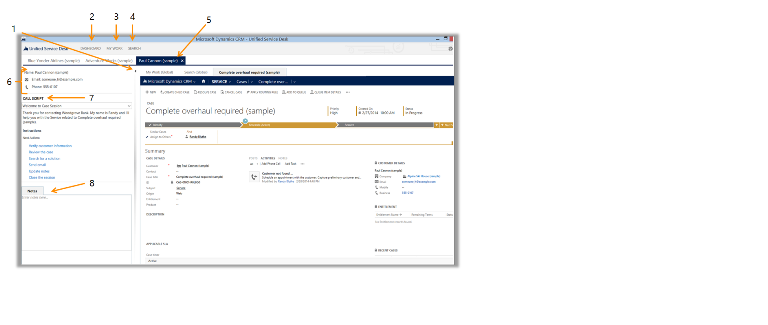
4. Search: Opens search for navigating through various entities. For this package you can search for Accounts and Contacts.

5. Session tabs: When you have multiple customer sessions open, each tab shows the different session. The tabs make it easy for an agent to work on multiple customer cases.

6. Session overview: Shows relevant information about the customer.

7. Call Script: Shows call scripts that the service agent can use when they’re working on a case. The scripts help guide the agent by giving them step-by-step instructions on how to handle the case.

8. Notes: This is the area to take notes in regarding the case.



View active cases

 From the toolbar, click or tap My Work to see all of your active cases and then select a case to work on. When you open a case, a new session opens.

Create a case

1. Look up the contact information. From the toolbar click or tap Search.

2. In the Search field, enter the contact information.

3. When you find the contact information, click or tap the record to open a new session.

4. In the left nav Call Script area, use the of list call scripts to guide you through the support case.

 When you click or tap a call script, a green checkmark displays to indicate that the action has been performed.

5. Enter your case notes in the Notes area. To attach your notes to the case, click or tap Update notes from call scripts.

Search for solutions

To help you resolve the case you, you can use the knowledge base articles or Bing search to help find a solution.

1. From the Call script area, click or tap the Search for solutions call script.

2. Then click or tap on one of the following:

 KB articles: Use the search to find articles that can help you resolve the case

 Bing search: The title automatically populates in the Bing search box.

Send an email

 From the list of call scripts click or tap the Send email call script and then select a template that automatically populates the body of the email.

Resolve a case

 To resolve a case, from the Call Script area, click or tap the Resolve Case call script.

Unified Service Desk for CRM 2013 SP1 with product updates package

Unified Service Desk (USD) is a desktop application that helps your customer service agents provide phone, email, chat, and social media support to your customers. USD provides a configurable framework to quickly build an Agent Desktop application that’s integrated with Microsoft Dynamics CRM. With USD you can quickly make a customized agent desktop application by leveraging the User Interface Integration framework.

With the Unified Service Desk for Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) package with product updates, the following components are installed:

 User Interface Integration Solution

 Unified Service Desk Solution

 Customizations for this package

 Data required for Microsoft Dynamics CRM and customizations

 KPI Custom Control

 Customer Information System

This package automatically populates the sample data for the new features introduced through product updates, such as:

 Entitlements

 Service level agreements (SLAs)

 Routing rules

 Automatic case creation rules

 Customer service schedule

For more information on how to set-up and administer USD see the, [Unified Service Desk Administration guide](http://go.microsoft.com/fwlink/?LinkId=394402)

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, activates, and queues.

5. Reminder: Shows a list of your activity reminders.

6. Applications: Shows custom applications for this package. When you’re working on a customer session, this shows global applications and session specific applications.

7. Session tabs: When you have multiple customer sessions open, each tab shows the different session. The tabs make it easy for an agent to work on multiple customer cases.

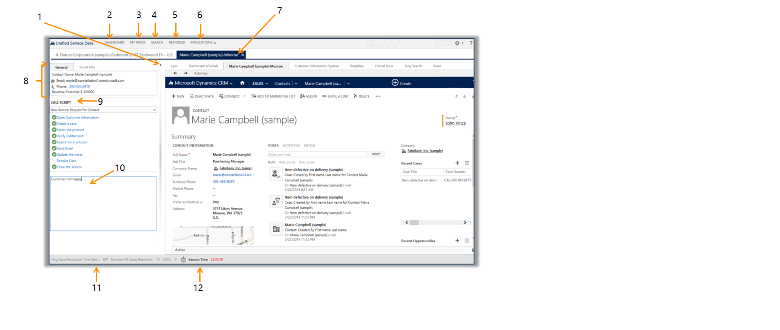
8. Session overview: Shows the relevant information about the customer.

9. Call Script: Shows call scripts that the service agent can use when they’re working on a case. The scripts help guide the agent by giving them step-by-step instructions on how to handle the case.

10. Notes: This is the area to take notes in regarding the case.

11. KPI Control: Shows Key Performance Indicators (KPI) such as Average Case Resolution Time, Number of Cases Resolved, and Customer Satisfaction.

12. Session timer: Shows how long a service rep has been on the session.



View your activities

 From the toolbar, click or tap My Work to see all of your activities.

Create a case

1. Look up the contact information. From the toolbar click or tap Search.

2. In the Search field, enter the contact information.

3. When you find the contact information, click or tap the record to open a new session.

4. In the left nav Call Script area, use the list of call scripts to guide you through the support case.

 When you click or tap a call script, a green checkmark displays to indicate that the action has been performed.

5. Enter your case notes in the Notes area. To attach your notes to the case, click or tap Update notes from call scripts.

Locate a customer

When you are working on a customer session, if you want to find the location of your customer, use Bing Maps.

 From the toolbar click or tap, Applications > Locate the customer. Then use Bing Maps to look up the customer’s location. This will open Bing Maps and automatically populate the address of the customer in the Search field.

Search for solutions

To help you resolve the case you, you can use the knowledge base articles or Bing search to help find a solution.

1. From the Call script area, click or tap the Search for solutions call script.

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Send an email

 From the list of call scripts click or tap the Send email call script and then select a template that automatically populates the body of the email.

Resolve a case

 To resolve a case, from the Call Script area, click or tap the Resolve Case call script.

When the case is resolved, the time spent on the case gets updated in Actual Service Unit field of case form. The KPI control is also updated with the number of cases and average handling time.

Unified Service Desk for CRM 2013 SP1 package

Unified Service Desk (USD) is a desktop application that helps your customer service agents provide phone, email, chat, and social media support to your customers. USD provides a configurable framework to quickly build an Agent Desktop application that’s integrated with Microsoft Dynamics CRM. With USD you can quickly make a customized agent desktop application by leveraging the User Interface Integration framework.

With the Unified Service Desk for Microsoft Dynamics CRM 2013 Service Pack 1 package, the following components are installed:

 User Interface Integration Solution

 Unified Service Desk Solution

 Customizations for this package

 Data required for Microsoft Dynamics CRM and customizations

 KPI Custom Control

 Customer Information System

For more information on how to set up and administer USD, see the [Unified Service Desk Administration guide](http://go.microsoft.com/fwlink/?LinkId=394402).

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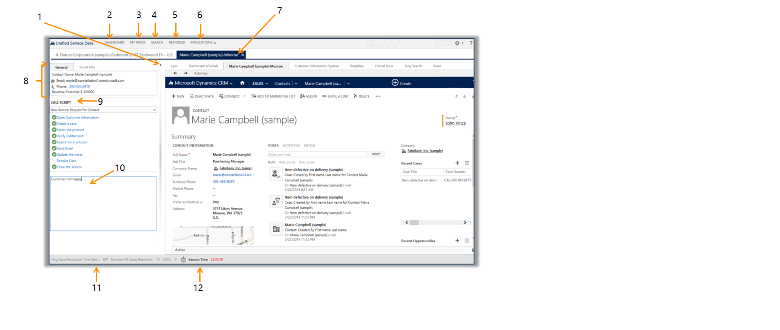
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10. Notes: Shows an area to take notes in regarding the case.

11. KPI Control: Shows Key Performance Indicators (KPIs) such as Average Case Resolution Time, Number of Cases resolved and Customer Satisfaction.

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View your activities

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Create a case

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2. In the Search field, enter the contact information.

3. When you find the contact information, click or tap the record to open a new session.

4. In the left nav Call Script area, use the list of call scripts to guide you through the support case.

 When you click or tap a call script, a green checkmark displays to indicate that the action has been performed.

5.

Enter your case notes in the Notes area. To attach your notes to the case, click or tap Update notes from call scripts.

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When you are working on a customer session, if you want to find the location of your customer, use Bing Maps.

 From the toolbar, click or tap Applications > Locate the customer. Then use Bing Maps to look up the customer’s location. This will open Bing Maps and automatically populate the address of the customer in the Search field.

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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 agents immediate access to business critical information so they can quickly engage with customers and address queries and issues using Unified Service Desk (USD) for Microsoft Dynamics CRM. USD gives you a configurable framework for quickly building applications for call centers so that agents can 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 the customer interactions.

Important

If you have an existing deployment of USD from a previous release, you must update your deployment for the new security roles to become available in your CRM instance. More information: [What's new in Unified Service Desk](http://go.microsoft.com/fwlink/?LinkId=511100)

 For more information, [view this video, Overview of Unified Service Desk](https://www.youtube.com/watch?v=_-qpyQ2yZrQ) (5:00).

 For more information on how to set up and administer USD, see the [Unified Service Desk Administration guide](http://go.microsoft.com/fwlink/?LinkId=394402).

Work with marketing campaigns

Get started with CRM marketing

Promote your business and improve sales with targeted marketing campaigns in Microsoft Dynamics CRM. Create activities for each campaign and assign them to different team members. Track customer response and costs for each campaign. Follow this step-by-step guide to get started with your marketing campaigns.

Note

The Marketing work area within CRM provides basic marketing features and gets you started with running marketing campaigns. Microsoft Dynamics Marketing takes you to the next level by providing deep customer insights and behavioral data to help plan and analyze your campaigns, greater functionality for automation and collaborating with team members, and social media integration. More information: [Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

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](#zdee40fe519424521986f714edfd36433)

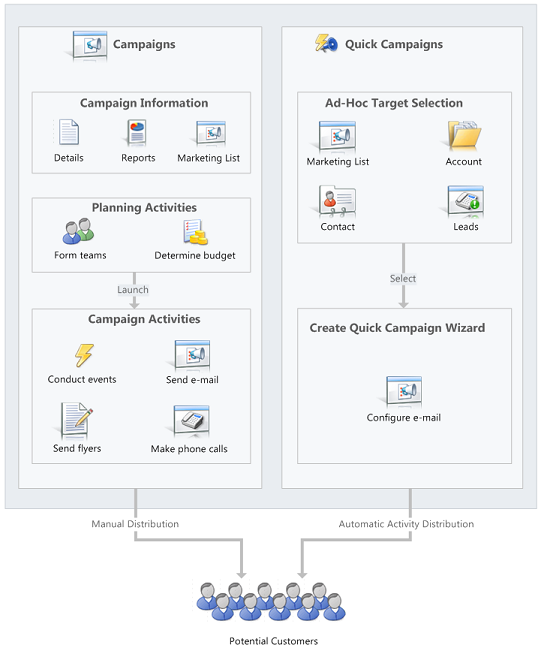
Create marketing lists

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](#z509b776a69324c87881a353782c95beb)

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](#z84763cb4b0c9465986ce7d980a57faea), [Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

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](#z1bf875ef5d8344f68b5c67f7e3286e7c)

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](#z873c410877574b38b7348b1d5ceddc58)

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](#z509b776a69324c87881a353782c95beb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

[Create or edit a campaign template in the CRM marketing work area](#z07423d4c854648e6878a6d54ecc0901f)

[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Create a marketing list in the CRM marketing work area

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](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Your marketing list is the core of running a successful marketing campaign. It can include any one type of customer record, such as leads, accounts, or contacts.

You can create two types of marketing lists:

 Static   Use a static list if you prefer to add and update members manually.

 Dynamic   Use a dynamic marketing list if you want the list to return a list of members dynamically when needed, based on search criteria you set. For example, if you want to run a campaign to members of a specific city, use a dynamic list. A dynamic marketing list retrieves the updated list of members each time you open the list, create a quick campaign from this marketing list, or distribute a campaign activity for a campaign associated with this marketing list.

Create a marketing list



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  Marketing appears on the nav bar.  b. Choose Marketing > Marketing Lists. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Marketing > Marketing > Marketing Lists. |   2. Click or tap New.  3. Add or change the information in the Summary area. This screenshot provides an example.    Note  To look up records in the Owner field, first click or tap Save, or you’ll lose your changes.  4. Click or tap Save so you can enter information in other areas of the form.  5. Add any other information that applies to your marketing list in the Notes area.  6. Click or tap Save. |

Add members to a marketing list

Add members to a static marketing list



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| 1. In any marketing list record, in the Members area, click or tap the Add  button.  2. In the Manage Members dialog box, click or tap one of the following options, and then click or tap Continue.  Add using Lookup   |  | | --- | | a. In the Look Up Records dialog box, select your search criteria.  b. Select the records that you want to add, click or tap Select, and then click or tap Add. |   Add using Advanced Find   |  | | --- | | a. In the Add Members dialog box, click or tap Select, and then click or tap the field on which you want to search, such as Account Name or City. You can select fields from the current record type, or from related record types. When you select a related record type, a new line appears with another Select list for the related record type.  b. Click or tap Equals, and then click or tap a query relational operator (for example Contains or Begins With).  c. Click or tap Enter Text, and then type the value that you want to locate.  d. To specify the columns to include in the search results, click or tap Edit Columns, and then Add Columns. Then select the columns that you want to add, and click or tap OK.  e. Click or tap Find.  f. Select the members that you want to add, click or tap one of the following, and then click or tap Add to Marketing List.   Add only the selected members to the marketing list   Add all the members returned by the search to the marketing list |   Remove using Advanced Find   |  | | --- | | a. In the Add Members dialog box, click or tap Select, and then click or tap the field on which you want to search, such as Account Name or City. You can select fields from the current record type, or from related record types. When you select a related record type, a new line appears with another Select list for the related record type.  b. Click or tap Equals, and then click or tap a query relational operator (for example Contains or Begins With).  c. Click or tap Enter Text, and then type the value that you want to locate.  d. To specify the columns to include in the search results, click or tap Edit Columns, and then Add Columns. Then select the columns that you want to add, and click or tap OK.  e. Click or tap Find.  f. Select the members that you want to remove, click or tap one of the following, and then click or tap Remove from Marketing List.   Remove only the selected members from the marketing list   Remove all the members returned by the search from the marketing list |   Evaluate using Advanced Find   |  | | --- | | a. In the Add Members dialog box, click or tap Select, and then click or tap the field on which you want to search, such as Account Name or City. You can select fields from the current record type, or from related record types. When you select a related record type, a new line appears with another Select list for the related record type.  b. Click or tap Equals, and then click or tap a query relational operator (for example Contains or Begins With).  c. Click or tap Enter Text, and then type the value that you want to locate.  d. To specify the columns to include in the search results, click or tap Edit Columns, and then Add Columns. Then select the columns that you want to add, and click or tap OK.  e. Click or tap Find.  f. Select the members that you want to keep, click or tap one of the following, and then click or tap Update Marketing List.   Keep only the selected members in the marketing list   Keep all the members returned by the search in the marketing list | |

Define the member selection criteria for a dynamic marketing list



|  |
| --- |
| 1. In any marketing list, in the Members area, click or tap click or tap the Add  button.  2. In the Manage Members dialog box, click or tap Select, and then click or tap the field on which you want to search, such as Account Name or City. You can select fields from the current record type, or from related record types.  When you select a related record type, a new line appears with another Select list for the related record type.  3. Click or tap Equals, and then click or tap a query relational operator.  4. Click or tap Enter Value, and then type the value that you want to locate (for example, "Seattle" or "Email").  For some values, you can click or tap the Lookup icon to open the Select Values dialog box and select the value you want.  5. To specify the columns to include in the search results, click or tap Edit Columns, and then Add Columns. Select the columns that you want to add, and click or tap OK.  6. Click or tap Use Query to add the matching records to your dynamic marketing list. |

Associate campaigns or quick campaigns to a marketing list

After you have created a campaign or quick campaign, you can associate it to your marketing list. You can also create a new campaign or quick campaign from your marketing list.



|  |
| --- |
| 1. In the Campaigns or Quick Campaigns area, click or tap click or tap the Add  button.  2. Search for the campaign or quick campaign you want to associate to this marketing list.  Note  If you don’t have any campaigns, or if you want to create a new one, you can click or tap + New.  If you don’t have any quick campaigns, the Quick Campaign Wizard will start. |

See Also

[Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Create or edit a campaign in the CRM marketing work area

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](http://go.microsoft.com/fwlink/p/?LinkId=394324)

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

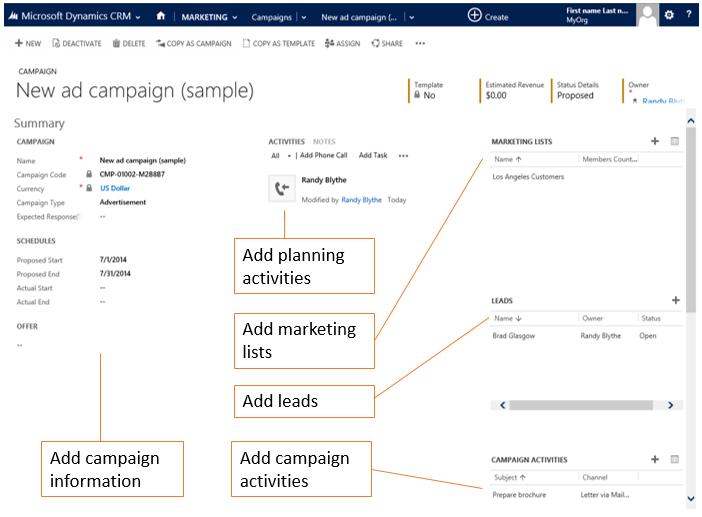
 Promotion codes

 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](#z8b0e36fe695d44bb9fe3de3819bc894d)





|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  Then, choose Marketing > Campaigns. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Marketing > Marketing > Campaigns. |   2. To create a new campaign, click or tap New.  - OR -  To edit a campaign, open a campaign from the list.  3. Add or change information in the text boxes.  a. In the Campaign section, enter the campaign details such as, name, type, and the expected response rate.  b. In the Schedules section, enter the proposed and actual start and end dates of the campaign.  c. Under Financials, enter details about the cost of the campaign and campaign activities, and the budget and revenue of the campaign.  d. To track conversations in the planning phase of the campaign, in the Activities area, add activities. More information: [Add a phone call, task, email, or appointment activity to a case or record](#zb72fe4a330b84dc49b93e87e5cdb7ef0)  4. When you’re ready to save your data, click or tap Save.  5. To add a marketing list to the campaign, in the Marketing Lists area, click or tap +, and in the Look Up Records dialog box, find and select a marketing list.  6. To create planning and campaign activities for your campaign, for example, identifying advertising channels or prepare campaign communications to send to the members on the marketing lists, see [Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d). |

See Also

[Create or edit a campaign template in the CRM marketing work area](#z07423d4c854648e6878a6d54ecc0901f)

[Create a marketing list in the CRM marketing work area](#z509b776a69324c87881a353782c95beb)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

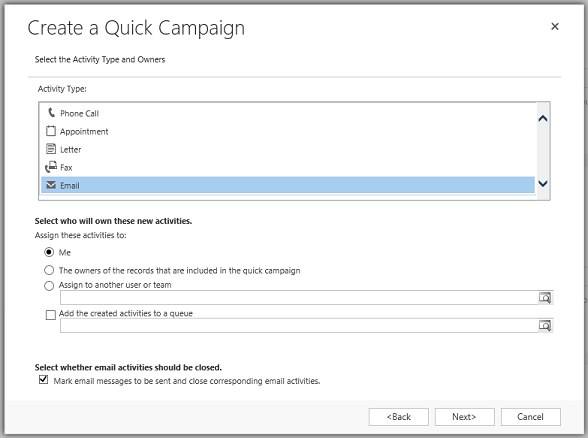
[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Create a quick campaign in the CRM marketing work area

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](http://go.microsoft.com/fwlink/p/?LinkId=394324)

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](#z84763cb4b0c9465986ce7d980a57faea)



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  Then, choose Marketing > Marketing Lists. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Marketing > Marketing > Marketing Lists. |   2. Open a record, and then in the Quick Campaigns area, click or tap the Add button .  3. In the Quick Campaign Wizard, read the instructions on the Welcome page, and click or tap Next.  4. Specify a name for the quick campaign.  5. Select the type of activity you want to create.  You can also select who you want Microsoft Dynamics CRM to assign the activity to and whether CRM should perform the activity automatically for appropriate activities, such as sending email messages. For example, if you are creating a phone call activity for all the sales representatives, you can select the phone call activity, and then select The owners of the records that are included in the quick campaign. Each sales representative can then see the activity and take action on it. However, if you are creating a large number of email activities that CRM will perform automatically, you can assign the email activity to yourself instead of the record owners.  6. Add or change information in the text boxes in the activity form, and click or tap Next.  7. Click or tap Create. |

Note

You can’t add records to a quick campaign after you create it.

See Also

[Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

[Create a marketing list in the CRM marketing work area](#z509b776a69324c87881a353782c95beb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Add an activity to a campaign in the CRM marketing work area

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](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Make your marketing campaigns successful by creating, distributing, and assigning planning and campaign activities in Microsoft Dynamics CRM. Planning activities are those you want to perform before you launch the campaign, and campaign activities are those you want to manage as part of the campaign. Examples of planning and campaign activities you can add include:

 Identify advertising channels and supporting materials

 Contact media channels to reserve time or space for advertising

 Create or refine target marketing lists

 Contact a design agency to request creation of collateral pieces and advertising materials

By default, a campaign targets an activity to the group of marketing lists that you select for the campaign. If you want to run a campaign activity on a subset of your marketing lists, you can distribute the activity to certain members instead.

Add a planning activity to a campaign



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  b. Then, choose Marketing > Campaigns. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Marketing > Marketing > Campaigns. |   2. In the campaign record you want to add the planning activity to, on the nav bar, click or tap the down arrow  next to the campaign you’re working on and then click or tap Planning Activities.    3. To add a new activity, on the command bar, click or tap Add New Activity, and then select the type of activity you want to create.  -OR-  To add an existing activity, click or tap Add Existing Activity. In the inline lookup field, search for and select the activity.  4. In the new activity form, add or change information in the text boxes.  5. When you’re ready to save your data, click or tap Save. |

Add a campaign activity to a campaign



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  b. Then, choose Marketing > Campaigns. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Marketing > Marketing > Campaigns. |   2. In the campaign record you want to add the planning activity to, on the nav bar, click or tap the down arrow  next to the campaign you’re working on and then click or tap Campaign Activities.    3. In the new campaign activity form, add or change information in the text boxes. Specify the campaign activity's priority and the amount of budget your organization wants to allocate to the activity.  4. Under Marketing Lists, you’ll see the marketing list that you had added to the main campaign if you’d chosen to add it to the campaign’s undistributed campaign activities, too.  Note  Before you can see any items under Marketing Lists, you have to create and save the activity record.  If a marketing list isn’t added, click or tap +. In the inline lookup box, click or tap the Search button, and select a marketing list that’s already added to the main campaign.  5. When you’re ready to save your data, click or tap Save.  6. To distribute the new campaign activity, on the command bar, click or tap Distribute Campaign Activity.  7. In the activity form, type or modify information in the text boxes, and click or tap Distribute.  8. Choose who will own the activities, and click or tap Distribute.  Note  You can only distribute campaign activities of type “mail merge” to marketing lists that contain the same type of record. For example, if one marketing list contains accounts and a second marketing list contains leads, the mail merge campaign activity will fail. Create a separate mail merge campaign activity for each group of marketing lists with the same record type.  9. After all the distributed activities are closed, you can close the campaign activity. To close the campaign activity, open the campaign activity record, and on the command bar, click or tap Close Campaign Activity. Set an appropriate status for the activity, and click or tap OK.  10. When the activity is completed, update the campaign activity record with the actual costs. Open the campaign activity and update the Actual Cost field. This can help guide you in planning future campaign activities. |

See Also

[Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

[Create a marketing list in the CRM marketing work area](#z509b776a69324c87881a353782c95beb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area

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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.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  b. Then, choose Marketing > Campaigns. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Marketing, and then click or tap Campaigns. |   2. Click or tap the name of the campaign that you want to add a list, product, or sales literature to. In the nav bar, click or tap the down arrow next to your campaign.    The following table shows what you need to do to add each type of item.   |  |  | | --- | --- | | To add | Do this | | A marketing list | Under Marketing, click or tap Target Marketing Lists, and then in the Records group, click or tap Add Existing Marketing List. | | A product | Under Sales, click or tap Target Products, and then in the Records group, click or tap Add Existing Product. | | Sales literature | Under Sales, click or tap Sales Literature, and then in the Records group, click or tap Add Existing Sales Literature. | | A related campaign | Under Marketing, click or tap Related Campaigns, and then in the Records group, click or tap Add Existing Campaign. |   3. Select the type of record you want in the Look Up Records dialog box, in the Look for list.  4. Type the first few letters of the name of the record to narrow your search in the Search box, and then click or tap the Find button .  5. Select the check boxes for the records that you want to add in the list of records that appears, click or tap Add, and then click or tap OK.  6. Click or tap Save or Save and Close.  Note  To verify that the item you selected was added to the campaign, reopen the campaign. Under Marketing, click or tap Target Marketing Lists, or under Sales click or tap either Target Products or Sales Literature. The information you added appears in the list. |

See Also

[Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

[Create a marketing list in the CRM marketing work area](#z509b776a69324c87881a353782c95beb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

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Track a campaign response in the CRM marketing work area

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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



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Marketing.  b. Then, choose Marketing > Campaigns. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Marketing > Marketing > Campaigns. |   2. Click or tap the campaign that you want to add campaign responses to, and under Responses, click or tap Add .  3. Add information in the Campaign Response form.  4. Click or tap Save. |

Create campaign responses automatically



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Marketing tab. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap the Settings > System > Administration > System Settings > Marketing tab. |   3. Set the Create campaign responses for incoming email option to Yes. |

See Also

[System Settings dialog box - Marketing tab](#z873c410877574b38b7348b1d5ceddc58)

[Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

[Create a marketing list in the CRM marketing work area](#z509b776a69324c87881a353782c95beb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

[Create or edit a campaign template in the CRM marketing work area](#z07423d4c854648e6878a6d54ecc0901f)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394324)

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 2015 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.

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

This feature also requires Microsoft Dynamics Marketing 2015 Update.

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](http://go.microsoft.com/fwlink/p/?LinkId=513887).

If you are a CRM administrator who wants to enable the Seller Portal for your users, see [Install the Seller Portal for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkId=513888).

View the Seller Portal for selected accounts

1. Go to Sales > Accounts.

2. Select the accounts for which you want to view marketing communications in Microsoft Dynamics Marketing.

3. Choose the More button … at the top of the screen and then choose View Marketing Portal.

4. Log in to Microsoft Dynamics Marketing if prompted.

View the Seller Portal for selected contacts

1. Go to Sales > Contacts.

2. Select the accounts for which you want to view marketing communications in Microsoft Dynamics Marketing.

3. Choose the More button … at the top of the screen and then choose View Marketing Portal.

4. Log in to Microsoft Dynamics Marketing if prompted.

Create and run 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](#zea98ae5e5dbc4c23b4c6513774997226).

Reports in CRM

|  |  |  |
| --- | --- | --- |
| Category | Description | More information |
| Account insights | Top revenue-generating accounts | [Account Distribution report](#zdd02756bf2ec40d88b463d164b7a9fc7) |
|  | Overview of an account | [Account Overview report](#zf84fb3418ed2410898ef5ef48383def4) |
|  | Chronological account summary | [Account Summary report](#zcf94f7d26ef94eb087609940a2c6bf30) |
|  | Accounts that haven’t been contacted | [Neglected Accounts report](#z7d04a20620114a56858ce38c79931c91) |
| Marketing insights | Summary of activities in a campaign | [Campaign Activity Status report](#z2a5e811a7fbf4acaba2964b7270923e9) |
|  | Compare campaigns | [Campaign Comparison report](#z08b186f5b1c54eb2b81f5828be67ef58) |
|  | Progress and status of campaigns | [Campaign Performance report](#zc09d2159667649928ade7bac8a7fe293) |
| Sales insights | Sales team performance against competitors | [Competitor Win Loss report](#zd8029ee86c194ce896eb3a74b48c4d37) |
|  | Activity patterns | [Activities report](#ze73b59e6997640588747efe3c6024b54) |
|  | Sales progress against goals | [Progress Against Goals report](#z30030c6f64c14944b31e7d59782b0ed2) |
|  | Sales performance of reps | [Sales History report](#zb6330b4107854d64909d24c84e8dedca) |
|  | Potential sales opportunities | [Sales Pipeline report](#z559b782c4cc74c18a51bc8fe8d602b45) |
|  | Compare effectiveness of lead sources for generating opportunities | [Lead Source Effectiveness report](#z139e33a8841840828fb92d5c4c5e8e20) |
|  | Leads that haven’t been contacted | [Neglected Leads report](#zeb24a74daa514af0aff4bfe77f3a4980) |
| Product insights | Products used by an account | [Products by Account report](#zf6f2787cc021406a9d43aa62c49f5c86) |
|  | Products used by a contact | [Products by Contact report](#z46723c2a73f24239a8f0ce02f9067c5d) |
| Invoices, quotes, and orders details | Line items of an invoice | [Invoices report](#zbaa85ee8f27a4a1cb3c23234aa828bb9) |
|  | Accounts receivable | [Invoice Status report](#z443a779b20fd499c88c4531a4990d610) |
|  | Line items of a quote | [Quotes report](#ze50c172696e141e2bc16a11bd19d6401) |
|  | Line items of an order | [Orders report](#zee95ce141a8f4f288ac1e84b61adbc96) |
| Service insights | Types of opened and resolved cases | [Case Summary Table report](#z541595fb8b5c4f76bdd180dd2ca3d8d2) |
|  | Cases with no recent activity | [Neglected Cases report](#z8d6574f6879744208d1a48949f235333) |
|  | Amount and length of service activities | [Service Activity Volume report](#za669f33472ec4c88b2475d9a0c7b1976) |
|  | Most searched knowledge base articles | [Top knowledge base articles report](#zf6f721a29e0443a7931b78d0d9c1382b) |
| Administrator reports | List of users | [User Summary report](#z75a24695dc764e49b8a89f4e2ee0fe19) |

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Share a report with other users or teams](#z3a30eb5f4e3a4c468fa4150d8b277041)

[Download a report](#zd5d2f12326824d41b6d814063fc19a1c)

[Create, edit, or copy a report using the Report Wizard](#z3b79a467ae114c84891e9d1c790194b6)

[Edit the default filter of a report](#zdb9fe06286824739b1622fb9109977bb)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

Add a report

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



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Reports. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Workplace, and then under My Work click or tap Reports. |   2. Click or tap New.  Add a file created in another application  a. In the Source section, in the Report Type box, select Existing File.  b. In the File Location box, enter the path and file name of the file to add, or click or tap Browse to locate the file.  -OR  Add a link to a webpage  a. In the Source section, in the Report Type box, select Link to Webpage.  b. In the Webpage URL box, enter the URL of the webpage.  3. Specify the properties for the report on the General tab.  a. In the Details section, specify a meaningful name and description for the report.  b. The Parent Report text box displays the parent report of the current report, if one exists.  c. Categories. Click or tap the Select or change the values for this field  button, and then specify the categories to include in this report.  d. Related Record Types. To have the report appear in the Reports list on a page for specific record types, click or tap the Select or change the values for this field  button, and then select record types.  e. Display In. To specify where reports should be visible, click or tap the Select or change the values for this field  button, and then select one or more of the options.  If no values are selected, the report won’t be visible to end users.  4. Edit the report ownership information on the Administration tab:   Owner  This option is only available if you have Assign permission for the report.   Viewable By  Select Organization to make the report organization-owned, and to make it viewable by anyone in the organization. Select Individual to make the report viewable only by the owner and anyone the owner shares the report with.  5. Click or tap Save or Save and Close. |

To share the new report, see the instructions in [Share a report with other users or teams](#z3a30eb5f4e3a4c468fa4150d8b277041).

See Also

[Create, edit, or copy a report using the Report Wizard](#z3b79a467ae114c84891e9d1c790194b6)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

[Report Writers Guide for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkID=317946)

Organize and lay out your data

When you create a report, you have to decide which columns to include, the order in which they are displayed, and whether to group data into subcategories. By grouping and summarizing the data, you make it easier to see the patterns.

For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.



|  |
| --- |
| 1. Define how to organize the report:   To group items so that they are organized together in the report by date or other common properties:  i. For each grouping level you need, click or tap Click here to add a grouping.  ii. Define the grouping:   Record type. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.   Column. The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.   Time interval. For datetime fields, group the data by Month, Day, Week, or Year.   Sort order. Sort order for displaying the groups.   Column width. Width of the column heading in pixels.   Summary type. You can group records by a count of matching records.  iii. To reorder the grouping levels, use the up and down arrows in the Common Tasks section.  iv. Click or tap OK.   To define the sort order within each group, click or tap Configure Sorting, select a column and sort order, and then click or tap OK.   To limit reports to groups with the highest or lowest values, click or tap Set Top or Bottom Number:  i. Select Top or Bottom.  ii. Select the number of groups to display.  iii. Click or tap OK.  2. Define which columns to display in the report. You can display columns that show data from a record, or columns that show summary information:  a. For each column you want to include, click or tap Click here to add a column:   Record type. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.   Column. The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.   Data type. The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.   Name. The name used in the database.   Column width. The width in pixels of the column.   Summary type. The specific type of summaries available depends on the data type of the column.  None: lookup, datetime, owner, picklist, bit, ntext  Average, Maximum, Minimum, Percent of Total, Sum: all numeric record types (decimal, int, float, money)   Include unformatted value column. Typically, in a report, the underlying data is formatted as plain text. When you export the report to Excel, you can’t change the format of the cell that contains the exported data (plain text) to a different format. This causes problems with calculations. To avoid this, you can select the Include unformatted value column check box for fields of type Date Only, Date and Time, Whole Number, Decimal, Currency, or Floating Point Number. This adds a column, which contains the unformatted value of the fields, to the report.   Use the left and right arrows to reorganize the columns.  b. Click or tap OK.  3. Click or tap Next. |

See Also

[Create, edit, or copy a report using the Report Wizard](#z3b79a467ae114c84891e9d1c790194b6)

Share a report with other users or teams

When you create a new report, share it with other people on your team or in your organization so that they can also benefit from it. There are several ways that you can share your new report with other people.

Share the report with other users or teams

If using the CRM web application

|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the area name, and then click or tap Reports.  3. In the list of reports, select the report.  4. Click or tap More Commands , and then click or tap Share.  5. In the Share Report dialog box, click Add User/Team.  6. In the Look Up Records dialog box, select the users or team you want to share the report with, and click OK.  7. In the Share Report dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share. |

If using CRM for Outlook

|  |
| --- |
| 1. In the Navigation Pane, expand your organization if necessary, and then click or tap Sales or Service or Marketing.  2. Click or tap Tools > Reports.  3. In the list of reports, select a report, and in the Collaborate group, click Share.  4. Specify the users or teams you want to share the report with. |

Share the report with your organization

If the report would be useful for all users, make it available to the organization.

If using the CRM web application

|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the area name, and the click or tap Reports.  3. In the list of reports, select the report, and on the command bar, click or tap Edit.  4. On the Actions  menu, click or tap Make Report Available to Organization. |

If using CRM for Outlook

|  |
| --- |
| 1. In the list of reports, select the report, and in the Records group, click Edit.  2. On the Actions  menu, click Make Report Available to Organization. |

Run a report

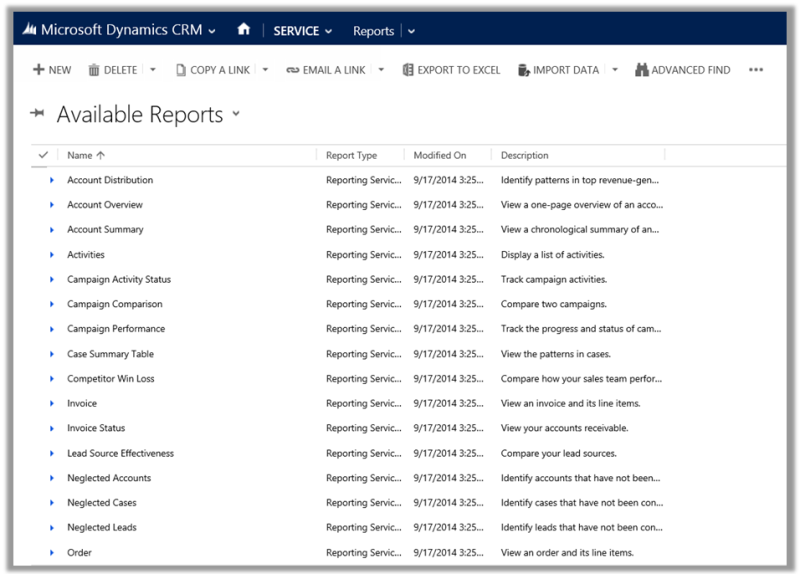
Reports help you manage your progress towards your goals by helping you see how you’re doing. You can also track trends - which can give you an advantage over your competitors.

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 Sales, Service, or Marketing > Reports.  (For CRM for Outlook, Workplace > My Work > Reports).  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. |



See Also

[Get a list of available reports](#zee3f61c8df9f44809cec5375b690ebda)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

[Customize your regional settings (number, currency, time, and date) in CRM for Outlook](#ze907d1536cf2444b93ad8c82bb70e3c0)

[Report Writers Guide for Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online](http://technet.microsoft.com/en-us/library/dn531183.aspx)

Download a report

To edit a default report, you can download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment, and then make the necessary changes.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Reports.  c. Select the report, and then click or tap Edit. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Workplace, and then under My Work, click or tap Reports.  b. On the Reports tab, in the Records group, click or tap Edit. |   2. 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](#z3b79a467ae114c84891e9d1c790194b6)

[Create a Custom Fetch-Based Reporting Services Report](http://go.microsoft.com/fwlink/?LinkID=317946)

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](#zdb9fe06286824739b1622fb9109977bb)

 You may be viewing a cached copy of the report. By default, data in Microsoft Dynamics CRM reports is pulled from the database each time you run a report. However, your system administrator may have changed a report to run from the cache. If data you entered recently is not included in the report, you may have an older version of the report from the cache. To refresh the report, on the Report toolbar, click or tap the Refresh button .

 You may not have permission to read records in a sub-report. If you do not have permission to read record types that are included in a sub-report, you will get an error message saying that the sub-report could not be displayed.

 Your Microsoft Internet Explorer privacy settings may block required cookies. For chart reports, if instead of seeing the chart, you see a red letter X, your privacy settings may be blocking a cookie that is required for the chart control. To fix this problem, in your browser, enable cookies for the server that is running Reporting Services.

 If you are offline, your local data groups may not include all the data. If you are using the report from Microsoft Dynamics CRM for Microsoft Office Outlook while you are offline, you must have a local data group that includes all the data that will be in the report. More information: [Example of going offline with CRM for Outlook](#zf622fe6914b344e0a4eb093959910c70)

Determine who can use a report

By default, a report is a personal report and can be used only by the author unless it is shared.

If you use Microsoft Dynamics CRM for Microsoft Office Outlook all reports that you own will be available when you’re offline. More information: [Work offline with CRM for Outlook](#zc97851f53063431895fa1d84c5f898c6).



|  |  |  |  |
| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Then click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Customizations. Then choose Customize the System. |   3. Click or tap Components > Reports, and then click or tap the report that you want to share.  4. Click or tap Actions.  a. To change the owner, select Assign, and then select the user or team.  b. To share the report, select Sharing, add the user or team you want to share the report with, and then give them specific permissions. Click or tap Share.  5. Click or tap Save or Save and Close. |

See Also

[Report Writers Guide for Microsoft Dynamics CRM and Microsoft Dynamics CRM Online](http://go.microsoft.com/fwlink/?LinkID=317946)

Edit the default filter of a report

When a report is a Microsoft SQL Server Reporting Services report, is enabled for prefiltering, and has a default filter, you can change the default filter to display the data you expect to see in the report. This filter is used each time any user runs the report.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Reports. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap the work area, Sales or Service or Marketing, and then click or tap Tools > Reports. |   3. Select a report, and on the command bar, click or tap More Commands , and then click or tap Edit Default Filter.  To see all reports, including sub-reports that aren’t visible in the default view, select the All Reports, Including Sub-Reports view.  4. Modify the filter criteria.  The criteria are grouped by record types that you can use in the filter, such as Accounts or Contacts.   To edit an existing row, click or tap the query relational operator and select an operator, or click or tap the underlined value and enter a new value.   Click or tap the query relational operator, and select an operator.   To add a criteria row:  i. Click or tap Select, and specify the field to filter on.  ii. Click or tap the query relational operator, and select an operator.  iii. Click or tap Enter Value, and enter a value to filter on. For some values, you can click or tap the Select or change the values for this field button  to open the Select Values dialog box and select the value you want.   To group criteria, you must select two or more rows for the same record type. For example, Sales Stage and Est. Revenue are both field values in the Opportunity record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as Account and Opportunity record types, cannot be grouped.  i. For each row you want to group, in detailed mode, click or tap the Options menu button  for that row, and then click or tap Select Row.  ii. On the Filter toolbar, select Group AND or Group OR.  iii. To remove a row from a group, click or tap the Options menu button  for that row, and then click or tap Delete.  iv. To select a group, click or tap the Options menu button  for that group, and then click or tap Select Group.  v. To add a criteria clause to a group, click or tap the Options menu button  for that group, click or tap Add Clause, and then select the field, query relational operator, and value.  vi. To unselect a group that has been previously selected, click the Options menu button  for that group, and then click or tap Deselect Group.  vii. To ungroup a group, click or tap the Options menu button  for that group, and then click or tap Ungroup.  viii. To change a Group AND group to a Group OR group, or a Group OR group to a Group AND group, click the Options menu button  for that group, and then click or tap Change to OR or Change to AND.  Tip   To clear all criteria and start over, on the Filter toolbar, click or tap Clear, and then click or tap Confirm.   To delete a row, click or tap the Options menu button  for that row, and then click or tap Delete.  5. Click or tap Save Default Filter. |

See Also

[Create, edit, or copy a report using the Report Wizard](#z3b79a467ae114c84891e9d1c790194b6)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

[Report Writers Guide for Microsoft Dynamics CRM and Microsoft Dynamics CRM Online](http://go.microsoft.com/fwlink/?LinkID=317946)

Customize and organize reports

Analyze data in Microsoft Dynamics CRM by using reports. Microsoft Dynamics CRM includes default reports for many common business needs. However, most organizations customize the default reports and add custom reports for specific needs.

