CHAPTER 7

Common Functions

Microsoft Dynamics CRM has a number of common features. By "common," we mean that, when working with most of the entities, they have the same functionality included in this chapter.

As an example, Accounts, Contacts, Leads, Opportunities, and Cases all have functionality on their main form that includes the following:

- Actions
- Activities
- History
- Notes
- Attachments
- Workflows

Because they are so similar (regardless of which entity you're working with), we have grouped these functions in this chapter to consolidate the description of their functionality.

The Resource Center is included with this chapter because all users of the application use it in the same manner.

NOTE

The Actions, Notes, and Attachments options are not available on the form until the record form has been saved. The record form does not need to be saved and closed—it just needs to be saved, and an expanded toolbar will appear. As an example of what we're describing, look in Figure 7.1 below the new Account form.

After the record form is saved (which, of course, requires entering the Business Required fields—in this case, the `Account Name` field), the icon options for Actions, Notes, and Attachments appear (along with the other advanced options), enabling you to perform these actions on the record (see Figure 7.2).

IN THIS CHAPTER

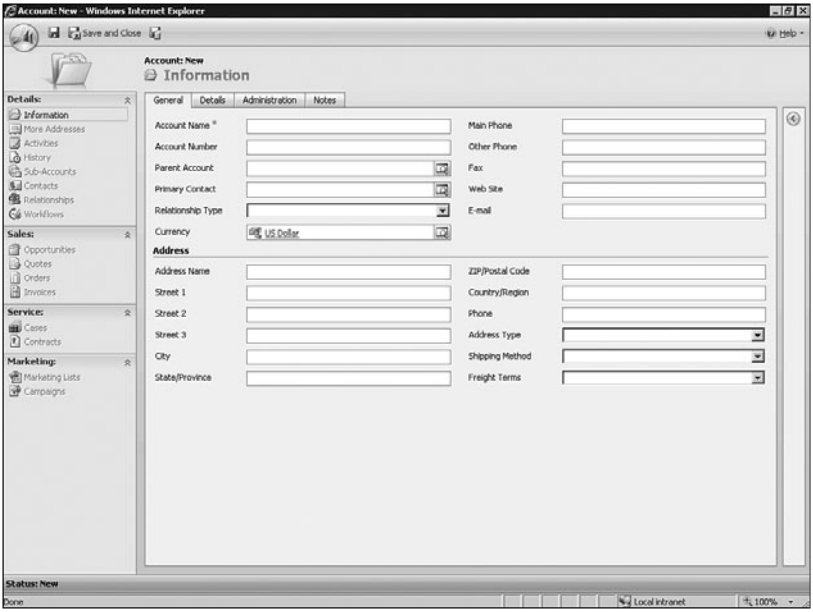

FIGURE 7.1 New Account form in Microsoft Dynamics CRM prior to save—notice the lack of options on the toolbar.

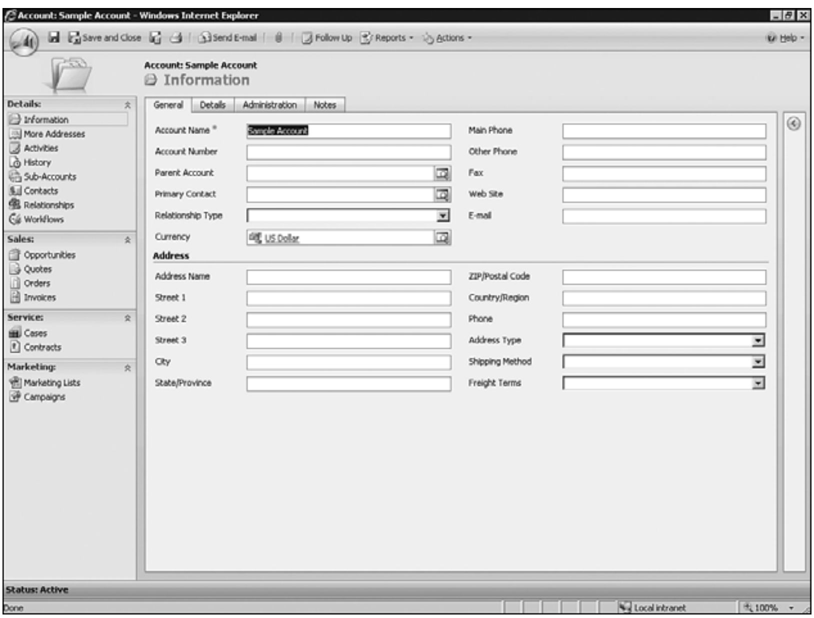

FIGURE 7.2 Save Account form in Microsoft Dynamic CRM after save—notice the toolbar options that have appeared.

Actions

The Actions icon (presented with a small hand on a star) has a drop-down menu that enables you to easily perform a number of Actions on a record without having to navigate to the near navigation. It often reduces the total number of clicks to accomplish something. The following Actions are available to Accounts, Contacts, Opportunities, and Leads. Although each Entity has Actions specific to it that are not listed, these are the most common:

- Add Activity
- Add a Note
- Attach a File
- Add Additional Address (Accounts and Contacts)
- Add to Marketing List (Accounts, Contacts, and Opportunities)
- Add Relationship (Accounts, Contacts, and Opportunities)
- Delete Record
- Deactivate Record (or Activate Record, if it is deactivated)
- Mail Merge (Accounts, Contacts, and Leads)
- Assign
- Sharing
- Copy Shortcut
- Send Shortcut

Most of the options available in the Actions drop-down menu are available elsewhere on the form and, in fact, are merely shortcuts. (For example, Add Additional Address has the same functionality as if you went to More Addresses and selected New Address.) Additionally, the Copy Shortcut and Send Shortcut options from the Actions drop-down menu should not be confused with the Copy Shortcut and Send Shortcut options from the More Actions when working with subrecords (explained later in this chapter).

Add Activity

Add Activity enables you to quickly add a new Activity to the main entity you're working with. When selecting this option, it has the same effect as selecting Activities from the near navigation and selecting New.

For a complete list of the available Activities, see the "Activities" section later in this chapter.

Add a Note

Add a Note opens the note dialog box with Regarding set to the entity you're working with by default (see Figure 7.3).