Ownership of reports

System reports are available to all users. Individuals who own reports can share them with specific colleagues or teams, or can make the reports available to the organization, so that all users can use them.

Report types

Microsoft Dynamics CRM supports two types of report:

 Microsoft SQL Server Reporting Services report. These reports use SQL queries and filtered views to retrieve report data. Filtered views restrict the data to what is available to the security role of the person running the report. All the default reports that ship with Microsoft Dynamics CRM are SQL-based reports.

You cannot access filtered views in Microsoft Dynamics CRM Online because access to the SQL database is not supported. Thus, if you have a Microsoft Dynamics CRM Online subscription, use Fetch-based reports for custom reporting.

 Fetch-based Reporting Services report. These reports use FetchXML queries that are proprietary to Microsoft Dynamics CRM instead of filtered views to retrieve data for reports. Reports that you create by using the Report Wizard in Microsoft Dynamics CRM are Fetch-based reports.

The other reports can be:

 Links to webpages

 Static files

 Dynamic Microsoft Office Excel files that read data from the Microsoft Dynamics CRM database

For each report, you can edit the following properties:

 File name or URL

 Display name

 Description

 Information about where the report displays in the user interface

Security of data in reports

All reports read Microsoft Dynamics CRM data from filtered views, which filter the data based on the user's security role. Reports only display data that the person running the report has permission to view.

Options for creating new reports

To create a new report, users with appropriate permissions can:

 Add a file or a link to a webpage as a report.

 Run the Report Wizard to create a new Reporting Services report. The Report Wizard can create table and chart reports, including drill-through reports and top N reports.

 Write a new Fetch-based Reporting Services report. To author custom fetch-based reports, you must install the Microsoft Dynamics CRM Report Authoring Extension. More information: “Create a Custom Fetch-Based Reporting Services Report” in [Report Writers Guide for Microsoft Dynamics CRM and Microsoft Dynamics CRM Online](http://go.microsoft.com/fwlink/?LinkID=317946).

Options for modifying existing reports

For existing reports, users with appropriate permissions can:

 Organize reports into categories to control which views in the Reports area display each report.

 Determine where a report is visible in the user interface, and edit other properties of the report.

 Edit a report created with the Report Wizard.

 Edit a default report. For example, if you customize Microsoft Dynamics CRM, you might need to modify labels or add or remove fields in default reports. More information: “Edit a Default Report or create a SQL-based Reporting Services report” in [Report Writers Guide for Microsoft Dynamics CRM and Microsoft Dynamics CRM Online](http://go.microsoft.com/fwlink/p/?LinkID=317946), [Create Reports for Microsoft Dynamics CRM Using SQL Server Reporting Services](http://msdn.microsoft.com/en-us/library/gg328097.aspx)

 Edit the default filter for a default report, a report created with the Report Wizard, or other Reporting Services reports.

 Create a one-time snapshot for a Reporting Services report or schedule a Reporting Services report to run at set intervals.

 Share a personal report with other users, or make it available to everyone in your organization.

 Publish a report so that it is available for use with external applications, such as Microsoft SharePoint or custom programs.

Reports in solutions

In Microsoft Dynamics CRM, reports are solution aware. Adding a report as a component to a solution makes it become a single unit of software that extends Microsoft Dynamics CRM functionality and the user interface. Only reports that are organization-owned or visible to the organization can be added to solutions.

Note

To find if a report is viewable to the organization: In the list of reports, select a report, and click or tap Edit. Then, on the Administration tab, see if Viewable By is set to Organization.

You can add, import, or export snapshots of reports as part of a solution. In Microsoft Dynamics CRM, reports, sub reports, report category, report display area, and report-related record type are considered as components of a report set. When you import a solution update in a non-overwrite mode, any updates by the solution to a report will be ignored if any component of the report set has been customized.

See Also

[Create, edit, or copy a report using the Report Wizard](#z3b79a467ae114c84891e9d1c790194b6)

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

All reports that are created using the Report Wizard are Fetch-based reports.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Reports. |   If using CRM for Outlook   |  | | --- | | a. Click or tap Sales, Service, or Marketing, and then click or tap Tools > Reports. |   3. To add a new report, click or tap New.  4. In the Report: New Report dialog box, in the Report Type list, click or tap Report Wizard Report, and then click or tap Report Wizard.  You can only use the Report Wizard to edit reports that were created with the wizard.  5. Select the starting point for your report.  a. To create a new report, select Start a new report.  - OR -  To start from a copy of an existing report, click or tap Start from an existing report, and check the Overwrite existing report check box.  - OR -  To edit an existing report, select Start from an existing report, select the report, and check the Overwrite existing report check box.  b. Click or tap Next.  6. Enter the name of the report, and specify which record types the report will use.  This step identifies where the data in the report comes from. You can include data from one or two record types, or data from related records.  a. Enter data in the fields:   Report name. This value will be displayed in the Reports area.   Primary record type. Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include.   Related record type. If you need to display data from a related record type, select an additional record type here.  Caution  Avoid selecting data from a related record type that is not required, as it makes the report take longer to load.  b. Click or tap Next.  7. Define a filter to determine which records are included in your report. More information: [Edit the default filter of a report](#zdb9fe06286824739b1622fb9109977bb).  8. [Organize and lay out your data](#zb4a11cd387aa46b390736d2ae9d28717)  9. Select the basic format of the report.   Table only. This provides a table grouped and sorted as you specified.   Chart and table. Displays both a chart and table.   Show table below the chart on same page. Clicking on the chart does nothing.   Show chart. To view data for a chart region, click the chart region. Clicking on an area in the chart will display a table with details for that section of the chart.  10. Click or tap Next.  11. If the report includes a chart, specify the type of chart, and how the data is displayed in the chart.  a. Select the chart type, and then click or tap Next.  The Chart preview area shows how the data will be displayed.   For vertical and horizontal bar charts and line charts, specify which data to display on each axis:   In the Format Column (X) Axis section, select the field to use for the X axis, and the label that is displayed on the chart for the field.   In the Format Value (Y) Axis section, you can select two fields. For each field, you can specify the label that is displayed on the chart.   In the Format Labels and Legends section, specify whether or not to show the data labels and a legend.   For pie charts, specify the slices and values for the chart.   For slices, you must select one of the groupings in your report.   For values, you must select a numeric column with a summary type.  b. Click or tap Next.  12. Review the summary of the report, click or tap Next, and then click or tap Finish.  13. After you finish defining the report, return to the Report form, and if required, update the name and description of the report, and determine where the report is displayed.  14. Test the report. On the Reports tab, in the Actions group, click or tap Run Report. If the report needs modifications, edit the report.  15. Make the report available to others for use. More information: [Determine who can use a report](#z1dea802464b74a4ea20d4af5cf7338ad) |

Note

 To edit an existing Report Wizard report, first select the report. Then, in the Records group, click or tap Edit. Finally, click or tap Report Wizard.

 All reports generated with the Report Wizard print in landscape mode.

 If you need to change data on the General or Administration tabs for a new report, wait until the report is saved before making the changes. Any changes on these tabs made before a report is saved will be ignored.

See Also

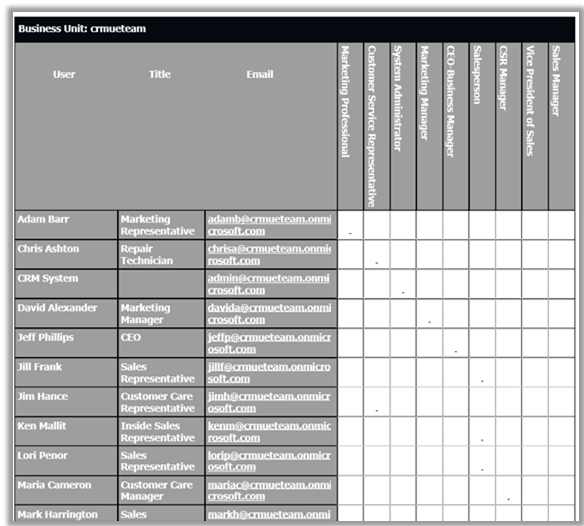
[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Report Writers Guide for Microsoft Dynamics CRM and Microsoft Dynamics CRM Online](http://go.microsoft.com/fwlink/?LinkID=317946)

Available reports

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](#zd691493b2e394a8999521500a8ddafd2)

[Create, edit, or copy a report using the Report Wizard](#z3b79a467ae114c84891e9d1c790194b6)

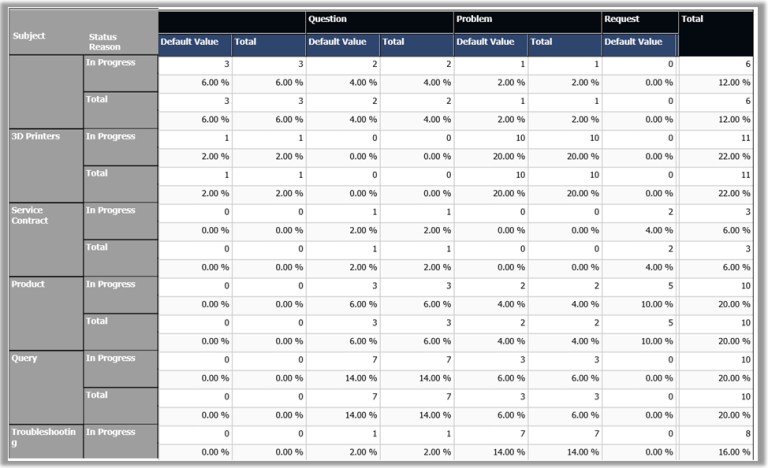
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

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](#zd691493b2e394a8999521500a8ddafd2)

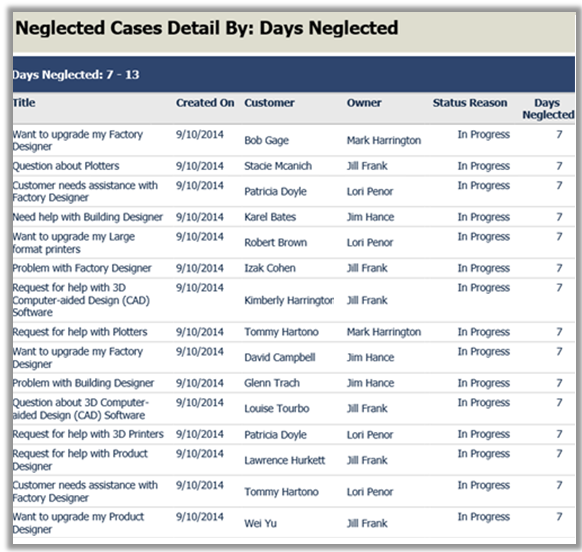
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

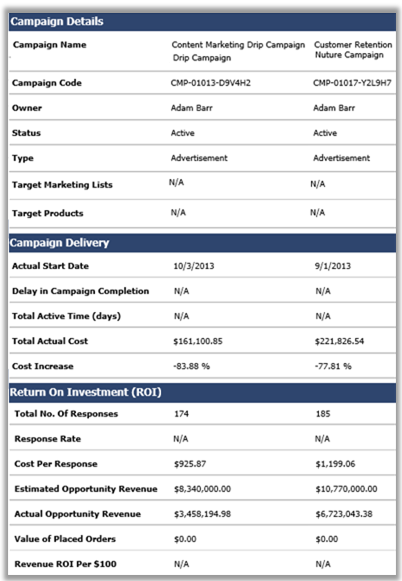
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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.



See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

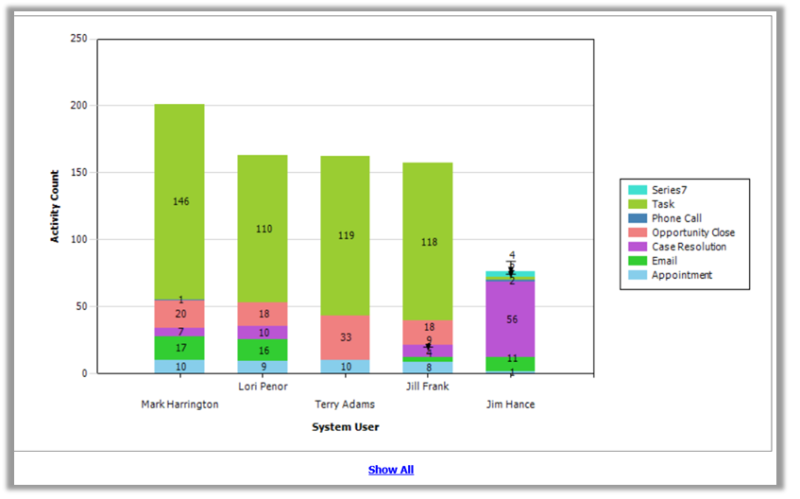
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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 and time period that you specify.

See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

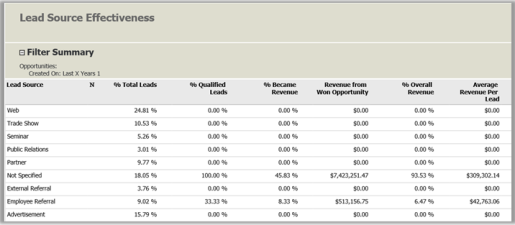
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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.



See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

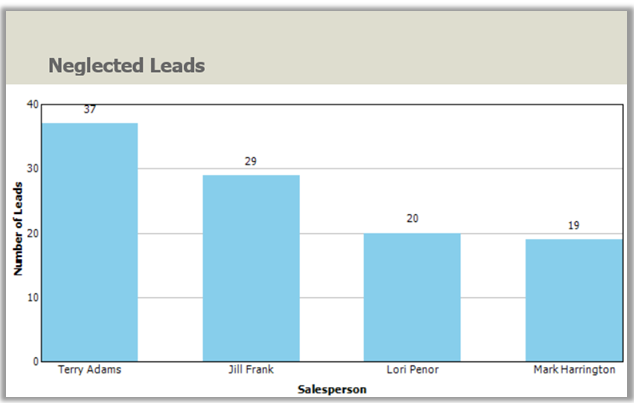
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

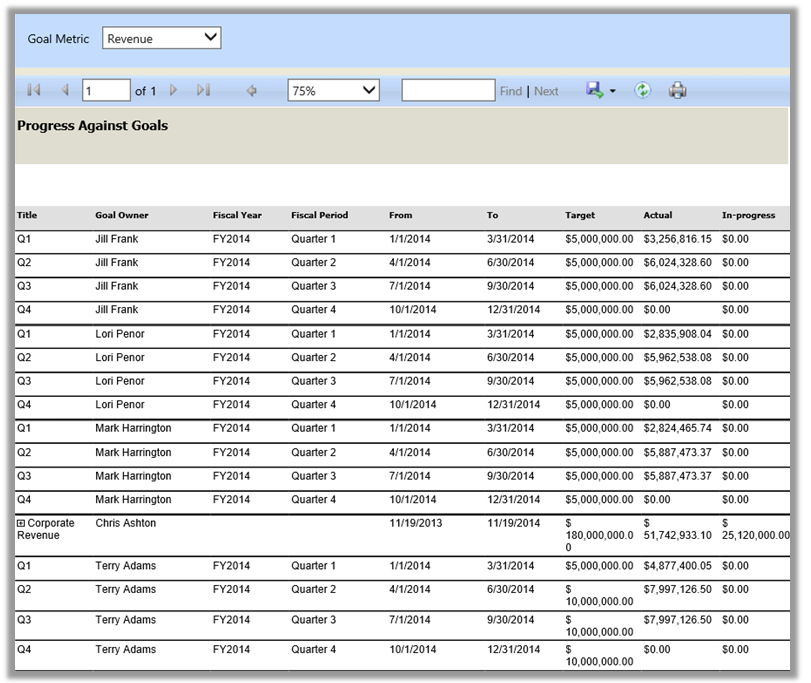
[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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.



See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

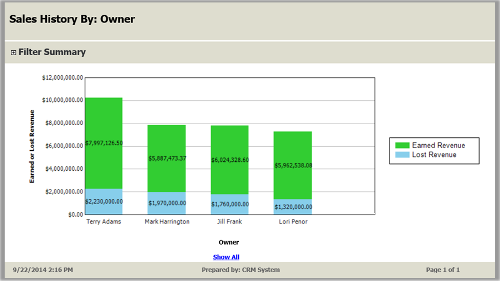
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

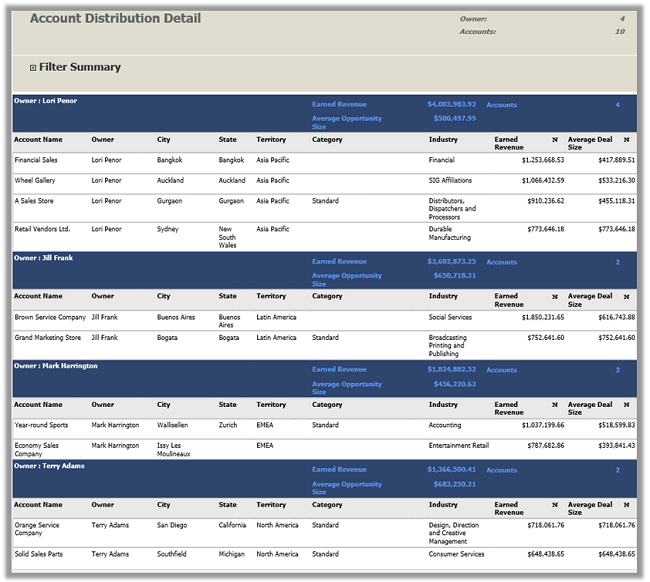
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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.



See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

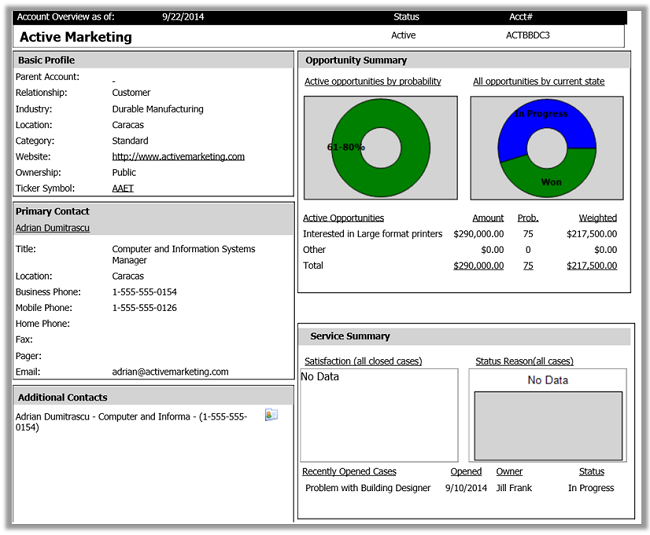
[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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](#zd691493b2e394a8999521500a8ddafd2)

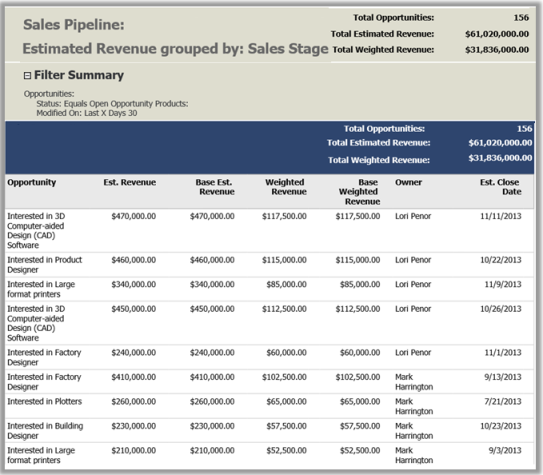
[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

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.



See Also

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

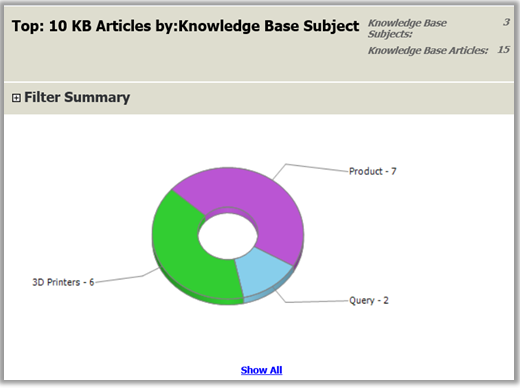
[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

[Creating and Using Workflows](http://go.microsoft.com/fwlink/?LinkID=316501)

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](#zd691493b2e394a8999521500a8ddafd2)

[Troubleshoot problems with data not displaying in a report](#z886fee0fd97b4baf901963ee11cdf329)

[Customize and organize reports](#zea98ae5e5dbc4c23b4c6513774997226)

[eBook: Use KB articles to help your customers](http://go.microsoft.com/fwlink/p/?LinkId=394983)

Administer CRM

Manage your CRM subscription

You can find information on this topic in our [Online Subscription Guide](http://go.microsoft.com/fwlink/p/?LinkID=511658).

See Also

[Administration Guide](http://go.microsoft.com/fwlink/?LinkID=317691)

Add user licenses to your subscription

For information about user licensing, see [Manage Microsoft Dynamics CRM Online licenses](http://go.microsoft.com/fwlink/?LinkID=321100) in Manage Your Microsoft Dynamics CRM Online Subscription.

Install product updates

Microsoft Dynamics CRM Online Spring ‘14 and Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) include many new features and updates. Some of these features are optional. The optional features are disabled by default to prevent any disruptions in your CRM experience. However, you can enable these features by installing the product updates. [Learn about installing product updates](http://go.microsoft.com/fwlink/?LinkID=397666).

Important

If you install Microsoft Dynamics CRM 2015 or the Microsoft Dynamics CRM Online 2015 Update, you’ll automatically get the optional updates from Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) or Microsoft Dynamics CRM Online Spring ‘14.

See Also

[Learn about installing product updates](http://go.microsoft.com/fwlink/?LinkID=397666)

Add storage

Check and manage your Microsoft Dynamics CRM Online storage through Microsoft Office 365.

Note

This topic applies to users who are on the Microsoft Online Services environment.

Monitor the amount of storage your organization is using

If your Microsoft Dynamics CRM organization is consuming 100% of your available storage, users in your organization won’t be able to enter data or create records, although they will be able to view data.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > Resources in Use. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration, and then click or tap Resources in Use. |   Review your storage used. |

To get more storage

 Free up storage consumed by unneeded data. More information: [10 ways to free storage space in Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkID=317689)

 Purchase additional storage from the Office 365 Admin portal page. In the Office 365 admin portal, in the Office 365 admin center, go to licensing > subscriptions and click or tap your subscription. Click or tap Buy now, expand optional add-ons, and enter the number of gigabytes of additional storage desired.

See Also

[Remove storage from your subscription](#z60bed2813a9c4e9f9fd9c6f04299b977)

Remove storage from your subscription

You may find that you don’t need extra storage and choose to remove it for your subscription. By removing storage capacity, you are reducing the amount of storage space available to your organization. Storage can’t be removed if it’s being used, or if you have the minimum amount of storage required by your subscription.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the step for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Then click or tap Settings > Administration > Subscription Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings, click or tap Administration, and then click or tap Subscription Management. |   3. Under Resource Usage and Management, click or tap Remove Storage.  4. Complete the Remove Storage Wizard.  Tip  Changes to your subscription take a few minutes to take effect, and will be reflected in your next month's billing on a prorated basis. |

See Also

[Add storage](#z0876183cca9749a698dd6b4aeafbd819)

[10 ways to free storage space in Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkID=317689)

Add License Wizard and Add Storage Wizard errors

You may see an error while running the Add User License Wizard if you have:

 Reached the maximum number of licenses available for your offer.

 Attempted to remove licenses, which would result in less than the minimum number of licenses required by your offer.

Important

To see other offers available to you, on the Subscription Management page, under Application Usage, click or tap View Offers. If you are eligible to change your current offer, the offers will be listed. If you are not eligible for an offer at this time, contact the Microsoft Dynamics CRM sales team.

You may see an error while running the Add Storage Wizard if you have:

 Reached the storage limit available for your offer.

 The minimum amount of storage for that offer.

If you cannot add storage from your Microsoft Dynamics CRM Online subscription, it might be that your current offer has a limited amount of storage available.

Manage users and set up security

Understand security roles

For information about security roles, see [Overview of security for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=317732)

For information about assigning a security role, see [Manage users](http://go.microsoft.com/fwlink/?LinkID=321099) in the Administration Guide for CRM.

See Also

[Create or edit a security role](http://go.microsoft.com/fwlink/?LinkID=317684)

[Copy a security role](http://go.microsoft.com/fwlink/?LinkID=317685)

Manage security settings

Microsoft Dynamics CRM 2015 makes it easier for you to set or update CRM security settings. This release introduces a new Security tile to the Settings navigation. This takes you to the new Security screen, where you can conveniently find your security-related admin settings all in one place.

Select the links in this table to learn more about each CRM security setting.

|  |  |
| --- | --- |
| Security setting | Related topics |
| Users | [Manage users](#z03a7de75f25d45a6a2812a237ca61d79)  [Add users to Microsoft Dynamics CRM](#z6683b14476be49c9b53d1f076c72618d)  [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9) |
| Security Roles | [Understand security roles](#zbafd20c475654903b92a3f27b2ef5c12)  [Assign a security role to a user](#zad0b5c7ad1754498abbc8082f5dd42be)  [Assign security roles to form](#zc15c1d806ad04eeab89b82cbf3d429b4) |
| Field Security Profiles | [Enable or disable security for a field](#z5ab086f22ed84f89a5ade9e119707a62)  [Set up security permissions for a field](#z578abf62e903452e90e07fb43343fcaf) |
| Positions | [Create a position](#z7665d499aed04ffa85462a68c467018d) |
| Teams | [Create or edit a team](#zc041b95ba1b5493499a7dc7edc2f7571) |
| Business Units | [Create or edit a business unit to control access to records](#zdea61b2ca4894d9a95352e8eb6fe8943) |
| Hierarchy Security | [Enable or disable hierarchy security](#zd95973ea857e40c5ba95fc0dbd39ed71) |
| Access Team Templates | [Create a team template and add to an entity form](#zf02c11325d34495683f6220394d26d58) |

View your user profile

Your user profile displays useful information about you to your entire organization; for example, your contact information, your organization, and your security role. Depending on your security role, you may be able to make changes to your user profile.



|  |  |  |
| --- | --- | --- |
| 1. This task requires permissions that are found in all default security roles.    2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. Click or tap the Settings gear () in the upper right side of the screen, then click or tap Options. |   If using CRM for Outlook   |  | | --- | | a. Click or tap File > CRM > Options. |   3. Scroll down and click or tap View your user information.  4. To check your security role: On the nav bar, click or tap the down arrow () next to your name, and then click or tap Security Roles.  5. To view other profile information, such as Work Hours, Connections, and Services, on the nav bar, click or tap the down arrow () next to your name. |

Add users to Microsoft Dynamics CRM

For information about adding users, see [Manage users (Deploy and Administer Microsoft Dynamics CRM)](http://go.microsoft.com/fwlink/?LinkID=321099).

Manage users

For more information, see [Manage users](http://go.microsoft.com/fwlink/?LinkID=321099) in our Administration Guide.

Assign a security role to a user

For information about assigning a security role, see [Manage users](http://go.microsoft.com/fwlink/?LinkID=321099) in our Administration Guide.

See Also

[Overview of security for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=317732)

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](#z7c29ad58b0f44a0fb686ecbca053592b).

On this page:

[Create a team](#z73)

[Edit a team](#z74)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Go to Settings > Security.  (In Microsoft Dynamics CRM for OutlookMake 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   3. Go to Settings > Security.  (In CRM for Outlook, go to Settings > System > Security.)  4. Click Teams.  5. In the Teams dropdown list, select All Teams or another appropriate view.  6. In the grid, select the team you want to edit.  7. 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](#zf02c11325d34495683f6220394d26d58)

[About team templates](#z7c29ad58b0f44a0fb686ecbca053592b)

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

Assign security roles to form

You can control form and field access by assigning different security roles to different forms that you create.

More information: [Overview of security for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=317732)



|  |  |  |  |
| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Customizations. Then choose Customize the System. |   3. Enable security roles.  a. Under Components, expand Entities, and then expand the entity you want.  b. Click or tapForms. In the list, click or tap a form to edit it if it has a Form Type of Main.  c. On the Home tab, in the Form group, click or tapEnable Security Roles.  4. Assign security roles.  a. In the Assign Security Roles dialog box, select the security roles to which this form will be available.  b. To make this the fallback form, select the Enabled for fallback check box.  At least one form per entity must be a fallback form, the form that is displayed to a user when no other form is available for that user's security role.  c. Click or tapOK.  5. Preview the main form.  a. On the Home tab, click or tapPreview, and then select Create Form, Update Form, or Read-Only Form.  b. To close the Preview form, on the File menu, click or tapClose.  6. When you’re ready to save your data, click or tap Save and Close.  7. Publish your customization.   For only the edited component: Click or tap Save > Publish on the Home   For all unpublished components at one time, click or tap Publish All Customizations. |

Note

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

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, you can also set field-level security for default fields. More information: [Field level security](http://go.microsoft.com/fwlink/p/?LinkID=317732)

To set which users and teams have read or write access to fields, see [Set up security permissions for a field](#z578abf62e903452e90e07fb43343fcaf).

Note

You can’t change the permissions on a field that you don’t have permission to access.



|  |
| --- |
| 1. Go to Settings > Customizations > Customize the System.  (In Microsoft Dynamics CRM for Outlook, go to Settings > System > Customization > Customizations > Customize the System).  2. Under Components, expand Entities, expand the entity that has the field you want to secure, and then choose Fields.  3. In the list of fields, double-click the field you want to secure.  4. In the Field window, on the General tab, to the right of Field Security, specify whether to Enable or Disable security for the field.  5. Choose Save or Save and Close.  6. When your customizations are complete, publish them:   To publish customizations for only the entity that you are currently editing, in the navigation pane, choose the entity, and then choose Publish.   To publish customizations for all unpublished entities at one time, in the navigation pane, choose Entities, and then on the command toolbar, choose Publish All Customizations. |

See Also

[Overview of security for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=317732)

[Set up security permissions for a field](#z578abf62e903452e90e07fb43343fcaf)

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.

For an overview of security concepts, see [Overview of security for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=317732)



|  |  |
| --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Go to Settings > Security.  3. Choose Field Security Profiles, and then on the command bar, choose New.  4. Enter a name and a description (optional).  5. Choose Save.  6. To add field permissions:  a. Under Common, choose Field Permissions.  b. Select a field, and then choose Edit.  c. To add users or teams:  i. Under Members, choose Teams or Users.  ii. On the command bar, choose Add.  iii. In the Look Up Records dialog box, select a team or user from the list (or search for a team or user), and then choose Select.  iv. Choose Add.  v. Repeat the above steps to add multiple teams or users, and then choose Add.  d. Select the permissions that you want to assign to users and/or teams, and then choose OK. |

See Also

[Enable or disable security for a field](#z5ab086f22ed84f89a5ade9e119707a62)

Secure sensitive data by enabling encryption

To provide an additional layer of security, you can encrypt the data in some fields that contain sensitive data, including user names and passwords. When you enable encryption, even database administrators can’t see the password data.

Microsoft Dynamics CRM users who have the System Administrator security role can enable data encryption or change the encryption key after enabling data encryption. More information: [Data encryption (Deploy and Administer Microsoft Dynamics CRM)](http://go.microsoft.com/fwlink/p/?LinkID=313325)

Check your security role

|  |
| --- |
|  Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).   Don’t have the correct permissions? Contact your system administrator. |

Important

Once you enable data encryption, you can’t turn it off.

See Also

[For admins: Data encryption](http://go.microsoft.com/fwlink/p/?LinkID=313325)

Enable or disable hierarchy security

To learn about hierarchy security, see [Security model for accessing hierarchical data](http://go.microsoft.com/fwlink/p/?LinkId=506747) in the Administration Guide for Microsoft Dynamics CRM.

See Also

[Enable or disable hierarchy security](http://go.microsoft.com/fwlink/p/?LinkId=506747)

[Understand security roles](#zbafd20c475654903b92a3f27b2ef5c12)

Using 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:

 [Securing fields](http://go.microsoft.com/fwlink/p/?LinkID=511424)

 [Creating calculated fields](http://go.microsoft.com/fwlink/p/?LinkID=511425)

Important

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

See Also

[Securing fields](http://go.microsoft.com/fwlink/p/?LinkID=511424)

[Creating calculated fields](http://go.microsoft.com/fwlink/p/?LinkID=511425)

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](#z75)

[Change the settings for a business unit](#z76)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, click or tap Settings > Security.  3. Click or tap Business Units.  4. On the Actions bar, click or tap 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.    6. If you want to change the parent business unit, click or tap the Lookup button , click or tap Look Up More Records, and then do one of the following:   Select an existing business unit from the list, and then click or tap Add.   To create a new parent business unit:  i. Click or tap 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, click or tap Save and Close in the Business Unit dialog box.  iii. In the Look Up Record dialog box, click or tap 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. Click or tap 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, click or tap Settings > Security.  3. Click or tap Business Units.  4. Click or tap 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.   Click or tap Actions on the Actions bar, and then select a command. For example, to change the parent business unit, click or tap Actions, and then click or tap 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, click or tap a record type to see a list of related records. For example, click or tap 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, click or tap Save or Save and Close. |

See Also

[Security concepts in Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkID=400724)

[Manage users](http://go.microsoft.com/fwlink/?LinkID=400725)

[Manage teams](http://go.microsoft.com/fwlink/?LinkID=400726)

[Enable or disable security for a field](#z5ab086f22ed84f89a5ade9e119707a62)

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

Manage data

Set up duplicate detection rules to keep your data clean

To maintain the integrity of your data, it’s a good idea to have rules in place to reduce duplicate records in the system. Microsoft Dynamics CRM includes default duplicate detection rules for accounts, contacts, and leads, but not for other types of records. If you want the system to detect duplicates for other record types, you’ll need to create a new rule.

After you’ve created duplicate detection rules, you need to turn duplicate detection on.



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Data Management > Duplicate Detection Rules. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Data Management > Duplicate Detection Rules. |   3. To create a new duplicate detection rule, click or tap New. Type a name and description.  –OR–  To edit an unpublished existing duplicate detection rule, click or tap the duplicate detection rule.  –OR–  To edit a published duplicate detection rule, select the rule. On the Actions menu, click or tap Unpublish, and then click or tap the rule.  4. Select the criteria to be used to identify a record as a duplicate.  a. If you are creating a new rule:   In the Duplicate Detection Rule Criteria section, in the Base Record Type list, click or tap the type of record that this rule applies to. For example, select Contacts.   In the Matching Record Type box, click or tap the type of record to compare. In most cases, you’ll probably want to use the same record type for Base Record Type and Matching Record Type. It’s also useful to be able to compare different record types. For example, you might want to compare the Email field in Contacts to the Email field in Leads.  b. If you want the rule to consider only active records while detecting duplicates, select the Exclude inactive matching records check box. You should also select this check box if your duplicate detection rule criteria are based on a status field.  c. If you want the rule to be case-sensitive, select the Case-sensitive check box.  d. If you selected different record types for the base and matching record types, for each new criterion, in the Base Record Field column, click or tap Select, and then click or tap a field name. In the same row, in the Matching Record Field column, click or tap Select, and then click or tap a field name.  - OR -  If you selected the same record types for the base and matching record types, for each new criterion, in the Field column, click or tap Select, and then click or tap a field.  e. In the same row, in the Criteria column, click or tap Select, and then click or tap an operator. For example, select Exact Match.  f. If you specified Same First Characters or Same Last Characters, in the No. of Characters column, click or tap Enter Value, and then enter the number of characters to compare.  g. If you don’t want the rule to consider blank fields (null values) as equal while identifying duplicates, select the Ignore Blank Values check box.  Important  If the duplicate detection rule contains only one condition, blank values are ignored during duplicate detection job.  The number of criteria that you can select is limited by the number of characters that can be stored in the matchcode for the record. As you add criteria, watch the Current matchcode length value shown at the bottom of the criteria list.    5. When you’re finished adding criteria, click or tap Save and Close.  6. To make the new or changed duplicate detection rule usable, select the rule, and then click or tap Publish.  When you publish a duplicate detection rule, a matchcode is created for every record in the matching record type for that rule. You can publish only five rules for the same base record type (Account, for example) at a time. You might need to delete or unpublish an existing rule if you bump up against this limit. |

Note

 We recommend that you set the duplicate detection criteria on a field that has unique values, for example, Email.

 You can have more than one duplicate detection rule for each record type.

See Also

[Turn duplicate detection rules on or off for the whole organization](#z8c34ccb0333f4e038faae241dbadbbba)

[Run bulk system jobs to detect duplicate records](#z61aff24191944a2c8d831bfdc8b7449d)

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](#za692ee2aad3347a9978e00331ec0f75e).



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| 1. 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.  Settings appears on the nav bar.  b. Choose Settings > Data Management. Click or tap Duplicate Detection Jobs. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Data Management > Duplicate Detection Jobs. |   2. Click or tap New, or click or tap the name of the duplicate detection job you want to run.  You’ll see the Check for Duplicates wizard, which helps you create a job to check for duplicates.  3. Click or tap Next.  4. In the Look for drop-down list, select the record type that you want to check for duplicates.  Note  What you see in this list depends on which duplicate detection rules are published. More information: [Set up duplicate detection rules to keep your data clean](#za692ee2aad3347a9978e00331ec0f75e).  5. In the Use Saved View drop-down list, select a view if you want to limit the records searched to records in that view. For example, select Active Accounts. When you select a view, CRM adds criteria to the criteria grid below.  6. To further limit the records searched, click or tap Select in the criteria grid, and then enter the criteria you want.    7. Click or tap Next.  8. Accept the default name for the job, or type a different name.  9. Enter the start time for the job, and enter how often to run the job in days. (Type 1 to run the job daily.)  10. If you want to receive an email confirmation when the job is completed, select the Email options check box. Enter an additional email address, if desired.  11. Click or tap Next, and then click or tap Submit. |

See Also

[Set up duplicate detection rules to keep your data clean](#za692ee2aad3347a9978e00331ec0f75e)

[Turn duplicate detection rules on or off for the whole organization](#z8c34ccb0333f4e038faae241dbadbbba)

[View and take action on bulk deletion jobs](#z8a7e3846a05446d68a60898b2c17523d)

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.



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| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the step for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings > Data Management > Duplicate Detection Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings. Under System, click or tap Data Management, and then click or tap Duplicate Detection Settings. |   3. Select or clear the Enable duplicate detection check box.  Note  If your system contains a large number of records, checking for duplicates can impact performance.  4. If you’re turning duplicate detection on, select or clear the check boxes to set when duplicates are detected:   When a record is created or updated  The system checks for duplicates when a user enters or updates records.  Important  Duplicates aren’t detected when a user merges two records, activates or deactivates a record, or saves a completed activity.   When Microsoft Dynamics CRM for Outlook goes from offline to online  For users of Microsoft Dynamics CRM for Outlook, the system detects duplicates when the user synchronizes their data after working offline, as long as users have enabled duplicate detection in Outlook. To enable duplicate detection in Outlook, click or tap File > CRM > Options. Click or tap the Local Data tab, and then select the Enable duplicate detection during offline to online synchronization check box.   During data import  When you use the Import Data wizard to bring in contacts, leads, accounts, or other types of data, the wizard detects any duplicate records as long as you enable duplicate detection in the wizard. More information: [Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)  5. Click or tap OK. |

See Also

[Set up duplicate detection rules to keep your data clean](#za692ee2aad3347a9978e00331ec0f75e)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[Run bulk system jobs to detect duplicate records](#z61aff24191944a2c8d831bfdc8b7449d)

Delete bulk records

The bulk deletion feature helps you to maintain data quality and manage the consumption of system storage in Microsoft Dynamics CRM.

For example, you can delete the following data in bulk to achieve improvements in data quality and storage consumption:

 Stale data.

 Data that is irrelevant to the business.

 Unneeded test or sample data.

 Data that is incorrectly imported from other systems.

For more information on bulk deletion, see [Delete bulk records](http://go.microsoft.com/fwlink/?LinkID=322004) in our Administration Guide.

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.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Data Management > Bulk Record Deletion. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Data Management > Bulk Record Deletion. |   2. In the Bulk Record Deletion window, you can perform the actions described in the following table.   |  |  | | --- | --- | | To | Do this | | View status | Look in the Status Reason column. | | View detailed status, including success and failure information | Select the bulk-deletion job. | | View queries submitted for deletion | Select the bulk-deletion job, and then under Information, click or tap Properties. | | Review the errors | Select the bulk-deletion job, and then under Related, click or tap Failures. | | Pause a bulk-deletion job | a. Select the bulk-deletion job, and then on the Actions menu, click or tap Pause.  b. When the confirmation message appears, click or tap OK.  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, click or tap Postpone.  b. When the confirmation message appears, click or tap OK. | | Resume a bulk-deletion job | a. Select the bulk-deletion job, and then on the Actions menu, click or tap Resume.  b. When the confirmation message appears, click or tap OK. | | Cancel a bulk-deletion job | a. Select the bulk-deletion job, and then on the Actions menu, click or tap Cancel.  b. When the confirmation message appears, click or tap OK. | | Modify recurrence of a bulk-delete job | a. Select the bulk-deletion job, and then on the Actions menu, click or tap Modify Recurrence.  b. If you select the Run this job after every check box, specify the interval after which you want the bulk-deletion job to run, and then click or tap OK.  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

[Data management area](#z2fe255b5d72d45749781e0653a785a62)

[Delete bulk records](#z6c1edaefd2d04e94bb3d819b208966c1)

Monitor and manage system jobs

Several Microsoft Dynamics CRM features use system jobs to perform tasks automatically, including workflows, import, and duplicate detection, running independently or in the background.