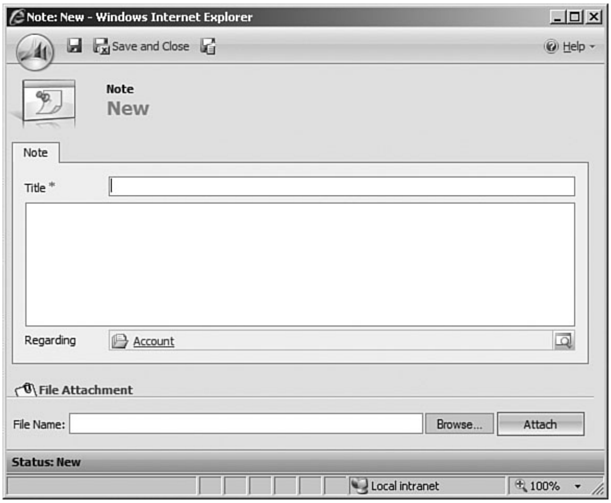

FIGURE 7.3 Add new note dialog box.

TIP

When working with the Add a Note option, you have the capability to enter the title of the note, as well as upload a file from the same form. This is helpful because the main Notes tab allows you to enter only the note, not the title. (See the "Notes" section later in this chapter.)

Attach a File

Attach a File opens the attachment dialog box, enabling you to upload a file to the entity you're working with. The uploaded file appears within the Notes tab section. Any file type can be uploaded and then opened by clicking the file within the Notes section (see Figure 7.4).

TIP

Previously, there was a 4MB limitation when uploading files. If you wanted to change this limitation, you had to perform a series of Registry edits. This version of Microsoft Dynamics CRM has increased the limitation to 5MB, and you can easily set and change this by navigating to the Systems Settings section of the Settings section.

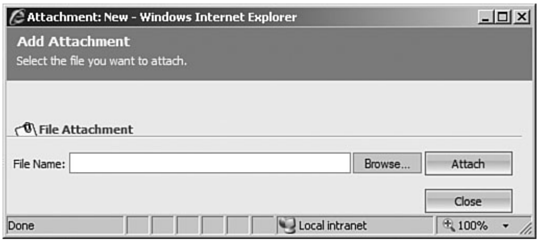

FIGURE 7.4 Add attachment.

Add Additional Address

Add Additional Address has the same functionality as selecting More Addresses from the near navigation and selecting New.

Add to Marketing List

Add to Marketing List enables you to quickly add the entity to an existing Marketing List. As explained in Chapter 11, "Working with Marketing," Marketing Lists are specific to Accounts, Contacts, or Leads. If you are working with Accounts and have only Marketing Lists for Contacts, you will be unable to add the Account to the existing Marketing List. However, you can create a new Marketing List for Accounts after you select Add to Marketing List that consists of only the Account you're working with. (You can manage the Marketing List further either by opening it under Marketing Lists on the Account page or by navigating to Marketing and selecting Marketing Lists there.)

Add Relationship

Unlike the near navigation option of Relationships, which enables you to create only a Customer Relationship, you can easily associate the entity with an Opportunity relationship. For more information about relationships, refer to Chapter 8, "Working with Customers."

Delete Entity

Delete Entity enables you to completely delete the record. Use this option with caution and carefully consider whether you want to delete or deactivate a record (see the next section). The reason for this is that when an Entity such as an Account is deleted, all records associated with the account are deleted and features such as reporting on the record are no longer available.

NOTE

In some circumstances, you aren't allowed to delete an entity and you receive a warning message. An example of this is when you try to delete an Account that has a Contract associated with it. Your only option in this case is to remove the Contract association or deactivate the record.

Deleting an Account has the following actions:

- Contacts associated with the Account are deleted.
- Activities associated with the Account are deleted.
- Opportunities associated with the Account are deleted.
- Subaccounts associated with the Account are not deleted but are removed from the Account.
- The Account is deleted and no longer available to report on.

Deleting a Contact has the following actions:

- Activities associated with the Contact are deleted.
- Opportunities associated with the Contact are deleted.
- Cases associated with the Contact are deleted.
- Subcontacts associated with the Contact are not deleted but are removed from the Contact.
- The Contact is deleted and no longer available to report on.

Deleting a Lead has the following actions:

- The Lead is deleted and no longer available to report on.

Deleting an Opportunity has the following actions:

- The Opportunity is deleted and no longer available to report on.

TIP

Even though you might have chosen Delete from the Actions menu, a warning should appear alerting you that you are about to perform the requested action. Furthermore, when you are deleting Accounts or Contacts, an option to merely deactivate is presented on the warning pop-up menu (see Figure 7.5).

FIGURE 7.5 Confirm record deletion dialog box.

Deactivate Record

Deactivate Record (or Activate Record, if it is deactivated) enables you to set the status of the record. This is the preferred method (rather than deleting) when working with older records because reporting visibility remains along with historical information. Also, when a record is deactivated, the associated records are kept as active as opposed to when it is deleted and the associated records are deleted. This is an important distinction, as it is possible to deactivate an Account and still have active Contacts that are associated with the Account that must be manually deactivated as well.

TIP

The status of a record is always shown in the bottom lower-left corner of the main entity form.

Mail Merge

Mail Merge (Accounts, Contacts, and Leads) is a new option available on both the Internet Explorer client and the Outlook client. Previously, this option was available only on the Outlook client.

Mail Merge is a powerful and easy-to-use feature that enables you to perform the following as part of its wizard steps:

- Select the records you want to use for the Mail Merge.
- Create Activity records for the records, reflecting the Mail Merge contact.
- Assign the Activity records to another user.
- Create a new quick campaign for the Mail Merge records.
- Use an existing template or create a new template based on the document type.

To access Mail Merge, select either the Mail Merge option from the Actions menu drop-down (when available) or the Mail Merge icon located on the toolbar directly above the records you're working with (see Figure 7.6).