You can monitor them to ensure that they run smoothly or have completed successfully.

Monitoring system jobs

If there is a problem with a system job, you can cancel, postpone, pause, or resume it.

 Canceling system jobs

You cannot resume a canceled system job.

 Postponing completion of system jobs

Postponing an active system job stops any current and subsequent actions. You can specify a later time when you want the system job to restart.

 Pausing system jobs

You can resume a paused system job.

 Resuming paused system jobs

Resuming restarts a system job that was paused.

Tip

a. If a system job fails, you can view the details about what steps failed and what the problems may have been. First, open the system job record. To display details about system job failures, move your pointer over the warning symbols.

b. To view system job failures in a format that you can print or copy and paste, click the Print button.

Note

You cannot make changes to the status of a system job that has been completed or canceled.

Send bulk email to customers

You can send the same message to multiple recipients using email templates. This is known as direct or bulk emailing.

Or, you can use mail merge with Microsoft Office Word and Word templates to create the message.



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| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM and then click or tap Sales or Marketing.  Sales or Marketing appears on the nav bar.  b. Click or tap Sales or Marketing and then click or tap the record type you want, for example, Contacts.  c. From the records list, select who you want to send email to and then, click or tap the More Commands icon (), and then click or tap Send Direct Email. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Sales or Marketing, and then click or tap the record type you want, for example, Contacts.  b. From the records list, select who you want to send email to and then, in the Collaborate group, click or tap Send Direct Email (). Or, just click or tap Send Direct Email to send email to everyone on the list. |   2. In the Send Direct Email dialog box, select the template you want to use.  3. Click or tap Send. |

See Also

[Create templates for email](#zb47eec74e83c4cfeb7a0a9195a3ac4da)

Add or remove sample data

Sample data gives you something to experiment with as you learn Microsoft Dynamics CRM, and to help you see how data is organized in the system. At some point, you’ll probably want to remove the sample data.

Or, if sample data isn’t installed on your system, you may want to add it for training purposes. Later, when you’re ready, you can remove it.

Important

Use sample data to learn and play around with system features. However, to avoid unwanted results, don’t associate it with any data you actually need.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  Choose Settings > Data Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Data Management. |   3. Click or tap Sample Data. You’ll see a message that tells you whether the sample data is currently installed.  4. Do one of the following:  Click or tap Remove Sample Data, then click or tap Close.  -OR-  Click or tap Install Sample Data, then click or tap Close. |

Check for duplicate contacts, accounts, or leads

To maintain the integrity of your data, you should check for duplicates regularly to make sure that you don’t inadvertently create duplicate contacts, accounts, or leads.

The Check for Duplicates wizard helps you set up a “job” that finds and cleans up duplicate records in the system. You can schedule the job to run daily, and you can receive an email confirmation when the job finishes.

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.

Checking for duplicate records works only when you or your system administrator (if that’s someone else) has created a rule for the record type, and duplicate detection is turned on.

Check for duplicate contacts



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Contacts.  c. Click or tap More Commands (), and then click or tap Detect Duplicates. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Sales, Marketing, or Service. Then, click or tap Customers > Contacts. In the Records group, click or tap Detect Duplicates. |   2. Do one of the following:  Click or tap For All Records on All Pages to check for all duplicate contacts (recommended).  --OR--  Click or tap For Selected Records to check if the selected contact has any duplicates in the system.  You’ll see the Check for Duplicates wizard, which helps you create a job to check for any duplicate contacts.  3. Accept the default name for the job, or type a different name.  4. Enter the start time for the job, and enter how often to run the job, in days. For example, type 1 to run the job daily.  5. Select the check box to receive an email confirmation when the duplicate detection job completes. Enter an additional email address, if desired.  6. Click or tap Next, and then click or tap Submit. |

Check for duplicate accounts



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Accounts.  c. Click or tap the More Commands (), and then click or tap Detect Duplicates. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Sales, Marketing, or Service. Then, click or tap Customers > Accounts. In the Records group, click or tap Detect Duplicates. |   2. Do one of the following:  Click or tap For All Records on All Pages to check for all duplicate accounts (recommended).  --OR--  Click or tap For Selected Records to check if the selected account has any duplicates in the system.  You’ll see the Check for Duplicates wizard, which helps you create a job to check for any duplicate accounts.  3. Accept the default name for the job, or type a different name.  4. Enter the start time for the job, and enter how often to run the job, in days. For example. type 1 to run the job daily.  5. Select the check box to receive an email confirmation when the duplicate detection job completes. Enter an additional email address, if desired.  6. Click or tap Next, and then click or tap Submit. |

Check for duplicate leads



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Sales.  b. Choose Sales > Leads.  c. Click or tap More Commands (), and then click or tap Detect Duplicates. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Sales > Leads. In the Records group, click or tap Detect Duplicates. |   2. Do one of the following:  Click or tap For All Records on All Pages to check for all duplicate leads (recommended).  --OR--  Click or tap For Selected Records to check if the selected lead has any duplicates in the system.  You’ll see the Check for Duplicates wizard, which helps you create a job to check for any duplicate leads.  3. Accept the default name for the job, or type a different name.  4. Enter the start time for the job, and enter how often to run the job, in days. For example, type 1 to run the job daily.  5. Select the check box to receive an email confirmation when the duplicate detection job completes. Enter an additional email address, if desired.  6. Click or tap Next, and then click or tap Submit. |

See Also

[Set up duplicate detection rules to keep your data clean](#za692ee2aad3347a9978e00331ec0f75e)

[Turn duplicate detection rules on or off for the whole organization](#z8c34ccb0333f4e038faae241dbadbbba)

[Run bulk system jobs to detect duplicate records](#z61aff24191944a2c8d831bfdc8b7449d)

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

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

[To learn more about rollup fields, see our Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=511856)

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

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

[To learn more about calculated fields, see our Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=511857)

Merge duplicate records for accounts, contacts, or leads

Looking for help?

[You’ll need to search online to see what’s available for this topic](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=merge%20duplicate&ds=f)

Create formulas for calculated fields

You can find information on creating formulas for calculated fields in our [Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=517067).

Create or edit charts and dashboards

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



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| 1. Before you start, make sure you have the Create, Write, and Read privileges on the User Chart entity.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Open the chart designer.  If using the CRM web application   |  | | --- | | a. Navigate to the list of records for which you want to create a chart. For example, to create a chart for the accounts data, on the nav bar, click or tap Microsoft Dynamics CRM > Sales. Then, click or tap Accounts.  b. On the right side, click or tap the charts pane.  c. In the Chart area, click or tap the New Chart + icon. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then navigate to the list of records for which you want to create a chart. For example, to create a chart for accounts, click or tap Sales > Customers > Accounts.  b. On the Charts tab, in the Charts group, click or tap New Chart. |   3. Define the properties of the chart.  Specify what you want to display on the chart   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | a. In the first drop-down box under Legend Entries (Series), select a field to display on the series axis.  b. In the Aggregate drop-down box, click or tap the option by which you want to group the field you selected in Legend Entries (Series).  For non-numeric fields, you can select only Count: All or Count: Non-empty. For numeric fields, you can select one of the following aggregation options: Count: All, Count: Non-empty, Avg, Max, Min, or Sum.  NULL values are not considered for computing minimum, maximum, and average of data. However, zeros (0) are considered. For example, if you have the following data:   |  |  |  | | --- | --- | --- | | Records | Potential Customer | Established Value | | Opportunity 1 | Account 1 | Null | | Opportunity 2 | Account 1 | 250 | | Opportunity 3 | Account 2 | 0 | | Opportunity 4 | Account 2 | 250 |   The average for Account 1 is 250 because the NULL value was not used. The average for Account 2 is 125 because the zero was used.  c. To create a chart with multiple series, click or tap the Add a series icon , select another field to display on the series axis, and then select an aggregate option for that series.  d. To change the chart type for a series, select the series, click or tap the Current chart type icon for that series, and then select a chart type.  e. To stack items in a chart, click or tap the chart type, and then click or tap Stacked or 100% Stacked. You can stack items only in a bar, column, or an area chart.  f. To display only top items on the chart, click or tap the Top/Bottom Rules icon > Top X Rule icon, > Top 3 or Top 5, or Custom to specify a different number. For example, to display only the top three opportunities grouped by potential customers, click or tap the Top/Bottom Rules icon > Top X Rule icon > 3.  -OR-  To display only the bottom items on the chart, click or tap the Top/Bottom Rules icon > Bottom X Rule icon > click or tap Bottom 3 or Bottom 5, or Custom to specify a different number.  g. From the list under Horizontal (Category), select the field to display on the category axis.  h. To create a comparison chart with multiple categories, click or tap the Add a category icon , and then select another field to display on the category axis.  You can add only two category items and one series item to a comparison chart.  i. For fields that are of the datetime type, click or tap the option by which you want to group the field you selected as the category. |   The chart is named based on the fields you chose for the series and category axes.  4. To specify a different name for the chart, click or tap the chart name to edit it.  5. To save the chart, in the chart designer, click or tap the Save icon. |

The chart obtains the data from the view that is selected for a record type. A chart is automatically updated every time that you change the view in the list of records. However, if the chart has been idle for some time, we recommend that you click or tap Refresh Chart on the Charts tab, so that the chart and the list of records show the synchronized data.

Edit a chart



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| 1. Open the chart designer.  If using the CRM web application   |  | | --- | | a. Navigate to the list of records for which you want to edit the chart. For example, to edit the chart for the accounts data, on the nav bar, click or tap Microsoft Dynamics CRM > Sales. Then, click or tap Accounts.  b. On the right side, click or tap the charts pane.  c. In the chart area, click or tap the chart list, then the chart you want to edit, and then click or tap the Edit Chart icon. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then navigate to the list of records for which you want to edit the chart. For example, to edit the chart for accounts, click or tap Sales > Customers > Accounts.  b. On the Charts tab, in the Layout group, click or tap Chart Pane > Right or Top.  c. In the chart area, click or tap the chart list, then the chart you want to edit, and then in the Charts group, click or tap Edit Chart. |   2. Modify the properties of the chart. For details, see Step 3 in the Create a chart section. |

See Also

[Create a dashboard](#zb4b04dc17f2040638ac5d6f08ce995fc)

[Drill down in a chart](#z5768a0f021c04c7b9c2a992c21df406c)

Drill down in a chart



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| 1. Open the list of records that you want to view a chart for. Then, click or tap the chart bar on the right or top of the list of records.  2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. Click or tap the Charts area. |   If using CRM for Outlook   |  | | --- | | a. In the ribbon, click or tap Chart Pane, and select where you would like the chart to be displayed. |   3. In the chart area, click or tap the arrow next to the chart name, and then click or tap a name of the chart that you want to see drill down into.  4. Click or tap the category area of the chart in which you want to drill down further to see lower level data.  5. In the shortcut menu, click or tap Select Field, and then click or tap the field by which you want to group the category.  6. Click or tap the corresponding icon for a chart type that you want use for viewing the data.  7. Click or tap OK.  Note  To go to the chart from which you drilled down, click or tap Back. |

See Also

[Create or edit a chart](#zc4d027caba554e618167165181dae634)

Create a dashboard

Dashboards in Microsoft Dynamics CRM provide an overview of business data ‒ actionable information that is viewable across the organization.

Create dashboard components that help you find and analyze important data.

You can create two types of dashboard:

 User dashboards. An individual user owns a user dashboard. It can be assigned to other users or teams. A user dashboard can be set as the default dashboard for individual users. A user dashboard overrides the system dashboard for the user.

 System dashboards. A system dashboard is available to all users in the organization, and can be set as the default dashboard for the organization. Importing, exporting, or uninstalling a solution applies the relevant actions on the dashboards.

Set the default dashboard

You can set a dashboard as the default dashboard. This makes it available to the organization each time users navigate to the Dashboards area.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, click or tap Dashboards, select a dashboard, and then click or tap Set as Default. |

More information: [Microsoft Dynamics CRM Customer Center](http://go.microsoft.com/fwlink/?LinkID=309289)

See Also

[eBook: Create or customize system dashboards](http://go.microsoft.com/fwlink/p/?LinkID=400662)

Manage dashboard components

You can create and design dashboards to show the information that you want exactly how you want to see it. While designing the dashboard, you can rearrange or remove the components that you have already added and change the height and width of a component.

By default, you can add only six components to any dashboard layout. This limit is configurable. For more information, contact your system administrator.



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  Click or tap the work area name, and then click or tap Dashboards.  b. Click or tap New to begin creating your dashboard. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap My Work, and then click or tap Dashboards.  b. In the Dashboard Management group, click or tap New to begin creating your dashboard. |   As you’re creating your dashboard, to undo the last action, click or tap Undo. To repeat an action, click or tap Redo.  2. To rearrange the components, click or tap the component header and drag it to an empty area on the dashboard or to the area of an existing component. When you drag a component over other components, a red line appears on top of the components to show that if you drop the component here, the existing component will move down.  3. To change the width of a component, select the component, click or tap the More Commands icon  and click or tap Increase Width or Decrease Width. The width increases or decreases by one column.  4. To change the height of a component, click or tap Increase Height or Decrease Height. The height increases or decreases by three rows.  5. To remove a component, select it and click or tap click Remove. When you remove a component, any new components are added in the bottom area of the designer. You can rearrange the components at any time after you insert them. |

Set properties for a chart or list included in a dashboard

To edit a chart or list component from the dashboard layout screen, double-click the chart or list. This opens the Set Properties dialog box.

You can set the following chart properties from the Set Properties dialog box:

 Name. Unique name for the chart. CRM suggests a value, but you can change it.

 Label. The label that appears at the top of the chart.

 Display label on the Dashboard. Select or clear this check box to display or hide the chart label.

 Entity. Select the entity (record type) to base the chart on. This setting determines the available values for the Default View and Default Chart properties.

 Default View. Select the view used to retrieve the data for the chart.

 Default Chart. Select the default chart that you want to display. The available values are determined by the value set for the Entity property. This property works together with the Display Chart Selection property.

 Show Chart Only. Select this check box if you want to display just the chart. Clear this check box if you want to display the chart and its associated data.

 Display Chart Selection. Select this check box to enable users to change the type of chart (column, bar, pie, etc.) when they use the dashboard. If the user changes the type of chart, the settings aren’t saved. The chart type reverts to the Default Chart setting when the dashboard is closed.

You can set the following list properties from the Set Properties dialog box:

 Name. Unique name for the list. CRM suggests a value, but you can change it.

 Label. The label that appears at the top of the list.

 Display label on the Dashboard. Select or clear this check box to display or hide the list label.

 Entity. Select the entity (record type) to base the list on. This setting determines the available values for the Default View property.

 Default View. Select the view used to retrieve the data in the list.

 Display Search Box. Select this check box if you want to display a search box at the top of the list. If the search box is included, you or other users can search for records in the list at runtime.

 Display Index. Select this check box if you want to display the A to Z filters at the bottom of the list. When the A to Z filters are displayed, you or other users can click or tap a letter to jump to records that start with that letter.

 View Selector. Select from the following values:

 Off. Don’t display the view selector. You or other users won’t be able to change views at runtime.

 Show All Views. Provide a full list of views associated with the value set in the Entity property.

 Show Selected Views. Select this setting to limit the list of views available at runtime. To select the specific views to be displayed, hold down the Ctrl key and tap or click each view you want to include.

See Also

[Create a dashboard](#zb4b04dc17f2040638ac5d6f08ce995fc)

Manage system dashboards

Help for this area is available in the [Microsoft Dynamics CRM customization guide](http://go.microsoft.com/fwlink/p/?LinkID=320204%20).

Work with System Charts

Help for this area is available in the [Microsoft Dynamics CRM customization guide](http://go.microsoft.com/fwlink/p/?LinkID=320204%20).

Create or edit a system chart

System charts are organization-owned charts and can’t be assigned or shared.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Customization > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Customizations. Then choose Customize the System. |   3. To create or edit a system chart, click or tap Components> Entities.  4. Expand the name of the entity and click or tap Charts, and then on the Actions toolbar, click or tap New.  -OR-  To edit a chart, click or tap More Actions, and then click or tap Edit.  5. Select a view to use for chart preview.  6. Specify the type of chart, and how the data is displayed in the chart.  a. Click or tap the chart name to edit it.  b. Select fields for the series and category axes.  c. Add description to identify the purpose of the chart.  7. Click or tap Save. |

Important

You can create and attach charts to only those record types in Microsoft Dynamics CRM that support the new ribbon interface in the web application. This is because all of the chart controls are only present in the ribbon interface of Microsoft Dynamics CRM. For more information, see Charts (Visualizations) for Microsoft Dynamics CRM in the [Microsoft Dynamics CRM Software Development Kit](http://go.microsoft.com/fwlink/?LinkId=97596).

Create or customize entities and forms

View or edit entity information

You can view all the information, or properties, associated with an entity, but you can only edit selected properties. This is because many of the properties associated with an entity are set when it is created. The editable properties associated with an entity vary depending on the type of entity you are working with.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, and then click or tap the entity you want to view or edit information for.  Information about that entity is displayed, and it appears on two tabs:   General. Use this tab to edit some or all of the properties (depending on the entity) listed in the following table:   |  |  | | --- | --- | | Option | Comments | | Note (includes attachments) | Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record. | | Activities | Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, e-mails, and tasks. | | Connections | Select this to permit ad hoc connections between a record in this entity and records in other entities. | | Sending e-mail (if an e-mail field does not exist, one will be created) | Select to add the Send Direct E-mail button to the main ribbon tab for the entity. | | Mail merge | Select this to allow this entity to be used in a mail merge. | | Document management | This allows you to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: [Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0) | | Queues | Select this to use this entity in queues. | | Duplicate detection | Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them. | | Auditing | Select this to track changes made to your business data. | | CRM for phones | Select this to display and use this entity in Microsoft Dynamics CRM for phones. | | Reading pane in CRM for Outlook | Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook. | | Offline capability for CRM for Outlook | Select this to let users create, read, update, or delete records while offline. |    Primary Field. On this tab, the only editable property is Description.  4. Publish your customizations:   To publish customizations for only the component that you are currently editing, on the nav bar or in the Navigation Pane, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations.  Important  Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.  Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it’s least disruptive to users. |

See Also

[Customize your system](#zdd849798c7cd4653a8d8849d424caa5f)

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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Customization > Customizations > Customize the System. |   3. Click or tap Entities, and then on the Actions toolbar, click or tap New.  4. Specify the Display Name and Plural Name that will be used for this entity throughout Microsoft Dynamics CRM.  5. In the Name box, view the name that Microsoft Dynamics CRM will use for this entity.  Note  When you specify the display name, a default value for the Name field is provided. If you change the display name before you save, the value in the Name field will not change. You can also modify the value in the Name field independently of the display name.  6. The Primary Image list only has the option [None] when you create a custom entity. After you create the entity you can create a new image field. Each entity can have only one image field. After you create a new image field, that field will be available for selection. After you change this setting you must save the entity and publish the customizations.  7. In the Ownership list, select one of the following:   User or Team. Records for this entity can be owned by individual users or by teams. Security can be defined according to the business unit with which the current owner is associated. For example, contact records are set to User or Team.   Organization. Records for this entity are used for reference by all Microsoft Dynamics CRM users. Individual users or teams can’t own these records. For example, product records are set to Organization.  8. Under Areas that display this entity, select the areas where this entity will be displayed in the Microsoft Dynamics CRM user interface.  Note  All new entities are displayed in Advanced Find.  9. Under Options for Entity, select the appropriate options for your scenario based on the detail provided in the following table.   |  |  | | --- | --- | | Option | Comments | | Business process flows (fields will be created) | Select this to enable creating business process flows for this entity. | | Note (includes attachments) | Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record. | | Activities | Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, emails, and tasks. | | Connections | Select this to permit connections between a record in this entity and records in other entities. | | Sending email (if an email field does not exist, one will be created) | Select to add the Send Direct Email button to the main ribbon tab for the entity. | | Mail merge | Select this to allow this entity to be used in a mail merge. | | Document management | Select this to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: [Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0) | | 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](#z7515e700487b4d79b7f570eedf0f0e52) | | Allow quick create | When this is enabled, and after you have created and published a Quick Create Form for this entity, people will have the option to create a new record using the Create button in the navigation pane. | | Duplicate detection | Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them. | | Auditing | Select this to track changes made to your business data. | | CRM for phones | Select this to display and use this entity in Microsoft Dynamics CRM for phones. | | CRM for tablets | When this is enabled this entity will be available using Microsoft Dynamics CRM for tablets. You also have the option to make this entity Read-only in CRM for tablets.  If the forms for an entity require an extension that is not supported by CRM for tablets, such as I-frame or web resource controls, use this setting to ensure that the data for these entities is not editable by people using CRM for tablets. | | Reading pane in CRM for Outlook | Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook. | | Offline capability for CRM for Outlook | Select this to let users choose to include records for this entity with those they can work with while offline. |   10. To ensure that an easily recognizable name is used to reference this entity, on the Primary Field tab, enter a descriptive Display Name, and then verify that Requirement Level set to Business Required.  The primary field is displayed when relationships to this entity are created or displayed, such as in the Look Up Records dialog box.  Note  The default Display Name for the primary field is Name. The Name will be “new\_name” if you use the default publisher customization prefix of “new”. If this is not the name you want to use, you must set the name when you create the entity. You can edit the display name after you save the entity.  11. Click or tap Save.  When a new entity is created, the following items are created also:   A default public view showing active records and a view showing inactive records.   An Advanced Find View, a Quick Find View, an associated view, and a lookup view.   The primary attribute you defined and the standard attributes. To see a list of them, navigate to the new entity you created, and under it, click or tap Fields. They are displayed in the main pane.   For entities that have Ownership set to User or Team, the creation of the Owner and Owning Business Unit attributes. For entities that have Ownership set to Organization, the creation of the Organization ID attribute.   A filtered view is created in the CRM Online database for the entity. This filtered view can be used to write reports using data from this entity.  Note  Relationships are created with the User entity to resolve user names for the Created By and Modified By attributes.  12. Change the icon for the new entity. More information: [Change custom entity icons](#z477f9792820749ef896845274b5355a8).  13. For any security roles that need access to the new entity, add the needed privileges.  Note  When adding privileges, you can follow the pattern for the privileges that are used on the Marketing, Sales, or Service tabs for the security role to provide users the same level of access to the custom entity that they have to other entities.     |  |  |  | | --- | --- | --- | | a. Follow the steps for the app you’re using.  If using CRM web application   |  | | --- | | i. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  ii. Click or tap Settings > Administration > Security Roles. |   If using CRM for Outlook   |  | | --- | | i. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > Security Roles. |   b. Open a security role, and then on the Custom Entities tab, specify the level of privileges that you want users with that security role to have.  c. Click or tap Save and Close to save the changes to the security role. |   14. Publish your customizations:   To publish customizations for only the component that you’re currently editing, click or tap the entity you’ve been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations.  Important  Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.  Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it’s least disruptive to users. |

Create or edit entity fields

Create new fields to capture data when existing system entities don’t have fields that meet your requirements.

After you create new fields, be sure to include them on the forms and views for the entity so that they are available from the Microsoft Dynamics CRM user interface. You can also add the new fields to relevant reports with the following restrictions:

 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.

You can find more information about creating and editing entities in the [Create and edit fields section in the Customization Guide](http://go.microsoft.com/fwlink/p/?LinkId=512074).

Tip

Remember to add a description of the field – this provides instructions to your users on how to use the new field.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.    If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, and then expand the entity you want.  4. Click or tap Fields.   To add a new field, on the Actions toolbar, click or tap New, and enter a Display Name to generate the Name.  - OR -   To edit a field, select it in the list, and then on the Actions toolbar, click or tap Edit. 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](#z5ab086f22ed84f89a5ade9e119707a62)  iv. For Auditing, enable or disable the feature for this field.  5. For new fields, select the Type, and then enter required information for the specified type. For existing fields, you cannot modify the type, but you can modify the settings for the type. More information: [Types of fields sections in the Customization Guide](http://go.microsoft.com/fwlink/p/?LinkId=512075)  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. | | 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. | | Lookup | You can create a lookup field using an entity relationship that has already been created, but not yet used with another lookup field. If you create a lookup field in an entity form, the relationship is automatically generated. A lookup field is created as a relationship field. |   6. Select the Field type, Format, and Maximum length of the field.  7. 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.  8. Click or tap Save and Close to close the form editor.  9. Publish your customization.   To publish customizations for just one entity, under Components, click or tap Entities. Then, on the Actions toolbar, click or tap Publish.   To publish all customizations you have made to any entities or components, on the Actions toolbar, click or tap Publish All Customizations . |

Note

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

See Also

[Types of fields sections in the Customization Guide](http://go.microsoft.com/fwlink/p/?LinkId=512075)

[Create and edit business rules](http://go.microsoft.com/fwlink/p/?LinkId=512459)

Mapping entity fields

Mapping streamlines data entry when you create new records that are associated with another record. When two entities have an entity relationship, it is possible to create new related entity records from the associated view that is visible on the primary entity. When the user creates a new record from an associated view, mapped data from the primary entity record is copied to the form for the new related entity record. You control what data is copied by adding new mappings in the relationship between the two entities. If a record is created any way other than from the associated view of the primary entity, data is not mapped.

Mapping only applies just before a new record is created from an associated view. Users are able to make changes before saving the record. Later changes to the data in the primary record are not applied to the related record.

Mapping picklists

If the field is an option set (picklist), make sure that the option values are identical between the two option sets. When values are added to an option set, the values are assigned an integer based on the order in which they are added. If they were not added in the same order, the labels for the option values on the target field can be edited so they represent a valid mapping as long as this does not affect existing data. If you later modify either option set, you must also remember to modify the other option set to keep them synchronized. Any invalid option set mappings will cause the target field to use the default option set value.

Generate mappings automatically

It is possible to automatically create mappings for the relationship but this usually is not recommended. This process will map any mappable fields based only on the data type and name of the field. All existing mappings are removed.

Create or edit N-N relationships between entities

See [Create and edit N:N (Many-to-Many) relationships](http://go.microsoft.com/fwlink/p/?LinkId=511374)

See Also

[Mapping entity fields](#z79e64eb732a344cb87d621ee9abb7cca)

Create or edit N-1 relationships between entities

See [Create and edit entity relationships](http://go.microsoft.com/fwlink/p/?LinkId=511114)

Create or edit 1-N relationships between entities

See [Create and edit 1:N relationships](http://go.microsoft.com/fwlink/p/?LinkId=511112)

Create and configure forms- default solution

In the default solution or an unmanaged solution you can create new forms or edit existing forms for all entities that allow form customization.

In an unmanaged solution, you can edit the managed properties for an unmanaged custom entity that was created for the solution.

If you are viewing a managed solution, you cannot create new forms or edit existing forms for entities. However, if the managed properties for an entity in the managed solution are set to allow customization, you can add or edit forms to that entity in the Customization area of Microsoft Dynamics CRM.

Customization tasks can be performed only while you are online.

Note

You can also navigate to the form editor from a record list in the Workplace, Sales, Marketing, or Service nodes. For example, to edit an account form, navigate to Accounts > Customize. Then click or tap in the Design > Form.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Customization > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Customizations. Then choose Customize the System. |   3. Under Components, click or tap Entities, and then expand the required entity.  4. Click or tap Forms, and select the form. Then on the Actions toolbar, click or tap Managed Properties.  5. In the Set Managed Properties dialog box, if Customizable is set to True, you can add or edit forms. |

See Also

[Create or edit the main form for an entity](#z9f1e50eead83435d908f53cf77e03787)

[Assign security roles to form](#zc15c1d806ad04eeab89b82cbf3d429b4)

Create or edit the main form for an entity

When you create a new form for an entity, its form type is Main. When the new form opens, it is identical to the form named Information. You can add or edit fields, sections, tabs, and navigation, and properties associated with the form, and then save the form.

This procedure applies to any form with a Form Type of Main. Each main form is comprised of one or more tabs. Each tab can have one or more sections. Each section contains one or more fields or IFRAMES.

If you want to base your new form on an existing form, you can clone a form.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customization > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, expand the entity you want to modify the main form for, and then click or tap Forms.  4. To create a new form, on the Actions toolbar, click or tap New.  - OR -  To edit an existing form, double-click or tap any form with a Form Type of Main.  5. Change the form design in any of the following ways, as needed:  a. Add a tab to a form  b. Add a section to a form  c. Add a field to a form  d. Add or edit a form IFRAME  e. Add or edit a sub-grid in a form  f. Add or edit a form web resource  g. Add or edit form navigation for related entities  h. Edit form headers and footers  i. Remove a tab section field or IFRAME  j. Enable or disable the Form Assistant  For more information, see the [Customization Guide](http://go.microsoft.com/fwlink/?LinkID=320204).  6. Edit the properties for parts of the form, as needed:  a. Edit form properties  b. Edit form field properties  c. Edit tab properties  d. Edit section properties  For more information, see the [Customization Guide](http://go.microsoft.com/fwlink/?LinkID=320204).  7. Add event scripts, as needed.  8. Determine which security roles will be able to view the form:  [Assign security roles to form](#zc15c1d806ad04eeab89b82cbf3d429b4)  9. Preview how the main form appears and how events function:  a. On the Home tab, click or tap Preview, and then select Create Form, Update Form, or Read-Only Form.  b. To close the Preview form, on the File menu, click or tap Close.  10. When you finish editing the form, click or tap Save As, enter a name for the form, and then click or tap OK.  11. When your customizations are complete, publish them:   To publish customizations for only the component that you are currently editing, under Components, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, under Components, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations. |

Note

 You cannot apply a requirement level to a field using this form. Requirement level constraints are applied to the attribute.

 Before deleting a field from a form, make sure the field is not required by other components or custom scripts. For example, the Opportunity form requires the Price List field to determine the pricing to use when adding a product to that opportunity. Removing the Price List field would prevent adding a new product to an opportunity.

 Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM, such as custom entities, relationships, or fields, are applied immediately.

 You cannot use the form editor to modify the visual style of forms, such as the font style, font size, or colors used in the form. Modification of the Cascading Style Sheets (CSS) pages in the web application or style properties of the form through scripts is not supported.

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

See Also

[Create or edit entity fields](#zaeab7223b9734b279dc681e3cb0a38af)

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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, expand the entity you want to customize, and then click or tap Forms.  4. In the list, locate an entry with the Form Type of Main, and then double-click or tap to edit it.  5. In the form, click or tap the section you want to add a field to, and then in the Field Explorer pane, double-click the field you want added to the form.  6. To preview how the form appears and how events function:  a. On the Home tab, click or tap Preview, and then select Create Form, Update Form, or Read-Only Form.  b. To close the preview form, click or tap Close .  c. To publish customizations for the form that you’re editing, with the form open, click or tap Publish.  7. When you’re finished editing the form, click or tap Save and Close.  8. To publish customizations for all unpublished components at one time, click or tap File, and then click or tap Publish All Customizations. |

Note

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

Edit form field properties



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Customization > Customizations > Customize the System. |   2. Under Components, expand Entities, expand the entity you want to work with, and then click or tap Forms.  3. In the list, locate an entry with the Form Type of Main, and then double-click or tap to edit it.  4. On the form body, double-click or tap the field you want to edit.  5. In the Field Properties dialog box, you can access and edit a variety of the properties associated with the field by using a series of tabs:   Display. Use this tab to perform the following tasks:   Change or hide the label used for this field in this form. The field display name remains unchanged.   Specify whether the field is read-only by selecting or clearing the Field is read-only check box.   In the Locking section, specify whether to lock the field to the form and prevent anyone from removing it by selecting or clearing the Lock the field on the form check box.   Specify whether a field is visible in the default view by selecting or clearing the Visible by default check box. If the check box is cleared, the field will not display in the Reading Pane in Microsoft Dynamics CRM for Microsoft Office Outlook. However, the field will display in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides the value set by this check box.  For lookup fields, this tab displays extra properties:   In the Related Records Filtering section, to filter the list of displayed records in the lookup, select the Only show records where check box.  The relationship combinations that are possible when you filter related records are listed in the following table.   |  |  |  | | --- | --- | --- | | First list relationship | Second list relationship | Available? | | N:1 | 1:N | Yes | | N:1 | N:1 | Yes | | N:1 | N:N | Yes | | 1:N | 1:N | Yes | | 1:N | N:1 | No | | 1:N | N:N | No | | N:N | 1:N | Yes | | N:N | N:1 | No | | N:N | N:N | No |   The first list is populated with all the potential relationships you can use to filter this lookup. Click one.  The second list is then populated with all relationships that connect the related entity (selected in first list) to the target entity. Click one.  Select the Allow users to turn off filter check box to give users the option of turning off the filter you define here. This makes it possible for them to view a wider range of records. If you want to make sure that users only see the limited range of records defined by this filter, clear this check box.   Also, for lookup fields, the tab displays the Additional Properties section. Here, select the Display Search box in lookup dialog check box if you want a search box to be available in the lookup.  In the Default View list, click the default view for which results will be displayed in the lookup.  If you want users to also have the option of selecting other views, select the Enable the View selection in lookup dialog check box.   Formatting. The formatting options displayed vary based on the which options are set for the section of the form that the field appears within.   Details. This tab provides access to the basic properties associated with the field. Click or tap Edit to modify them.   Events. This tab includes two sections:   Form Libraries. In this section, you can add or remove the available JScript libraries for form or field events. You can edit the listed custom libraries if necessary.   Event Handlers. In this section, you can add a JScript library (a script web resource) authored by a developer and associate a function within that library to an event.  i. In the Events list, click or tap onChange, and then click or tap Add.  ii. In the Handler Properties dialog box, supply the requested information. Select the Enabled check box to make the function available to be called by a field event.  iii. Click or tap OK.   Business Rules. Use this tab to create or edit the process components of business rules.  6. When you finish modifying the properties for the field, in the Field Properties dialog box, click or tap OK.  7. To preview how the form appears and how events function:  a. On the Home tab, click or tap Preview, and then select Create Form, Update Form, or Read-Only Form.  b. To close the Preview form, on the File menu, click or tap Close.  8. When you finish editing the form, on the Home tab, click or tap Save and Close to close the form.  9. When your customizations are complete, publish them:   To publish customizations for only the component that you are currently editing, on the nav bar or in the Navigation Pane, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations. |

Note

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

Add or edit form navigation for related entities

In the form Navigation Pane, you can add links to related entities. When a user clicks one of these links in a record, the associated view for the entity is displayed.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, expand the entity you want to work with, and then click or tap Forms.  4. In the list, locate an entry with the Form Type of Main, and then double-click or tap to edit it.  5. To add a link to a related entity, on Home tab, in the Select group, click or tap Navigation.  The Relationship Explorer pane displays on the right side of the form editor.  6. In the Relationship Explorer pane, in the Filter list, select one of the following options:   Available Relationships. Lists all the entities that can be related to the entity the form is associated with.   1:N Relationships. Lists entities that can be related in a 1:N relationship to the entity the form is associated with.   N:N Relationships. Lists entities that can be related in a N:N relationship to the entity the form is associated with.  Note  If no related entities show up in the Relationship Explorer pane, you cannot create a link on this form to a related entity.  7. Select the related entity you want link to, drag it to the Navigation Pane, and then drop it where you want it to display.  Tip  You can also create a new relationship by clicking or tapping New 1:N or New N:N in the Relationship Explorer. More information: [Create or edit 1-N relationships between entities](#zbac0854938884a43a8676649b8aba5b2), [Create or edit N-N relationships between entities](#z7ee0f237288c4eaa9907076638deb9d7)  8. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the Home tab, click or tap Change Properties.  9. In the Relationship Properties dialog box, on the Display tab, type a new display label.  10. On the Name tab, click or tap Edit to view or edit the details associated with the relationship record.  11. Click or tap OK.  12. Preview how the main form will appear and how events will function:  a. On the Home tab, click or tap Preview, and then select Create Form, Update Form, or Read-Only Form.  b. To close the Preview form, on the File menu, click or tap Close.  13. When you finish editing the form, click or tap Save and Close to close the form.  14. When your customizations are complete, publish them:   To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations. |

Note

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

Add or edit a form web resource

You can add or edit web resources on a form to make it more appealing or useful to users. The types of web resources that you can add or edit on a form are images, HTML files, or Silverlight controls.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, and then expand the entity you want to work with.  4. Click or tap Forms, in the list locate a form of type Main, and then double-click or tap the entry to open and edit the form.  5. To add an existing web resource, click or tap the tab (for example, General or Notes) you would like to insert it on, and then on the Insert tab, click or tap Web Resource.  - OR -  To edit a Web resource, select a form tab and the web resource that you want to edit, and then on the Home tab, click or tap Change Properties.  6. In the Add Web Resource or Web Resource Properties dialog box, on the General tab, enter the appropriate information in the required fields.  In particular, note the following:  a. In the Web resource box, select the image, HTML, or Silverlight web resource that you want to use.  Note  After you specify a web resource, the Web Resource Properties section appears at the bottom of this tab, providing options that vary based on the type of web resource you are adding. These options include specifying custom parameters, passing a record object-type code as a parameter, or specifying alternative text that describes the resource or, for images, that makes the image more accessible to all users.  b. In the Name box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.  c. The Label field is automatically populated with a variation of the name you specify, but ensure that the proposed label meets your needs or update it accordingly.  7. On the Formatting tab, the options that display vary based on the type of web resource inserted. These options include specifying the number of columns and rows display, whether a border displays, and the scrolling behavior.  8. 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 or tap the Add Selected Records button  to move the selected fields to the Dependent fields list, and then click or tap OK to close the dialog box.  9. When you finish editing the form, on the Home tab, click or tap Save and Close to close the form.  10. To preview how the main form will appear and how events will function:  a. On the Home tab, click or tap Preview, and then select Create Form, Update Form, or Read-Only Form.  b. To close the Preview form, on the File menu, click or tap Close.  11. When your customizations are complete, publish them:   To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations. |

Note

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

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.



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| 1. 0.1. 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Customization > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Customizations. Then choose Customize the System. |   3. Under Components, expand Entities, and then expand the entity you want.  4. Click or tap Views, and then select the view.  5. On the Actions toolbar, click or tap More Actions, and then select Managed Properties.  6. You can edit the view if the entity is unmanaged. In the Set Managed Properties dialog box, set Customizable to allow editing or creating views.  7. Click or tap Set. |

See Also

[Create or edit a public view for an entity](#z5689d5f3749b4b248562fcff576adf21)

[Edit the quick find view](#z6d4ec5b1b2a64444a8144b2de0a495ca)

[Understand security roles](#zbafd20c475654903b92a3f27b2ef5c12)

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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, and then expand the entity you want.  4. Click or tap Views.  5. To create a new public view, on the Actions toolbar, click or tap New. On the View Properties dialog box, in the Name box, type a name for the new view, and then click or tap OK.  If the New button does not appear, you can’t add views for the entity you selected.  - OR -  To edit a view, double-click or tap a Public View in the list. The view type is specified in the Type column.  6. Modify the columns that are displayed.   Add a column:  a. In the Common Tasks area, for Quick Find Views, click or tap Add View Columns, or for other types of views, click or tap Add Columns.  - OR -  For other types of views, click or tap Add Columns.  b. Select the check boxes for the columns you want to add, and then click or tap OK.   Move a column:  a. Click or tap the column you want to move.  b. In the Common Tasks area, use the arrows to move the column left or right.   Change the width of a column:  a. Click or tap the column you want to change.  b. In the Common Tasks area, click or tap Change Properties.  c. In the Change Column Properties dialog box, click or tap an option to set the column width, and then click or tap OK.   Remove a column:  a. Click or tap the column you want to remove.  b. In the Common Tasks area, click or tap Remove.  c. In the confirmation message, click or tap OK.   Change the sort order of a column:  a. In the Common Tasks area, click or tap Configure Sorting.  b. In the Configure Sort Order dialog box, in the Column list, select the column you want to sort, then click or tap Ascending Order or Descending Order, and then click or tap OK.   Enable online presence for instant messaging:  a. In the View form for the selected entity, click or tap the column you want to change.  b. In the Common Tasks area, click or tap Change Properties.  c. In the Change Column Properties dialog box, select the Enable presence for this column, and then click or tap OK.  7. Click or tap Save and Close.  8. Set any public view as the default view for an entity.  Note  Every entity in Microsoft Dynamics CRM must have a default public view. This is the view that is displayed for a list of entities, such as Appointment, Account, or Contact. For example, if your organization is set up so that users manage their own appointments, you can change the default view for Appointments from All Appointments to My Appointments.  a. In the list of views, select the public view that you want to set as the default. The view type is indicated in the Type column.  b. On the Actions toolbar, click or tap More Actions, and then click or tap Set Default.  9. Click or tap Save and Close to close the view.  10. Publish view customization.  Important  Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.  Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it’s least disruptive to users.   To publish view customizations for just one entity, under Components, click or tap Entities, and select the entity. Then, on the Actions toolbar, click or tap the Publish button.   To publish all customizations you have made to any entities or components, on the Actions toolbar, click or tap Publish All Customizations.  Tip  To create views that appear in the Service calendar, create views in the Service Activity, Appointment, User, or Facility/Equipment entities. To see views created in these entities from the Service calendar, users select the view type from the Type list. |

See Also

[Create and configure views](#z76507b5c343f471d9a3f60edf80142ee)

Edit the quick find view

You can edit an entity’s Quick Find view (the view used to display results of searches performed using the Search box), for example to modify the fields that are searched and which columns display or to specify the width and sort order of the columns displayed.

Important

Changes to the Quick Find view associated with an entity set the default view for everyone who uses the search box for that entity.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. In the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears in the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, expand the entity you want to modify, and then click or tap Views.  4. In the list of views, in the Type column, locate Quick Find View, and then double-click or tap the view.  5. Modify the fields that are searched:  a. In the Common Tasks pane, click or tap Add Find Columns.  b. Select the check boxes for the columns you want to add, and then click or tap OK.  6. Modify the columns that are displayed.   To add a column:  i. In the Common Tasks area, for Quick Find Views, click or tap Add View Columns.  - OR -  ii. Select the check boxes for the columns you want to add, and then click or tap OK.   To move a column:  i. Click or tap the column that you want to move.  ii. In the Common Tasks area, use the arrows to move the column left or right.   To change the width of a column:  i. Click or tap the column that you want to change the width for.  ii. In the Common Tasks area, click or tap Change Properties.  iii. In the Change Column Properties dialog box, click or tap an option to set the column width, and then click or tap OK.   To remove a column:  i. Click or tap the column that you want to remove.  ii. In the Common Tasks area, click or tap Remove.  iii. In the confirmation message, click or tap OK.   To change the sort order of a column:  i. In the Common Tasks area, click or tap Configure Sorting.  ii. In the Configure Sort Order dialog box, in the Column list, select the column you want to sort, click or tap Ascending Order or Descending Order, and then click or tap OK.   To enable online presence for instant messaging:  i. In the View form for the selected entity, click or tap the column you want to change. Only some columns have presence such as Primary Contact or Potential Customer  ii. In the Common Tasks area, click or tap Change Properties.  iii. In the Change Column Properties dialog box, select the Enable Presence for this column, and then click or tap OK.  7. Click or tap Save or Save and Close.  8. On the Actions toolbar, click or tap Publish.  When the customizations are published, a confirmation message appears. |

Note

A customized business entity might have different properties than those described in Help; Help does not contain content that is specific to the custom entities your organization creates. However, Help does describe how to create and use custom entities.