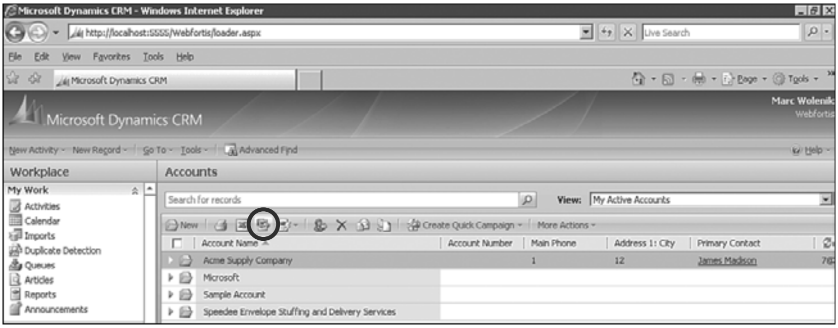

FIGURE 7.6 Mail Merge icon.

When working with the Mail Merge function, a pop-up window called Microsoft Dynamics CRM Mail Merge for Microsoft Office Word presents the available options (see Figure 7.7).

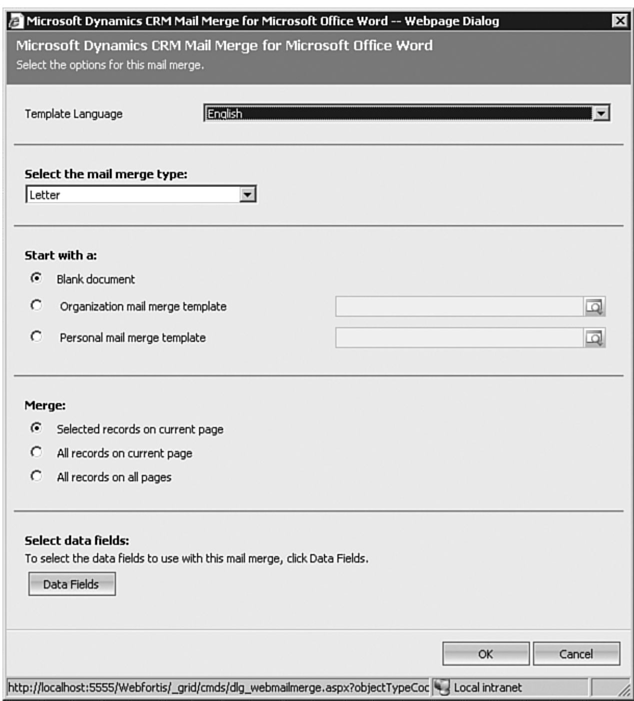

FIGURE 7.7 Microsoft Dynamics CRM Mail Merge for Microsoft Office Word.

By default, the base language is selected for the Template Language. However, you can change it to any of the languages your administrator has made available (refer to Chapter 14, “Settings and Configuration,” for more information about language options). Notice there is no drop-down menu if no MUIs have been installed.

Selecting the Mail Merge type defaults Microsoft Word to the correct page layout, and you have the option to work with either existing templates or create new blank one. Existing documents are available on either a personal or an organizational level. However, you can easily create a new template if none exists and set the access level (personal or organizational) manually.

Additional options include record merge options and the capability to select specific data fields.

For the following example on how to use Mail Merge, assume that you have no existing Mail Merge templates (either personal or organizational) and that you will create a new letter to send to all active Accounts announcing the relocation of your main offices to a new address.

NOTE

Options are limited on the Mail Merge dialog to only the following:

- Selected Records on Current Page
- All Records on Current Page
- All Records on All Pages

You could easily select a subset of these records by either performing a simple search on the main page and then selecting a merge from there using the last option (All Records on All Pages), or performing an Advanced Find and working with the results of that to create the Mail Merge (see “Advanced Find” later in this chapter for more information about working with Advanced Find).

Additionally, these options are explained as follows:

- **Selected Records on Current Page**—If you have selected one or more records on the page, only the highlighted (or selected) records will be used for the Mail Merge.

TIP

To select multiple records on a page, hold down either the Ctrl or Shift key while making your selections. As with most Windows applications, Ctrl can be used to select individual nonsequential records, whereas Shift selects a range of records. With this technique, you can select only the records you want. Also, this technique works on filtered views just as well. If you have selected records and then change the page, you will lose the previously selected records.

- **All Records on Current Page**—Remember that Microsoft Dynamics CRM displays only the first 50 records per page, by default. If you have more records, you must navigate to the next page to see the records. As such, this option sends only to the records you have on this current page.

  Typically, this is the best option when you have entered a value in the `Search` field and returned a subset of existing records. A good example of this is if you have multiple Contacts named Bob Smith and you want to send an e-mail to every Bob: You could enter `Bob` in the text search and, with the results displayed, select Mail Merge and then All Records on Current Page. The Mail Merge would create records for only the selected Bob records—assuming that they all fit on the existing page.

TIP

You can change this setting of 50 records by navigating to Options and selecting a different value for the number of CRM records to display (see Figure 7.8).

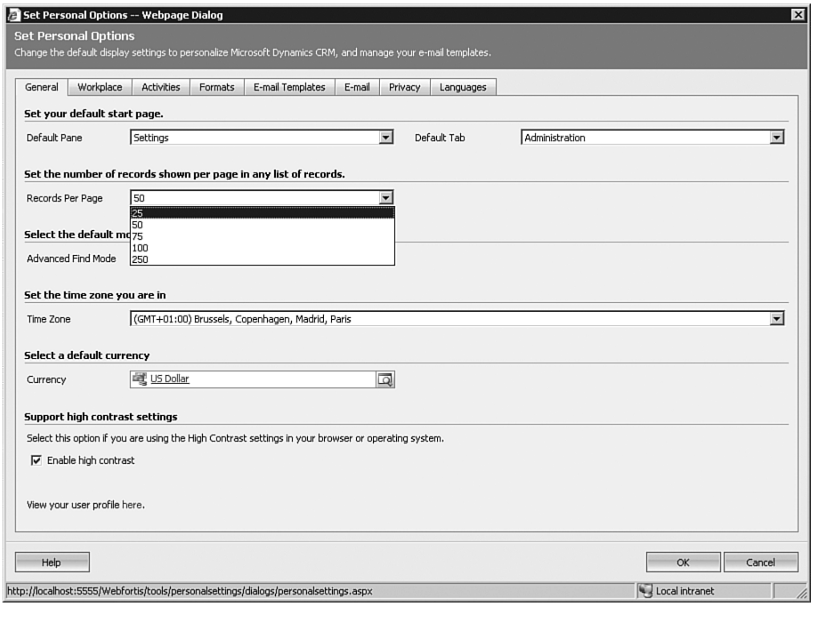

FIGURE 7.8 Microsoft Dynamics CRM options page showing 50 records as the default.