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

Set the default view for an entity

In Microsoft Dynamics CRM, every entity, such as Appointments, Accounts, or Contacts, requires a default public view. However, you can change the default view for an entity to accommodate the specific needs of your business. For example, if your organization is set up so that users manage their own appointments, you can change the default view for Appointments from All Appointments to My Appointments.

You can make any public view the default public view for an entity.

Important

The default view for some entities is not configurable.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Customizations > Customize the System. |   3. Under Components, expand Entities, and then expand the entity you want to work with.  4. Click or tap Views, and in the list locate the view of type Public View that you want to set as the default, and then click or tap to select the entry for that view.  5. On the Actions toolbar, click or tap More Actions, and then click or tap Set Default.  6. When your customizations are complete, publish them:   To publish customizations for only the component that you are currently editing, under Components, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, under Components, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations. |

Note

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

Export customized entity and field text for translation

After you create customized entity and field text, you may want to translate it into other languages.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Customization > Customizations. Then click or tap Customize the System. |   3. On the Actions toolbar, click or tap Export Translations.  4. After completing the export, open or save the compressed (.zip) file that contains the exported labels to your local computer or network.  5. Extract the XML file from the compressed (.zip) file and translate it. |

See Also

[Customize your system](#zdd849798c7cd4653a8d8849d424caa5f)

Change custom entity icons

When you create a custom entity, it is automatically assigned a default icon, and all custom entities by default use the same icon. If your organization has several custom entities, it can be helpful to change the icon associated with one or more custom entities to help users differentiate them.

Note

You cannot modify the icons assigned to system entities.

You can upload two types of entity icons for each custom entity:

 Icon in Web application. This icon should be:

 16 x 16 pixels in size.

 In .gif, .png, or .jpg format.

 No larger than 10 kilobytes.

 Icon for Entity Forms. This icon should be:

 32 x 32 pixels in size.

 16 colors.

 In .ico format.

 No larger than 10 kilobytes.

Important

Before you begin this task, be sure that you have uploaded as web resources any custom icons that you intend to assign. More information: [Add or edit a form web resource](#z174096b5be7b44f3a186109c47813fe7)



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Customization > Customizations > Customize the System. |   3. Expand Entities if necessary, click or tap the custom entity you want to update the icon for, and then on the Actions toolbar, click or tap Update Icons.  4. In the Select New Icons dialog box, under Icon in Web application or Icon for Entity Forms, to the right of New Icon, click or tap the Browse icon , select the appropriate image file, and then click or tap OK.  5. On the Actions toolbar, on the File menu, click or tap Save.  6. When your customizations are complete, publish them:   To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations.  New icons might not display in Microsoft Dynamics CRM until you closed and reopened the Microsoft Dynamics CRM client. |

Note

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

Import translated entity and field text

If you have customized entity or field text, such as field labels or drop-down list values, you can provide the users in your organization who are not working with the base language version of your Microsoft Dynamics CRM implementation with this customized text in their own languages. To do so, you export the text strings for all your customizations so that they can be translated into the languages you use in your organization.

After the translation, you need to import the translated text strings into your Microsoft Dynamics CRM implementation before users can take advantage of the changes.

Important

The file that you import must be a compressed file that contains the CrmTranslations.xml and the [Content\_Types].xml file at the root.

Important

Microsoft Dynamics CRM cannot import translated text that is over 500 characters long. If any of the items in your translation file are longer than 500 characters, the import process will fail. If the import process fails, review the line in the file that caused the failure, reduce the number of characters, and try to import again. Also note that after you import translated text, you must republish customizations.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Customization > Customizations, then click or tap Customize the System. |   3. In the solution explorer, on the Actions toolbar, click or tap Import Translations.  4. In the Import Translated Text dialog box, specify the file that contains the translated text, and then click or tap Import.  5. When Microsoft Dynamics CRM finishes importing the translated text, click or tap Close. |

Note

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

See Also

[Export customized entity and field text for translation](#z7e269d094453490ab50cf0795ff6f348)

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](#zf02c11325d34495683f6220394d26d58).

See Also

[Create a team template and add to an entity form](#zf02c11325d34495683f6220394d26d58)

[Create or edit a team](#zc041b95ba1b5493499a7dc7edc2f7571)

[Access Teams in Microsoft Dynamics CRM](http://download.microsoft.com/download/E/9/0/E9009308-CA01-4B37-B03C-435B8ACB49B4/Access%20Teams%20with%20Microsoft%20Dynamics%20CRM%202013.pdf)

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](#z84)

[Create a team template](#z85)

[Add a team template to the entity form](#z86)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  3. Go to Settings > Customizations.  4. In the Customization window, click or tap Customize the System.  5. In the navigation pane, expand Entities, and then click or tap the entity you want to use in the team template.  6. On the Entity Definition form, in the Communication & Collaboration section, select the Access Teams checkbox.  7. On the Actions toolbar, click or tap Save. |

Create a team template



|  |
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| 1. Click or tap Settings > Security > Access Team Templates.  2. On the Actions toolbar, click or tap New, complete the required fields, and then click or tap Save. |

Add a team template to the entity form



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Go to Settings > Customizations.  3. In the Customization window, click or tap Customize the System.  4. In the navigation pane, expand Entities, expand the entity you want to use in the team template, and then click or tap Forms.  5. In System Forms, select Active Forms > Main form.  6. On the Main form, open the Insert tab.  7. On the ribbon, click or tap Sub-Grid.  The Set Properties dialog box appears.  8. In Set Properties, complete the required fields, and then select the Display label on the Form check box.  9. In the Records drop-down list, select All Record Types.  10. In the Entity drop-down list, select Users.  11. In the Default View drop-down list, select Associated Record Team Members.  12. In the Team Template drop-down list, select the desired template and click or tap Set.  The team template you selected now appears on the Main form.  13. On the Actions toolbar, click or tap Save, and then click or tap Publish. |

See Also

[About team templates](#z7c29ad58b0f44a0fb686ecbca053592b)

[Print leads, quotes, and other records](#zd807028a08474bd094bb61cd2fe4017d)

View or download developer resources

This page is designed for developers who want to link to the Microsoft Dynamics CRM SDK, developer tools, or want to know the service endpoint URLs.

Organization Unique Name

You need the unique name for your organization when you interact with the Discovery Service.

WindowsAzure AppFabric Issuer Certificate

This is the public certificate that is required to configure Windows Azure AppFabric ACS for Microsoft Dynamics CRM integration.

Developer Center

The [Microsoft Dynamics CRM Developer Center](http://www.crmdevelopercenter.com) on MSDN contains a wealth of information to help developers. Here you will find the SDK, which includes documentation, samples, and tools, as well as technical articles, ramp-up kits, videos, blogs, forums, and more. For more information about using each item on this page, see the article "Using the Developer Resources Page" in the [SDK documentation](http://go.microsoft.com/fwlink/?LinkID=313255).

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.

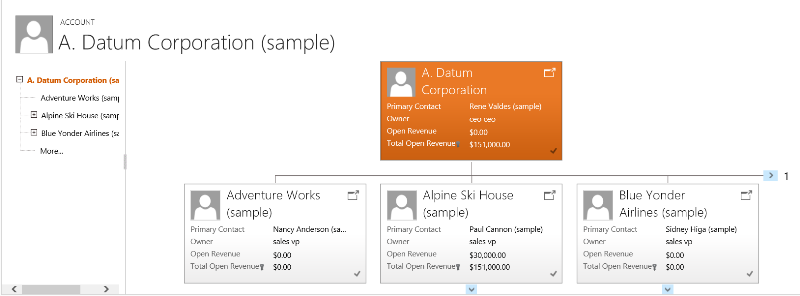
Organization Data Service

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.

Calculated field syntax

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 screen shot 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. More information: [Query and visualize hierarchical data](http://go.microsoft.com/fwlink/p/?LinkID=517549).

Create custom Help for your organization or solution

If you have customized Microsoft Dynamics CRM extensively, you may want to replace the default Help system provided with CRM to make it more relevant for your users. You can provide a single global Help URL for all customizable record types (useful if you’re using mostly custom entities) or you can provide custom URLs for Help links on grids and forms for specific record types (useful if you’re using mostly out-of-the box record types but you have heavily customized a few record types). If you’re a developer, you may also want to include additional parameters in the URL, such as language code and entity name, to make your Help more dynamic. More information: [Access parameters in custom Help URL](http://go.microsoft.com/fwlink/p/?LinkID=511994)

Important

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Override the default Help system with a single global URL

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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, click or tap Microsoft Dynamics CRM > Settings > Administration > System Settings > General tab. (In CRM for Outlook, in the Navigation Pane, click or tap Settings > Administration > System Settings > General tab).  3. Under Set custom Help URL, next to the Use custom Help for customizable entities item, click or tap Yes.  4. In the Global Custom Help URL box, enter the URL for your custom Help system.  5. If you want to access parameters for User Language Code, Entity Name, Entry Point, or Form ID, set the Append Parameters to URL option to Yes. |

Override default Help for specific record types

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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps in the procedure above to enable custom Help.  3. On the nav bar, click or tap Microsoft Dynamics CRM > Settings > Customizations > Customize the System. (In CRM for Outlook, in the Navigation Pane, click or tap Settings > Customizations > Customize the System).  4. In the left navigation, expand Entities, and then select the entity you want to create custom Help for.  5. On the right side of the screen, scroll down to the Help section.    6. Select the Use custom Help check box.  7. In the Help URL box, enter a URL for the custom Help for this record type. |

Create or edit a drop-down list (option set) for a form

You can find help on this task in [Planning and Deploying Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=517197).

Create and configure views

Help for this area is available in the [Microsoft Dynamics CRM customization guide](http://go.microsoft.com/fwlink/p/?LinkID=320204%20).

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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Then click or tap Customization > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Customization > Customizations. Then click or tap Customize the System. |   3. To create a new web resource, click or tap Components > Web Resources, and then on the Actions toolbar, click or tap New.  4. Type or modify information in the text boxes.   The name entered in the Name text box, plus the file extension will become its file name.   The name entered in the Display Name text box will be displayed in the Display Name.   In the Type drop-down box, select the file type you want.  5. Click or tap Browse to select and upload the file from your local machine.   To preview an uploaded image web resource: Click or tap Web Resource>Preview.   To edit a text web resource: Click or tap Text Editor.   To preview a text web resource: Click or tap Web Resource> Preview.  6. When you’re ready to save your data, click or tap Save and Close.  7. Publish your customization.   For only the edited component: Click or tap Save > Publish on the Home.   For all unpublished components at one time, click or tap Publish All Customizations. |

Note

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

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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Then click or tap Customization > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Setting > Customization > Customizations. Then click or tap Customize the System. |   3. Click or tap Components > Entities, and then expand the entity you want.  4. Click or tap Forms. In the list, click or tap a form to edit if it has a Form Type of Main.  5. On the Home tab, click or tap Preview, and then select Create Form, Update Form, or Read-Only Form.  a. If you have added an OnLoad event for the form, open the form in each mode, and verify that your event executed as expected.  b. If your code depends on data existing in the form when it loads, test your script in an OnChange or OnSave event to enter sample data into the form. The Update Form will open with no data.  i. If you have added an OnChange event for a field, for create and update modes, enter the data in the field and verify that your event executed as expected.  ii. If you have added an OnSave event for a field, for create and update modes, click or tap Simulate Form Save and verify that your event executed as expected.  6. Click or tap File > Close. |

Read-only view

This is a read-only view of this record. To make changes to the record, close this dialog box and double-click the record.

[Run a report](#zd691493b2e394a8999521500a8ddafd2)

Properties dialog box

Use the Properties dialog box to view the date the record was created and last modified and by whom, and the permissions that you have on the record.

If the current record is integrated with back office systems, information about the relationship is also displayed on this dialog box.

Create or edit a solution

Create a managed solution

Customizers and developers use solutions to author, package, and maintain units of software that extend the functionality of Microsoft Dynamics CRM. 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.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Solutions. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Solutions. |   3. On the Actions toolbar, click or tap the New icon ().  4. Complete the required fields, and then on the File menu, click or tap Save.  By default, this saves an unmanaged solution.  5. To add a new or existing component to your solution, in the Component Type list, click or tap the type you want to add, and then click or tap New or Add Existing.  6. If you create a new component, fill in the required information, and then click or tap Save or OK (depending on the type of component you are creating) to save the component.  7. On the File menu, click or tap Save and Close  Your new unmanaged solution displays in the Solutions list.  8. Click or tap the solution you want to export, and then follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the Actions bar, click or tap the Export icon (). |   If using CRM for Outlook   |  | | --- | | a. On the Actions bar, click or tap Export Solution. |   9. Select the options you want in the Export wizard. When you get to the Package Type page, select Managed.  10. Click or tap Export.  11. In the File Download dialog box, click or tap Save, choose a location for the solution .zip or .cab file, and then click or tap Save again.  Note  The regular scenario is for you to create a solution in a test Microsoft Dynamics CRM organization, export it, and then import it into a production Microsoft Dynamics CRM organization. If you want to import your managed solution into the same organization in which you created and exported it, you have to delete the unmanaged version and any components you created. You also have to delete child components, such as field relationships, that you created. |

You now have a managed solution that you can import into another Microsoft Dynamics CRM organization.

See Also

[Create, Install, and Update a Managed Solution](http://go.microsoft.com/fwlink/?LinkID=314234)

Import a solution

You can find help for this task in [Use solutions for your customizations](http://go.microsoft.com/fwlink/?LinkID=517493) on our IT Pro site.

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



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Customizations. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Customizations. |   3. Choose Customize the System.  4. In the solution explorer, choose Export Solution.    5. When you’re prompted to open or save Default\_1\_0.zip, choose 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



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Solutions. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, choose Settings > Customization > Solutions. |   3. In the list, select the solution you want to export, and then choose 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, choose Next.  Note  Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you publish customizations when it’s least disruptive to users.  5. If your solution contains any missing components that are required, you’ll see the Missing Required Components step. Disregard this warning only if you intend to import the solution as an unmanaged solution back into the original organization. Otherwise, follow the instructions in the dialog box to cancel the export, and then add the required components. [Read more about managed and unmanaged solutions](http://go.microsoft.com/fwlink/?LinkID=328953).  6. In the Export System Settings (Advanced) step, you can choose certain system settings to include in your solution. If your solution depends on any of the groups of system settings, select them, and then choose Next. For more information on these settings, see [Settings options for solution export](http://go.microsoft.com/fwlink/?LinkID=513272).  7. In the Package Type step, choose whether to export the solution as an Unmanaged or Managed solution, and then choose Next.  Note  Export a solution as a managed solution only when it’s complete and you’re ready to distribute it. After exporting a managed solution, you can’t import it back into the organization it was exported from; you can only import it into a different organization. [Read more about managed and unmanaged solutions](http://go.microsoft.com/fwlink/?LinkID=328953).  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 choose version 6.0 as the target for your solution export, solution components dependent on features added in Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) will be removed. [Learn more about exporting a solution for a specific CRM version](http://go.microsoft.com/fwlink/?LinkID=393530).  9. Choose Export to download the solution file.  10. When prompted to open or save the compressed (.zip) file, choose Save As.  11. Choose a location to save your solution, and then choose Save. |

Important

 Don’t add files to a compressed (.zip) file that contains customizations and settings exported from Microsoft Dynamics CRM. CRM will attempt to import the first file in the compressed (.zip) file. If it’s not a valid file, the import will fail.

 Some user information may be exported when exporting workflows, for example, the domain logon, the forms authentication user name, or the Microsoft account unique user identifier (PUID) value.

See Also

[Introduction to solutions](http://go.microsoft.com/fwlink/?LinkID=328953)

[Package and distribute extensions with solutions](http://go.microsoft.com/fwlink/?LinkID=392623)

Add a solution component

Adding a component to a solution extends the functionality or usefulness of that solution for users. You can add a component to an existing unmanaged solution, or you can create a new unmanaged solution and add a component to it. This procedure guides you through the process of creating an unmanaged solution and adding new or existing components. While you can add new or existing components for most component types, for the following types you can only add components that already exist in Microsoft Dynamics CRM:

 Client extensions

 Plug-in assemblies

 SDK message processing steps

 Service endpoints

Components can be created in the Customization area of Microsoft Dynamics CRM, or they can be developed outside of Microsoft Dynamics CRM. More information: [Introduction to Solutions](http://msdn.microsoft.com/en-us/library/gg334576.aspx)

Important

Customization tasks can be performed only while you’re online.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Solutions. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > Customization > Solutions. |   3. On the Actions toolbar, click or tap New.  4. Complete the required fields, and then click or tap the Save.  By default, this saves an unmanaged solution.  5. To add a new or existing component to a solution, in the Component Type list, click or tap the type you want to add, and then, on the Actions toolbar, click or tap New or Add Existing.  The steps required for adding each type of component are available in the Help on This Page topic associated with the type of component you’re adding.  6. After specifying the necessary details for the component, click or tap Save and close the window, or click or tap Save and Close (depending on the type of entity you created or added).  7. To set the managed properties for each component that you’re adding, on the Actions toolbar click or tap Managed Properties. More information: [Edit or view managed properties](#z16ad39633a8d49108eae4694f7c1babc)  8. Click or tap Save and Close to save your unmanaged solution and any components that you added to it.  9. When your customizations are complete, publish them:   To publish customizations for only the component that you’re currently editing, click or tap the entity you’ve been working on, and then click or tap Publish.   To publish customizations for all unpublished components at one time, click or tap Entities, and then on the Actions toolbar, click or tap Publish All Customizations. |

Note

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

Edit or view managed properties

All solution components, except for plug-in assemblies, have an IsCustomizable managed property. This property appears in the interface with the label Can be customized. Managed properties only become effective after their associated components are installed as part of a managed solution.

While an entity has managed properties in addition to IsCustomizable, the value 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 cannot edit any of the managed properties.

 If the entity is part of a managed solution and the IsCustomizable managed property is set to True, you can edit the managed properties.

 If the entity is part of the default solution or an unmanaged solution and it is a business entity, you can edit all managed properties except for IsCustomizable.

 If the entity is part of the default solution or an unmanaged solution and it is a custom entity, you can edit all managed properties including IsCustomizable.



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| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Customizations > Customize the System. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Customization > Customizations> Customize the System. |   3. Under Components, click or tap the component and the record that you want to edit or view managed properties for.  4. On the Actions toolbar, click or tap Managed Properties.  Note  If Managed Properties does not appear on the Actions toolbar, you cannot edit or view the managed properties for that component and record.  5. In the Set Managed Properties dialog box, you can view all of the properties associated with the component, and you can edit selected properties based on the behaviors listed above.  6. Click or tap Set to save the settings. |

View or edit default solution components

All components that make up a default solution or an unmanaged solution are listed in the window for that solution.

All components that comprise the managed solution are listed in the solution explorer. You can view all components and properties for a managed solution, but you can’t edit the properties or perform any actions on the components.

Warning

If you attempt to install some solutions without first installing product updates, you’ll receive a warning. This warning will give you the option to install a solution without the components that depend on product updates, but it’s very likely the solution may not function as designed. When a solution is done importing, you can check the import log to see which components imported successfully and which didn’t.

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

View a managed solution in the solution explorer

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| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security roles   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  Then click or tap Settings > Customizations > Solutions. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Customizations > Solutions. | |

Edit a customizable component for the default solution or an unmanaged solution

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| 1. 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.  Settings appears on the nav bar.  Then click or tap Settings > Customizations > Solutions. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Customizations > Solutions. |   2. In the Solution window, click or tap Components to see a list of all default solution components in the main pane. To see components for an individual type, click or tap a type from the Component Type list.  The component type and the properties set by the creator of the component determines whether a component is customizable. This is indicated in the Customizable column.  The following table lists actions that you can perform on some components. These actions are available on the command bar.   |  |  | | --- | --- | | Actions | Comments | | New | Create a new component. You can create new components for most types. The exceptions are SDK message processing steps, client extensions, plug-in assemblies, and service endpoints. | | Add Existing | (Applies to an unmanaged solution only.) Add a component from the default solution or other unmanaged solution to this solution. | | Delete | Delete an existing component. You can delete unmanaged components or managed components that are customizable. You cannot delete any system entities. If the component has dependencies such as relationships, first you must remove the dependencies before you can delete the component. See Show Dependencies. | | Remove | Remove a component from the solution. The component is available still in the default solution after you remove it from here. | | Publish | This action applies to the entity component. Publish customizations to your Microsoft Dynamics CRM organization, including changes to forms, fields, views, charts, and relationships. | | Activate or Deactivate | Do this for workflows, dialogues, and SDK message processing step. | | Show Dependencies | Open a dialog box that lists the other components that are dependent on this component. If you want to delete this component, first you must remove the dependencies. | | Managed Properties | This action lists the managed properties settings for the component. | | Add Required Components | (Applies to an unmanaged solution only.) Add required components to your solution. This helps you avoid an error when you export the unmanaged solution. | |

See Also

[Edit or view managed properties](#z16ad39633a8d49108eae4694f7c1babc)

[Export your customizations as a solution](#z14fa7a7996384036941e9ba122ed8eb9)

[Export customized entity and field text for translation](#z7e269d094453490ab50cf0795ff6f348)

[Import translated entity and field text](#z3d77d149819b45e68e701fbe54d5c153)

Edit a solution publisher

You can edit some of the properties in the publisher record of an unmanaged solution or the Microsoft Dynamics CRM default solution. You can’t edit any properties for a publisher record that was imported as part of a managed solution. Customization tasks can be performed only while you are online.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. In the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears in the nav bar.  b. Click or tap Settings > Customizations > Publishers. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Customization > Customizations, and then click or tap Publishers. |   3. In the list, double-click the row for the publisher record that you want to edit.  4. Modify the Display Name for the publisher. The name that you enter here is added as an option to the Publisher list in a solution record. When someone creates a new solution, that person can select this publisher.  Note  The value in the Name box was created with the record and can’t be edited.  5. In the Prefix box, edit the text prefix that you want added to any entity or field created for a solution that has this publisher. This text prefix, plus an underscore, is added before the value in Name.  6. In the Option Value Prefix text box, edit the set of integers that are a prefix for any option set created in a solution for this publisher.  7. Click or tap Save and Close. |

Note

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

[CUSTG]Customize your system by using the default solution

You can find help for this task in our  [Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=391749).

Customize your system

You can find help on this topic in our [Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=391749).

Create, edit, and delete solutions

Help for this area is available in the [Microsoft Dynamics CRM customization guide](http://go.microsoft.com/fwlink/p/?LinkID=320204%20).

Add or edit a solution publisher

Help for this area is available in the [Microsoft Dynamics CRM customization guide](http://go.microsoft.com/fwlink/p/?LinkID=320204%20).

Manage system settings

System Settings dialog box - Marketing tab

Use the settings on this page to configure marketing settings for Microsoft Dynamics CRM.

Open the Marketing System Settings dialog box

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Marketing tab. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings > Marketing tab. | |

|  |  |
| --- | --- |
| Settings | Description |
| Set whether direct email through mail merge is enabled in campaigns |  |
| Enable Direct Email via Mail Merge | 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. |
| 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 - Reporting tab

Use the settings on this page to configure reporting settings for Microsoft Dynamics CRM.

Open the Reporting System Settings dialog box

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Reporting tab. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings > Reporting tab. | |

|  |  |
| --- | --- |
| Settings | Description |
| Specify report categories | Default categories:  **** Sales Reports  **** Service Reports  **** Marketing Reports  **** Administrative Reports  Note  If you add a new category or change existing categories, you should also change the default views available for the Report record type. Otherwise, users won't have a way to see all reports in the new categories. |
| Default Value | Default: Unassigned Value. Select the default report category. |

System Settings dialog box - Formats tab

You can control how Microsoft Dynamics CRM displays numbers, currencies, times, and dates for your organization.

Open the Formats System Settings dialog box

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Formats tab. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings > Formats tab. | |

|  |  |
| --- | --- |
| Settings | Description |
| Organizational Standards and Formats |  |
| Current Format | Default: your organization’s language and locale. Click or tap Customize to customize number, currency, time, and date formats for your organization. |
| Format Preview | Preview the settings for the selected language and locale. |

See Also

[Customize regional options - system settings](#z37bb6de7edcb4c3c9bf554ec3e8b5ebc)

System Settings dialog box - Email tab

This page describes the settings on the Email tab of the System Settings dialog box.

Open the Email 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, choose Microsoft Dynamics CRM > Settings > Email Configuration Settings. (In Microsoft Dynamics CRM for Outlook, choose Settings > System > Email Configuration). |

|  |  |
| --- | --- |
| Settings | Description |
| Configure email processing | |
| Process Email Using | Select whether you want to process email by using server-side synchronization or the Email Router. |
| Configure default synchronization method | For any mailbox that is automatically created in CRM when a user or queue is created, the default email settings as defined in this section will be applied. |
| Server Profile | Select the email server profile that you want to use as the default for processing. |
| Incoming Email | Select whether you want to use CRM for Outlook, the Email Router, server-side synchronization, or a forward mailbox for processing incoming email. |
| Outgoing Email | Select whether you want to use CRM for Outlook, the Email Router, or server-side synchronization for processing outgoing email. |
| Appointments, Contacts, and Tasks | Select whether you want to use CRM for Outlook or server-side synchronization to synchronize appointments, contacts, and tasks between Outlook and CRM.  Note  CRM doesn’t support the combination of POP3 and SMTP for server-side synchronization of appointments, contacts, and tasks. |
| 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 email correlation |  |
| Use Correlation | Select this check box if you want to link email activities with other related records using the information in the email headers. This method uses properties of email for correlation and is more accurate than smart matching.  Note  Email correlation using email headers works only when email is processed using server-side synchronization.  If you are using the Email Router to process email, you can use tracking tokens or smart matching to correlate email activities with the related records. |
| Use tracking token | Select this check box to use tracking tokens and to configure how CRM displays them in the Subject line of the email messages. Use tracking tokens to more accurately determine if a new record is related to an existing, tracked record. When you change the email prefix, up to 256 characters are saved as history. Long prefixes or too many prefix changes may cause lost data in history. |
| Use smart matching | Select this check box to use smart matching to correlate email based on the similarity between email messages. |
| Set tracking options for emails between CRM users |  |
| Track email sent between two CRM users as two activities | Select this option to create two email activities between 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. |
| Set file size limit for attachments |  |
| Maximum file size (in Kilobytes) | Increase or decrease the maximum file size for attached files. |
| 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

[Set up email through server-side synchronization](http://go.microsoft.com/fwlink/p/?LinkID=507734)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

System Settings dialog box - Outlook tab

Use the settings on this page to configure how Microsoft Outlook interacts with Microsoft Dynamics CRM.

Open the Outlook System Settings dialog box

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Outlook tab. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings > Outlook tab. | |

|  |  |
| --- | --- |
| Settings | Description |
| Set email promotion options for CRM for Outlook |  |
| Perform checks as new email is received | Default: Yes. If Yes, email is checked for tracking as soon as it arrives. |
| Promote incoming email every | Default: 10 minutes. Looks for and links incoming email on the specified interval. |
| Send pending CRM email every | Default: 10 minutes. Sends pending Microsoft Dynamics CRM email on the specified interval. |
| Set whether users can schedule synchronization in CRM for Outlook |  |
| Users can schedule synchronization | Default: Yes. If Yes, users can set whether or not CRM for Outlook synchronizes with Microsoft Dynamics CRM. |
| Minimum Time between synchronizations | Default: 15 minutes. Synchronizes CRM for Outlook and Microsoft Dynamics CRM on the specified interval. |
| Set whether users can update their local data in the background in CRM for Outlook |  |
| Users can schedule background local data synchronization | Default: Yes. If Yes, users can update the data that is stored on their computer to use offline. |
| Minimum time between background local data synchronizations | Default: 15 minutes. Local data is synchronized with Microsoft Dynamics CRM on the specified interval. |
| Set schedule for address book synchronization in Microsoft Dynamics CRM for Outlook |  |
| Users can schedule background address book synchronization | Default: Yes. If Yes, users can update the address book that is stored on their computer to use offline. |
| Minimum time between address book synchronizations | Default: 1 hour. The local address book is synchronized with Microsoft Dynamics CRM on the specified interval. |
| Set whether users see CRM for Outlook message |  |
| Users see “Get CRM for Outlook” option 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

Start auditing at the organization level to track changes to your organization’s data and maintain a log of these changes.



|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings. |   3. In the System Settings dialog box, on the Auditing tab, under Audit Settings, you can start auditing and specify whether or not to audit user access, and you can stop auditing if it is currently enabled.  If you opt to enable auditing and audit user access, you will track when the user starts accessing Microsoft Dynamics CRM and whether or not the user accessed the application by using the web application or CRM for Outlook.  4. Under Enable Auditing in the following areas, you can specify to audit specific areas of the product, as described in the following table:   |  |  | | --- | --- | | Auditing area | Enable to start auditing for the following entities: | | Common Entities | Account, Contact, Lead, Marketing List, Product, Quick Campaign, Report, Sales Literature, Security Role, and User | | Sales Entities | Competitor, Invoice, Opportunity, Order, and Quote | | Marketing Entities | Campaign | | Customer Service Entities | Article, Case, Client Feedback, Contract, and Service | |

See Also

[Audit data changes](#z1eb88dfe1b7d4f658e3abc2ef58374fa)

System Settings dialog box - General tab

Use the settings on this page to change general system-level 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, choose Microsoft Dynamics CRM > Settings > Administration > System Setttings > General tab. (In Microsoft Dynamics CRM for Outlook, in the Navigation Pane, choose Settings > System > Administration > System Settings > General tab. |

|  |  |
| --- | --- |
| Settings | Description |
| Select the default save option for forms |  |
| Enable auto save on all forms | Default: Yes. If Yes, after a record is created (initially saved), any changes made to a form will automatically be saved thirty seconds after the change is made. The 30-second period starts again after a change is made. If no changes are made, the automatic save doesn’t happen. For more information, see [Manage auto-save](http://go.microsoft.com/fwlink/?LinkID=328717). |
| Set the IM presence option |  |
| Enable presence for the system | Default: Yes. If Yes, instant messaging will display the current status for users, contacts, opportunities, or leads. This only applies to lists and sub-lists for entities with an updated user interface. |
| Set the full-name format |  |
| Name Format | Default: First Name Last Name. Select the order in which you want customer and user names to be displayed. |
| Set the currency precision that is used for pricing throughout the system |  |
| Pricing Decimal Precision | Default: 2. Select how many decimal points to use for a currency. |
| Set whether reassigned records are shared with the original owner |  |
| Share reassigned records with original owner | Default: No. Select whether or not a record is shared with the original owner of the record, or completely reassigned to another user. |
| Set blocked file extensions for attachments | Prevent users from attaching files with specific file name extensions. |
| Set the currency display option |  |
| Display currencies by using | Default: Currency symbol. For example, Currency symbol: $, Currency code: USD. |
| Set up Quick Find |  |
| Enable Quick Find record limits | Default: Yes. If Yes, if more than 10,000 records are found, a message will be displayed that suggests a more selective search. |
| Select entities for search on Microsoft Dynamics CRM for tablets | Click or tap Select to choose the entities to include when users do a search in CRM for tablets. |
| Enable Bing Maps |  |
| Show Bing Maps on forms | Default: Yes. Microsoft Dynamics CRM on-premises users will also need to enter a Bing Map key. CRM Online users do not need to enter a key. |
| Please enter Bing Maps key | On-premises users can obtain a Bing Map key from: <https://www.bingmapsportal.com/> |
| Set the default country/region code |  |
| Enable country/region code prefixing | Default: Enabled. If enabled, CRM will prefix the country/region code to numbers users are trying to call. |
| Country/Region Code Prefix | Default: +1. +1 is the country/region calling code for North America. |
| Set the telephony provider |  |
| Select provider for Click to call | Default: Skype. Choose which provider to enable outbound calls from within CRM. This setting does not apply to CRM for tablets or Microsoft Dynamics CRM for phones. |
| Set whether users see CRM for tablets message |  |
| Users see app download message | Default: Yes. If Yes, users will see a message regarding downloading the CRM for tablets app. |
|  |  |
|  |  |
| Set custom Help URL |  |
| Use custom Help for customizable entities | If you want to replace the default Help file with custom help designed for your users, choose Yes. After you enable custom Help, you can enter a Global Custom Help URL.  Note  This feature is available if you’re using CRM Online and you have installed the 2015 Update, or if you’re using CRM 2015. |
| 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: [Create custom Help for your organization or solution](#zc3ac520336fb41b9b51ed3a6cc066ca2) |
| Append Parameters to URL | If you choose Yes to append parameters to the URL, you can make Help content more dynamic. For example, you can access parameters for User Language Code, Entity Name, Entry Point, and Form ID. More information: [Create custom Help for your organization or solution](#zc3ac520336fb41b9b51ed3a6cc066ca2) |
| Disable Social Engagement |  |
| Prevent feature from receiving social data in CRM | Default: No. If you don’t want to receive social data in CRM, select Yes. If you disable social engagement, your organization will not be able to receive social data in CRM. Users can continue to work with existing social data, however. |
| Set whether users see navigation tour |  |
| Display navigation tour to users when they sign in | When users start CRM, they’re presented with a navigation tour that provides a quick overview of CRM. Choose No to disable this tour for all users in your organization.  Note  This feature is available if you’re using CRM Online and you have installed the 2015 Update, or if you’re using CRM 2015. |

System Settings dialog box - Goals tab

Set the duration and frequency of the automatic rollup of goals. These settings only affect the automatic handling of all goals set in Microsoft Dynamics CRM. You can always perform a manual rollup for any goal at any time.

Open the Goals System Settings dialog box

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Goals tab. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings > Goals tab. | |

|  |  |
| --- | --- |
| Settings | Description |
| Set the roll-up expiration time and the roll-up frequency. |  |
| Days after the goal end date when the rollup will stop | Default: 30 days. Set the number of days after the ending date of a goal for Microsoft Dynamics CRM to stop including a goal in a rollup. |
| Roll-up recurrence frequency | Default: 24 hours. Set the number of hours between each Microsoft Dynamics CRM goal rollup. |

System Settings dialog box - Calendar tab

Use the settings on this page to configure calendar settings for Microsoft Dynamics CRM.

Open the Calendar System Settings dialog box if it isn’t already open

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the Microsoft Dynamics CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings > Calendar tab. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings > Calendar tab. | |

|  |  |
| --- | --- |
| Settings | Description |
| Set scheduling options |  |
| Maximum duration of an appointment in days | CRM users can create appointments to meet or talk to customers. Users create these appointments on the Service Calendar or in the Activities area.  You can use this setting to control the maximum number of days that your users can schedule an appointment for. The default is 10 days. |

See Also

[Create or edit an appointment](#z50af7faf857842449710f05544b97f38)

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](#z6f8a783f2cb242929318b0cedc9fb5f9)..  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Business Management. Then click or tap Fiscal Year Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > Business Management > Fiscal year Settings. |   3. Type information in the text boxes.  a. In the Start Date box, select the date to start the fiscal year.  b. In the Fiscal Period Template drop-down list, select how your fiscal year is divided.  c. In the Fiscal Year drop-down list, select how you want to display the fiscal year.  d. In Name Based On drop-down list, select whether the fiscal year name is displayed on the start or end of the fiscal year.  e. In the Fiscal Period drop-down list, select how you want to display the fiscal period.  f. In the Display As drop-down list, select how you want the fiscal year abbreviation and the year to appear.  4. Click or tap OK. |

See Also

[Set up Business Management options](#z111ca00a8163496baccc399ac98dea98)

[Set up security roles for salespeople](#z5166066163f540b6a9e262ef57257eb6)

[Set up sales territories to organize business markets by geographical area](#za7fef06e31ad43d1b4a6c234a836b191)

Customize regional options - system settings

You can customize how numbers, currencies, times, and dates appear to everyone in your organization.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Administration > System Settings. |   3. Click or tap the Formats tab.  4. From the Current Format list, select the language and country or region, and click or tap Customize.  5. In the Customize Regional Options dialog box, you can change the default settings for the selected format. View how the changes will look in the preview boxes.   Click or tap the Number tab to change the decimal symbol, digit grouping symbol, digit groups, and negative numbers.   Click or tap the Currency tab to change the currency format, negative currency amounts, and number of decimal places.   Click or tap the Time tab to change the time format, time separator, and notation for morning and afternoon.   Click or tap the Date tab to set the type of calendar, first day of the week, first week of the year, formats for long and short dates, and whether or not to show week numbers in calendar views.   Click or tap Apply to apply the changes and continue working in the dialog box, or click or tap OK to save the changes and close the dialog box.  6. Click or tap OK. |

See Also

[System Settings dialog box - Formats tab](#za9ac1c00c7d8439086b1932f98632cf7)

Enable or disable languages

You can enable or disable languages in Microsoft Dynamics CRM to address your business requirements. However, you can’t disable the base language.

Important

If you’re running Microsoft Dynamics CRM for Microsoft Office Outlook, before you can enable additional languages, you must download one or more [Language Packs](http://go.microsoft.com/fwlink/?LinkId=200478) 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > Languages. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Administration > Languages. |     3. Select the languages you want to enable and clear those you want to disable.  4. Click or tap Apply.  5. When you’re finished enabling and disabling languages, click or tap Close. |

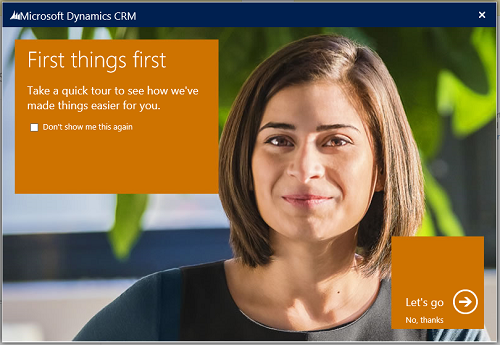
Set the unit measurements for products

Looking for help?

[You’ll need to search online to see what’s available for this topic](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=unit%20measure&ds=f)

Disable the navgation tour

When users first start Microsoft Dynamics CRM, if they want to get a quick overview of CRM, they can start the navigation tour.



You can disable this navigation tour so that it doesn’t appear each time a user starts CRM.



|  |  |
| --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, click or tap Microsoft Dynamics CRM > Settings, and then click or tap Settings > Administration > System Settings > General tab. (In CRM for Outlook, click or tap Settings > System > Administration > System Settings > General tab.)  3. Scroll to the bottom of the General tab, and then under Set whether users see navigation tour, choose No. |

Broadcast announcements to an entire organization

Looking for help?

[You’ll need to search online to see what’s available for this topic](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=announcements&ds=f)

Set up Business Management options

Looking for help?

[Find help for this task on the Customer Center](http://go.microsoft.com/fwlink/p/?LinkID=391869)

Change auto-numbering prefixes for contracts, cases, articles, quotes, orders, invoices, and campaigns

[You’ll need to search online for help with this task](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=auto%20numbering&ds=f)

Add facilities and equipment for service scheduling

Looking for help?

[You’ll need to search online to see what’s available for this topic](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=facility%20equipment)

Set up sales territories to organize business markets by geographical area

Looking for help?

[You’ll need to search online to see what’s available for this topic](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=territory&ds=f)

Set up a relationship role to define family, social, or business relationships

Looking for help?

[You’ll need to search online to see what’s available for this topic](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=relationship&ds=c)

Data management area

Help for this area is available in the [Microsoft Dynamics CRM administration guide](http://go.microsoft.com/fwlink/p/?LinkID=317691).

Work with your user record and work hours

[You’ll need to search online for help with this task](http://go.microsoft.com/fwlink/p/?LinkID=391331&q=work%20hours&ds=f)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Notifications. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Notifications. | |

Enable or manage auditing

Audit data changes

Track changes made to your business data by enabling auditing. Analyze the history of a particular record, view a summary of everything that changed, or track when a user accesses Microsoft Dynamics CRM. Keep track of the changes done to a record, a field, or by a user. Microsoft Dynamics CRM automatically creates logs for the changes that are tracked.

More information about how to view what changed in a record: [View the audit history of individual records](#z3c80b62bcd244060a4a7a8fc9b2d85b6)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the area name, and then select the record type you want, for example, accounts.  c. In the list of records, open the record that you want to see the audit history for.  d. On the nav bar, click or tap the down arrow beside the record name, and then select Audit History. The history is displayed. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary. Click or tap the area name, and then select the record type you want, for example, accounts.  b. In any list of records, open the record for which you want to view the changes made.  c. Under Related, click or tap Audit History. |   3. Use the Filter on drop-down box to choose the field that you want to see the audit history for.  4. To open the change list for an item, double-click the item. |

See Also

[Audit data changes](#z1eb88dfe1b7d4f658e3abc2ef58374fa)

[System Settings dialog box - Auditing tab](#z97b968aa18d04ada8c800975d61f844a)

Recover database space by deleting audit logs

When you enable auditing, Microsoft Dynamics CRM stores the change history for transactions in the form of audit logs in the database. It is important to delete the old or unwanted logs to clean up the database space.

Caution

When you delete an audit log, you can no longer view the audit history for the period covered by that audit log.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Auditing > Audit Log Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Auditing > Audit Log Management. |   3. Select the oldest audit log. Then, on the Actions toolbar, click or tap Delete Logs.  4. In the confirmation message, click or tap OK.  Note  You can only delete the oldest audit log in the system. To delete more than one audit log, repeat deleting the oldest available audit log until you have deleted enough logs. |

See Also

[Audit data changes](#z1eb88dfe1b7d4f658e3abc2ef58374fa)

View the audit summary

Help for this area is available in the [Microsoft Dynamics CRM administration guide](http://go.microsoft.com/fwlink/p/?LinkID=317691).