- **All Records on All Pages**—Selects every record you have for that Entity, regardless of whether it is displayed on the current page.

  As with the previous example, if you did a search for Contacts that started with `Bob` and you had 400 different Bob type Contacts, you would need to select this option so that you would send to more than just the first 50 (or whatever value you selected for your records to display) Bob Contacts.

TIP

Advanced Find has significantly more options and thus enables users to perform a much more complicated underlying record query. In this example, if you wanted to find all Accounts (not just active or inactive), you would use Advanced Find and remove any filter for account status, to return all Accounts. When you need more than just matching search results or the views predefined in the views, rely on Advanced Find.

Follow these steps to create a mail merge using the Web client (the steps are similar in the Outlook client):

1. Select Account Entity and the View type from the drop-down list.
2. *Important:* Select the View type as Active Accounts from the View drop-down, as shown in Figure 7.9.

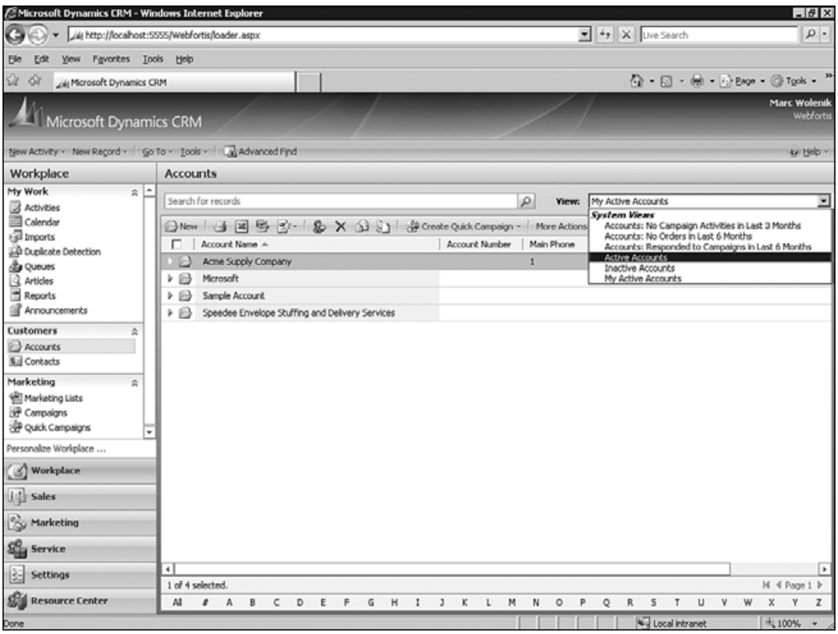

FIGURE 7.9 Microsoft Dynamics CRM Accounts View drop-down list.

By selecting the view, you are adding what is essentially a "prefilter" on the available records. If you had selected a different view type, the records available by default on this mail merge would be different (for example, if you had been working with the default view of My Active Accounts).

3. Select the Mail Merge icon. The Mail Merge pop-up menu appears (see Figures 7.6 and 7.7).

4. Leave Template Language as its default English, and leave the Mail Merge type as its default of Letter. Because you'll be creating a new document as part of this sample, leave the Start with A setting as its default of Blank Document as well.

5. Because you want to send this letter to all your Accounts, select the Merge option of All Records on All Pages.

6. By default, the most commonly used fields for an Entity are selected as its data fields; however, by selecting the Data Fields button, you can easily select or change the columns that you want to have available for Mail Merge.

TIP

Entity relationships are available within the data fields and are easily recognizable by the parenthesis (see Figure 7.10). This is extremely helpful if you need to add records associated with existing relationships (such as data from the Contact Entity, in which you have the relationship of Primary Contact to Account).

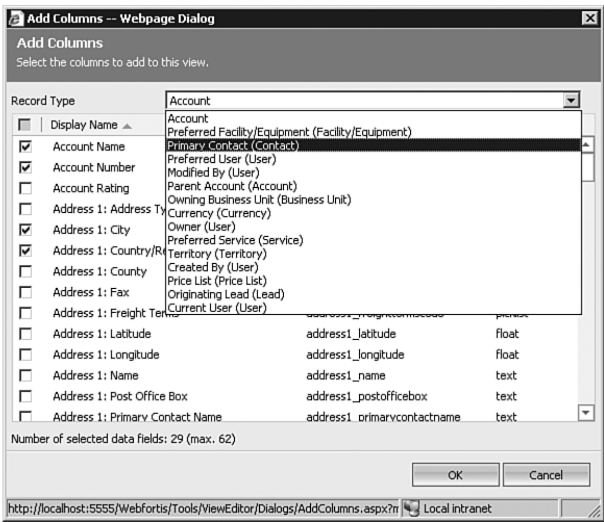

FIGURE 7.10 Microsoft Dynamics CRM Entity Relationships in Mail Merge.

Leave the defaults, and select OK to close the Data Fields window; then select OK to continue.

7. Microsoft Word automatically starts with the selected Mail Merge type format (Letter, Envelope, Fax, or Label), and the Mail Merge Wizard displays the list of recipients that will be used in the merge. By default, all records are selected; however, if you want to exclude one or more, you can uncheck the selection here. From here you can also add sorting and filtering options (see Figure 7.11).