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 our Administration Guide](http://go.microsoft.com/fwlink/p/?LinkID=507734).

See Also

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

Set up an activity feed

Administer the activity feed

Enable Activity Feeds to let users see their most recent activities on the wall. When you first install Microsoft Dynamics CRM, Activity Feeds is available and turned on by default, though it is a solution and you’ll administer it as you would any other solution.

Your organization also can use Yammer, which is an alternative to using activity feeds—you can use either one, but not both.

Many record types allow for activities to be associated with them. For example, for an opportunity, you might have an associated phone call activity. If you want to stay up to date with what's happening in your organization, viewing all the activities you and your colleagues have recorded in the system is an effective way to do that. With activity feeds, you'll see the most recent news about everything you're interested in—colleagues and records alike—in one single-page view.

You can do the following in Activity Feeds:

 Create a personal page. Here, you can post a profile picture along with other personal data about you and the work you do.

 View recent news in one view. On your personal page, you'll see a feed of updates from colleagues as well as updates about records.

 Follow your colleagues. When a colleague you follow posts a comment, you'll see it on your feed page. If the colleague changes a record, you'll see that on your feed page as well.

 Follow records. You can stay up to date on records by following them in activity feeds. Even if you're not following the user who changes them, your feed page will display posts about opportunities, leads, and cases that you follow.

See Also

[Stay up-to-date with customer news with the activity feed](#z2396d3f3ca6b4a4499ddbdbaf9b22a58)

[Display your picture on the activity feed](#zdf7b76fae87b4861bc4c236fcc5722fd)

Set up SharePoint document management

Manage SharePoint documents from within Microsoft Dynamics CRM

Store your documents on Microsoft SharePoint and manage these from within Microsoft Dynamics CRM by using the document management capabilities of SharePoint.

Integrate Microsoft Dynamics CRM with SharePoint to access, share, and collaborate more effectively. You can protect your stored documents in SharePoint from unauthorized access or use. More information: [Manage permissions for a list, library, folder, document, or list item](http://technet.microsoft.com/en-us/library/cc721640(v=office.14).aspx)

Enable document management on entities

To manage documents for an entity, you must enable document management for that entity. You can manage documents for any entities on SharePoint. By default, document management is automatically enabled on the following entities when you enable document management for the organization:

 Account

 Article

 Lead

 Opportunity

 Product

 Quote

 Sales Literature

Define which entities manage documents on Microsoft Dynamics CRM in the Document Management Settings dialog box. More information: [Enable document management on entities](#zac5a3303206b43b0b0a4d7346a001ba5)

When you set up document management, SharePoint creates document libraries and folders in the context of the Microsoft Dynamics CRM entities and records.

How document management works

When you set up document management, you specify a SharePoint site collection or site URL where the documents will be stored. More information: [Sites and site collections overview](http://go.microsoft.com/fwlink/?LinkId=200952)

Microsoft Dynamics CRM uses the specified site collection or site to create document libraries for entities and folders for records on SharePoint.

When the document libraries and folders are created automatically on SharePoint, corresponding document location records are created on Microsoft Dynamics CRM that point to the newly created folders.

If you do not want to use the automatic creation feature, you can manually create document libraries and folders on SharePoint. Then, create document location records in Microsoft Dynamics CRM that point to the document libraries and folders on SharePoint, and then associate the document location records with the entity records.

After the folder structure to store the documents is in place, you can start using all the document management capabilities.

How document libraries and folders are created automatically

There are two ways to create a folder structure:

 Manually create document libraries and folders in the context of Microsoft Dynamics CRM entities and records. Then, associate the SharePoint folders with Microsoft Dynamics CRM records.

 Let Microsoft Dynamics CRM automatically create the document libraries and folders in SharePoint.

Microsoft Dynamics CRM automatically creates document libraries and folders on SharePoint if the URL you specify is for one of the following:

 A site collection that is on Microsoft SharePoint Server 2010 or Microsoft SharePoint Server 2013, and has the Microsoft Dynamics CRM List Component installed on it.

 A site under a site collection that is on Microsoft SharePoint Server 2010 or Microsoft SharePoint Server 2013, and the site collection has the Microsoft Dynamics CRM List Component installed.

When you choose to have Microsoft Dynamics CRM automatically create folders for you, you must specify whether you want the folders to be created based on the default (generic) structure or based on the entity.

 Default structure. A folder is created for each record in the document library for the entity. This is the default folder structure.

For example, you have 100 bikes and 250 bikes opportunity records. These are opportunities for Margie's Travel. Microsoft Dynamics CRM creates this folder structure:

../opportunity/100 Bikes.

In this structure:

 opportunity is the document library.

 100 bikes and 250 bikes are opportunity record folders.

 Structure based on entity. A folder is created so that folders for primary entities (for which you want to manage documents) and their records are created under the document library of the related entity that you select. To create folders using this structure, select the Based on entity check box and then select an entity from the list (such as Account or Contact).

For example, you have 100 bikes and 250 bikes opportunity records. These opportunities are associated with Margie's Travel as the parent customer. You select Account for the entity. This is the created folder structure:

../account/Margie's Travel/opportunity/100 bikes

In this structure:

 account is the document library.

 Margie's Travel is the folder for the related records.

 opportunity is the folder for the related opportunity records.

 100 bikes and 250 bikes are related opportunity record folders for the main entity.

Microsoft Dynamics CRM creates the document library when you set up document management. However, Microsoft Dynamics CRM creates the various folders in the document library only when you open the Documents list for a record.

Set up SharePoint document management

You can store the documents related to your CRM records in Microsoft SharePoint folders and manage the folders and documents from within Microsoft Dynamics CRM. Integrating SharePoint document management with CRM makes it easier to access and share documents associated with your CRM records.

When you set up SharePoint document management, you specify a SharePoint collection or site URL where the documents will be stored. CRM uses the specified site collection or site to create document libraries for record types (entities) and folders associated with records in SharePoint. More information: [Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0).

There are two ways to create a SharePoint structure in CRM:

 Create the SharePoint libraries and folders manually, and then associate the libraries and folders with your CRM records.

 Have CRM automatically create the structure for you. If you have CRM create the structure, the method you choose depends on which combinations of products you’re using, as shown in the following table:

|  |  |
| --- | --- |
| Product combination | Method to use |
| CRM Online and SharePoint Online | You have the option to enable server-based SharePoint integration or you can install the Microsoft Dynamics CRM List Component. Server-based SharePoint integration provides an immersive document management experience consistent with the look and feel of CRM. Documents are displayed in the native CRM grids and users can access SharePoint actions directly from the CRM command bar. |
| CRM Online and SharePoint 2013 or later (on-prem) | Install the Microsoft Dynamics CRM List Component |
| CRM 2013 or later (on-prem) and SharePoint 2013 or later (on-prem) | Install the Microsoft Dynamics CRM List Component |
| CRM 2013 or later (on-prem) and CRM Online | Install the Microsoft Dynamics CRM List Component |

[Read more about enabling server-based SharePoint integration or installing the List Component.](http://go.microsoft.com/fwlink/?LinkID=394413)

See Also

[Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0)

[Enable server-based SharePoint integration or install the List Component](http://go.microsoft.com/fwlink/?LinkID=394413)

[SharePoint document management software requirements](http://go.microsoft.com/fwlink/?LinkID=394400)

[Enable document management on entities](#zac5a3303206b43b0b0a4d7346a001ba5)

Enable document management on entities

Store the documents related to Microsoft Dynamics CRM entity records in Microsoft SharePoint and quickly access, share, and manage these documents from Microsoft Dynamics CRM by enabling document management on the specific entities.



|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM. Or that you have Read and Write privileges on all record types that are customizable.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Document Management. |   If using CRM for Outlook   |  | | --- | | a. Click or tap your organization.  b. Click or tap Settings > System > Document Management.  c. Click or tap Document Management Settings. |   3. Select the entities for which you want to manage documents in SharePoint.  4. Specify the URL of the site where the document locations and folders for storing documents must be created, and click or tap Next.  If you’re on CRM Online with server-based integration turned on   |  | | --- | | a. If you want the document libraries and folders to be automatically created, specify a valid SharePoint Online URL, and make sure the site is under the same Office 365 tenant as your Dynamics CRM instances. |   If you’re on CRM on-premises or CRM Online without server-based integration   |  | | --- | | a. If you want the document libraries and folders to be created automatically, specify a valid SharePoint Server 2010 or SharePoint Server 2013 site URL, and make sure the site has the Microsoft Dynamics CRM List Component for SharePoint Server installed. Note, this will also work if you specify a SharePoint online site URL.  b. The remaining steps are described assuming that the specified site is on SharePoint Server 2010 or SharePoint Server 2013 and the site collection for this site has the Microsoft Dynamics CRM List Component installed. |   Learn how folders and document libraries are created in SharePoint in [Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0).  By default, a folder for each record is created under the corresponding document library for the entity. For example, for an opportunity record “100 Bikes”, a document library “opportunity” is created, and in it, a folder “100 Bikes” is created. The path is ../opportunity/100 Bikes.  5. To have the folders created under the parent account or contact, click or tap the Based on entity check box. In the list next to the check box, click or tap Account or Contact.  When you select this option, the folders are created under the related account or contact folder.  The structure is:.../account/Margie's Travel/opportunity/100 Bikes where “account” is the document library for the referenced entity that you selected from the list, and “Margie's Travel” is the folder for the referenced record of the selected entity, in this case opportunity.  6. Click or tap Next.  Microsoft Dynamics CRM creates document libraries for the selected entities on SharePoint. Microsoft Dynamics CRM also creates the corresponding document location records that contain the links to these document libraries. The Document Management Settings wizard shows the creation status of the document libraries. |

See Also

[Create or edit site records](#z2b0f8bb9548f498a83b8d7fbf3c05884)

[Create or edit document location records](#ze0bacd7bf84d4856a1922bb564188160)

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 tapDocuments.  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 tapCreate 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 tapOK. A folder with this name is created in SharePoint.  3. Click or tapSave. |
| 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 tapSave. |
| 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 tapOK. |

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](#z49e2abee71334e93b0fde1a16ee479c0)

[Create or edit document location records](#ze0bacd7bf84d4856a1922bb564188160)

Create or edit site records

Sites in Microsoft Dynamics CRM are records that point to a site or site collection on SharePoint. Sites and site collections in SharePoint contain document libraries and folders that are used to store documents for Microsoft Dynamics CRM records.

Create site records

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the step for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Document Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings.  b. Under System, click or tap Document Management. |   3. Click or tap SharePoint Sites > New.  4. Enter the following information:   Name. Specify a descriptive and useful name for the site.   Owner. By default, you are added as the owner of the site record.   Description. Specify a description for the site. For example, specify what documents the site contains.   URL Type. Choose whether you want to add an absolute (full) or relative URL for the site.   Absolute URL. To point this site record to a site collection or site in SharePoint, specify the fully qualified URL of the site collection or site. You can use this record as a parent site to create other site records with relative URLs for sites inside the site collection or sites on the same SharePoint site.   Relative URL. Use this option when you have at least one site record pointing to a site collection in SharePoint. In the Parent Site box, select an existing Microsoft Dynamics CRM site record. If the site record that you selected as a parent site points to a site collection on SharePoint, specify the name of an existing site in the second box. If the site record that you selected as a parent site points to a site on SharePoint, specify the name of an existing subordinate site on SharePoint.   List component is installed. Click or tap this check box if the URL that you specified is a site collection on SharePoint Server 2010 or SharePoint Server 2013 and if the site collection has the Microsoft Dynamics CRM List component installed.  This check box is available only if you used the Absolute URL option.  The URL Validation section displays the validation status and the date when the URL was last validated  5. Click or tap Save.  6. To validate the URL of the site, in the Actions group, click or tap Validate. Click or tap Save and Close.  7. Click or tap Save and Close. |

Edit site records

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the step for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Document Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings.  b. Under System, click or tap Document Management. |   3. To edit a site record, on the SharePoint Sites page, select the site record, and in the Records group, click or tap Edit.  4. Click or tap Save.  5. To validate the URL of the site, in the Actions group, click or tap Validate  6. Click or tap Save and Close. |

Note

To activate or deactivate a site record, on the SharePoint Sites page, select the site record and in the Records group, click or tap Activate or Deactivate.

See Also

[Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0)

Create or edit document location records

SharePoint document locations are records in Microsoft Dynamics CRM that point to a SharePoint document library or folder.

To store documents for Microsoft Dynamics CRM records, the document libraries or folders must be in place. If Microsoft Dynamics CRM is unable to create the document libraries and folders automatically, you can manually create these in SharePoint. After you create the document libraries and folders in SharePoint, you must create document location records in Microsoft Dynamics CRM to point to these SharePoint document libraries and folders.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings. Settings appears on the nav bar.  b. Click or tap Settings, and then click or tap Document Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings, and then under System, click or tap Document Management. |   2. Click or tap SharePoint Document Locations.  3. Click or tap New.  4. Specify the following information as required:   Name. Type a name for the document location. This name displays in the location list in the entity record.   Owner. By default, you are added as the owner of this location record.   Description. Type a description for the document location.   URL Type. Select whether you want to create the location with an absolute URL or relative URL.   Select Absolute URL, and in the Absolute URL box, specify the fully qualified URL of the location of the folder in SharePoint.  - OR -   Select Relative URL. In Relative URL, to create a relative document location to the existing site or document location record, select the existing SharePoint site or document location record. In the second box, enter the name of the SharePoint folder.   Regarding. Click or tap the Lookup button . In the Look Up Record dialog box, in the Look for list, select the type of records you want to find. Search and select the record for which you want to create the location record in Microsoft Dynamics CRM, and click or tap OK.  5. Click or tap Save and Close. |

Note

To activate or deactivate a document location, on the Document Locations page, select the document location record, and click or tap Activate or Deactivate.

See Also

[Set up SharePoint document management](#z5f80809718924f50b521ef07ded65d4b)

[Create or add a location for the first time](#zee3d48e4aa0747f5ac095ee2b882dc69)

Upgrade to server-based SharePoint integration

If you’re using the Microsoft Dynamics CRM List Component to integrate SharePoint document management with CRM Online, you can upgrade to server-based SharePoint and use CRM Online with SharePoint Online. Server-based SharePoint integration provides an immersive document management experience consistent with the look and feel of Microsoft Dynamics CRM. The new integration displays the documents in the native CRM grids and users can access SharePoint actions directly from the CRM command bar. [Read more about server-based SharePoint integration](http://go.microsoft.com/fwlink/?LinkID=394413).

See Also

[Enable server-based SharePoint integration](http://go.microsoft.com/fwlink/?LinkID=394413)

[Manage SharePoint documents from within Microsoft Dynamics CRM](#z49e2abee71334e93b0fde1a16ee479c0)

[Enable document management on entities](#zac5a3303206b43b0b0a4d7346a001ba5)

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 reenter the same information.

[Create templates for articles](#zacaff4e51b6846308d7222e6f3c66e89)

[Create templates for contracts](#z8d08bb4c88044e37a15b257bd47e43f4)

[Work with mail merge templates](#z3b9afe9fcd044543998e558f61e9ebf4)

[Create or edit a campaign template in the CRM marketing work area](#z07423d4c854648e6878a6d54ecc0901f)

[Set up entitlements quickly with templates](#zdadea8f7c9314cdc881532f8c0f89b51)

See Also

[eBook: What’s new in customer service](http://go.microsoft.com/fwlink/p/?LinkID=393186)

[eBook: Use KB articles to help your customers](http://go.microsoft.com/fwlink/p/?LinkId=394983)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management > Article Templates. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Click or tap Articles Templates. |   3. To create a new article template, click or tap New.  4. In the Article Template Properties dialog box, type the new article title, select the language, and then click OK.  5. To add a section, in the Common Tasks area, click Add a Section, and specify the following:  a. In the Title box, type a title.  b. In the Instructions box, type a description of the information that users should provide in this section when they use this template.  When a user creates a new article with this template, these instructions appear in the body text for this section, and disappear when the user starts typing.  6. To reposition a section from the template, select the section you want to reposition, and in the Common Tasks area, click the green arrows to move the section to the position you want.  When you select a section, its border turns green and the border lines become solid.  7. To remove the section, select the section you want to remove, and in the Common Tasks area, click Remove a Section.  8. To edit a section, select the section you want to edit, and in the Common Tasks area, click Section Properties. Edit the title and description.  9. To format the text, font, and color of the article title, headings, and body text of each section, use the tools on the Modify toolbar.  10. When you’re done, click or tap Save or Save and close.  After you save the template, it is immediately available for use. If the template is not complete and you want to finish it later, you can save the template, deactivate it (make it ready-only), and then complete it later. When the template is complete, you can reactivate it. |

Note

If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#z14fa7a7996384036941e9ba122ed8eb9).

See Also

[Create or edit a contract](#z8b15a78733c7433cbe202c5b8f642f4b)

[eBook: Use KB articles to help your customers](http://go.microsoft.com/fwlink/p/?LinkId=394983)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management > Contract Templates. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Contract Templates. |   3. To create a new contract template, choose New.  4. Type information in the fields:  a. Name: Enter a name. When you create a new contract, this name will appear in the list of available contract templates.  b. Abbreviation: Enter an abbreviated name. The name will be displayed as the abbreviated contract template name.  c. Billing Frequency: Select how often the customer should be billed.  d. Allotment Type: Select the criteria needed to track the cases. You cannot change the allotment type for contract lines in contracts that are created from a contract template.  e. Calendar: Mark the days and times your organization offers customer support. Green dots indicate when the support is offered.  f. Contract Service Level: Select the service level that will be allocated to the customer.  g. Description: Enter a description of the template or any notes about how this template is to be used.  h. Use Discount as Percentage: If you want the discount to be calculated in a percentage, select Yes.  5. 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](#z14fa7a7996384036941e9ba122ed8eb9).

See Also

[Create or edit a contract](#z8b15a78733c7433cbe202c5b8f642f4b)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. In the Navigation Pane, click or tap Settings, click or tap Templates, and then click or tap Email Templates.  3. On the Actions toolbar, click or tap New.  4. In the Email Template Type dialog box, in the Template Type list, select the type, and then click or tap OK.  Important  If you choose a specific record type, such as lead or opportunity, the template is available only for that record type. This cannot be changed. To use the same content for another record type, create a new template.  5. On the Email Templates form, enter a Title and Subject.  6. You can type a description of the template. This is not displayed to the recipient.  7. Type the text you want to send in this message. Use the Formatting toolbar to edit the text.  Tip   Although you cannot insert images or HTML directly into 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](http://go.microsoft.com/fwlink/?LinkId=98752).   The Formatting toolbar has limited fonts and font sizes. However, you can copy and paste content from Microsoft Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press Shift+Enter.  8. To insert data fields to display information such as a customer's name or data from a quote, from a Microsoft Dynamics CRM record, click or tap Insert/Update, and then in the Data Field Values dialog box, click or tap Add.  9. In the Add Data Value dialog box, select the Record type and Field, and then click or tap OK.  10. Click or tap OK again to insert the data.  11. To enter customers' first and last names, you'll need to repeat these three data-insertion steps; first and last names are separate data values.  Tip  Use the Default Text box to define what text is displayed if the record does not have data for the field.  12. Click or tap Save or Save and Close. |

Note

 To change a shared template to a personal one or a personal template to a shared one, on the template form, on the Actions  menu, click or tap Revert to Personal Template, or click or tap Make Template Available to Organization.

 If you use an email template as a signature in another template, insert the signature template first. Otherwise, the Subject line will be overwritten.

 If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#z14fa7a7996384036941e9ba122ed8eb9).

See Also

[Work with templates](#z5aa5e6472770411db9dff1ca323e6a62)

Work with mail merge templates

You can use mail merge templates with Microsoft Office Word to create customer-ready letters, faxes, e-mail messages, and quotes.

Microsoft Office Word templates are created and edited in Microsoft Office Word, but can be uploaded to Microsoft Dynamics CRM to use with mail merge and share with other users. Only Microsoft Office Word .xml documents can be used as templates. To learn more about how to create mail merge templates, see the online Help for Microsoft Office Word.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Templates. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click Settings, click Templates. |   3. Click Mail Merge Templates.  4. To create a new mail merge template, click or tap New.  5. In the Mail Merge Templates form, enter a Name and an Associated Entity (record type).  6. You can enter a description of the template. This is not displayed to the recipient.  7. Enter the Ownership and Owner information. Use the handy tooltips as a guide.  8. If you have enabled additional languages, you can select one for the template.  9. To attach the template, click or tap Browse, search for the template on your computer, and then click or tap Attach. Only .xml documents can be uploaded.  10. When you’re done, click Save and close. |

Note

To change a personal template to a shared one, after you save the record on the template form, on the More Actions menu, click Make Available to Organization. To revert the template to a personal one, click Make Personal.

See Also

[Work with templates](#z5aa5e6472770411db9dff1ca323e6a62)

Create or edit a campaign template in the CRM marketing work area

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The 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](http://go.microsoft.com/fwlink/p/?LinkId=394794)

Save time when creating multiple campaigns by creating a campaign template. Campaign templates contain prefilled data that you specify, so you don’t have to reenter the same information for each campaign. You can either create a new campaign template or copy an existing campaign to use as a template.

Create a campaign template



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Marketing.  b. Click or tap Marketing > Campaigns. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand Marketing, and then click or tap Campaigns. |   2. Click or tap New Template.  - OR -  Open the campaign you want to edit.  3. Add information in the template form just as you do when creating a campaign. In the template form, enter the information you want to appear in campaigns based on this template, and add items such as planning tasks, campaign activities, and marketing lists.  4. Click or tap Save or Save and Close. |

Copy an existing campaign as a template



|  |
| --- |
|  Open the campaign that you want to copy. Click or tap Copy as Template, type a name for the template, and click or tap Save. |

If you need to back up your templates, or use them in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#z14fa7a7996384036941e9ba122ed8eb9)

See Also

[Get started with CRM marketing](#zaa14c110056b4eddb8dfb1eae71a1ccb)

[Create a marketing list in the CRM marketing work area](#z509b776a69324c87881a353782c95beb)

[Create or edit a campaign in the CRM marketing work area](#z84763cb4b0c9465986ce7d980a57faea)

[Create a quick campaign in the CRM marketing work area](#zff906069cba845cd93e82b517c1d89d2)

[Add an activity to a campaign in the CRM marketing work area](#z8b0e36fe695d44bb9fe3de3819bc894d)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#z7811de7faf814d3ca365700730290471)

[Track a campaign response in the CRM marketing work area](#z1bf875ef5d8344f68b5c67f7e3286e7c)

[Microsoft Dynamics Marketing Help Center](http://go.microsoft.com/fwlink/p/?LinkId=394794)

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

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  b. Choose Settings > Service Management.  c. Choose Entitlement Templates. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization, and then choose Settings > Business > Service Management.  b. Choose Entitlement Templates. |   3. 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.  4. Type or modify information in the text boxes.  Hovertips provide hints about what to enter.   Entitlement Template Name   Start Date. Select the date from which the entitlement will be valid.   End Date. Select the date until which the entitlement will be valid.   Restrict based on entitlement terms. To restrict creating case when the entitlement term is over, select Yes. Otherwise, Select No.   SLA. Select an SLA record to associate the service levels or key performance indicators for the support you are providing with this entitlement.  Under Entitlement Terms, specify the term details for the entitlement.   Allocation Type. Select whether the entitlement is for number of hours or number of cases.   Decrease Remaining On. Select whether to decrease the remaining term on case creation or resolution.   Total Term. Specify the total amount of support the customer is entitled for with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total term, then the customer is entitled for support up to 100 cases.  5. Choose 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)](#z75c6bab854d84410b210003953aa4b53)

[Create an entitlement to define the support terms for a customer](#z9384cb0a64ec424dbf737010997c4d4e)

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 CRM for Outlook, only one mail merge can be run at a time. If you receive the message "Microsoft Dynamics CRM Mail Merge is already running" and want to discontinue a mail merge, close and then reopen Microsoft Office Word or Internet Explorer.

To use mail merge, your email format must be HTML.

Record types that use mail merge:

 Account

 Campaign

To use mail merge with a campaign, you must first distribute a mail campaign activity to a selected marketing list.

 Contact

 Lead

 Opportunity

 List Member in Marketing List

 Quick Campaign

In CRM for Outlook, you can create a mail merge, and then at the end of the process, create a quick campaign.

 Quote

With mail merge, you can print only one quote at a time.

Create a mail merge document

|  |
| --- |
| 1. In CRM for Outlook, open the list of records you want.  Tip  This list can be the results of an [Advanced Find search](http://www.microsoft.com/en-US/dynamics/crm-customer-center/create-edit-or-save-an-advanced-find-search.aspx).  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.  5. 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](#z3b9afe9fcd044543998e558f61e9ebf4)  6. If necessary, you can add or delete data fields.  Microsoft Office Word supports up to 62 data fields, of which CRM for Outlook reserves two data fields to store the primary key and the record owner.  7. Click or tap Download.  Microsoft Dynamics CRM automatically opens a Word document. You may need to select Microsoft Office Word in the task bar.  This is not your mail-merge document. This is an interim page.  8. In the Mail Merge Recipient dialog box, verify that the list is accurate, and then click or tap OK.  9. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation for mail merge.  Tip   To display the information you want and select the format, in the Mail Merge wizard, click or tap Address Block and then Greeting Line.   To add data fields to display more information, click or tap More Items. You can use up to 62 data fields.  10. If you have either created a new template or updated an existing template, you can upload the template.   To save the document as a template, on the Complete the merge pane, click or tap Upload Template to CRM.  11. If you have saved the document as a template, you can go back and edit the template with Settings > Business > Templates. Click or tap your template to review and edit it. |

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Work with templates](#z5aa5e6472770411db9dff1ca323e6a62)

[Send bulk email to customers](#z4d2fe05b99a449b5a6c957d15df30f3b)

Go mobile

Get started with CRM for phones

Microsoft Dynamics CRM for phones is the essential business tool to help you stay connected and productive wherever you are. Stay up to date with your customer info—even when you’re on the go. Arrive prepared for every appointment, and update your notes, tasks, contacts, accounts, leads, and opportunities while the details are still fresh in your mind.

You can do the following with the CRM for phones app:

 See your CRM data quickly displayed and optimized for a mobile screen.

 Add and modify contacts, tasks, and notes as well as other relevant sales data.

 View activity feeds and see addresses on Bing Maps (Windows Phone only).

 Get back to recently viewed records even when you’re not connected (Windows Phone only).

You can also access your CRM data with your phone’s browser, but the CRM for phones app makes your data easier to view and edit.

The following articles provide more information about how to install and use CRM for phones:

 [Install the CRM for phones app](#zdd360ed207ec420185ef7e1654ae91f9)

 [Take a tour of CRM for phones](#zc6c278e70e604097a4b2ca02c774b688)

 [eBook: Go mobile with CRM for phones](http://go.microsoft.com/fwlink/p/?LinkId=395076)

See Also

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[Information for admins: Set up CRM for phones](http://go.microsoft.com/fwlink/p/?LinkID=327922)

[Create and edit mobile forms](http://go.microsoft.com/fwlink/p/?LinkID=320373)

Install the CRM for phones app

While on the go, you can use Microsoft Dynamics CRM 2013 on your mobile phone with the CRM for phones app.

Before you can use the app, you need to check to make sure your CRM 2013 admin has set up CRM for phones for you. Your admin might have provided you with instructions on how to install and start the app, but if not, you can use these instructions.

Install CRM for phones

If your admins have told you to download the CRM for phones app, click the link in the following table for your phone. The link will take you to the app in your phone’s app store.

|  |  |
| --- | --- |
| Phone | App link |
| Windows Phone | [Windows Store](http://go.microsoft.com/fwlink/p/?LinkID=328765) |
| Apple iPhone | [Apple App store](http://go.microsoft.com/fwlink/p/?LinkID=328968) |
| Android phone | [Google Play](http://go.microsoft.com/fwlink/p/?LinkID=328969) |

Start CRM for phones



|  |
| --- |
| 1. Open the CRM for phones app.  2. On the Get Started screen, type your company’s CRM web address.    3. Tap Go to continue. |

Having trouble with your app?

If you’re having trouble with your CRM for phones app, it’s a good idea to contact your IT department. If you want to do some troubleshooting on your own, try these resources:

 If your app isn’t working well on your phone, be sure to check the compatibility information in [Mobile phone support for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](http://go.microsoft.com/fwlink/p/?LinkId=393101).

 For specific problems and error messages, see [Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134).

See Also

[Get started with CRM for phones](#z8a3167c5a3194954aa893682fdf26b78)

[Take a tour of CRM for phones](#zc6c278e70e604097a4b2ca02c774b688)

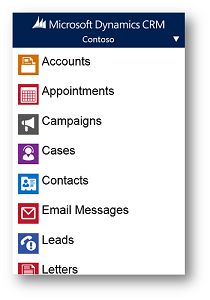
[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for phones: Information for admins](http://go.microsoft.com/fwlink/p/?LinkID=327922)

Take a tour of CRM for phones

If you’re new to Microsoft Dynamics CRM for phones, check out this quick tour to see how to navigate or work in the app.

When you first open CRM for phones, you’ll see a list of record types such as accounts, contacts, and leads.



Follow the instructions here to navigate, search, and do other common tasks.

On this page:

[Use Cortana on Windows 8 phones](#z88)

[Display a list of records](#z89)

[Search for records from a list](#z90)

[Search for records from a lookup field](#z91)

[Change the current view](#z92)

[Start a call or email](#z93)

[Mark activities complete](#z94)

[Add an attachment to a record](#z95)

Use Cortana on Windows 8 phones

You can speak your CRM for phones commands if you are using Cortana on Windows 8 phones.

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

You can use the following commands with Cortana:

|  |  |  |
| --- | --- | --- |
| To do this | Say this | Examples |
| Open an entity | CRM open (or show or show me) <entity type> called (or named) <record name> | CRM open contact named Maria Campbell.  CRM show contact called Maria Campbell.  CRM show me my active accounts. |
| Search for an entity | CRM find <entity> called (or named) <name> | CRM find activity called write proposal.  CRM find activity named write proposal. |
| Open a contact | CRM open (or show me or show) contact called <contact name> | CRM open contact called Maria Campbell.  CRM show me contact called Maria Campbell.  CRM show contact called Maria Campbell. |
| Create a new entity | CRM create (or add new) <entity type> called (or named) <record name> | CRM create contact called Maria Campbell.  CRM add new contact named Maria Campbell. |
| Create a phone call | CRM remind me to call <call name> | CRM remind me to call Maria Campbell to set up appointment. |
| Create a task | CRM remind me to follow up with (or remind me to or follow up) <task name> | CRM remind me to follow up with quote for Maria Campbell.  CRM remind me to send quote to Maria Campbell.  CRM follow up send quote to Maria Campbell. |
| Create an appointment | CRM schedule meeting to <subject> | CRM schedule meeting to discuss quote with Maria Campbell. |
| Open task list | CRM what should I do next? | CRM what should I do next? |

For more information about using Cortana, see [Meet Cortana](http://www.windowsphone.com/en-us/how-to/wp8/cortana/meet-cortana).

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



|  |
| --- |
| 1. Tap the Search button  at the bottom of the screen. Enter text to search.    2. Tap the Search button . |

Search for records from a lookup field



|  |
| --- |
| 1. 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.    Initially, 10 records display. Scroll down to retrieve more records. |

Start a call or email



|  |
| --- |
|  Tap a phone number or email address to start a call or launch your email app. |

Mark activities complete

Follow the steps for the app you’re using.

Windows Phone

|  |
| --- |
|  On a Windows Phone, tap the check button. |

iPhone or Android phone

|  |
| --- |
|  On an iPhone or Android, tap the more button, and then tap MarkActivityAsComplete. |

Add an attachment to a record



|  |
| --- |
|  Tap the attachment button and select the document, picture, or other item that you want to attach. |

Use additional features in the Windows Phone app

The CRM for phones app for Windows Phone includes the following added features:

 Activity feeds

 Record panorama (you can swipe to view additional information or related records)

 Offline experience (you can see recently viewed data while disconnected from the network, but you can’t edit it)

 Ability to synchronize customizations by clearing the local cache

View activity feeds



|  |
| --- |
|  Tap what’s new and view the posts. |

Use the record panorama



|  |
| --- |
|  To view additional information, swipe left and right. |

Synchronize customizations by clearing the local cache



|  |
| --- |
| 1. From time to time, your CRM administrator might make changes to the system. While the app will automatically check for changes every eight hours or so and synchronize them, you can manually start a synchronization if you need it sooner. To synchronize customizations to the app, tap the gear button on the home page.    2. Tap clear local cache. |

See Also

[eBook: Go mobile with CRM for phones](http://go.microsoft.com/fwlink/p/?LinkId=395076)

[Get started with CRM for phones](#z8a3167c5a3194954aa893682fdf26b78)

[Install the CRM for phones app](#zdd360ed207ec420185ef7e1654ae91f9)

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for phones: Information for admins](http://go.microsoft.com/fwlink/p/?LinkID=327922)

Get started with CRM for tablets

Access your Microsoft Dynamics CRM data on the go with the Microsoft Dynamics CRM for tablets app. You can easily look up records, edit them, create new ones, and keep in touch with colleagues. Click these links to get started with installing and using CRM for tablets.



[Install the CRM for tablets app](#z7dc8f57ece1040a9a827ae0fe13f0b93)

[View a list of supported tablets](http://go.microsoft.com/fwlink/p/?LinkId=393276)

[Take a tour of CRM for tablets](#z8e4137453677443baafdcf4bf38225d3)

[Track customer service status on the go with CRM for tablets](#z46f0311dd7e749fc925f8a85f781b433)

[Work offline with CRM for tablets](#zb1055e0788684a79a1c4699ffa7a649f)

[Sign out or reconfigure CRM for tablets](#z15bd88e8dd0d4f4c8402c33fc5b20a16)

See Also

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for tablets information for admins](http://go.microsoft.com/fwlink/?LinkId=391413)

[Troubleshoot a CRM for Windows 8.1 app start-up error](#z66361a6d4cac40a0acf495669a2ae97b)

Install the CRM for tablets app

While on the go, you can use Microsoft Dynamics CRM 2015 on your mobile device with the Microsoft Dynamics CRM for tablets app. Before you can use the app, you need to check to make sure your CRM 2015 admin has set up CRM for tablets for you. Your admin might have provided you with instructions on how to install the app, but if not, you can use these instructions to download the app from your tablet’s app store.

On this page:

[Review the list of supported tablets](#z97)

[Install CRM for tablets](#z98)

[Start the app](#z99)

[Having trouble with your app?](#z100)

Review the list of supported tablets

Before installing the app, it’s important to determine if the app is supported on your tablet. More information: [Tablet support for Microsoft Dynamics CRM 2015 and CRM Online](http://go.microsoft.com/fwlink/p/?LinkId=393276)

Install CRM for tablets

To install the CRM for tablets app on your tablet, click the link in the following table for your tablet. The link will take you to the app on your tablet’s app store.

|  |  |
| --- | --- |
| App | App link |
| Microsoft Dynamics CRM for Windows 8.1 | [Windows Store](http://go.microsoft.com/fwlink/p/?LinkID=%20392776) |
| Microsoft Dynamics CRM for Windows 8 | [Windows Store](http://go.microsoft.com/fwlink/p/?LinkID=313642) |
| Microsoft Dynamics CRM for iPad | [Apple App store](http://go.microsoft.com/fwlink/p/?LinkID=313645) |
| Microsoft Dynamics CRM for Android | [Google Play](http://go.microsoft.com/fwlink/p/?LinkID=392774) |

The Windows 8.1 app only works on Windows 8.1, but either the Windows 8 or the Windows 8.1 app works on Windows 8.1 tablets.

If your organization has an on-premises deployment of CRM, you need to make sure that your organization is ready for you to install the Windows 8.1 app before you install it. More information: [Troubleshoot a CRM for Windows 8.1 app start-up error](#z66361a6d4cac40a0acf495669a2ae97b)

Start the app



|  |
| --- |
| 1. Open the CRM for tablets app.  2. On the Let’s get set up! screen, enter your company’s CRM web address.    3. Choose the Arrow button in the lower right corner to continue. |

Having trouble with your app?

If you’re having trouble with your CRM for tablets app, it’s a good idea to contact your IT department. If you want to do some troubleshooting on your own, try these resources:

 If your app isn’t working well on your tablet, be sure to check the compatibility information in [Tablet support for Microsoft Dynamics CRM 2015 and CRM Online](http://go.microsoft.com/fwlink/p/?LinkId=393276).

 If you have installed the Windows 8.1 app and your organization has an on-premises CRM deployment, see [Troubleshoot a CRM for Windows 8.1 app start-up error](#z66361a6d4cac40a0acf495669a2ae97b).

 For all other problems, see [Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134).

See Also

[Get started with CRM for tablets](#zd064b214e190411e954068355c3af6e2)

[Tablet support for Microsoft Dynamics CRM 2015 and CRM Online](http://go.microsoft.com/fwlink/p/?LinkId=393276)

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for tablets: Information for admins](http://go.microsoft.com/fwlink/?LinkID=317906)

[Work offline with CRM for tablets](#zb1055e0788684a79a1c4699ffa7a649f)

[Troubleshoot a CRM for Windows 8.1 app start-up error](#z66361a6d4cac40a0acf495669a2ae97b)

Take a tour of CRM for tablets

The Microsoft Dynamics CRM for tablets app is the best way to view CRM data on a tablet. The app is intuitive and uses familiar tablet gestures, but this tour offers useful tips about the CRM for tablets app that you might not know.

When you first open CRM for tablets and sign in, you’ll see your home page for CRM for tablets, which provides a quick overview of your CRM data, including different views and charts.

Follow the instructions here to navigate, search, and do other common tasks.

On this page

[Navigate the dashboard](#z101)

[Switch to a different dashboard](#z102)

[Search for records](#z103)

[Pin tiles to your Home screen and create a communication card](#z104)

[Work with grids](#z105)

[Work with charts](#z106)

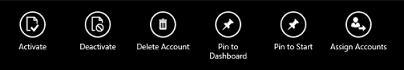
[Limitations](#z107)

Navigate the dashboard

Navigation is intuitive, and it’s easy to view or create new records from the dashboard. Here are a few quick tips.

Display the command bar

You can add a new record, change views, or do other tasks from the command bar.



Follow the steps for the app you’re using.

Windows 8 app and Windows 8.1 app

|  |
| --- |
|  Swipe up from the bottom of the screen. |

iPad app and Android app

|  |
| --- |
| 1. Tap the More Commands button … on the bottom right of the screen. |

The command bar is context-sensitive, and the available commands change depending on where you are in the app. When you display the command bar for a specific record, the available commands are relevant to that record.

Display the command bar for a specific record or from a list or grid

|  |
| --- |
|  Press and hold the record or the list or grid header. |

Display the nav bar

The nav bar gives you a full list of the record types you can view.



|  |
| --- |
|  Tap the List button on the top left corner of the screen. |

Work with records on the dashboard

|  |  |
| --- | --- |
| To do this: | Do this: |
| View all the records for a record type on the dashboard, for example Leads. | Tap the header of the list. |
| Open the form for a record on the dashboard. | Tap the record. |
| Create a new record from the dashboard. | Tap the New Item button + on the right side of the header of the type of record you want to create (for example, My Activities). |

Change views for a list on the dashboard



|  |
| --- |
| 1. Press and hold the name of the list to display the command bar.  2. To select a different view, tap the Select View button on the command bar. |

View activities and mark them complete

On the dashboard, if your admin chose to put it there, My Activities shows your activities that are past due or due today in a darker color than those that aren’t.

Mark an activity complete

|  |
| --- |
|  Tap the check box next to the activity in the list to mark it complete. |

Create or edit stakeholders or sales team members

On the dashboard, Stakeholders and Sales Team allow you to look up or create a new stakeholder or sales team member without leaving the dashboard.

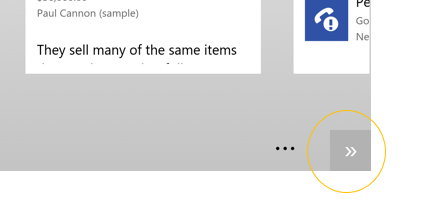


|  |
| --- |
| 1. In Stakeholders or Sales Team, tap the New Item button +.  2. Enter a contact name to look up in the dropdown that appears in the simple list.  3. Either select from the contacts that appear or, if it’s a new contact, tap the Add button and complete the information in the form that appears.  4. Select a role for the contact. |

Navigating on Android tablets

Navigation on Android tablets is a little different than on iPad or Windows 8 tablets.

When you scroll on an Android tablet by swiping left or right, the app scrolls a whole page at a time instead of a partial page. You can also use the arrow buttons at the bottom of the screen to scroll left or right.



Depending on where you are in the app, the Android Back button takes you to the previous form, cancels dialog boxes or error messages, closes the keyboard, or performs other actions depending on context.

Switch to a different dashboard

In CRM 2015, you can use different dashboards in CRM for tablets. In previous versions, you could only use the Sales dashboard.

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Switch to a different dashboard

|  |
| --- |
| 1. Choose the menu button to open the nav bar.  2. Choose Dashboards.  3. Choose the dashboard you want to use. |

Return to your home screen

|  |
| --- |
|  Tap the Home button at the top left of the screen. |

To create new dashboards in CRM and enable them for use on CRM for tablets, see [Create a dashboard](http://go.microsoft.com/fwlink/p/?LinkId=513317).

Search for records

To quickly find your records in Microsoft Dynamics CRM for tablets, you can search across multiple record types (up to 10) at once.

Start a search



|  |
| --- |
| 1. Tap the Search button  in the upper right corner of the screen.  2. Type one or more characters in the search box.  3. Tap the Search button next to the search box.  The search results include only records that begin with the letters you type. For example, if you want to search for “Alpine Ski House”, type alp in the search box; if you type ski, the record won’t show up.      Important  Although you can use wildcard characters in your search (such as \*ski), it’s best to avoid wildcards due to possible performance issues. |

Filter search results



|  |
| --- |
|  To filter results by one record type, on the search screen choose a record type from the Filter with: drop-down box.     To search against all record types, choose None in the Filter with: drop-down box |

Pin tiles to your Home screen and create a communication card

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 of Windows 8 tablets.