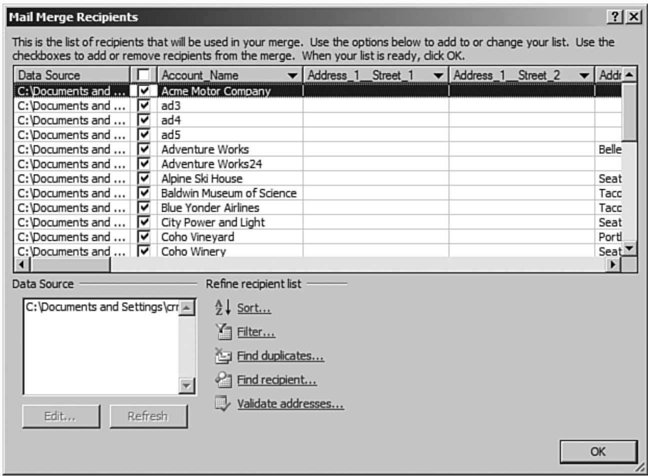

FIGURE 7.11 Microsoft Word Mail Merge Wizard select recipients.

Click OK to continue.

8. You may be presented with a dialog box asking if you want to Open or save this file. Select Open to continue.

9. To use the Mail Merge feature, macros need to be enabled. If you have already enabled macros, you can skip this step; otherwise, select Options near the security warning and then Enable this content to continue the mail merge (see Figure 7.12).

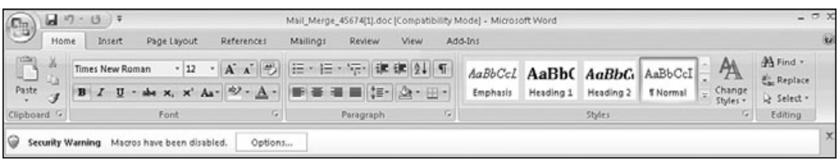

FIGURE 7.12 Enable macros in Microsoft Word.

After you've enabled macros, select either the Add-Ins or CRM option from the top tab; then click the CRM icon to continue with the mail merge.

10. Working within Microsoft Word, you now have the option to follow the Mail Merge Wizard, located in the lower-right corner of the new document, where it reads Step 1 of 4 (see Figure 7.13).

Click Next: Write Your Letter to continue.

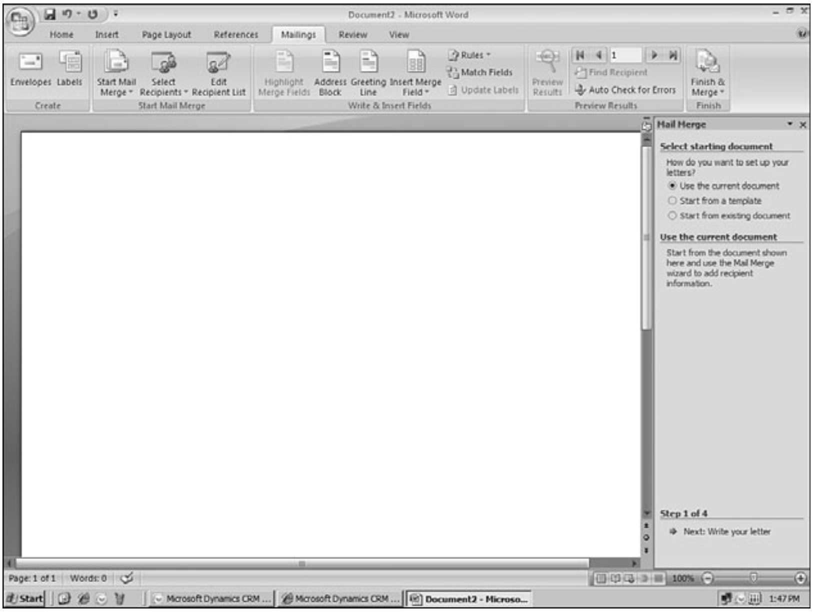

FIGURE 7.13 Microsoft Word Mail Merge Wizard (lower-right corner).

11. Following the Mail Merge Wizard, you can compose your letter and enter your data fields as appropriate (see Figure 7.14).

    Click Next: Preview Your Letters to Continue to continue.

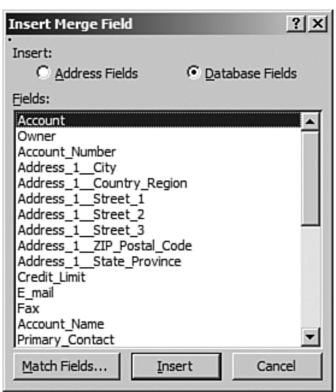

FIGURE 7.14 Microsoft Word Mail Merge letter composed with data fields added.

12. Completing the steps in the Mail Merge Wizard enables you to preview the records and make any changes or exclusions you might need to make at this point (see Figure 7.15).

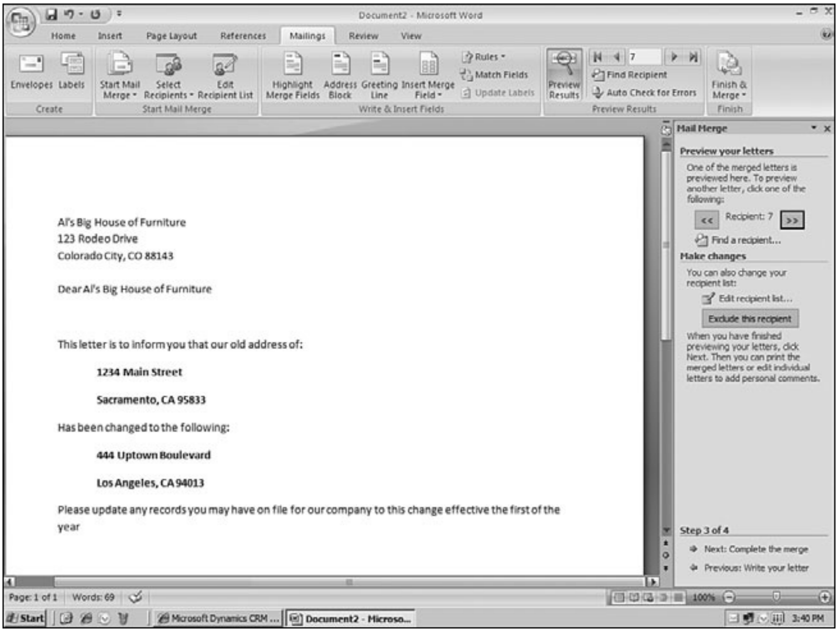

FIGURE 7.15 Microsoft Word Mail Merge letter preview.

Click Next: Complete the Merge to continue.

13. In the last step of the Mail Merge Wizard (Step 4 of 4), you are presented with three options:

- Print
- Edit Individual Letters
- Upload Template to CRM (when using the Outlook client)

Upload Template to CRM is available because you created a new document using the Outlook client. If you want to work with this document again, select Upload Template to CRM. Click Yes when asked whether you want to create a new mail merge template; the Microsoft Dynamics CRM Mail Merge Template opens, enabling you to name, assign, and save the template for future use.

See Chapter 14 for working with templates.

When selecting either Print or Edit Individual letters, the merge job completes and you are presented with the option Create Activities for the Mail Merge (see Figure 7.16).

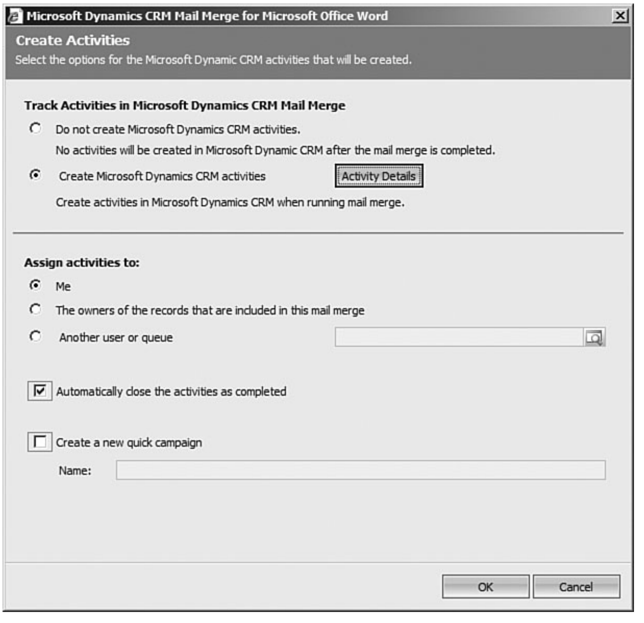

FIGURE 7.16 Microsoft Word Mail Merge Create Activities options.

Track Activities for the Mail Merge

By default, no Activities are created in Microsoft Dynamics CRM after the mail merge is completed. Because you want to track that you sent this letter to your active Accounts only, you will change the default setting and ask that Activities be created after the mail merge is completed. Although it is not necessary to select the Activity Details button, you can easily view and change what the Activity will look like when it has been completed (see Figure 7.17).

NOTE

When viewing the Activity Details in Figure 7.17, notice that you cannot change several fields: `Sender`, `Recipient`, `Address`, `Direction`, `Regarding`, and `Owner`. These are set by default as part of the Mail Merge function. You can change the `Subject` (which defaults to the standard CRM Activity type and date/time/user stamp), the description (message), the `Duration`, the `Due` date, `Priority`, `Category`, and `Subcategory`. In the example, you'll leave the defaults.

Assign Activities

Because you are creating Activity records, you have the option to change the Activity assignment (see Figure 7.16). By default, the owner of the Activity is the user who completed the mail merge; however, because the records might belong to different owners, you can set the ownership to the owners of the record that were included in the mail merge. Alternatively, if you wanted to manually assign them to another user entirely (say an administrative assistant who is responsible for managing the outgoing correspondence for example), we could change the setting to Another User or Queue.

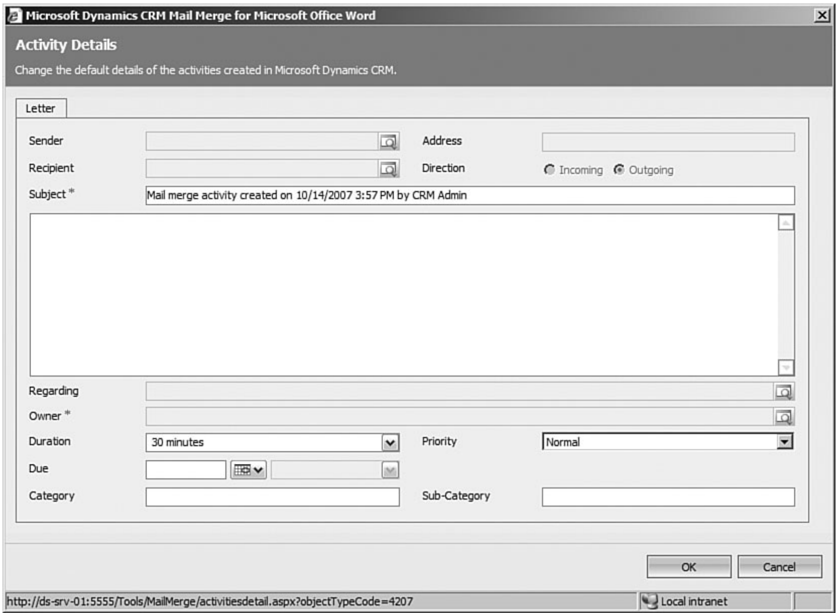

FIGURE 7.17 Microsoft Word Mail Merge Activity Details.

If you chose to keep the records open for follow-up, be sure to change the default selection for Automatically Close the Activities as Completed.

Finally, the option Create a New Quick Campaign enables you to quickly and easily manage the Mail Merge as a campaign and, therefore, track responses.

For more information about quick campaigns, refer to Chapter 11.

Depending on the size of your mail merge, you might experience a delay while Microsoft Word is preparing the merge and while Microsoft Dynamics CRM 4.0 creates the Activity records, assigns them accordingly, closes them (if applicable), and adds them to a new quick campaign.

You can easily view the Activities in the History (if you selected them to be closed) or in the Activities tab of the affected Contacts.

Assign

Assign enables you to set record ownership by selecting a new user or queue within the system, depending on the Entity type. For example, an Account can be assigned only to another user. An Activity, on the other hand, can be assigned to either a user or a queue, as shown in Figure 7.18 (for more information about working with queues, refer to Chapter 14).

FIGURE 7.18 Assign dialog box.

Sharing

As its name implies, the Sharing option enables you to share the record with other Microsoft Dynamics CRM 4.0 users or teams. The capability to perform the act of sharing is set with the security roles for a user (see Chapter 14 for more information about security roles). When you share a record with another user, the other user inherits the security settings on the associated records of the record.