With Microsoft Dynamics CRM 2015, you can also pin dashboards to your Home screen or to the Start screen of Windows 8 tablets.

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

Pin a tile

|  |
| --- |
| 1. To pin a tile from a grid or list, press and hold the item you want to pin to show the command bar. To pin a tile from a record form, swipe up from the bottom on Windows 8 tablets or tap the More button on iPad or Android tablets to show the command bar.  2. Tap Pin to Home on the command bar. The item appears as a tile in the Pinned Tiles section of your Home screen. |

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.

Create a communication card from a pinned tile

|  |
| --- |
| 1. Press and hold a contact or user tile that is pinned to the dashboard.  2. Tap Larger on the command bar. The contact information becomes a communication card. |

Work with grids

Resize columns in a grid

You can resize columns in a grid, and the CRM for tablets app will remember your settings the next time you view that grid. Follow the steps for the app you’re using.

Windows 8 app or Windows 8.1 app

|  |
| --- |
| 1. Swipe up from the bottom to open the command bar.  2. Tap Resize Columns.  3. Drag the column handles that appear above the form to the width you want. |

iPad app or Android app

|  |
| --- |
| 1. Tap the More Commands icon on the bottom right of the screen to open the command bar.  2. Tap Resize Columns.  3. Drag the column handles that appear above the form to the width you want. |



Sort a grid



|  |
| --- |
|  To sort in ascending order by a column, tap that column’s header.   To sort in descending order, tap the column’s header again. |

Work with charts

Drill through to see the records for a chart



|  |
| --- |
|  To see the records that represent a certain part of a chart, tap that section of the chart.       To see all records for the chart, tap the area surrounding the chart.       Tap any of the records to display its form. |

Note

You can see charts alongside a list only if you tap a chart from the sales dashboard. You can’t display a chart to appear next to a list if you don’t start from a chart on the dashboard.

Change the chart view



|  |
| --- |
| 1. Tap Select View button on the command bar.      2. Tap the view you want. |

Change the chart to display



|  |
| --- |
| 1. Tap Select Chart on the command bar.  2. Tap the chart you want to display. |

Limitations

The following features in the web application aren’t available in CRM for tablets:

 Yammer and activity feeds

 Bing Maps integration

 SharePoint document libraries

 Custom web resources and iFrames

However, if you need to use these features or want to view a record in the web application, you can do that in your tablet’s browser.



|  |
| --- |
| 1. Press and hold the record or view you want to see.  2. Tap Open in browser.  3. Sign in to the web application when it appears. The web app goes right to the record that you were working on in the CRM for tablets app. |

See Also

[Install the CRM for tablets app](#z7dc8f57ece1040a9a827ae0fe13f0b93)

[Get started with CRM for tablets](#zd064b214e190411e954068355c3af6e2)

[Work offline with CRM for tablets](#zb1055e0788684a79a1c4699ffa7a649f)

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for tablets information for admins](http://go.microsoft.com/fwlink/?LinkId=391413)

Track customer service status on the go with CRM for tablets

As a Customer Service Manager, use the Microsoft Dynamics CRM for tablets app to keep track of activities in your customer service organization while on the go. The app's dashboard lets you track your team's performance, monitor high priority cases, and route cases from your tablet.

You can set up your dashboard to see the data that is most useful to you. More information: [Customize CRM for tablets](http://go.microsoft.com/fwlink/p/?LinkId=397960)

Pin your most important cases to your dashboard

Keep urgent cases at your fingertips by pinning them to the Pinned Tiles area of your dashboard.



|  |
| --- |
| 1. Press and hold the case.  2. On the command bar, tap Pin to Dashboard. |

Open a case in the web app to work on it in more detail

If you need to perform more actions on a case than you can in the CRM for tablets app, you can easily open the case in your browser.



|  |
| --- |
| 1. On the case screen, open the command bar.  2. Tap Open in browser.  3. Sign in to the web application when it appears. The web app goes right to the case you had open in the CRM for tablets app. |

Differences in the customer service area between CRM for tablets and the web app

The CRM for tablets app is optimized for Customer Service Managers who are always on the move and need to keep track of activities in their customer service organization. Due to these optimizations, the service areas in the CRM for tablets app have a different appearance and functionality than the web app in some cases, as shown in the following table:

|  |  |
| --- | --- |
| Web app feature | Difference in CRM for tablets app |
| Merge cases | Not available. |
| KB article lookup | Not available (appears as locked in the app). |
| Queue filter in Queue Items list | Not available. However, you can change the view so that it filters items by queues. More information: [Customize CRM for tablets](http://go.microsoft.com/fwlink/p/?LinkId=397960) |
| Queue Item Details button on forms for items that you can route to a queue; for example, cases | Not available. |
| Similar Cases area on the case form | Not available. |
| Customer contact card on the case form | Tap the customer name on the case form to view the customer record and contact card. |
| Case origin icons on the Cases list | The Cases list shows the list of cases without the icons. The case origin appears on the individual case form. |
| Subject lookup in Case Details area | Instead of selecting from a tree view, type in letters to start a search. |
| Find Case step in Identify, Similar Cases step in Research, and Resolve Case step in Resolve case business process flow | These actions do not appear in the case process. However, to resolve a case, you can use Resolve in the command bar. |
| Entitlement lookup | You can’t filter results in entitlement lookup. |

See Also

Service best bets

[Get started with service management](#zfbf7f81b5c9240a58579711027c4d8ad)

Work offline with CRM for tablets

When you’re on the go and can’t connect your tablet to the Microsoft Dynamics CRM server, you can still access cached data (data you’ve recently accessed) with Microsoft Dynamics CRM for tablets.

With Microsoft Dynamics CRM 2015 and the most recent CRM for tablets apps, you can also create new records like accounts, contacts, and activities as drafts. Once you reconnect, you need to review and save your drafts into the CRM system.

Charts aren’t available offline, and some images might also be unavailable. To remind you that you’re working offline, CRM displays an offline indicator on the left side of the screen.

Note

Cached data is not encrypted. You can use BitLocker to encrypt the entire hard drive on a Windows 8 device.

In this topic:

[Reconnect after working offline](#z108)

[Sign in while disconnected](#z109)

[Work offline with on-premises CRM deployments](#z110)

Reconnect after working offline

If you create any records while you are disconnected, CRM for tablets saves them as drafts. If you have any drafts when you reconnect after working offline, CRM for tablets prompts you with a message telling you that you have unsaved drafts. You’ll need to review and save your drafts to make them available to CRM. Any drafts that you do not manually save will only be available on your tablet.

Reconnect to the CRM server

|  |
| --- |
|  When the connection to the Microsoft Dynamics CRM server is available, tap the offline indicator on the left side of the screen and then tap the Reconnect link. |

Create records while offline

|  |
| --- |
| 1. On a dashboard, tap the Add button + at the top of the list for the type of record you want to create.  OR  a. On the Home screen, swipe up to open the command bar (on Android and iPad tablets, tap the More button on the bottom right of the screen).  b. Tap New Record.  c. Choose the type of record you want to create. |

Review and save drafts

|  |
| --- |
| 1. Tap the Menu button on the top left corner of the screen to open the nav bar.  2. Tap Drafts.  3. On the Draft Records screen, select each record individually, review the record and make any necessary changes, and tap Save. |

Note

Keep the following limitations in mind when creating draft records while you’re offline:

 While offline, you can only create new records. To edit existing records, you need to be connected. You can edit records that you created while you were offline, however.

 You can only create records offline with the Quick Create form, not the full form, so you can only enter information into fields that are available with the Quick Create form.

 While disconnected, you can only create standalone records or associate records to those that are cached on your tablet for offline access. For example, you can create an opportunity for an account only if that account was created before you went offline and if it’s cached for offline access. You can’t create an account while offline and then create an opportunity for that account.

 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.

Sign in while disconnected

When your current session expires, you need to sign back in to CRM. If this happens while you’re disconnected, and if you tap the Back button on the sign-in page, you’ll still be able to work in offline mode on iPad and Windows 8 tablets until you can reconnect. On Android tablets, however, you can no longer work in offline mode and will be redirected to the configuration page until you can reconnect and sign in again.

Work offline with on-premises CRM deployments

If you’re using your CRM for tablets app with Microsoft Dynamics CRM 2015 (on-premises), you can continue to use CRM for tablets while disconnected. However, with the Windows 8 app, once you close CRM for tablets (like when you start another app), you will be unable to use CRM for tablets until you can connect to the Internet. With the Windows 8.1 app, you can continue to access your data even if you close the app.

Note

Before installing the Windows 8.1 app, you need to make sure that your organization is ready for you to install it. If your organization isn’t ready, you can still use the Windows 8 app on a Windows 8.1 tablet. More information: [Troubleshoot a CRM for Windows 8.1 app start-up error](#z66361a6d4cac40a0acf495669a2ae97b)

See Also

[Get started with CRM for tablets](#zd064b214e190411e954068355c3af6e2)

[Take a tour of CRM for tablets](#z8e4137453677443baafdcf4bf38225d3)

[Install the CRM for tablets app](#z7dc8f57ece1040a9a827ae0fe13f0b93)

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for tablets information for admins](http://go.microsoft.com/fwlink/?LinkId=391413)

Sign out or reconfigure CRM for tablets

If you share a tablet with another person, or if you need to sign in to a different organization (for example, if you need to sign in to a test installation), you don’t have to uninstall and reinstall the Microsoft Dynamics CRM for tablets app. You can use either the sign out or the reconfigure options instead.

Applies to

For Microsoft Dynamics CRM Online organizations, this feature is available if you've applied product updates for CRM Online Spring '14, or if you’ve installed the CRM Online 2015 Update.  
  
For on-premises CRM organizations, this feature is available if you've installed CRM 2013 Service Pack 1, or if you’ve updated to CRM 2015.  
Interested in getting this feature? More information:  [Find your CRM administrator or support person](http://go.microsoft.com/fwlink/p/?LinkID=513070)  You also need the latest versions of the Microsoft Dynamics CRM for tablets apps.

Sign out of the CRM for tablets app

Windows 8 or Windows 8.1 apps

|  |
| --- |
| 1. Swipe in from the right to open the command bar.  2. Tap Settings.  3. Tap Sign Out. |

iPad or Android apps

|  |
| --- |
| 1. Tap the More Commands icon on the bottom of the screen to open the command bar.  2. Tap Settings.  3. Tap Sign Out. |

You can sign in again as the same or different user, or you can sign in to a different organization.

Reconfigure the CRM for tablets app

Windows 8 or Windows 8.1 apps

|  |
| --- |
| 1. Swipe in from the right to open the command bar.  2. Tap Settings.  3. Tap Reconfigure. |

iPad or Android apps

|  |
| --- |
| 1. Tap the More Commands icon on the bottom of the screen to open the command bar.  2. Tap Settings.  3. Tap Reconfigure. |

You can now sign in to a different server or organization.

What’s the difference between sign out and reconfigure?

Sign out

Signing out deletes data and authentication tokens from the cache, and it also deletes cookies on iPad and Android tablets. Signing out does not delete metadata. This means that if a user signs in again after signing out, a metadata sync is not required before using the application again, which can save a few minutes when you sign in.

Caution

CRM for tablets makes a best effort to delete data and authentication tokens from the cache; it is not guaranteed that this will occur in every situation.

Reconfigure

Reconfiguring deletes all data and metadata from the cache.

If you sign out from one organization and sign in to another, and use the Reconfigure option on the second one, your metadata will still remain for the first organization. If you want to remove your metadata from the first one, you’ll need to sign in to it and use the Reconfigure option there, as well.

Caution

CRM for tablets makes a best effort to delete data and metadata from the cache; it is not guaranteed that this will occur in every situation.

Note about pinned tiles

If you’re using a Windows 8 or Windows 8.1 tablet and had pinned tiles to your Start screen, those tiles will remain whether you use the Sign Out or Reconfigure option. These tiles will only work for users who have access to that record or view, however. For example, if you sign in as user1 from org1 and pinned a tile to Start, someone who signs in as user2 from org2 and taps that tile will receive an error message saying the record isn’t available.

See Also

[Get started with CRM for tablets](#zd064b214e190411e954068355c3af6e2)

[Install the CRM for tablets app](#z7dc8f57ece1040a9a827ae0fe13f0b93)

[Work offline with CRM for tablets](#zb1055e0788684a79a1c4699ffa7a649f)

[Known issues for CRM for tablets and phones](http://go.microsoft.com/fwlink/p/?LinkID=393134)

[CRM for tablets information for admins](http://go.microsoft.com/fwlink/?LinkId=391413)

Admin and troubleshooting for CRM for phones and tablets

Customize CRM for phones

You can select which entities are available to Microsoft Dynamics CRM for phones users. For each entity, you can define which attributes are available on the form for the entity.

Edit the entity to show or hide it in CRM for phones. For more information, see [Create and edit entities](http://go.microsoft.com/fwlink/?LinkID=320372) in the Customization Guide.

Edit the mobile form to select which fields you want to display and in what order you want them to appear. For more information, see [Create and edit mobile forms](http://go.microsoft.com/fwlink/?LinkID=320373) in the Customization Guide.

You can also define who has permission to use CRM for phones by setting the CRM for phones privilege. All default security roles include this privilege. If a user's security role gives them access to an entity in Microsoft Dynamics CRM, they have the same permission in CRM for phones. For more information, see [Create or edit a security role](http://go.microsoft.com/fwlink/?LinkID=317684).

Troubleshoot a CRM for Windows 8.1 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.

|  |  |
| --- | --- |
| Users: | Install and use the [Windows 8 app](http://go.microsoft.com/fwlink/p/?LinkID=313642) instead, and notify your CRM administrator that you received this error. |
| Admins: | To enable the CRM for Windows 8.1 app, you need to make some configuration changes. More information: [Get your on-premises deployment ready for CRM for Windows 8.1 tablets](http://go.microsoft.com/fwlink/p/?LinkId=393127) |

See Also

[Install the CRM for tablets app](#z7dc8f57ece1040a9a827ae0fe13f0b93)

[Get started with CRM for tablets](#zd064b214e190411e954068355c3af6e2)

[Troubleshooting and things to know about CRM for tablets](http://go.microsoft.com/fwlink/?LinkId=393134)

Set up and use CRM for Outlook

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. CRM for Outlook can also provide access to CRM data while you’re offline. More information: [Do your CRM work in Outlook](#z110d41043f0140ca8247ec7f42287560)

Important

To install and use CRM 2015 for Outlook, your organization must be running Microsoft Dynamics CRM Server 2015.

Step 1: Review installation prerequisites

Log on as a Local Administrator

|  |
| --- |
|  To install CRM for Outlook, you must be able to log on to your computer as a user with Local Administrator privileges.  In smaller companies, CRM for Outlook is often installed manually, on a computer-by-computer basis. Administrators or individual users who have Local Administrator privileges and who possess a general familiarity with installing software can do these installations. |

Review software requirements

|  |
| --- |
|  [Get information on software requirements](http://go.microsoft.com/fwlink/p/?LinkID=510486) |

Review hardware and network requirements

|  |
| --- |
|  [Get information on hardware and network requirements](http://go.microsoft.com/fwlink/p/?LinkID=510493) |

Install updates

|  |
| --- |
|  Before you install CRM for Outlook, make sure you have all the latest Microsoft Office updates, including all security updates from Microsoft Update. [Go to Microsoft Update](http://go.microsoft.com/fwlink/p/?LinkId=165705). |

Verify permissions

|  |
| --- |
|  To install CRM 2015 for Outlook, you must have the appropriate security permissions. [Learn about permissions](http://go.microsoft.com/fwlink/p/?LinkId=510526). |

Step 2: Download the software

Before you or your users install CRM 2015 for Outlook, please note the following:

 Make sure you have completed your desired CRM customizations. If your users will use CRM 2015 for Outlook in offline mode, for best performance, enable only the minimum required record types (entities) and views for offline use. [See the Customization Guide for more information](http://go.microsoft.com/fwlink/p/?LinkID=394763).

 Group Policy Folder Redirection with offline files is not supported in CRM for Outlook. If your CRM data is stored with redirected offline files, users may be unable to use CRM for Outlook. More information: [Group Policy Folder Redirection](http://go.microsoft.com/fwlink/p/?LinkID=397989)

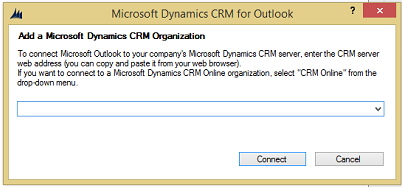
 For synchronization to work correctly, we recommend that you turn on Cached Exchange Mode in Outlook. More information: [Turn Cached Exchange mode on or off](http://go.microsoft.com/fwlink/p/?LinkID=512447)

Download the software

|  |
| --- |
| 1. In the CRM user interface, choose Get CRM for Outlook on the message bar.    2. If you see one or more Security Warning dialog boxes, choose 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, choose Copy to copy your organization’s URL to your computer’s Clipboard. You’ll paste this URL in the Configure step below.  4. Choose 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 choose Next.  7. Do one of the following:   To install CRM for Outlook without offline capability, choose Install Now.   To install CRM for Outlook with offline capability, choose Options, select the Offline Capability check box on the Customize Installation page, and then choose Install Now. If you don’t install offline capability during installation, you can add it later by clicking Go Offline in CRM for Outlook.  Important  If 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](http://go.microsoft.com/fwlink/p/?LinkID=399355)  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 Download the software step above, and then choose 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 again, in the Windows 8 Start screen, search for Configuration Wizard and run it. In earlier versions of Windows, choose Start > All Programs > Microsoft Dynamics CRM, and then choose Configuration Wizard. |

Step 4: Read about privacy

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

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. CRM for Outlook can also provide access to CRM data while you’re offline. More information: [Do your CRM work in Outlook](#z110d41043f0140ca8247ec7f42287560)

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

Log on as a Local Administrator

|  |
| --- |
|  To install CRM for Outlook, you must be able to log on to your computer as a user with Local Administrator privileges.  In smaller companies, CRM for Outlook is often installed manually, on a computer-by-computer basis. Administrators or individual users who have Local Administrator privileges and who possess a general familiarity with installing software can do these installations. |

Review software requirements

|  |
| --- |
|  [Get information on software requirements](http://go.microsoft.com/fwlink/p/?LinkID=394537) |

Review hardware and network requirements

|  |
| --- |
|  [Get information on hardware and network requirements](http://go.microsoft.com/fwlink/p/?LinkID=396420) |

Install updates

|  |
| --- |
|  Before you install CRM for Outlook, make sure you have all the latest Microsoft Office updates, including all security updates from Microsoft Update. [Go to Microsoft Update](http://go.microsoft.com/fwlink/p/?LinkId=165705). |

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. [See the Customization Guide for more information](http://go.microsoft.com/fwlink/p/?LinkID=394763).

 Group Policy Folder Redirection with offline files is not supported in CRM for Outlook. If your CRM data is stored with redirected offline files, users may be unable to use CRM for Outlook. More information: [Group Policy Folder Redirection](http://go.microsoft.com/fwlink/p/?LinkID=397989)

 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](http://go.microsoft.com/fwlink/p/?LinkID=512447)

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, choose Get CRM for Outlook on the message bar. If you see one or more Security Warning dialog boxes, choose Run in each.     From the web: [Go to the download page](http://go.microsoft.com/fwlink/p/?LinkID=393787), 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 choose Next.  4. In the Select the installation page, do one of the following:   To install CRM for Outlook with offline capability, choose Options, select the Offline Capability check box on the Customize Installation page, and then choose Install Now. If you don’t install offline capability during installation, you can add it later by clicking Go Offline in CRM for Outlook.  Important  If 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](http://go.microsoft.com/fwlink/p/?LinkID=399355)   To install CRM for Outlook without offline capability, choose Install Now.  CRM installs CRM for Outlook. You may need to restart your computer to complete the installation.  5. On the final page of the wizard, choose Close. |

Step 3: Configure CRM for Outlook

You must configure CRM for Outlook after installing it. When you restart Outlook after installing, the Configuration Wizard starts automatically.

Note

If the Configuration Wizard doesn’t start automatically, in the Start screen, search for Configuration Wizard and run it. In earlier versions of Windows, choose Start > All Programs > Microsoft Dynamics CRM, and then choose Configuration Wizard.



|  |
| --- |
| 1. In the Configuration Wizard, you’ll see a Server URL drop-down list. Choose 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. Choose 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 choose 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 choose 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 choose OK. Then choose Close.  Tip  If you have problems installing and configuring CRM for Outlook, [try the Configuration Troubleshooting Wizard](http://go.microsoft.com/fwlink/p/?LinkID=394362). |

Step 4: Read about privacy

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Do your CRM work in Outlook](#z110d41043f0140ca8247ec7f42287560)

[Learn about other options for installing CRM 2015 for Outlook (admins)](http://go.microsoft.com/fwlink/p/?LinkID=511201)

[Upgrade to CRM 2015 for Outlook from earlier versions](http://go.microsoft.com/fwlink/p/?LinkID=511885)

[Troubleshoot CRM 2015 for Outlook installation](http://go.microsoft.com/fwlink/p/?LinkID=511202)

[Learn about other options for installing CRM 2013 for Outlook (admins)](http://go.microsoft.com/fwlink/p/?LinkID=404078)

[Upgrade to CRM 2013 for Outlook from CRM 2011 for Outlook](http://go.microsoft.com/fwlink/p/?LinkID=394360)

[Troubleshoot CRM 2013 for Outlook installation](http://go.microsoft.com/fwlink/p/?LinkID=394361)

Configure another organization to use with CRM for Outlook

If you’re a member of more than one Microsoft Dynamics CRM organization, you can configure each organization to use with Microsoft Dynamics CRM 2015 for Outlook.



|  |
| --- |
| 1. Close Outlook.  2. Do one of the following:   In Windows 8, 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 > Configuration Wizard.  3. In the Microsoft Dynamics CRM 2015 for Outlook Configuration Wizard dialog box, choose the Add button to add a new organization.  You’ll see the following 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, 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 CRM for Outlook Navigation Pane.  9. Choose OK.  10. In the wizard, choose Close. |

Privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Do your CRM work in Outlook](#z110d41043f0140ca8247ec7f42287560)

[Set up CRM for Outlook](#za34b2e8a75884132963a9ac9f4bcecf7)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#z4a0cb9d00192433081d6322c717a9d82)

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](#z112)

[Explore CRM for Outlook](#z113)

[What Outlook features are unavailable in CRM for Outlook?](#z114)

[Privacy](#z115)

What CRM for Outlook offers

When you use CRM for Outlook, you can access all the CRM core functionality directly from Outlook. 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 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 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. CRM for Outlook also automatically synchronizes records you own from CRM to CRM for Outlook. More information: [Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

 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. 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, CRM for Outlook automatically synchronizes the data again with the CRM server. More information: [Work offline with CRM for Outlook](#zc97851f53063431895fa1d84c5f898c6)

 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](#zde3bac06c80f40f8bf8f6e0735e8350e)

Note

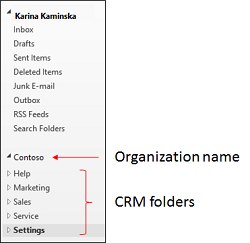
If people in your organization share the same computer by using different user accounts, each person can install and use CRM for Outlook for their own account.

Explore CRM for Outlook

When you [install CRM for Outlook](http://go.microsoft.com/fwlink/p/?LinkID=512584), the software adds several user interface elements to your Outlook screen.

Navigation pane

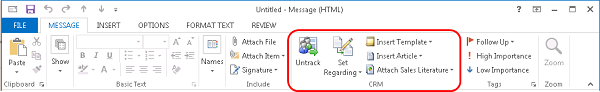
You’ll see a folder for your organization in the navigation pane on the left side of the screen. Under your organization name, you’ll see a list of CRM folders. Use these folders to navigate to your area and open different record types.



If you connect to more than one organization, you’ll see a separate folder for each organization in the navigation pane.

Ribbon

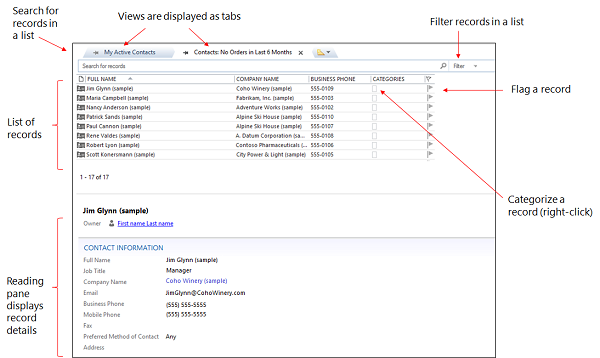
You access commands in CRM for Outlook through the ribbon. The ribbon displays different buttons and features depending on context. For example, if you view a list of opportunities, the ribbon displays buttons that apply to opportunities. For appointments, contacts, and tasks, you’ll see a special CRM 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 choose 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](#z45fe5705b32c4b8ca81d659bd987b02c)

What Outlook features are unavailable in CRM for Outlook?

Microsoft Dynamics CRM uses standard Internet Explorer controls, so some Outlook features are unavailable in 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 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

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

[Work offline with CRM for Outlook](#zc97851f53063431895fa1d84c5f898c6)

[Create a Microsoft Word mail-merge document with CRM for Outlook](#zde3bac06c80f40f8bf8f6e0735e8350e)

[Customize the Reading Pane in CRM for Outlook](#z45fe5705b32c4b8ca81d659bd987b02c)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[CRM for Outlook compatibility](http://go.microsoft.com/fwlink/p/?LinkID=512581)

Send and receive email in CRM for Outlook

When you are working in CRM for Outlook, you can use all the familiar Outlook buttons and toolbars with the Microsoft Dynamics CRM toolbar, menu, or tab to manage e-mail messages and most other activities.

At any time, you can track an Outlook e-mail message in Microsoft Dynamics CRM. Tracked messages still appear in the Outlook mail folders. By default, tracked messages display a Microsoft Dynamics CRM  symbol. A copy of the e-mail message is saved as an activity and is available in the Microsoft Dynamics CRM Activities area. You can link the activity to a record in Microsoft Dynamics CRM. You can also set your personal options so that all incoming e-mail is tracked in Microsoft Dynamics CRM.

Important

Because Microsoft Dynamics CRM shares data between users, many of the default privacy assumptions of a full e-mail system do not apply. This means that an e-mail activity that is associated with a Microsoft Dynamics CRM record (for example, a case, account, or contact) has the same visibility as any other activity associated with that record. Any user who has access to the record and its associated activities also has access to the e-mail message.

Managing incoming e-mail

When you use CRM for Outlook, all the e-mail you receive arrives in your Outlook Inbox. Only e-mail messages that originated as a Microsoft Dynamics CRM e-mail activity (that is, a response to an e-mail message you send from Microsoft Dynamics CRM) or that is marked as tracked in Microsoft Dynamics CRM, arrives in the Microsoft Dynamics CRM Activities and My Work: Queues area. If you prefer, you can:

 Track all incoming e-mail messages as Microsoft Dynamics CRM e-mail activities.

 Track only e-mail messages that originated in Microsoft Dynamics CRM (that is, e-mail sent in response to a Microsoft Dynamics CRM e-mail activity) into Microsoft Dynamics CRM e-mail activities.

 Track only e-mail messages related to your accounts, contacts, or leads.

 Track e-mail messages related to all Microsoft Dynamics CRM and custom record types that contain an e-mail field.

Note

More than one custom record type could contain the same e-mail address. When this happens, Microsoft Dynamics CRM links the e-mail messages that are received from this e-mail address to the custom record type that was created first. For example, a Patient record type that was created in January lists the e-mail address someone@example.com. A Doctor record type created in February also lists the same e-mail address. Microsoft Dynamics CRM links the e-mail messages received from someone@example.com only to the Patient record type. Sending an e-mail message to someone@example.com links the e-mail message to the Patient record type and the Doctor record type.

If you choose not to track all incoming e-mail messages, you can manually track selected messages in Outlook as e-mail activities in Microsoft Dynamics CRM.

If you track all your e-mail messages as Microsoft Dynamics CRM e-mail activities, they can be accessed by anyone who has permission to view or work with your activities. Also, when you track an e-mail message with attachments to a Microsoft Dynamics CRM activity, the attachments are included in the activity. If you do not want these attachments to be available to other users, delete them from the e-mail activity.

Sending and replying to e-mail messages

You can link Microsoft Dynamics CRM e-mail activities to active contacts, accounts, leads, facilities, equipment, queues, or users in Microsoft Dynamics CRM. You can select active Microsoft Dynamics CRM records with e-mail addresses from the Microsoft Dynamics CRM address book, which is installed automatically when you install CRM for Outlook. You can also track e-mail activities in Microsoft Dynamics CRM without being related to another record.

When you send, reply, or forward an e-mail message that is tracked as an e-mail activity, a closed activity is created for each account and contact referenced and displayed in the Activities area. Closed e-mail activities cannot be updated except to link them to a related Microsoft Dynamics CRM record. If a related record has not already been selected, you have the option to select one.

Working with CRM for Outlook offline and synchronizing with Microsoft Dynamics CRM

If you installCRM for Outlook, you have the option of working offline from the Microsoft Dynamics CRM server. You can create Microsoft Dynamics CRM e-mail messages that are sent when you go back online with the Microsoft Dynamics CRM server. If you send Outlook e-mail messages, those are sent immediately if you have network access for sending e-mail.

When you work with CRM for Outlook offline, a sent e-mail message can fail to be delivered or can be blocked. This can happen because the recipient does not want to receive the e-mail message or the mail server is down. If this happens, Outlook saves the e-mail message to your Drafts folder, but Microsoft Dynamics CRM creates a closed activity. In Microsoft Dynamics CRM, use the Pending E-mail view to see unsent messages.

When you are working offline, Microsoft Dynamics CRM e-mail messages that you send are saved to your Outlook offline queue. When you go online, Microsoft Dynamics CRM automatically tries to send them and create the activities. If an e-mail message cannot be sent, Microsoft Dynamics CRM saves it as a draft activity, but it does not appear in your Drafts folder in Outlook.

Using the Microsoft Dynamics CRM address book

Use the Microsoft Dynamics CRM address book to select Microsoft Dynamics CRM records in Outlook. The address book includes accounts, contacts, facilities and equipment, leads, queues, and users. Access and use the Microsoft Dynamics CRM address book by using the same menu as your other Outlook address books.

The address book is used to reconcile e-mail recipients in incoming messages to Microsoft Dynamics CRM contacts and link them automatically. How the contacts are matched is set in your personal options.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

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 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](#z893ce4423fb748dd94406fb5f169d064)

On this page:

[Using the Track button vs. the Set Regarding button](#z117)

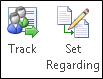
[Using the tracking pane](#z118)

[What can you do after you track a record?](#z119)

[Other things to know about tracking records](#z120)

Using the Track button vs. the Set Regarding button

To track a record in 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

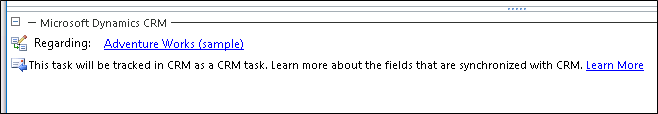
 The name of the parent account for contacts, if set

 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 CRM for Outlook ribbon to do the following tasks.

|  |  |  |
| --- | --- | --- |
| To do this task | Choose | Applies to |
| Open the record directly in CRM |  | Email, appointments, contacts, and tasks |
| Add a connection between the record and any CRM record capable of tracking connections |  | Email, appointments, contacts, and tasks |
| Convert the record into a CRM opportunity, lead, or case |  | Email, appointments, and tasks |
| Insert a CRM template |  | Email |
| Insert a CRM Knowledge base article |  | Email |
| Attach CRM 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 above) 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 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](#z4a0cb9d00192433081d6322c717a9d82)

 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](#z413db37c1f034fc0aaf1b13c12407c6c)

 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](#z6747eed5e26443a18f27ea0d46afaaa1)

 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](http://go.microsoft.com/fwlink/?LinkId=201849)

Privacy

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Track Outlook email as activities in CRM for Outlook](#z47e0acb302a4456e9037a4de82bfc405)

[Track Outlook appointments in CRM for Outlook](#z430d8700ae2749b7a4c10e0fcc49fa50)

[Track Outlook contacts in CRM for Outlook](#zce639d6e1cad4db09c46640af2020c40)

[Track Outlook tasks in CRM for Outlook](#z213803dc90964ffaa3cbca57794372c6)

[Deleting records that have been tracked with CRM for Outlook](#z6747eed5e26443a18f27ea0d46afaaa1)

[Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#z4a0cb9d00192433081d6322c717a9d82)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

Track Outlook email as activities in CRM for Outlook

When CRM for Outlook is installed, email messages, as well as contacts, appointments, and tasks, include a Microsoft Dynamics CRM pane that displays information about the sender and recipients. An icon is displayed that shows the record type of the sender and recipients in Microsoft Dynamics CRM. The pane also includes links to the parent, regarding, and related Microsoft Dynamics CRM records. Click or tap the links to open the records in Microsoft Dynamics CRM. More information: [Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

You can save Outlook email messages as new Microsoft Dynamics CRM email activities. You can also set the Regarding field for any email activity.

Your administrator can block messages from being saved if they contain attachments of specific file types, such as .exe files. Any messages that are stored in locations other than the default Microsoft Exchange location cannot be linked. After you save your email message as a Microsoft Dynamics CRM email activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.



|  |
| --- |
| 1. In your Inbox, click or tap to select the email message that you want to track in Microsoft Dynamics CRM.  2. In the CRM group, click or tap Track.  In the Microsoft Outlook folder, the symbol beside the records changes to the Tracked in CRM icon .  Note  You can set whether replies to tracked messages are also tracked. More information: [Set personal options](#z10711d140a844b76b9e9572ab3113c50)  Email messages appear as activities in the Activities area of Microsoft Dynamics CRM.  3. To modify the Microsoft Dynamics CRM email activity form, open the email message in Outlook, and then, in the CRM group, click or tap View in CRM.  The Microsoft Dynamics CRM record form opens.  You cannot edit an email message after it has been sent, except to include the record to which the email message relates.  4. To link the email message to a Microsoft Dynamics CRM record, such as an account or contact, open the email message in Outlook, and then, in the CRM group, click or tap Set Regarding.  Tip  Click or tap Regarding, Set Regarding, or Set Parent first, and Track in CRM is automatically activated.  Note  In Outlook, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Open the Outlook item. In the CRM group, click or tap Untrack, and then in the confirmation message box, click or tap Yes. |

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Create templates for email](#zb47eec74e83c4cfeb7a0a9195a3ac4da)

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](#zf29b60cedd9c47779c954df8765d0302)

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 CRM email. As an alternative, you can set an option to track email messages automatically.

Automatically track email messages



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| --- |
| 1. In 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 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 that are in response 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. Tracks email messages only if the sender has a record in Microsoft Dynamics CRM. 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.  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, CRM for Outlook will try to match the email address of the sender 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: [How security affects synchronization between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511113) |

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

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Send and receive email in CRM for Outlook](#z4ac40b3f907d473cadfa6b26656ad8b8)

[Track Outlook email as activities in CRM for Outlook](#z47e0acb302a4456e9037a4de82bfc405)

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

Track Outlook contacts in CRM for Outlook

You can save Microsoft Outlook contacts as new Microsoft Dynamics CRM contacts. You can link a newly saved record to another Microsoft Dynamics CRM record, such as an account or contact.



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| 1. In CRM for Outlook, in the Microsoft Outlook contacts folder, select up to 20 contacts.  2. On the Home tab, in the CRM group, click or tap Track.  The contacts appear in the Contacts area in Microsoft Dynamics CRM.  In the Microsoft Outlook Contacts folder, the Tracked in CRM icon  is displayed to indicate that each contact is tracked.  3. To link the contacts to a parent record, in Microsoft Outlook, in the CRM group, click or tap Set Parent, and then click or tap the type of record.  4. In the Look Up Record dialog box, click or tap the record that you want, and then click or tap OK.  Tip  Click or tap Regarding, Set Regarding, or Set Parent first, and Track in CRM will automatically be activated.  Note  Duplicate detection identifies duplicate records when a record is tracked. Microsoft Dynamics CRM also checks for duplicates when you synchronize or go online.  Resolve potential duplicate records  If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the Duplicates Detected dialog box.  a. To open a record to make sure it is a potential duplicate, in the Potential duplicate records list, double-click or tap the record.  b. If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.  c. If your new or updated record is not a duplicate, to create the new record, click or tap Save Record.  - OR -  If your new or updated record is a duplicate, to cancel your changes, click or tap Cancel.  Important  Duplicate detection can take place only if duplicate detection is enabled in Duplicate Detection Settings and if at least one duplicate-detection rule exists for the record type. |

 To add additional information to the Contact form in Microsoft Dynamics CRM, click or tap the contact in Microsoft Outlook, and then in the CRM group, click or tap View in CRM.

 If the contact is linked to a parent record, you can open the parent record from the Microsoft Outlook contact record. In the Microsoft Outlook contacts list, click or tap to open the record. In the CRM group, click or tap View Parent.

 The Company field in a Microsoft Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information: [Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#z4a0cb9d00192433081d6322c717a9d82)

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Send and receive email in CRM for Outlook](#z4ac40b3f907d473cadfa6b26656ad8b8)

[Create templates for email](#zb47eec74e83c4cfeb7a0a9195a3ac4da)

Use a wizard to add and track multiple Outlook contacts in CRM for Outlook

You can track your Outlook contacts in CRM for Outlook. When you track a contact, a copy of that contact’s record is saved in CRM for Outlook and synchronized with the Outlook record. After your contacts are tracked, you’ll see the email, tasks, and appointments associated with any Microsoft Dynamics CRM contact or account. If you sync Outlook on your mobile device, you can also access your contact records on that device.

Tracking contacts in 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 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 whther future communications with the tracked contacts should be synchronized with CRM for Outlook.

Important

To track contacts in 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. Click or tap File > CRM > Import Contacts > Add Contacts.  2. Click or tap Next.  3. Confirm the folder where your Outlook contacts are stored, and then click or tap Next.  Note   The wizard determines the folder, usually called Contacts. You can select or clear subfolders in the Contacts folder.   If you allow someone else to manage your email (called a “delegate”), you can’t add contacts from that person’s contacts folder.  4. Select how to group your contacts. The groups are:   Company Name. Group the contacts by the matching account name in Microsoft Dynamics CRM. The wizard lists the number of contacts associated with each account. Click or tap the link to verify the list of names for each account.   Email Domain. Group the contacts by email domain. The email domain is the part of the address after the @ symbol. For example, in the email address someone@contoso.com, "contoso.com" is the domain. Click or tap the link to verify the list of names in each domain.   Categories. Group the contacts by the category you use to organize contacts in Outlook, if applicable. Click or tap the link to verify the list of names for each category.  If you don’t want to add all the groups, clear the check boxes to the left of any groups you don’t want.  Note  The Number of Contacts column displays a color to indicate how many of the contacts are already linked to Microsoft Dynamics CRM:  Green. All of the contacts are already in Microsoft Dynamics CRM.  Yellow. More than 50% of the contacts are already in Microsoft Dynamics CRM.  Red. At least one contact is already in Microsoft Dynamics CRM.  Tip  You may find that the groupings have many variations if the company names don’t match exactly. If so, it may be best to cancel the wizard, correct the company names in Outlook, and then run the wizard again.  5. Verify that Use Company Name to be the Account is selected (recommended). Otherwise, if you want to associate an account name with each contact later in Microsoft Dynamics CRM, clear this check box.  6. Select Track all communications for added contacts to track the messages, appointments, and tasks associated with these Outlook contacts in Microsoft Dynamics CRM.  7. To manually select the accounts to associate the contacts with, click or tap Advanced. In the Set Account column, click or tap the row for the contact. From the drop-down list, select one of the following:   Leave the field blank (Not Set) to associate the contacts with an account later in Microsoft Dynamics CRM.   Select Use Company Name to associate the contacts with a Microsoft Dynamics CRM account using the company name.   Select Pick Existing Account, select an account or contact, and then click or tap OK.  8. In the Include Communication column, clear the check box for any grouping for which you don’t want to track email messages, appointments, or tasks in Microsoft Dynamics CRM.  9. Click or tap Add Contacts.  10. Review the Summary page and view any errors, if applicable. Then choose Close. |

See Also

[Track Outlook contacts in CRM for Outlook](#zce639d6e1cad4db09c46640af2020c40)

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

[Deleting records that have been tracked with CRM for Outlook](#z6747eed5e26443a18f27ea0d46afaaa1)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

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 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 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 CRM for Outlook is automatic, however. You can use CRM for Outlook to view any task records you own that were created in CRM.

Important

To synchronize tasks between 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



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| 1. In CRM for Outlook, create a task or open an existing task.   To create a task, choose Tasks on the navigation bar, and then choose New Task.   To open an existing task, choose 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, choose 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, choose Track.  Note  To track the task record as a phone call, letter, or FAX, choose 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, choose Set Regarding, choose More, and then search for the 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 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, CRM for Outlook also provides a link to the Regarding record. [Tell me more about how tracking works.](http://go.microsoft.com/fwlink/p/?LinkID=510100)  6. To save the task, choose the down arrow on the Actions button, and then choose Save & Close.  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, choose Untrack. It’s best to untrack items one at a time. |

Assigning tasks

If you’re using Microsoft Dynamics CRM 2015 for Outlook, you can also track assigned tasks if your administrator has enabled this capability. [Learn more about enabling tracking of assigned tasks](http://go.microsoft.com/fwlink/p/?LinkID=512487)

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 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 CRM for Outlook.

 You can’t track recurring tasks.

Assign a task

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| 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, choose 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, choose 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, choose 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, choose Send.  When you choose 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 choose Return to Task List. After reclaiming ownership, you can reassign the task to someone else. |

Accept, decline, or reassign a task assigned to you

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| 1. If someone assigns a task to you in CRM for Outlook, you have three options:   On the Task tab, in the Respond group, choose Accept. If you accept the task, you become the owner of the task.   On the Task tab, in the Respond group, choose 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, choose Assign Task. If you reassign the task, ownership of the task passes to the person you assign the task to.  Important  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, choose 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

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| 1. Open the task.  2. Make sure that Status and % Complete is current.  3. On the Task tab, in the Manage Task group, choose 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. Choose Send. |

Follow the progress of tasks you assign

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|  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, choose Change View, and then choose 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, choose Details, and then review the names in the Update list box. |

See Also

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

[Deleting records that have been tracked with CRM for Outlook](#z6747eed5e26443a18f27ea0d46afaaa1)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

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. 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 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 CRM for Outlook is automatic, however. You can use 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, you can also synchronize appointment attachments if your system administrator has enabled this capability. You can then view and update the attachments in CRM for Outlook or CRM.