The following is the list of records that can be shared:

- Accounts
- Contacts
- Cases
- Campaigns
- Invoices
- Quotes
- Orders
- Reports
- Opportunities
- Marketing Lists
- Leads
- Contracts

When sharing, select the user or team and then toggle the permissions you want to give (see Figure 7.19).

Copy Shortcut and Send Shortcut

Copy Shortcut and Send Shortcut are new options available with Microsoft Dynamics CRM. Do not confuse them with Copy Shortcut and Send Shortcut from the More Actions option located at the top of the Quickview. Although both provide the capability to quickly and easily create shortcuts directly to the record, when you select from the

Actions drop-down, the main record you're working with (Account, Contact, and so on) will be selected instead of the specific associative records (if chosen from the Quickview menu option—that is, Contacts associated with the Account or History for the Account). For this reason, you might get the error message shown in Figure 7.20 when you select Copy Shortcut from the Quickview menu but fail to select any associative records (to avoid this error, select one or more records and then try again).

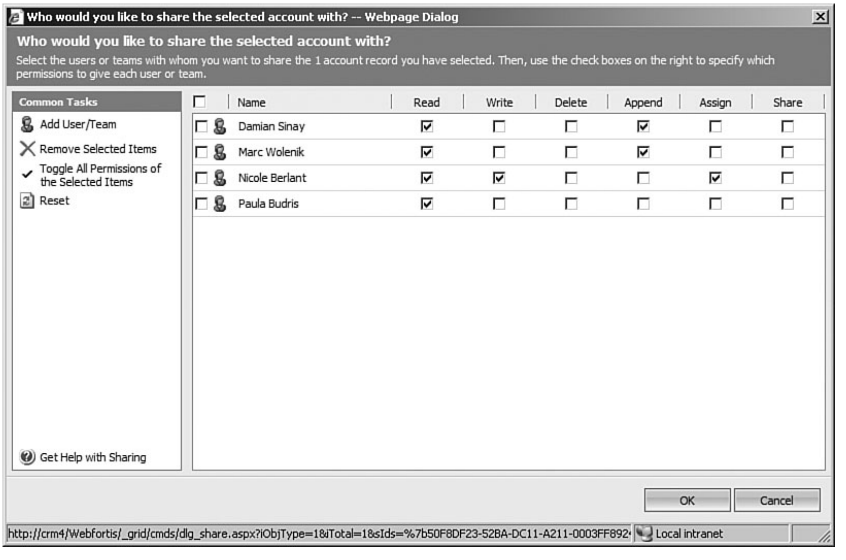

FIGURE 7.19 Microsoft Dynamics CRM share permissions form.

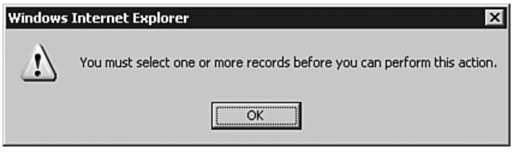

FIGURE 7.20 Copy Shortcut chosen from the Quickview, but without any subrecords selected.

TIP

The capability to send the shortcut to another user does not preclude that user's appropriate security role to view the record. So even if you have the capability to view a record, the user you're sending it to might not and would then receive an error page when attempting to access the link you send.

Activities

Think of Activities as how work gets assigned. For example, if you have an Account that requires a follow-up Phone Call, you would open the Account, create a new Activity with type equal to Phone Call, and assign it to yourself (or another user). Quite commonly, employees who use Microsoft Dynamics CRM come into the office in the morning and, after checking their e-mails, check their pending Activities.

As with all Entities that have Activities, the Activities display nonclosed actions applicable to the Entity. When an Activity becomes closed, it is not visible here; you can find it in the History (see the next section).

An Activity can consist of the following:

- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity
- Campaign Response

Additionally, within the Activities, you have the option to run manual Workflow via Run Workflow, located at the top of the section. The option to run a Workflow is based on the entity you're working with, so to run Workflow manually, you must have at least one Workflow created for it.

By default, the Activities filter shows Activities that are due within the next 30 days and filters on This Record Only.

NOTE

An Activity that does not have a due date shows in all filter views until a date is assigned to it.

Unlike previous versions where activities could only be converted to opportunities, activities can now be converted to leads and cases as well.

Finally, when working with Activities, you are limited to only the Activities that come with Microsoft Dynamics CRM, and you cannot create one as you could with a custom entity. So if have a specific Activity that is not in the previous list (Task, Fax, Phone Call, and so on), you must change your business process to accommodate these Activity types only.

For more information about using Activities, see Chapter 9, "Working with the Workplace."

History

Think of History as where all work (or Activities) that has been closed or completed resides, along with e-mail correspondence. Similarly, when you send an e-mail from CRM or from Outlook and select the Track in CRM option, this is where you find the history of that e-mail.

As with the Activities section, you have the option to run manual Workflow via Run Workflow, located at the top of the screen. The History shows the last 30 days and filters on This Record Only.

For more information about using the History, see Chapter 9.

Notes

The `Notes` field enables you to enter notes about the Entity free form. Generally, if you have standardized data about an Entity (for example, favorite restaurant) and you want to record similar information across the Entities (such as for all Accounts or Contacts), it is a better idea to add a new field to the Entity interface via customization rather then enter the data here. There are a couple of reasons for this. First, there is *no* built-in ability to query on the `Notes` field. While you can do it by going to the database level or utilizing a third-party tool, there is no functionality from Microsoft Dynamics CRM to search `Notes` fields. Second, it is usually a much better idea to standardize the entry (via a drop-down box of restaurants, for example) and have a common location that you can control entry to.

To enter a note, navigate to the Notes tab (generally, the last tab) on the main Information tab, and select Click Here to Add a New Note. By default, the title of the note is Note Created on <*date/time*> by <*user*>. To change the title, save the Note either by selecting Save from the top menu options or by merely clicking somewhere else on the form (this automatically saves any entered date); then double-click the Note icon to open the Note form, where you can make changes to the title of the Note as well as the Note contents.