Important

To synchronize appointments between 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

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| 1. In CRM for Outlook, create an appointment as you normally would in Outlook.  2. If you want to insert an attachment, choose 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](#z5e5cc5aeb4c94800be83824af6aa4bb5)  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.](http://go.microsoft.com/fwlink/?LinkID=510099)  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, choose Track.  -Or-   To track the task and link it to a particular CRM record (for example, a specific account), choose Set Regarding, choose 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 choose 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, CRM for Outlook also provides a link to the Regarding record. [Tell me more about how tracking works.](http://go.microsoft.com/fwlink/?LinkID=510100) |

Notes

 To stop tracking an appointment, open the appointment record, and then choose the Untrack button.

 After an appointment attachment is synchronized, if different users update the attachment in 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 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 CRM for Outlook.

See Also

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

[Deleting records that have been tracked with CRM for Outlook](#z6747eed5e26443a18f27ea0d46afaaa1)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

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](#zf29b60cedd9c47779c954df8765d0302).

The following rules apply whether you synchronize records with 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, 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, 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, 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, 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](#zf29b60cedd9c47779c954df8765d0302)

[Track Outlook email as activities in CRM for Outlook](#z47e0acb302a4456e9037a4de82bfc405)

[Track Outlook appointments in CRM for Outlook](#z430d8700ae2749b7a4c10e0fcc49fa50)

[Track Outlook contacts in CRM for Outlook](#zce639d6e1cad4db09c46640af2020c40)

[Track Outlook tasks in CRM for Outlook](#z213803dc90964ffaa3cbca57794372c6)

Synchronizing data with Outlook or Exchange FAQ

What does “synchronization” mean in Microsoft Dynamics CRM for Outlook?

“Synchronization” can mean a few different things when you’re synchronizing data between Microsoft Dynamics CRM and Outlook:

 You can use Microsoft Dynamics CRM for Outlook to track email messages, appointments, contacts, and tasks. When you track an email message, appointment, contact, or task record in CRM for Outlook, a copy of that record is saved as an activity in CRM and synchronized with the Outlook record. You can then view and edit that record in CRM for Outlook or CRM. Tracking in CRM for Outlook is a manual process. This gives you the ability to keep your personal Outlook records separate from your CRM records. More information: [Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

 When you use CRM for Outlook, CRM also automatically synchronizes appointments, contacts, and tasks that you own from the CRM server to your Outlook folders. CRM for Outlook uses online synchronization filters to determine the records to copy from CRM to your local hard drive. You can modify these filters or create new filters. More information: [Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

If you want to go offline with CRM for Outlook, you can choose the records to take with you by modifying the offline synchronization filters. You can reset these filters every time you go offline so you always have just the data you need. More information: [Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

Is there a way to automatically synchronize CRM email?

Yes, you can set different options to automatically track and synchronize email messages in response to CRM email. You can track all email messages in response to CRM email messages, track email messages only if the sender has a record in CRM, track email messages only if they originate from someone with a CRM lead, contact, or account record, or track email messages from all record types (including custom record types) that contain an email address field. More information: [Set an option to automatically track incoming Outlook email in CRM for Outlook](#z893ce4423fb748dd94406fb5f169d064)

Should I synchronize records through CRM for Outlook or through server-side synchronization?

If you’re an administrator, there are two ways to synchronize appointments, contacts, and tasks. You can use CRM for Outlook (also known as “Outlook sync”) or you can use server-side synchronization (also known as “Exchange sync”).

CRM for Outlook is a client application, so users have to have CRM for Outlook open to synchronize data. If you set up server-side synchronization, the synchronization happens directly between the Exchange server and the CRM server, so users don’t have to keep CRM for Outlook open.

Synchronizing data through server-side synchronization can also significantly improve the performance of CRM for Outlook, since the burden of synchronizing happens at the server level. More information: [Learn more about server-side synchronization and what it has to offer](http://go.microsoft.com/fwlink/p/?LinkID=511116)

Can I still track records in CRM for Outlook if I synchronize records through server-side synchronization?

Yes, you can continue to use the Track button or the Set Regarding button to track records after synchronizing through server-side synchronization. These buttons provide a convenient way to push records from Outlook to CRM. Note that records don’t get created in CRM immediately; they’re created when server-side synchronization processes synchronization for the mailbox.

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 CRM for Outlook to determine the synchronizing records. You can modify these filters or create new filters through CRM for Outlook. More information: [Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

How often are records synchronized?

By default, records are synchronized every 15 minutes. 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](#z4a0cb9d00192433081d6322c717a9d82)

If you need to synchronize right away, you can synchronize records manually if you’re using CRM for Outlook. More information: [Synchronize records manually with CRM for Outlook](#z5b5e89e35d724c4884e5a5639b8ef9e6). If you’re synchronizing with server-side synchronization, the Synchronize button is removed from the ribbon.

Can I view or control the fields that are synchronized between CRM and Outlook?

Yes, you can view the synchronizing fields and determine whether fields are synced one way, two way, or not at all. More information: [View the fields that are synchronized between CRM and Outlook](#z2c5b04cc25b542bc80040f3c87c8516f).

If you’re a system administrator or system customizer, you can also control field synchronization and sync direction. More information: [Control field synchronization between CRM and Outlook or Exchange](http://go.microsoft.com/fwlink/p/?LinkID=511111)

Note

This feature is available if you’re using CRM Online and you have installed the 2015 Update, or if you’re using CRM 2015.

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: [How security affects synchronization between CRM and Outlook or Exchange](http://go.microsoft.com/fwlink/p/?LinkID=511113)

Note

This is only true if you’re using CRM Online and you have installed the 2015 Update, or if you’re using CRM 2015.

See Also

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

[Synchronize records manually with CRM for Outlook](#z5b5e89e35d724c4884e5a5639b8ef9e6)

[Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#z4a0cb9d00192433081d6322c717a9d82)

[View the fields that are synchronized between CRM and Outlook](#z2c5b04cc25b542bc80040f3c87c8516f)

[Set up server-side synchronization](http://go.microsoft.com/fwlink/p/?LinkID=511116)

[What fields can be synchronized between CRM and Outlook?](http://go.microsoft.com/fwlink/p/?LinkID=511110)

[Control field synchronization between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511111)

[How security affects synchronization between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511113)

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 CRM for Outlook) whether you’re synchronizing through CRM for Outlook or server-side synchronization.

Important

The synchronization filters for appointments only apply when synchronizing through 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: 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 CRM for Outlook. More information: [Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

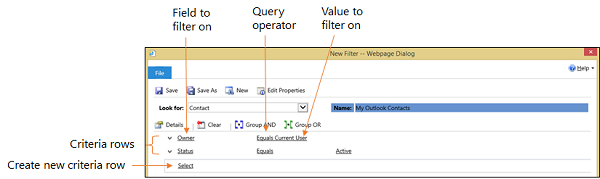
Create or modify online synchronization filters



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| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. Choose the Settings button  in the upper-right corner of the window, and then choose Options.  b. In the Set Personal Options dialog box, choose the Synchronize tab. |   If using CRM for Outlook   |  | | --- | | a. On the File menu, choose CRM.  b. Choose Options, and then in the Set Personal Options dialog box, choose the Synchronize tab. |   2. Under Synchronize Microsoft Dynamics CRM items with Outlook or Exchange, choose 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: [Tell me more about system filters](http://go.microsoft.com/fwlink/p/?LinkID=511918)  3. Do one of the following:   To open an existing filter, choose the filter.   To create a new filter, choose 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).



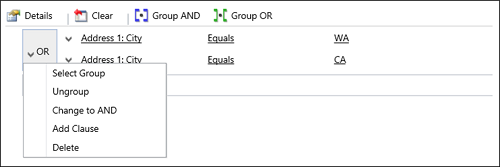
Add a criteria row

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| 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

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| 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

[Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

View the fields that are synchronized between CRM and Outlook

In Microsoft Dynamics CRM 2015 for Outlook, 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



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| 1. In CRM for Outlook, choose File, and then choose CRM.  2. On the Synchronize button, choose the down arrow, and then choose Review Synchronization Settings.    3. In the Synchronization Settings for Outlook or Exchange dialog box, choose 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, choose the View in CRM button to open the record in CRM. If you see Lock icon, you can’t access the field. |

See Also

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[What fields can be synchronized between CRM and Outlook or Exchange?](http://go.microsoft.com/fwlink/p/?LinkID=511110)

[Control field synchronization between CRM and Outlook or Exchange (admins)](http://go.microsoft.com/fwlink/p/?LinkID=511111)

[How security affects synchronization between CRM and Outlook or Exchange](http://go.microsoft.com/fwlink/p/?LinkID=511113)

Synchronize records manually with CRM for Outlook

You can use your personal options in Microsoft Dynamics CRM for Microsoft Office Outlook to change what Outlook and Microsoft Dynamics CRM synchronize and how often they synchronize linked data.



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| --- | --- |
| 1. This task requires permissions that are found in all default security roles.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. In CRM for Outlook, click or tap File > CRM > Synchronize > Synchronize.  Warning  If you receive the error message "CRM server Not Found", verify that you have Internet connectivity and that the Microsoft Dynamics CRM server is running. Then try synchronizing again. |

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

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 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.

[Tell me more about controlling field synchronization](http://go.microsoft.com/fwlink/p/?LinkID=511111)

Important

To use this feature when synchronizing with server-side synchronization, you must use Microsoft Dynamics CRM 2015 or the Microsoft Dynamics CRM Online 2015 Update. To use this feature when synchronizing with CRM for Outlook, you must use CRM 2015 or the CRM Online 2015 Update, and you must use Microsoft Dynamics CRM 2015 for Microsoft Office Outlook.

See Also

[View the fields that are synchronized between CRM and Outlook](#z2c5b04cc25b542bc80040f3c87c8516f)

[Which fields can be synchronized between CRM and Outlook?](http://go.microsoft.com/fwlink/p/?LinkID=511110)

[How security affects synchronization between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511113)

[System Settings dialog box - Synchronization tab](#za12f2c14467f4c7d8238a9102594a7c4)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[Overview of tracking records in CRM for Outlook](#zf29b60cedd9c47779c954df8765d0302)

Which fields can be synchronized between CRM and Outlook?

For information about which fields can be synchronized between Microsoft Dynamics CRM and Outlook or Exchange, see our [Administration Guide](http://go.microsoft.com/fwlink/p/?LinkID=511110).

See Also

[View the fields that are synchronized between CRM and Outlook](#z2c5b04cc25b542bc80040f3c87c8516f)

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 CRM for Outlook for a particular field if you don’t have read privileges for that field. More information: [How security affects synchronization of data between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511113)

See Also

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[Which fields can be synchronized between CRM and Outlook?](http://go.microsoft.com/fwlink/p/?LinkID=511110)

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

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, choose Microsoft Dynamics CRM > Settings > Administration > System Settings > Synchronization tab. (In CRM for Outlook, in the Navigation pane, choose Settings > System > Administration > System Settings > Synchronization tab). |

|  |  |
| --- | --- |
| Settings | Description |
| 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 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](#z413db37c1f034fc0aaf1b13c12407c6c) |
| View or manage the synchronized fields of your Outlook or Exchange items including appointments, contacts, and tasks. | 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: [Control field synchronization between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511111) |
| 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 in 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](#z720b3428867f4abc861c580930b0e43c) |
| Configure general synchronization rules for your entire organization for appointments, 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](#z430d8700ae2749b7a4c10e0fcc49fa50) |
| Contacts |  |
| Synchronize mailing address only in Outlook contact  Synchronize all three addresses 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 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](#z213803dc90964ffaa3cbca57794372c6) |

See Also

[Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

[Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

[Track Outlook tasks in CRM for Outlook](#z213803dc90964ffaa3cbca57794372c6)

[Track Outlook appointments in CRM for Outlook](#z430d8700ae2749b7a4c10e0fcc49fa50)

[Control field synchronization between CRM and Outlook](http://go.microsoft.com/fwlink/p/?LinkID=511111)

[Which fields can be synchronized between CRM and Outlook?](http://go.microsoft.com/fwlink/p/?LinkID=511110)

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 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](#z125)

[Go offline](#z126)

[Go back online](#z127)

[What features are unavailable offline?](#z128)

[Other things to know about going offline](#z129)

Before you go offline

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](#z720b3428867f4abc861c580930b0e43c)

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 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 CRM for Outlook, click or tap File > CRM > Go Offline.

When you choose Go Offline, 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

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 CRM for Outlook installed can potentially access CRM data stored in the offline database. Shared use of a computer running 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](#z4a0cb9d00192433081d6322c717a9d82)

 Offline security permissions. You have the same security permissions offline as when you’re online.

 Privacy. To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Set up CRM for Outlook](#za34b2e8a75884132963a9ac9f4bcecf7)

[Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

[Example of going offline with CRM for Outlook](#zf622fe6914b344e0a4eb093959910c70)

Choose records to work with offline in CRM for Outlook

You can 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 to 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](#z4a0cb9d00192433081d6322c717a9d82)

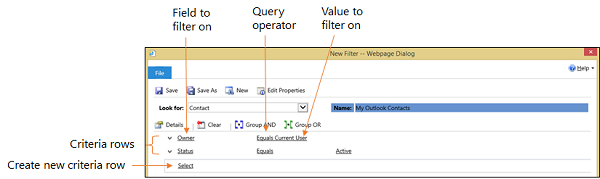
Create or modify offline synchronization filters



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. Choose the Options button  in the upper-right corner of the window, and then choose Options.  b. In the Set Personal Options dialog box, choose the Synchronize tab. |   If using CRM for Outlook   |  | | --- | | a. On the File menu, choose CRM.  b. 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 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: [Tell me more about system filters](http://go.microsoft.com/fwlink/p/?LinkID=511918)  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).



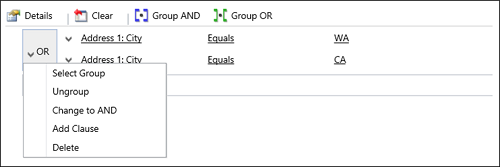
Add a criteria row

|  |
| --- |
| 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](#zc97851f53063431895fa1d84c5f898c6)

[Example of going offline with CRM for Outlook](#zf622fe6914b344e0a4eb093959910c70)

[Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

Example of going offline with CRM for Outlook

Salespeople can make critical customer information available and up-to-date on business trips with filters. By specifying only the data you need to synchronize with your laptop, you can avoid wasting valuable laptop memory, stay current with the head office, and keep information on your laptop fresh. Meanwhile, managers and co-workers are up-to-date.

Using CRM for Outlook, you can set up and activate filters with criteria similar to Advanced Find by specifying the criteria for the Microsoft Dynamics CRM records that you want to be available when you go offline. In addition, you can change what data will be available when you synchronize by activating and deactivating the filters.

To see what data filters are being applied to your offline synchronization, in Outlook, on the File 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.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Set address book options in CRM for Outlook

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 CRM for Outlook, and then once every 24 hours.



|  |
| --- |
| 1. In 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](#z413db37c1f034fc0aaf1b13c12407c6c)   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.  5. 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 information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

[Track Outlook contacts in CRM for Outlook](#zce639d6e1cad4db09c46640af2020c40)

[Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#z4a0cb9d00192433081d6322c717a9d82)

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

Customize the Reading Pane in CRM for Outlook

When you use Microsoft Dynamics CRM for Microsoft Office Outlook, you can choose the sections in Microsoft Dynamics CRM records that are displayed in the Reading Pane so that you don't have to open the record to see the details.



|  |
| --- |
| 1. In the CRM for Outlook Navigation Pane, click or tap your organization.  2. Click or tap the area that contains the records you want to work with (for example, Service), and then click or tap the record type.  3. Click or tap the View tab, and then in the List group, click or tap Customize Reading Pane.  By default, all the sections that you can add or remove are listed in the Displayed Sections box.  4. To remove a section, in the Displayed Sections box, click or tap the section, and then click or tap Remove.  5. To add a section, in the Available Sections box, click or tap the section, and then click or tap Add.  6. To change the order of the sections in the Reading Pane, in the Displayed Sections box, click or tap the section, and then click or tap the Move Up or Move Down button.  7. Click or tap OK. |

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

You can change how Microsoft Dynamics CRM displays number, currency, time, and date formats to match your company’s regional settings.

Note

The Set Personal Options dialog box is only accessible in CRM for Outlook.



|  |
| --- |
| 1. In Outlook 2010 or Outlook 2013, on the File tab, click or tap CRM > Options.  2. In the Set Personal Options dialog box, on the Formats tab, in the Current Format list, select the name of the language and country or region for the format that you want to personalize, and then click or tap Customize.  In the Customize Regional Options dialog box, you can change the default settings for the format that you selected by selecting one of the following tabs:   Number. Set options for the decimal symbol, digit grouping symbol, digit groups, and negative numbers.  Important  Some negative numbering options always display numbers within parentheses, for example (100.00), regardless of the preferred setting in some countries/regions. Additionally, some long numbers will not appear with commas as they should, for example 10000. This issue will be corrected in a future release.   Currency. Set options for the currency format, negative currency amounts, and number of decimal places.   Time. Set options for the time format, time separator, and notation for morning and afternoon.   Date. Set options for the type of calendar, whether or not to show week numbers in calendar views, and formats for long and short dates.  3. On each of the tabs, use the lists to change the default settings for the format that you selected, viewing the changes that you make in the preview boxes.  4. To apply the changes you have made to the default formats and continue working in the dialog box, click or tap Apply.  - OR -  To apply the changes you have made to the default formats and close the dialog box, click or tap OK. |

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](#z413db37c1f034fc0aaf1b13c12407c6c)

 System Filters. System administrators can programmatically modify online synchronization filters for an entire organization. More information: [Create and publish filter templates](http://go.microsoft.com/fwlink/?LinkID=511918)

 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](#z2c5b04cc25b542bc80040f3c87c8516f)

 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 CRM for Outlook. More information: [Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

 System Filters. System administrators can programmatically modify offline synchronization filters for an entire organization. More information: [Create and publish filter templates](http://go.microsoft.com/fwlink/?LinkID=511918)

See Also

[Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c)

[Choose records to work with offline in CRM for Outlook](#z720b3428867f4abc861c580930b0e43c)

[View the fields that are synchronized between CRM and Outlook](#z2c5b04cc25b542bc80040f3c87c8516f)

[Work offline with CRM for Outlook](#zc97851f53063431895fa1d84c5f898c6)

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 CRM for Outlook, on the File menu, choose CRM, and then choose Options.

-Or-

 In CRM, choose the Settings button  in the upper-right corner of the screen, and then choose 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 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](#za6b483be88ff4264b83492a536deb45e)

Note

Some of the options on the Synchronization tab are only available if you’re using CRM 2015 or if you’re using CRM Online and you have installed the 2015 Update.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 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 Exchange folders.  More information: [Choose the records to synchronize between CRM and Outlook or Exchange](#z413db37c1f034fc0aaf1b13c12407c6c) | ****** From CRM for Outlook or from CRM  ****** For Outlook sync or server-side sync |
| 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](#z720b3428867f4abc861c580930b0e43c) | ****** From 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](#z2c5b04cc25b542bc80040f3c87c8516f) | ****** From CRM for Outlook or from CRM  ****** For Outlook sync or server-side sync |
| Overwrite the names in the Outlook contacts Company field with the parent account from CRM contacts | Synchronization | Update the company field for Outlook contacts | Update Company fields with parent account names | ****** From 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 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 in your Outlook folders | Synchronization | Schedule automatic synchronization with Outlook | Synchronize the CRM items in my Outlook folders every | ****** From CRM for Outlook only  ****** For Outlook sync only |
| Enable CRM to send email using 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 CRM for Outlook only |
| Track incoming email automatically | Email | Select how Microsoft Dynamics CRM for Outlook should integrate email with Microsoft Dynamics CRM | Check incoming email in Outlook and determine 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](#z893ce4423fb748dd94406fb5f169d064) | From CRM for Outlook only |
| 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](#z893ce4423fb748dd94406fb5f169d064) | From CRM for Outlook or from CRM |
| Automatically create contact or lead records if the sender of the email message or meeting invitation doesn’t already have a record in CRM | Email | Automatically create records in Microsoft Dynamics CRM | Create  More information: [Set an option to automatically track incoming Outlook email in CRM for Outlook](#z893ce4423fb748dd94406fb5f169d064) | From CRM for Outlook or from CRM |
| 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](#zb35f1f811cf04768ae668c61bcf9a88b) | From 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 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 CRM for Outlook only |

See Also

[Synchronizing data with Outlook or Exchange FAQ](#za6b483be88ff4264b83492a536deb45e)

[Set up email processing through server-side synchronization](#z94f4fc75d4ae4b69852a81e3c5511f97)

The Outlook email address should be the same as the CRM email address

Oops, 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.

In any case, here’s how to fix this:

If you’re using Microsoft Dynamics CRM Online and Microsoft Office 365

If you’re using CRM Online and Office 365, you need to change the CRM email address to match the Office 365 email address. Here’s how:



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make a note of the Office 365 email address.  2. 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   3. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings > Security. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then choose Settings > Security. |   4. Choose Users.  5. Under Enabled Users, choose First name Last name.  6. In the Primary Email field, enter the Office 365 email address.  7. On the action bar, choose Save & New.  8. On the action bar, choose Approve Email. |

If you’re using CRM on-premises

If you’re using CRM on-premises, you can change the Outlook email address to match the CRM email address or you can change the CRM email address to match the Outlook email address. If you change the CRM email address to match the Outlook email address, you must make sure you’re using the primary Outlook email address. Most people have just one 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 |

Change the email address in CRM to match the Outlook address

|  |  |  |  |
| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings > Security. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then choose Settings > Security. |   3. Choose Users.  4. Under Enabled Users, choose First name Last name.  5. In the Primary Email field, enter the Outlook email address.  6. On the action bar, choose Save & New.  7. On the action bar, choose Approve Email. |

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. |

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. CRM for Outlook can also provide access to CRM data while you’re working offline. [Learn more about doing your CRM work in Outlook](http://go.microsoft.com/fwlink/?LinkID=394774).

You can install CRM for Outlook directly from the Office 365 dialog box, but before you install the add-in, review the installation prerequisites and configuration instructions below.

Step 1: Review installation prerequisites

Logging on as a Local Administrator

|  |
| --- |
|  To install CRM for Outlook, you must be able to log on to your computer as a user with Local Administrator privileges. |

Software requirements

|  |
| --- |
|  [Get information about software requirements](http://go.microsoft.com/fwlink/?LinkID=394537) |

Hardware and network requirements

|  |
| --- |
|  [Get information about hardware and network requirements](http://go.microsoft.com/fwlink/?LinkID=396420) |

Installing updates

|  |
| --- |
|  Install all the latest Microsoft Office updates, including all security updates, from Microsoft Update. [Go to Microsoft Update](http://go.microsoft.com/fwlink/?LinkId=165705). |

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 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. |

Step 3: Read about privacy

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren’t asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.   
  
 After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.   
  
 If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.   
  
 For every email you receive, CRM for Outlook will send CRM the sender’s email address, the recipient’s email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Configuration Troubleshooting Wizard](http://go.microsoft.com/fwlink/?LinkID=394362)

[Troubleshoot CRM for Outlook installation](http://go.microsoft.com/fwlink/?LinkID=394361)

[Do your CRM work in Outlook](http://go.microsoft.com/fwlink/?LinkID=394774)

Monitor social media

Add social listening visuals to a dashboard or account

Microsoft Social Listening scours social networks like Facebook and Twitter to help you monitor what people are saying about your products or brand, and then analyzes the data and presents it to you in easy-to-read charts and graphs.

These visuals help you spot emerging trends in people’s comments, respond to service issues before they escalate, track marketing campaigns, gain insights about your competitors, and more.

Microsoft Dynamics CRM Online users can add Microsoft Social Listening charts and visuals to dashboards, or you can add them to account, contact, or competitor screens. You can also add Microsoft Social Listening charts and visuals to other types of records.

To help you get up and running quickly with Microsoft Social Listening, a system administrator sets up lists of common search terms for your organization in advance. Everyone shares and can select from the same pre-set lists of search terms to listen for on social networks like Facebook and Twitter.

Or, you can [Set up your own searches for Social Listening](#zcbb1f76a9bae4d7092f373c92105173c) for Microsoft Social Listening to monitor on social networks.

Tip

Want to know more about Microsoft Social Listening before you set it up? Check out the [eBook: Microsoft Social Listening for CRM](http://go.microsoft.com/fwlink/p/?LinkID=393642). This eBook shows you how Microsoft Social Listening can help you quickly analyze what people are really saying on vast social networks like Facebook and Twitter. Includes a gallery of all available charts and visuals with examples so you can get an idea of what’s possible. For more info about pricing and licensing, see Get ready for the next release.

Create a social listening dashboard

You’ll use a wizard to set up the search terms to listen for on social networks like Facebook and Twitter, and to select the charts or visuals you want to include on a dashboard.

People in sales, service, or marketing can create their own dashboards. CRM admins can create dashboards to share with the entire organization.



|  |  |  |
| --- | --- | --- |
| 1. To start the social listening wizard are different, follow the steps for your role.  If you’re in sales, service, or marketing   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Dashboards. |   If you’re a CRM admin   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Customizations.  c. 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.  5. To start the wizard, choose the Social Listening 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 listening chart or visual to an account or other type of record

You’ll use a wizard to set up the search terms to listen for on social networks like Facebook and Twitter, and to select the charts or visuals you want to include for an account.

You can also add social listening charts or visuals to contacts, competitors, or other types of records.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Accounts.  You’ll see a list of accounts. You may need to scroll to see the whole list. |   If using Microsoft Dynamics CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then choose Accounts.  You’ll see a list of accounts. You may need to scroll to see the whole list. |   2. Choose the account you want.  3. To start the social listening wizard, choose Configure Social Insights.  4. On the Set up Social Insights page, choose Search topic, and then choose Next.  5. In the Search topics list, select the list of terms to listen for, and then choose Next.  6. From the Visual name drop-down list, select the name of the chart or visual. Each one includes a brief description to help you find the one you want.  Tip  To add more than one chart or visual, choose Add visual, and then select another chart or visual from the list.  7. Choose Finish. |

See Also

[eBook: Microsoft Social Listening for CRM](http://go.microsoft.com/fwlink/p/?LinkID=393642)

[Set up your own searches for Social Listening](#zcbb1f76a9bae4d7092f373c92105173c)

Get ready for the next release

Set up your own searches for Social Listening

To help you get up and running quickly with Microsoft Social Listening, a system administrator sets up lists of common search terms (also referred to as “search topics”) for your organization in advance. Everyone shares and can select from the same pre-set lists of search terms to listen for on social networks like Facebook and Twitter.

However, if you want Microsoft Social Listening to monitor different search terms, you can use a wizard to set up your own searches.

Tip

Want to know more about Microsoft Social Listening before you set it up? Check out the [eBook: Microsoft Social Listening for CRM](http://go.microsoft.com/fwlink/p/?LinkID=393642). This eBook shows you how Social Listening can help you quickly analyze what people are really saying on vast social networks like Facebook and Twitter. The eBook includes a gallery of all available charts and visuals with examples so you can get an idea of what’s possible. For more info about pricing and licensing, see Get ready for the next release.

Set up your own search on a social listening dashboard

You’ll use a wizard to set up your own search terms to monitor on social networks, and to select the charts or visuals you want to include on a dashboard.



|  |
| --- |
| 1. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  2. Click or tap the work area name, and then click or tap Dashboards.  3. Click or tap New.  4. Choose the layout to use for the dashboard, and then click or tap Create.  Tip  The 2-column regular dashboard layout is a good place to start because it gives you a simple design for up to four different charts.  5. Type a name for the dashboard.  6. To start the wizard, click or tap the Social Listening button () on the dashboard.  7. On the Set up Social Insights page, click or tap Search topic > Create a new search topic. Complete the fields on the screens.  To group this search by the type of record (for example, accounts, competitors, or contacts), in the Select a category for this search topic drop-down list, select the record type.  In the Keywords to search for field, enter the terms to search for, separated by commas. Social Listening finds exact matches, but the terms aren’t case-sensitive. For best results, include variations on the terms (for example, “phone” and “phones”).  In the Keywords that must be INCLUDED in results field, enter additional terms that are required in results. These additional terms will narrow your search (think “AND”).  In the Keywords that must be EXCLUDED from results field, enter terms you don’t want in results. Use exclusions to avoid overwhelming your results with irrelevant keywords (think “NOT”).  8. Click or tap Next.  9. From the Visual name drop-down list, select the name of the chart or visual. Each one includes a brief description to help you find the one you want.  Tip  To add more than one chart or visual, click or tap Add visual, and then select another chart or visual from the list.  10. Click or tap Finish.  11. Click or tap Save, and then click or tap Close. |

Set up your own search for an account or other type of record

If you want to monitor emerging trends on social media for an account, you can use a wizard to set that up.

You can also add social listening charts or visuals to contacts, competitors, or other types of records.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Choose the work area name, and then choose Accounts.  You’ll see a list of accounts. You may need to scroll to see the whole list. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then click or tap Accounts.  You’ll see a list of accounts. You may need to scroll to see the whole list. |   2. Click or tap the account you want.  3. To start the wizard, click or tap Configure Social Insights.  4. On the Set up Social Insights page, click or tap Search topic, and then click or tap Create a new search topic. Complete the fields on the screens.  To group this search by the type of record (for example, accounts, competitors, or contacts), in the Select a category for this search topic drop-down list, select the record type.  In the Keywords to search for field, enter the terms to search for, separated by commas. Social Listening finds exact matches, but the terms aren’t case-sensitive. For best results, include variations on the terms (for example, “phone” and “phones”).  In the Keywords that must be INCLUDED in results field, enter additional terms that are required in results. These additional terms will narrow your search (think “AND”).  In the Keywords that must be EXCLUDED from results field, enter terms you don’t want in results. Use exclusions to avoid overwhelming your results with irrelevant keywords (think “NOT”).  5. Click or tap Next.  6. From the Visual name drop-down list, select the name of the chart or visual. Each one includes a brief description to help you find the one you want.  Tip  To add more than one chart or visual, click or tap Add visual, and then select another chart or visual from the list.  7. Click or tap Finish. |

See Also

[eBook: Microsoft Social Listening for CRM](http://go.microsoft.com/fwlink/p/?LinkID=393642)

[Add social listening visuals to a dashboard or account](#zcb0c2c12d9254a5898c12abd9642675d)

Get ready for the next release

Disable or enable social data for an organization

If your organization uses Microsoft Dynamics CRM Online, Microsoft Dynamics CRM 2013 Service Pack 1 (SP1), or Microsoft Dynamics CRM 2015, 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: [Control social data](http://go.microsoft.com/fwlink/?LinkID=394751)

See Also

[Control social data](http://go.microsoft.com/fwlink/?LinkID=394751)

[Automatically create cases from email or social monitoring](#z6331648fe0f54e679a1808fdb22ba879)

Connect your organization to Microsoft Social Listening

You can monitor—right on a Microsoft Dynamics CRM screen—what people are saying on Facebook, Twitter, or blogs.

[Connect to Microsoft Social Listening](http://go.microsoft.com/fwlink/p/?LinkID=395137)

[eBook: Microsoft Social Listening for CRM](http://go.microsoft.com/fwlink/p/?LinkID=393642)

[Add social listening visuals to a dashboard or account](#zcb0c2c12d9254a5898c12abd9642675d)

[Set up your own searches for Social Listening](#zcbb1f76a9bae4d7092f373c92105173c)

[Microsoft Social Listening Help Center](http://go.microsoft.com/fwlink/p/?LinkID=394325)

[Microsoft Social Listening Forum](http://go.microsoft.com/fwlink/p/?LinkID=510293)

Collaborate with Skype, Lync, and Yammmer

Set up Microsoft Dynamics CRM to make calls with Skype or Lync

If your organization is set up to use Skype or Lync, you can call your contacts from within Microsoft Dynamics CRM by clicking or tapping the person’s phone number. This capability is called “click to call.”

There are a few areas where system administrators configure settings for this feature.

For users to place calls from within Microsoft Dynamics CRM on their computer, they either need to [install Skype](http://go.microsoft.com/fwlink/?LinkID=246141); or you will need to setup and make available [Lync](http://office.microsoft.com/en-us/microsoft-lync-video-conferencing-and-instant-messaging-FX102004552.aspx).

Supported versions of Skype or Lync

These versions of Lync and Skype are supported:

 Microsoft Lync 2010 or Microsoft Lync 2013

 Skype 6.0

Set whether your organization uses Skype or Lync

You can configure which telephony provider your organization uses for click to call.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration > System Settings. |   3. On the General tab, under Set the telephony provider, for Select provider for Click to call, select Skype or Lync.  4. Click or tap OK. |

Set your organization’s prefix for phone numbers

For people to place Skype or Lync calls from within Microsoft Dynamics CRM, the phone numbers must be entered and stored in a valid number format: <country/region code><area code><number>. However, when entering data in Microsoft Dynamics CRM, users may not include the required country or region prefix in a phone number.

To solve this, you can enable country/region code prefixing, and the system will prefix the code to the number that you are trying to call. This prefixing can be done for the entire organization, or users can set the country or region code in their personal options. If a user has specified a different code than what is set for the organization, the user’s setting overrides the organization’s setting.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, click or tap Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Click or tap Settings > Administration > System Settings. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then click or tap Settings > System > Administration, and then click or tap System Settings. |   3. On the General tab, in the Set the default country/region code section, select the Enable country/region code prefixing check box, and then in the Country/Region Code Prefix, specify the country/region code, such as +01181 (81 is the country code for Japan).  4. Click or tap OK. |

Place calls with Skype or Lync

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

To place calls from within Microsoft Dynamics CRM on your computer, you either need to [install Skype](http://go.microsoft.com/fwlink/?LinkID=246141); or you need to check with your system administrator for steps to install Lync.

To place calls from within CRM for tablets, you’ll need to download the Skype app. If you don’t already have the app when you tap a phone number, you’ll have the opportunity to download the app before the call is placed.

These versions of Lync and Skype are supported:

 Microsoft Lync 2010 or Microsoft Lync 2013

 Skype 6.0

Collaborate and communicate with Yammer

Yammer gives you one place to have conversations, create and edit documents, and share information with your colleagues without sending a single email or attending any meetings.

If your organization is set up to work with Yammer, you’ll see posts on your Microsoft Dynamics CRM dashboard when colleagues update customer info and you can comment on their posts—asking questions, offering congratulations, and so on.

Important

Before you can use Yammer within Microsoft Dynamics CRM, your organization needs to buy Yammer enterprise licenses.

When you use Yammer within Microsoft Dynamics CRM, here’s what you’ll be able to do:

 The Yammer newsfeed displays on your dashboard. As you and your colleagues work with customers, you’ll stay up to date with the latest news about what’s happening, and you’ll be able to join in the conversation. Discuss project deadlines, share the latest files, gather feedback – and more.

 Colleagues receive updates on your customer interactions automatically. When you create a new lead, convert it to an opportunity, close it, and so on, Yammer displays this news in your organization’s newsfeed automatically.

 You can share files and discuss content without ever leaving your browser. Share documents, PDFs, images, and videos across teams quickly and easily.

See Also

[Visit the Yammer website](http://go.microsoft.com/fwlink/?LinkID=272440)

Connect Microsoft Dynamics CRM to Yammer

Yammer gives colleagues at your organization a central place to have conversations, create and edit documents, and share information without sending a single email or attending any meetings.

After you set up your organization to work with Yammer, employees will see posts in a newsfeed on their Microsoft Dynamics CRM dashboard whenever people update customer info, and they’ll be able to join in the conversation with their own posts.

Important

Before your organization can use Yammer in CRM, your organization needs to buy Yammer enterprise licenses.

Connect your organization to Yammer

Step 1: Connect to Yammer

|  |  |
| --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Note  You’ll also need to have verified system administrator privileges for your organization’s Yammer account, plus both the prvWriteOrganization and PrvConfigureYammer privileges. If you’re not an administrator, by default these privileges aren’t available, and must be added.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Install the most recent product updates.  3. Sign up for a Yammer Enterprise account, and note the name of the network you receive. More information: [Visit the Yammer website](http://go.microsoft.com/fwlink/?LinkID=272440)  4. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  5. Choose Settings > Administration.  6. Click or tap Get Yammer.  7. Read the disclaimer, and then click or tap Continue.  8. Click or tap Authorize Microsoft Dynamics CRM Online to connect to Yammer.  9. Sign in to your enterprise Yammer account using your administrator credentials.  10. Follow the on-screen instructions to accept the Yammer terms of service, note which Yammer network has been set up for you, and connect your organization to it. After your organization is connected, you’ll see a confirmation message at the bottom of the screen.  11. If desired, stay signed in to your Yammer account and set your organization’s preferences for Yammer posts. |

Step 2: Set your organization’s preferences for Yammer posts (optional)

|  |
| --- |
| 1. Make sure you’re signed in to your enterprise Yammer account using your administrator credentials.  2. If desired, select whether Yammer posts are public (everyone sees Microsoft Dynamics CRM posts in the newsfeed, or private (people must “follow” a record to see posts about that record in the newsfeed).  3. If desired, select the default group where you would like Microsoft Dynamics CRM posts to appear.  4. If desired, select which record types trigger automatic posts to the Yammer newsfeed. |

What triggers automatic posts to the Yammer newsfeed?

The record types and rules in the following list can be enabled to trigger a Yammer post automatically. Record types that are enabled by default are marked “Yes.” If you want to enable an entity or rule type, make sure that the entity or rule is activated and that the types of auto-posts you want are enabled.

|  |  |  |
| --- | --- | --- |
| Post Entity Id | Name | Enabled to Post Automatically |
| Case | New Case for an Account | Yes |
| Case | New Case for a Contact | Yes |
| Case | Case Closed for an Account |  |
| Case | Case closed for a Contact |  |
| Case | Case Assigned to User/Team |  |
| Case | Case Routed to Queue |  |
| Lead | New Lead created |  |
| Lead | A Lead has been qualified |  |
| Opportunity | New opportunity for an Account | Yes |
| Opportunity | New opportunity for a Contact | Yes |
| Opportunity | Probability for an Opportunity Updated for an account |  |
| Opportunity | Probability for an Opportunity Updated for a contact |  |
| Opportunity | Opportunity Won for an Account | Yes |
| Opportunity | Opportunity Won for a Contact | Yes |
| Opportunity | Opportunity Lost for an Account |  |
| Opportunity | Opportunity Lost for a Contact |  |
| Account | New Account Created | Yes |
| Contact | New Contact Created |  |
| Competitor | New Competitor Created | Yes |

When you have Yammer set up, keep these things in mind:

 All user posts (conversations) are stored in Yammer, not in Microsoft Dynamics CRM.

 All system posts are stored in Microsoft Dynamics CRM.

 If the Post to Yammer Activity Stream rule (or posttoyammer attribute) is set to True in Post Rules Configuration, that activity will post to Yammer.

See Also

[Collaborate and communicate with Yammer](#z3f607d0310cb42d58c0aa6e08e6b3cb8)

[Visit the Yammer website](http://go.microsoft.com/fwlink/?LinkID=272440)

Follow best practices with business processes

Guide staff through common tasks with processes

To help you automate common business tasks and ensure that people handle customers consistently, Microsoft Dynamics CRM includes processes.

There are four types of processes, each designed for a different purpose:

 Business process flow. Use when you want staff to move through the same stages and follow the same steps to interact with a customer. For example, use a business process flow if you want everyone to handle customer service requests the same way, or to require staff to gain approval for an invoice before submitting an order.

Microsoft Dynamics CRM includes several ready-to-use business process flows for common sales, service, and marketing tasks that you can use with little or no changes required. Or, you can create your own.

More information:

 [Create a new business process](#zefe86ab3430f485ab9246ed82cfbb449)

 [Activate a business process](#zeacffbbe46614d1e9d1fdfb6fed352d2)

 [Add ready-to-use business processes](#ze9810459224b4bde851ae581cf5fb8a4)

 [Assign a security role to a business process](#zc4f67b3ec6f04114be752ff40bdbee1b)

 Dialog. Use when you have a step-by-step script you want staff to read through when talking to customers. For example, create a dialog to guide customer service reps through a customer call to resolve a case.

More information: [Customization Guide: Work with dialogs](http://go.microsoft.com/fwlink/?LinkID=317256)

 Workflow. Use when you want to automate common tasks, such as automatically sending a confirmation email to a customer when an order ships.

More information: [Customization Guide: Set up workflows](http://go.microsoft.com/fwlink/?LinkID=317256)

 Action. Use when you want to automate a series of commands in the system.

More information: [Customization Guide: Automate actions programmatically](http://go.microsoft.com/fwlink/?LinkID=317256)

Create a new business process

You can help ensure that people enter data consistently and follow the same steps every time they work with a customer by creating a business process. For example, you might want to create a business process to have everyone handle customer service requests the same way, or to require people to gain approval for an invoice before submitting an order.

The system comes with several ready-to-use business processes for common business scenarios. All you have to do is add them to the system. More information: [Add ready-to-use business processes](#ze9810459224b4bde851ae581cf5fb8a4)

Or, you can create your own business process if you need to cover a scenario that is unique to your organization.

When a business process is activated for a record type, people are prompted to enter required data and follow required steps to move a record through the process successfully.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Processes. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Process Center, and then click or tap Processes. |   3. On the Actions toolbar, click or tap New.  4. Complete the required fields.  For the Category, select Business Process Flow from the drop-down list.  For the Entity, select the type of record from the drop-down list.  5. Select New blank process.  6. Choose OK.  7. Type a description for the process. You can use up to 2000 characters.  8. If people will progress from one type of record to another in order, click or tap , and then select the next type of record in the process. Select more types of records to use in the process, if desired.  9. Type a name for the stage in the process.  10. If desired, select a category for the stage, either Qualify, Develop, Propose, Close, Identify, Research, or Resolve.  11. Type a name for the first step in the stage. To add more steps, click or tap , and then type a name.  12. If you want people to enter data to complete a step, select the field from the drop-down list. Select Required if people must fill in the field to complete the step and move to the next stage of the process.  13. If desired, click or tap  to add another stage. Repeat steps 9 through 12 until you have added all the stages and steps to the process.  14. To save the process as a draft, click or tap Save at the top of the screen. (As long as a process is a draft, people won’t be able to use it.) To activate it so that people can use it, click or tap Activate. |

See Also

[Activate a business process](#zeacffbbe46614d1e9d1fdfb6fed352d2)

[Assign a security role to a business process](#zc4f67b3ec6f04114be752ff40bdbee1b)

[Add ready-to-use business processes](#ze9810459224b4bde851ae581cf5fb8a4)

Activate a business process

Before people can follow the stages and steps in a business process, you’ll need to activate it.

Note

If the business process includes workflows or portable business logic rules, you’ll need to activate those separately. More information: [Customization Guide](http://go.microsoft.com/fwlink/?LinkID=317256)



|  |  |  |  |
| --- | --- | --- | --- |
| 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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Processes. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Process Center, and then click or tap Processes. |   3. On the list of processes, click or tap on the left of the process name to select it.  4. Click or tap Activate. |

See Also

[Create a new business process](#zefe86ab3430f485ab9246ed82cfbb449)

[Assign a security role to a business process](#zc4f67b3ec6f04114be752ff40bdbee1b)

[Add ready-to-use business processes](#ze9810459224b4bde851ae581cf5fb8a4)

Assign a security role to a business process

So that people can handle customers according to the stages and steps required in a business process, you need to enable their security role for the process. After you enable a security role, the people with the role can assign the process to new records, and can switch to this process on an existing record.



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Processes. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, click or tap Settings > Process Center, and then click or tap Processes. |   3. On the list of your processes, click or tap the process name.  4. Click or tap Enable Security Roles.  5. Select Enable for everyone or select Enable only for the selected security roles, and then select the security role.  6. Choose OK. |

See Also

[Activate a business process](#zeacffbbe46614d1e9d1fdfb6fed352d2)

[Create a new business process](#zefe86ab3430f485ab9246ed82cfbb449)

[Add ready-to-use business processes](#ze9810459224b4bde851ae581cf5fb8a4)

Add ready-to-use business processes

Microsoft Dynamics CRM includes several ready-to-use business processes for common sales, service, and marketing scenarios – to help you ensure that staff follow consistent steps every time they work with customers.

Before you can use these processes, you need to add them to the system.

Note

Ready-to-use business processes are activated automatically when you add them. If a ready-to-use business process includes workflows or portable business logic rules, you’ll need to activate those separately. More information: [Customization Guide](http://go.microsoft.com/fwlink/?LinkID=317256)

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](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   2. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  3. Choose Settings > Data Management.  4. Click or tap Add Ready-to-Use Business Processes.  5. Click or tap Add. |

See Also

[Create a new business process](#zefe86ab3430f485ab9246ed82cfbb449)

[Assign a security role to a business process](#zc4f67b3ec6f04114be752ff40bdbee1b)

[Guide staff through common tasks with processes](#z0b4e66025701485981cc6f6fe50901b2)

Business process solutions available for download

Check out the [Microsoft Dynamics Marketplace](http://go.microsoft.com/fwlink/p/?LinkID=389745) for several business process solutions that help organizations like yours follow best practices for common scenarios in your industry. These solutions help you save time by giving you a great starting point for creating business processes that match the way you do business.

Before you can use these processes, you need to download them from the Microsoft Dynamics Marketplace, and then import the solution into the system. Many solutions include demo data so that you can experiment with them and see how they work.

Important

These solutions are not supported by Microsoft. They are intended to serve only as templates for customizations in Microsoft Dynamics CRM. More information: [Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=328174)

|  |  |  |
| --- | --- | --- |
| Industry | Business Process Solution | 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. |
|  | Wealth Management Process | Gather required information from clients, develop investment proposals, and close transactions successfully. Doesn’t include demo data. |
|  | Health Plan Sales Management Process | Capture information from marketing campaign responses, convert leads into opportunities, send price quotes, and create policies. Customer service reps can also follow the process to cross-sell insurance products during service calls. |
|  | Life Insurance Sales Process | Capture information from prospects, convert leads into opportunities, send price quotes, and create policies. Customer service reps can also follow the process to cross-sell insurance products during service calls. Doesn’t include demo data. |
| Public Sector | Healthcare Management Process | Screen patients, provide appropriate counseling, and schedule follow-up appointments for patients. Doesn’t include demo data. |
|  | License and Permit Compliance Process | Oversee the collection of licensing and permitting fees from businesses and citizens. |
|  | Public Sector Case Management Process | Follow standardized steps to assess cases, define and approve mitigation plans, provide management reports, and ensure all required activities are completed to close a case. |
|  | Citizen Service Request Process | Prioritize and assign service requests, estimate time and costs, and track progress until requests are resolved. |
|  | Grant Management Process | Manage and track grant awards to individuals, businesses, or other governments from application to the allocation of funds. |
|  | Microsoft Dynamics CRM for Nonprofits | Track donation requests from ask to thank you, store templates for receipts, letters, and sign-up sheets, and gather information about potential donors, sponsors, and volunteers. Doesn’t include demo data. |
|  | Higher Education Admissions Sample Process | Manage admissions and enrollment for prospective students, including collecting student information, tracking receipt of application documents, and monitoring applications under consideration. Doesn’t include demo data. |
| Manufacturing and Resources | Service Call – Repair and Return Process | Standardize how customer service reps (CSRs) assist customers with product fixes by phone, and manage product returns, replacements, and repairs. |
|  | Collaborative Marketing for Automotive Process | Designed for OEMs and dealers to help with collaboration on marketing campaigns. Define targeted marketing program requirements, follow up on responses, and submit proof of compliance with reimbursement terms. |
|  | Design Win for Manufacturing Process | For semi-conductor and electronic component manufacturers. Executive the design process successfully from prototyping to signed contract. Define the design, identify parts suppliers, generate a proposal, gather the right information from the customer, and close the contract. |
|  | Proactive Service to Cross Sell Process | Armed with sensor data, service representatives can diagnose issues and then reach out to customers to cross-sell products – all before a service interruption occurs. Review the sensor data, identify a product to cross-sell, and handle the service case. |
|  | Sales Targeting in New Markets for Manufacturing Process | Create targeted marketing campaigns for products, and nurture campaign responses through the sales cycle to shipping an order. Guide sales representatives through each step to collaborate with the engineering team to create prototypes and manage change orders. |
|  | Warranty Claims Management for Automotive Process | Simplify handling of warranty claims, including capturing key information from the customer, creating work orders for repairs, coordinating OEM review and approval of claims, and submitting required documentation. |
| Professional Services | Complex Opportunity Management Process | Respond to a Request for Proposal (RFP) or Request for Quote (RFQ). Create proposals, assess risks, conduct cost-benefit analysis, and make bid/no bid decisions based on relevant data. |
|  | Solution Selling® – Short Sales Cycle | Guide sales representatives through a simple sales cycle with two or three meetings with prospective customers or decision makers. |
|  | Solution Selling® – Strategic/Complex Sales Cycle | Guide sales representatives through a complex sales cycle with five or more meetings with prospective customers, decision makers, or sponsors. |
|  | Solution Selling® – Transactional Cycle | Guide sales representatives through a highly scripted, “one call” sales cycle. Covers inbound and outbound calling scenarios. |
|  | Sports Management Process | Designed for professional sports teams. Manage the sale of tickets and merchandise, and track players and teams, including injuries, scouting reports, drug testing results, and contracts. Doesn’t include demo data. |

See Also

[Customization Guide](http://go.microsoft.com/fwlink/?LinkID=317256)

[Activate a business process](#zeacffbbe46614d1e9d1fdfb6fed352d2)

[Create a new business process](#zefe86ab3430f485ab9246ed82cfbb449)

[Assign a security role to a business process](#zc4f67b3ec6f04114be752ff40bdbee1b)

[Import a business process solution from the Microsoft Dynamics Marketplace](#z70d7053c70254de997e4165d9a50535b)

Import a business process solution from the Microsoft Dynamics Marketplace

Before you follow these steps, download the files for the business process solution from the Microsoft Dynamics Marketplace. The files are in cabinet format (.cab), so you’ll need to extract them into compressed file (.zip) first, then extract all files you need for the solution.

Important

These solutions are not supported by Microsoft. They are intended to serve only as templates for customizations in Microsoft Dynamics CRM. Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it’s least disruptive to users. More information: [Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=328174)

Step 1: Import the business process solution



|  |  |  |  |
| --- | --- | --- | --- |
| 1. Download the solution from the Microsoft Dynamics Marketplace. Extract the compressed (.zip) file from the download (.cab) file, and then extract all the files included with the solution.  2. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  Check your security role   |  | | --- | | a. Follow the steps in [View your user profile](#z6f8a783f2cb242929318b0cedc9fb5f9).  b. Don’t have the correct permissions? Contact your system administrator. |   3. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Choose Settings > Customizations. Click or tap Solutions. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Solutions > Customization > Customizations. Then click or tap Solutions. |     4. On the Actions toolbar, click or tap Import.  5. Browse to the folder that contains the compressed (.zip) file, select it, and then click or tap Open.  6. Click or tap Next. Wait until the file processes.  7. Click or tap View solution package details to review the list of imported solution components. When you’re finished reviewing the list, click or tap Close.  8. Click or tap Next.  9. To activate any workflows and enable any SDK message processing steps included in the solution, under Post Import Actions, select the check box. The workflows and SDK message processing steps begin working as soon as the import finishes.  Note  If you don’t activate any workflows or SDK message processes steps on import, you’ll need to activate them later for them to work. More information: [Customization Guide: Set up workflows](http://go.microsoft.com/fwlink/?LinkID=317256)  10. Click or tap Import. Wait while the solution imports. You’ll see a message that notifies you when the import is completed.  11. Click or tap Close. |

Note

 You cannot import a custom entity with the same name as an existing entity. Microsoft Dynamics CRM allows duplicate display names, however.

 You can import only items that you have organization-level access to create, read, and update.

 Any imported security roles are associated with the root business unit.

Step 2: Import demo data

You’ll use the Import Data wizard to import the demo data that comes with the business process solution.



|  |  |  |
| --- | --- | --- |
| 1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.  2. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Data Management.  c. Click or tap Imports. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Data Management > Imports. |   3. Click or tap Import Data.  4. Browse to the folder with the compressed (.zip) file of demo data, select it, and then click or tap Open. Click or tap Next.  5. Review the files listed on the upload summary. Click or tap Next.  6. Select Default (Automatic Mapping) for the System Data Map. Click or tap Next.  7. On the Map Record Types screen, for any record type with an alert icon, map the type of data to the corresponding field in Microsoft Dynamics CRM. Click or tap Next.  8. On the Map Fields screen, for any fields with an alert icon, map the field name to the corresponding field in Microsoft Dynamics CRM. Click or tap Next.  9. Review the summary, then click or tap Next.  10. Review the fields, and then click or tap Submit.  11. To verify that the wizard was successful, click or tap Imports, and then review the status screen. Otherwise, click or tap Finish. |

See Also

[Create a new business process](#zefe86ab3430f485ab9246ed82cfbb449)

[Activate a business process](#zeacffbbe46614d1e9d1fdfb6fed352d2)

[Add ready-to-use business processes](#ze9810459224b4bde851ae581cf5fb8a4)

[Assign a security role to a business process](#zc4f67b3ec6f04114be752ff40bdbee1b)

[Business process solutions available for download](#z5ec3679802a44f1e890b0b94ada87164)

Use a dialog to create an interactive process like a wizard

You can find information on creating dialogs in  [Planning and Deploying CRM](http://go.microsoft.com/fwlink/p/?LinkID=517194).

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 our Customization Guide](http://go.microsoft.com/fwlink/p/?LinkID=511855)

See Also

[Learn about different types of processes in Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/p/?LinkID=395120)

Import data

Import contacts

Whether your contacts are stored in an email program, a spreadsheet, or on your phone, you’ll probably want to import them into Microsoft Dynamics CRM so you can keep track of the people you do business with all in one place.

Step 1: Get your import file ready

First, you export your contacts into a file.

These file formats are supported:

 Comma-separated values (.csv)

 Text (.txt)

 Compressed (.zip)

 Excel Spreadsheet 2003 (.xml)

The maximum file size allowed for .zip files is 32 MB. For the other file formats, the maximum file size allowed is 8 MB.

Tip

If you need to import a larger amount of data, see the [Developer Toolkit for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkID=31788) for additional details.

If you store contacts in more than one program, add your import files to a single .zip file. Then import the .zip file to bring in all the files at once.

Follow the procedure for the program or location where your contacts are stored:

Export contacts from an email program

|  |
| --- |
| 1. Export the contacts into a comma separated values file (.csv).  To find specific steps to export contacts from your email program, open the program’s Help, and search for “export.” Look for topics that include “exporting contacts” or “exporting your address book” or “export wizard” in the title.  2. Save the file in a location where you can find it easily later. |

Export contacts from a spreadsheet

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Open the spreadsheet.  2. If necessary, edit any column name in the spreadsheet to match exactly with the corresponding name shown here.  Warning  If the spreadsheet doesn’t include all the column names listed, that’s okay. However, if a column name does exist, it must match exactly with the corresponding name in the list or the import won’t work. Spaces are required. Note that the word “Email” doesn’t contain a hyphen.   |  | | --- | | Column Name in Spreadsheet (spelling must match exactly) | | First Name | | Middle Name | | Last Name | | Business Phone | | Mobile Phone | | Job Title | | Business Street | | Business City | | Business State | | Business Postal Code | | Business Country/Region | | Email Address |   3. Save the file. |

Export contacts from your phone

|  |
| --- |
| 1. Use a USB cable or an app to export your contacts from your phone to your computer.  To find specific steps to export contacts for your brand of phone, search for “export contacts from my phone” in your favorite search engine (like Bing).  To find an app, search your phone’s online store. |

Step 2: Import the file

You’ll use the Import Data wizard to import your contacts.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears on the nav bar.  b. Choose Settings > Data Management.  c. Click or tap Imports. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Data Management > Imports. |   2. Click or tap Import Data.  3. Browse to the folder where you saved the file that contains the export of your contacts. Select the file, then click or tap Open. Click or tap Next.  Tip  You can import only one file at a time. To bring in more files, run the wizard again later, or add all your contacts files to a single .zip file.  4. Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Click or tap Next.  Note  In most cases, you can accept the default delimiters.  5. Select Default (Automatic Mapping) for the System Data Map. Click or tap Next.  6. In the Microsoft Dynamics CRM Record Types drop-down list, select Contacts. Click or tap Next.  7. For any record type with an alert icon, map the column from your contacts file to the corresponding field in Microsoft Dynamics CRM. Click or tap OK, then click or tap Next.  8. Review the summary, then click or tap Next.  9. Click or tap Submit.  10. To verify that the wizard was successful, click or tap Imports, then review the report. Otherwise, click or tap Finish. |

Step 3: Check that the contacts imported successfully

After the wizard finishes, check your list of contacts to make sure they imported correctly.



|  |
| --- |
| 1. Click or tap Microsoft Dynamics CRM, then click or tap your role (either Sales, Service, or Marketing).  2. Click or tap Contacts.  3. Scroll through the contact list. Check that each person is listed and verify the contents of the fields for accuracy. |

See Also

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Review the file upload summary



|  |
| --- |
| 1. Verify that the files you want to import are listed. For .zip files, the list includes each file added to the .zip file.  2. Click or tap Delimiter Settings, then select the characters used to separate the contents of fields and pieces of data. (These characters are called “delimiters.”)   The default delimiter for fields is a comma (,).The other supported delimiters for fields are colon (:), semicolon (;), and tab character (/t).   Example of field delimiter: Company Name,Address,City,State   The default delimiter for data is double quotation marks (").The other supported delimiters for data are single quotation mark ('), and None.  Examples of data delimiter:  Company Name,Address  "Fabrikam, Inc.","150 A Street"  Note  Because an XML file does not use delimiters, if you upload a file that is in XML Spreadsheet 2003 format, or a .zip file that contains XML Spreadsheet 2003 files, the delimiter information won’t be available.  3. Click or tap Next. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Select a data map



|  |
| --- |
| 1. Select a data map to tell the Import Data wizard how to organize your imported data into the right columns and fields in Microsoft Dynamics CRM.  Select the default data map to let the wizard automatically map your data, or select a data map to match the type of information you’re importing.  The following table helps you decide which data map to use.  2. Click or tap Next. |

|  |  |
| --- | --- |
| System Data Maps | When to Use |
| Default (Automatic Mapping) | Recommended. Use when you want the wizard to map the imported data to the columns and fields in Microsoft Dynamics CRM automatically.  If the wizard can’t determine how to map your data, you’ll have an opportunity to map it manually later.  Important  Import files can only contain one type of data, such as contacts, leads, accounts, or cases. Also, the column headings in the source file must match exactly with the field names in Microsoft Dynamics CRM. |
| For Generic Contact and Account Data | Use when the import file contains contacts or accounts. |

|  |  |
| --- | --- |
| Data Maps for Salesforce.com | When to Use |
| For Contact and Account Report Export | Use this map when your import file contains contacts or accounts from Salesforce.com. |
| For Full Data Export | Use this map when your import file is exported from Salesforce.com using Full Data Export. |
|  |  |
| For Report Export | Use this map when your import file is exported from Salesforce.com using Report Export. |

|  |  |
| --- | --- |
| Data Maps for Microsoft Outlook Business Contact Manager | When to Use |
| For BCM 2010 | Use this map when your import file contains data from Microsoft Outlook 2010 with Business Contact Manager. |

|  |  |
| --- | --- |
| Custom Maps(optional) | When to Use |
| Custom maps | If available, custom data maps created for your organization are listed here. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Review settings and import data

Set whether the Import Data wizard checks for and handles duplicate data on import, decide who can edit or share the imported data, and save the settings you used for this import so you can use them again later.

Check for duplicate data

|  |
| --- |
| 1. Make sure there is a duplicate detection rule for the type of information you’re importing. By default, the system includes rules for contacts, accounts, and leads. If you’re importing a different type of data and need to set up duplicate detection rules, follow the steps in [Set up duplicate detection rules to keep your data clean](#za692ee2aad3347a9978e00331ec0f75e).  2. If it’s okay for the Import Data wizard to import duplicate records, in the Allow Duplicates section, select Yes.  Caution  In most cases, to avoid importing duplicate information, you should keep this option set to No. |

Set who owns the imported data

|  |
| --- |
| 1. To set who owns the imported records, in the Select Owner for the Imported Records section, click or tap the Lookup button .  Important  Who should “own” the imported data? Most security roles allow people to view the data. However, the owner is also allowed to edit and share it. Here’s an example: If your import file contains contacts you collected at a trade show and you want to assign a user to follow up with these contacts, select that person for the owner.  To assign someone other than yourself as the owner of the imported records, your security role must include permissions to create records for the user. If you don’t have sufficient permissions, the wizard assigns you as the owner of the imported records by default.  Also, if applicable, ownership is assigned to the person defined in the data map metadata and users.csv file.  2. In the search box, type the person’s name, then click or tap the Lookup button .  3. Select the name, then click or tap Add. |

Save these import settings to use again

|  |
| --- |
| 1. To save these import settings so you can use them again, enter a name for the settings (called a “data map”).  The next time you run the Import Data wizard, you’ll see the new data map listed under Custom Maps.  2. To import the data, click or tap Submit. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Map record types



|  |
| --- |
| 1. For each import file, confirm that the Import Data wizard has identified the correct type of information (called a “record type”) contained in the file.  For example, if an import file contains contacts, the record type should be Contact. An import file containing accounts should have the record type Account, and so on.  2. For any import file marked Not Mapped or that has an incorrect record type, from the Microsoft Dynamics CRM Record Types drop-down list, select the record type contained in the import file.  3. Click or tap Next. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Review the mapping summary

Click or tap Edit if you want to change any record type or field mappings. Otherwise, click or tap Next.

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Map fields



|  |
| --- |
| 1. Confirm that the Import Data wizard has mapped all the pieces of info (called “fields”) in the import file to the correct fields in Microsoft Dynamics CRM. You may need to scroll down to see all the fields in the import file.  For example, an import file containing contacts may have a field for First Name, Last Name, and Job Title. Make sure those fields are mapped correctly to the corresponding fields in Microsoft Dynamics CRM.  2. For any field in the import file that is marked Not Mapped, go to the CRM Field Types drop-down list and select the field name to use in Microsoft Dynamics CRM. You may need to scroll down to see all available fields.  3. Click or tap Next. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Create custom fields with the Import Data wizard

Upload a data import file



|  |
| --- |
| 1. Before you run the Import Data wizard, create a file that contains the data you want to import. Follow the steps in [Import contacts](#z476018f9e48146baa9d1c87cb4dd810a). Or to import other types of data such as leads, accounts, or cases, see [Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433).  2. Browse to the folder where you saved the file containing the import file. Select the file, then click or tap Open. Click or tap Next. |

Note

File types that are supported are comma-separated values (.csv), text (.txt), compressed (.zip), and XML spreadsheet 2003 (.xml).   
  
The maximum file size allowed is 32 MB for .zip files (200 MB total for files added to the .zip file), and 8 MB for other supported file types.

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

[Import accounts, leads, or other data](#zdee40fe519424521986f714edfd36433)

Import accounts, leads, or other data

Whether your data is stored in spreadsheets, databases, or other systems, you’ll probably want to import the data into Microsoft Dynamics CRM so you can keep track of all your customer information in one place.

You can import any type of information, such as accounts, leads, or opportunities – even activities or cases. (The different types of information are called “record types.”)

Note

Want to import contacts? More information: [Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

Step 1: Get your import file ready

First, you’ll need to get your data into a file.

Make sure your data is as complete and accurate as possible when you create the import file. Fill in any missing info, and verify that names and other information are spelled correctly.

These file formats are supported:

 Comma-separated values (.csv)

 Text (.txt)

 Compressed (.zip)

 Excel Spreadsheet 2003 (.xml)

The maximum file size allowed for .zip files is 32 MB. For the other file formats, the maximum file size allowed is 8 MB.

Tip

If you need to import a larger amount of data, check out the [Developer Toolkit for Microsoft Dynamics CRM](http://go.microsoft.com/fwlink/?LinkID=31788) 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](#za692ee2aad3347a9978e00331ec0f75e)

Step 2: Run the Import Data wizard

You’ll use the Import Data wizard to import the file.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM > Settings.  Settings appears in the nav bar.  b. Choose Settings > Data Management. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, click or tap Settings > System > Data Management. |   2. Click or tap Imports > Import Data.  3. Browse to the folder where you saved the file that contains the import file. Select the file, and then click or tap Open. Then, click or tap Next.  Tip  You can import only one file at a time. To bring in more files, run the wizard again later, or add all your import files to a single .zip file.  4. Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Then, click or tap Next.  Note  In most cases, you can accept the default delimiters.  5. Select how the wizard determines which fields to use for the data.   Select Default (Automatic Mapping) if you want the wizard to determine the corresponding fields in Microsoft Dynamics CRM automatically. If the wizard can’t find a field, you’ll have the opportunity to “map” it yourself.   -- OR --   Select For Generic Contact and Account Data if your import file contains contacts and accounts (and contacts are the main type of data).   -- OR --   Select For BCM 2010 if your import file contains your contacts from Microsoft Outlook 2010 with Business Contact Manager.   -- OR --   If available for your organization, select a custom data map. (You’ll see them in the list if they’re available to you.)  6. Click or tap Next.  7. If prompted, in the Microsoft Dynamics CRM Record Types drop-down list, select the type of records you are importing, for example Account or Lead. Then, click or tap Next.  8. For any record type with an alert icon, map the field from your import file to a corresponding field in Microsoft Dynamics CRM. Scroll to see the whole list. Then, click or tap Next.  9. Review the summary, and then click or tap Next.  10. Select additional import settings.   If it’s okay for the Import Data wizard to import duplicate records, in the Allow Duplicates section, select Yes.  Caution  In most cases, to avoid importing duplicate information, you should keep this option set to No.   To set who owns the imported records, in the Select Owner for the Imported Records section, click or tap the Lookup button . Select Look Up More Records, type the person’s name, and then click or tap Add.  Note  How do you decide who should “own” the imported data? Usually, the owner is the person responsible for taking action on the data. Here’s an example: If your import file contains contacts you collected at a trade show and you want to assign a user to follow up with these contacts, select that person for the owner. To assign someone other than yourself as the owner of the imported records, your security role must include permissions to create records for the user. If you don’t have sufficient permissions, the wizard assigns you as the owner of the imported records by default.   To save these import settings so you can use them again, enter a name for the settings (called a “data map”).  The next time you run the Import Data wizard, you’ll see the new data map listed under Custom Maps.  11. Click or tap Submit.  12. To verify that the wizard was successful, click or tap Imports, and then review the report. Otherwise, click or tap Finish. |

See Also

[Import contacts](#z476018f9e48146baa9d1c87cb4dd810a)

Assign a record to a user or team

If you would like another person in your organization to handle an account or contact for you, you can assign the record to that person.

You can also assign a record to a team, or to yourself.



|  |  |  |
| --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. On the nav bar, choose Microsoft Dynamics CRM. Then select a work area: Sales, Service, or Marketing. The work area name appears on the nav bar.  b. Click or tap the work area name, and then click or tap Accounts or Contacts.  c. In the list of records, select the record that you want.  In the command bar, click or tap More Commands (), and then click or tap Assign. |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then select your work area: Sales, Service, or Marketing.  b. Expand Customers, and then click or tap Contacts or Accounts.  c. In the list of records, click or tap the record that you want.  d. In the Collaborate group, click or tap Assign. |   2. In the Assign dialog box, click or tap:   Assign to me  - OR -   Assign to another user or team  Click or tap Lookup, and then click or tap Look Up More Records. From the Look for drop-down list, select User or Team. In the Search box, type the name, click or tap the search icon, and then click or tap the name to select it. Click or tap Add.  3. Choose OK. |

Export data to Excel

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

Export to a static or dynamic Microsoft Office Excel worksheet or to a PivotTable.

[Export to an Excel static worksheet](#za3c0bc587b21496bb63d852d7301020c)

[Export to an Excel PivotTable](#z5b7982875c5847daa893f00394d0ae94)

[Export to an Excel dynamic worksheet](#zfd391660beac4f58949990c8e807dc97)

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.   
 When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you’ll be authenticated with Microsoft Dynamics CRM using your credentials. You’ll be able to see the data that you have permissions to view.   
 An administrator determines whether your organization’s users are permitted to export the data to Excel by changing the users’ security roles.

Export to an Excel PivotTable

You can export Microsoft Dynamics CRM data to a Microsoft Office Excel PivotTable to see patterns and trends in data. An Excel PivotTable is a great way to summarize, analyze, explore, and present your CRM data.

Important

On a default Microsoft Dynamics CRM installation, before you export data to an Excel PivotTable, make sure that:

 Your Microsoft SQL Server allows remote connections.

Allow remote connections to SQL Server

a. Start Microsoft SQL Server Management Studio.

b. Connect to the SQL Server instance.

c. Right-click the SQL Server instance name, click or tap Properties, click or tap Connections, and then select the Allow remote connections to this server check box.

 Windows Firewall allows remote SQL Server connections. See [How to: Configure a Windows Firewall for Database Engine Access](http://go.microsoft.com/fwlink/?LinkID=183089).

Export to an Excel PivotTable

|  |
| --- |
| 1. Open a list of records in the CRM web application or in CRM for Outlook. Click or tap Export to Excel.  2. Click or tap Dynamic PivotTable.  3. In the Select PivotTable Columns list, select or clear the check boxes for the fields as needed, and then click or tap Export.  By default, the PivotTable Field List includes only fields that are displayed in the Select PivotTable Columns list.  4. Click or tap Save and then save the .xml file. Make note of the location where you saved the file.  5. Open Microsoft Office Excel and then open the .xml file you saved in the previous step.  6. If you see the security warning External Data Connections have been disabled, click or tap Enable Content.  7. To refresh data in the file, on the Data tab click or tap Refresh All.  8. Drag the fields from the PivotTable Field List to the PivotTable. For more information, see Microsoft Office Excel Help.  9. To refresh data in the file, on the Data tab click or tap Refresh All. |

Tip

If you export a list to a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others or make it available to all Microsoft Dynamics CRM users.

If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can email a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Note

In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”

Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

If you are using the Office 365 Excel web app, you must save the file, open the file using the Excel desktop application, and then resave the file to the .xlsx format. Then you can reopen the Excel document in Excel Online.

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.   
 When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you’ll be authenticated with Microsoft Dynamics CRM using your credentials. You’ll be able to see the data that you have permissions to view.   
 An administrator determines whether your organization’s users are permitted to export the data to Excel by changing the users’ security roles.

See Also

[Export Data to Excel](#z7505920cfb5b4794acdb110e307f0ffe)

[Edit the default filter of a report](#zdb9fe06286824739b1622fb9109977bb)

[Importing data best bets](http://www.microsoft.com/en-US/dynamics/crm-customer-center/importing-data-best-bets.aspx)

[Create, edit, or save an Advanced Find search](#z45e83f30ab4c4ef586c4a0a8f2a21561)

Export to an Excel dynamic worksheet

Export data to a Microsoft Office Excel worksheet so users can have the latest Microsoft Dynamics CRM information any time they view the worksheet. Imagine the CEO of your company getting the critical information they need without having to navigate Microsoft Dynamics CRM but instead, merely opening the Excel link on their desktop.



|  |
| --- |
| 1. Open a list of records in the CRM web application or in Microsoft Dynamics CRM for Outlook. Click or tap Export to Excel.  2. Click or tap Dynamic worksheet.  3. Click or tap Next.  4. Under Common Tasks, configure the column settings and then click or tap Export.  5. Click or tap Save and then save the .xml file. Make note of the location where you saved the file.  Note  If you are using the Office 365 Excel web app, you must save the file, open the file using the Excel desktop application, and then resave the file to the .xlsx format. Then you can reopen the Excel document in Excel Online.  6. Open Microsoft Office Excel and then open the .xml file you saved in the previous step.  7. If you see the security warning External Data Connections have been disabled, click or tap Enable Content.  8. To refresh data in the file, on the Data tab, click or tap Refresh All.  9. Save the exported data to an Excel file. |

Tip

If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can email a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Note

 In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”

 Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.   
 When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you’ll be authenticated with Microsoft Dynamics CRM using your credentials. You’ll be able to see the data that you have permissions to view.   
 An administrator determines whether your organization’s users are permitted to export the data to Excel by changing the users’ security roles.

See Also

[Export Data to Excel](#z7505920cfb5b4794acdb110e307f0ffe)

[Edit the default filter of a report](#zdb9fe06286824739b1622fb9109977bb)

[Create, edit, or save an Advanced Find search](#z45e83f30ab4c4ef586c4a0a8f2a21561)

Export to an Excel static worksheet

When you want to present CRM information to an individual who doesn’t have access to Microsoft Dynamics CRM, or you have data that doesn’t change often, consider exporting your CRM data to a Microsoft Office Excel static worksheet.

Note

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

 You cannot change the columns for a system view, such as All Active Accounts. You must either customize the view, which requires the System Administrator or System Customizer security role, or use Advanced Find to create your own view based on the current view.

 If you are using the Office 365 Excel web app, you must save the file, open the file using the Excel desktop application, and then resave the file to the .xlsx format. Then you can reopen the Excel document in Excel Online.



|  |
| --- |
| 1. Open a list of records in the CRM web application or in Microsoft Dynamics CRM for Outlook. Click or tap Export to Excel.  2. In the Export Data to Excel dialog box, click or tap Static worksheet with records from this page.  - OR -  In the Export Data to Excel dialog box, click or tap Static worksheet with records from all pages in the current view.  The second option is visible only when your view includes more than one page of records.  Tip  If you are exporting the data so that you can make changes and import it back into Microsoft Dynamics CRM, select the Make this data available for re-importing by including required column headings check box.  By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths. To make changes to the columns in an Advanced Find View, click Edit Columns. More information: [Create, edit, or save an Advanced Find search](#z45e83f30ab4c4ef586c4a0a8f2a21561)  3. Click or tap Export.  4. To view the static worksheet, click or tap Open.  You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click or tap Yes.  5. In Excel, save the exported data to a file.  Tip  You can email a static exported worksheet to anyone, or store it in a shared file. Anyone who opens the file will see all the data in the file, whether or not they are a Microsoft Dynamics CRM user or have privileges to view the data in Microsoft Dynamics CRM.  Note   In Microsoft Dynamics CRM, money values are exported to Excel as numbers. After you have completed the export, to format the data as currency, see the Microsoft Office Excel Help topic titled “Display numbers as currency.”   By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet.   By default, Microsoft Dynamics CRM lists up to 50 records per page. Click the Page arrows at the bottom of the list to view any additional pages. |

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.   
 When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you’ll be authenticated with Microsoft Dynamics CRM using your credentials. You’ll be able to see the data that you have permissions to view.   
 An administrator determines whether your organization’s users are permitted to export the data to Excel by changing the users’ security roles.

See Also

[Export Data to Excel](#z7505920cfb5b4794acdb110e307f0ffe)

[Importing data best bets](http://www.microsoft.com/en-US/dynamics/crm-customer-center/importing-data-best-bets.aspx)

[Edit the default filter of a report](#zdb9fe06286824739b1622fb9109977bb)

[Create, edit, or save an Advanced Find search](#z45e83f30ab4c4ef586c4a0a8f2a21561)

Search

Create, edit, or save an Advanced Find search

Find the records you want in Microsoft Dynamics CRM by using the Advanced Find command. You can also use Advanced Find to prepare data for export to Microsoft Office Excel so that you analyze, summarize, or aggregate data, or create PivotTables to view your data from different perspectives.



|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. Follow the steps for the app you’re using.  If using the CRM web application   |  | | --- | | a. Navigate to the list of records you want to query, and on the command bar, click or tap More Commands icon , and then click or tap Advanced Find. For example, if you want to search for account records, do this:  i. On the nav bar, choose Microsoft Dynamics CRM > Sales.  ii. Choose Sales > Accounts.  iii. On the command bar, click or tap More Commands , and then click or tap Advanced Find |   If using CRM for Outlook   |  | | --- | | a. In the Navigation Pane, expand your organization if necessary, and then navigate to the list of records you want to query, and then in the Data group, click or tap Advanced Find. |   2.  Specify what to search for.     |  | | --- | | a. In the Look for list, select a record type.  b. Click or tap Select to define search criteria: field (for example, Account Name or City), the query relational operator (Part of an expression (for example "is equal to" or "contains") that defines how a specified attribute should be compared with a value.), and the values to locate (for example, "Seattle" or "Email").  You can select fields from the current record type, or from related records. For example, an account might have many related contact records.  At the bottom of the Select list, the Related section shows related record types. For example, most record types have a related Notes record type. To select fields from a related record type, select field, and a new Select link appears. |   3. Specify the columns to include in the search results.     |  | | --- | | a. Click or tap Edit Columns, and then click or tap Add Columns.  b. Select the record type that includes the columns you want to add.  c. Select the columns you want to add, and then click or tap OK. |   4. Specify the sort order.     |  | | --- | | a. Click or tap Edit Columns.  b. Click or tap Configure Sorting.  c. Specify the column to sort on, specify the sort order, and then click or tap OK.  d. Click or tap OK. |   5. Click or tap Results. |

How inline lookup works

Quickly find the record you are looking for by using the inline lookup in Microsoft Dynamics CRM. By default, when you click or tap the Lookup button, you see the first 10 results for the specific record type.

You can use the inline lookup fields to search for records by using keywords. As you type, the inline lookup shows you the most recently used (recently searched, updated, or created) records in the list. The lookup resolves automatically if you enter partial text and tab out of the lookup field, and if a single matching record is found. If multiple matching records are found, you’ll see a list of matching results you can select a record from.

Note

The recently used records are shown only in the classic forms.

When you press Enter or click or tap the Lookup button, the search results that match your keyword are shown. Microsoft Dynamics CRM looks for matching records by searching for the keyword in columns defined in the quick find view of the entity or in the view that’s set as the default view of the entity. Lookup search results show the first three columns that are defined in the lookup view of the entity or the view that’s set as the default view of that lookup, including the primary field of that entity. More information: [Creating and editing views](http://go.microsoft.com/fwlink/?LinkId=316364)

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.

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

For Microsoft Dynamics CRM Online organizations, this feature is only available if you've installed the CRM Online 2015 Update.   
  
For on-premises CRM organizations, this feature is only available if you've updated to CRM 2015.   
Interested in getting this feature?  [Find your CRM administrator or support person.](http://go.microsoft.com/fwlink/p/?LinkID=513070)

There are two ways to search:

 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\*

Start a search



|  |
| --- |
| 1. From the top nav bar, type one or more characters in the search box.  2. Click or tap 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](#z45e83f30ab4c4ef586c4a0a8f2a21561)

Accessibility

Accessibility for people with disabilities

Microsoft is committed to making its products and services easier for everyone. More information: [Microsoft Accessibility](http://www.microsoft.com/enable/default.aspx)

Keyboard shortcuts in Microsoft Dynamics CRM

Microsoft Dynamics CRM offers keyboard shortcuts to address issues faced by people with limited dexterity or motion disabilities. Also, people who don’t use a mouse can use a keyboard to navigate and complete actions.

More information: [Keyboard shortcuts](#z5b47a624d2984a0c87d87298a736e090)

Accessibility info for browsers

For accessibility information about your browser, visit the following websites:

 [Internet Explorer 9 accessibility](http://www.microsoft.com/enable/products/ie9/default.aspx)

 [Internet Explorer 10 accessibility](http://www.microsoft.com/enable/products/ie10/default.aspx)

 [Firefox accessibility features](http://support.mozilla.org/en-US/kb/accessibility-features-firefox-make-firefox-and-we?redirectlocale=en-US&redirectslug=Accessibility)

 [Safari accessibility features](http://www.apple.com/accessibility/)

 [Google Chrome accessibility technical documentation](https://sites.google.com/a/chromium.org/dev/developers/design-documents/accessibility)

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](http://www.microsoft.com/enable/products/windows8/default.aspx) and [Windows 7](http://www.microsoft.com/enable/products/windows7/default.aspx).

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 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](http://technet.microsoft.com/en-us/library/cc766527.aspx)

 [MMC Keyboard Shortcuts](http://technet.microsoft.com/en-us/library/cc766476.aspx)

See Also

[Microsoft Accessibility](http://www.microsoft.com/enable/default.aspx)

Keyboard shortcuts

Keyboard shortcuts give you an alternate way to do common tasks, instead of using your mouse or tapping with your finger. And because many keyboard shortcuts are the same across all Microsoft products, some of these might already be familiar to you.

Note

The shortcut keys described in this section refer to the U.S. keyboard layout. Depending on your country/region and layout, you may not have the same keys.

Form keyboard shortcuts

|  |  |
| --- | --- |
| To | Press |
| Move to the next option, option group, or field | Tab |
| Move to the previous option, option group, or field | Shift+Tab |
| Complete the command for the active option or button | Enter |
| Move between options in an open list, or between options in a group of options | Arrow keys |
| Cancel a command, or close a selected list or dialog box | Esc |
| Save | Ctrl+S or Shift+F12 |
| Save and Close | Alt+S |
| Cancel edits and close (Close) | Esc |
| Open search | Spacebar or Enter |
| Delete text from a field | Backspace |
| Delete the record (when forms are in Edit mode) | Ctrl+D |
| Save and then open a new form (Save and New) (when forms are in Edit mode) | Ctrl+Shift+S |
| Move to another field or command | Tab |
| Open the lookup menu with the most recently used items in alphabetical order | Alt+Down Arrow |
| Open the list menu (when forms are in Edit mode) | Ctrl+Shift+2 |
| Navigate to the next item on the list (when forms are in Edit mode) | Ctrl+> |
| Navigate to the previous item on the list (when forms are in Edit mode) | Ctrl+< |
| Open lookup drop-down list | Enter |
| Close lookup drop-down list | Esc |
| Auto-resolve lookup value | Ctrl+K |
| Open a record found in lookup with forms in Edit mode | Enter |
| Open a record found in lookup with forms in Read-optimized mode | Ctrl+Enter |
| Add a step in the business process editor | Alt+Shift+N |
| Tab to Command Bar when in the updated user experience | Ctrl + [ |
| Tab to process control when in the updated user experience | Ctrl + ] |
| Tab to the Navigation Pane | Ctrl + Shift + 3 |

Accessibility keyboard shortcuts

If you’re running Microsoft Windows, you can set system accessibility options to match the way you work. For example, you can use Windows Sticky Keys if you have difficulty holding down two or more keys at a time, such as Ctrl+P. Sticky Keys enable you to press the Ctrl key and have it remain active until you press the P.

|  |  |
| --- | --- |
| To | Press |
| Switch Sticky Keys on and off | Shift five times |
| Switch Filter Keys on and off | Right Shift for eight seconds |
| Switch Toggle Keys on and off | Num Lock for five seconds |
| Switch High Contrast on and off | Left Alt+Left Shift+Print Screen |
| Switch Mouse Keys on and off | Left Alt+Left Shift+Num Lock |
| Tab into an Active X control | Alt+Shift+F10 |

Mac keyboard shortcuts

These keyboard shortcuts apply when using a Mac.

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Windows Keys | Mac Keys | Notes |
| Tab | Tab  Shift+Tab | Tab  Shoft+Tab | Enable Tabbing in System Preferences and Safari Preferences (refer to Apple and Safari documentation). |
| Access keys | Alt + Access key | Ctrl + Alt + Access key | For example, the Next button uses N as its access key. |
| Microsoft Dynamics CRM Shortcut keys | Ctrl + key | Ctrl + key | For example, move to the first tab in the ribbon control with Ctrl + {. Save using Ctrl + S. |
| Activate Control | Space / Enter | Space / Enter |  |
| Close topmost window | Window + W | Command + W | Refer to Apple support documentation. |

See Also

[Accessibility for people with disabilities](#zc071a618457448949ae574dac6443b0a)

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. Log in to your CRM organization and go to your area (Sales, Service, or Marketing).  2. On the command bar, click or tap Advanced Find.    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

[Get Help from the Microsoft Dynamics CRM Community](http://go.microsoft.com/fwlink/p/?LinkID=511675)