7

TIP

If you need to make a quick change or add a new note quickly, we recommend not opening the Note form—just enter it on the Notes tab by clicking where it says Click Here to Add a New Note. If you need to make a Note with a title or upload something, select the Add a Note option from the Actions drop-down, described earlier in this section.

Additional Notes considerations are the capability to easily see when a note was entered and by whom, as well as when a note was edited and by whom (see Figure 7.21).

TIP

Notes do not support either rich text or HTML. If you need to have content such as this, consider uploading an attachment instead.

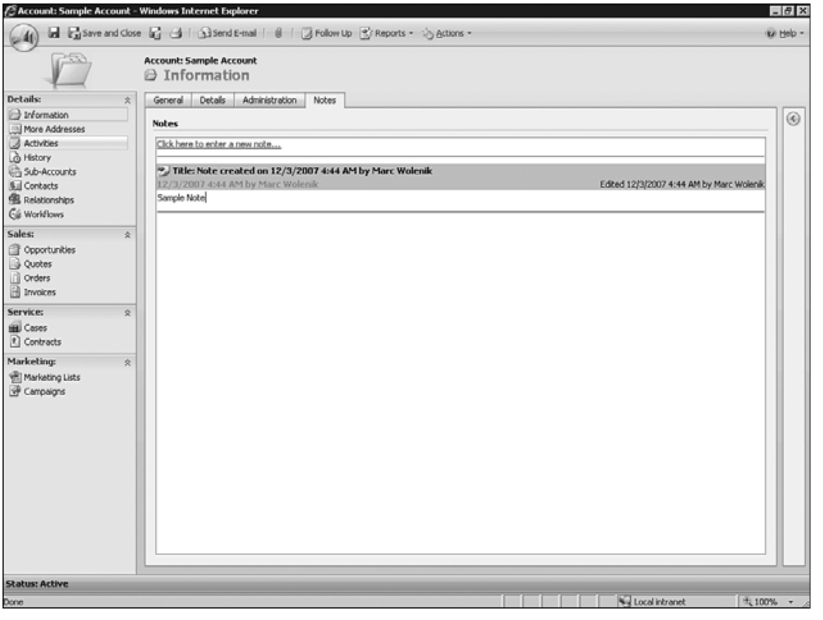

FIGURE 7.21 Account Notes entry screen.

Attachments

When you upload a document to the Account entity, it is placed in the Notes section with the same audit information mentioned previously.

NOTE

As mentioned previously in this chapter, you cannot upload anything to a newly created Entity until it is saved first (see Figure 7.22). After it is saved, the Paper Clip icon appears (as well as the other advanced options), enabling you to perform the actions on the record (see Figure 7.21).

Attachments are stored in the CRM database. After you've uploaded them, you can view them by selecting them from the Notes.

TIP

When viewing attachments, the location of the file can sometimes be misleading. The reason for this is that, when you are viewing an attachment, its location is your C:\ drive. We have had many calls from concerned clients saying that they were sure they had uploaded files from their C:\ drive, only to view them and, when viewing the properties, find they were on the C:\ drive also. The explanation is simple: When you view a file from the CRM, it downloads the file for viewing to your Temporary Internet Settings folder (usually located on your C:\ drive). So when you're viewing an uploaded file, you're really viewing a local *copy* of the file.

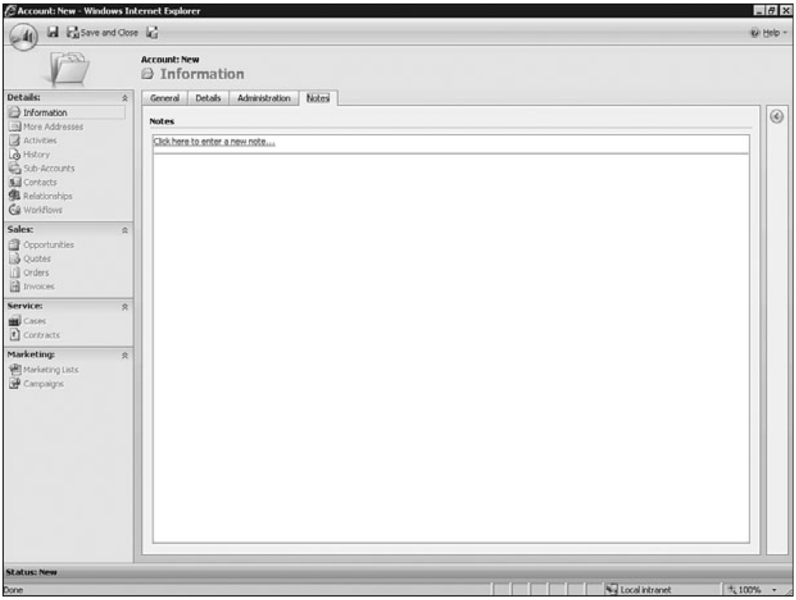

FIGURE 7.22 Account screen prior to saving. Notice the lack of the Paper Clip icon (allowing you to upload) present in Figure 7.21.

NOTE

To make edits to an uploaded file, you must first download it, edit it, and then reupload it. Microsoft Dynamics CRM does not have the capability to handle versioning or online document editing. If this is a requirement that you might have, we suggest that you look at an integrated Microsoft Dynamics CRM and Microsoft Office SharePoint Server (MOSS) solution.

Run Workflow

When located as part of the Quickview, the Run Workflow option enables you to quickly and easily run a workflow that has been marked as Run on Demand.

By default, the Workflows are entity dependent, so there will not be an option to Run Workflow if you have not created at least one workflow for the entity you're working with.

TIP

If you need to run a workflow and are unsure from where to run it, you can always navigate to the Settings and Workflow page to check its attributes and manually run it, if necessary. When checking, you might notice that no workflow exists for the Activity Entity; each Activity is a separate option for Workflow (such as E-mail and Appointment). These items all are available from the Activity Run Workflow.

For more information about Workflow, refer to Chapter 20, "Workflow Development."

Advanced Find

In our opinion, one of the most helpful tools in giving visibility to CRM data is Advanced Find. It enables users to query deep within the CRM system, often creating significantly powerful queries that would otherwise require a dedicated support staff (see Figure 7.23).

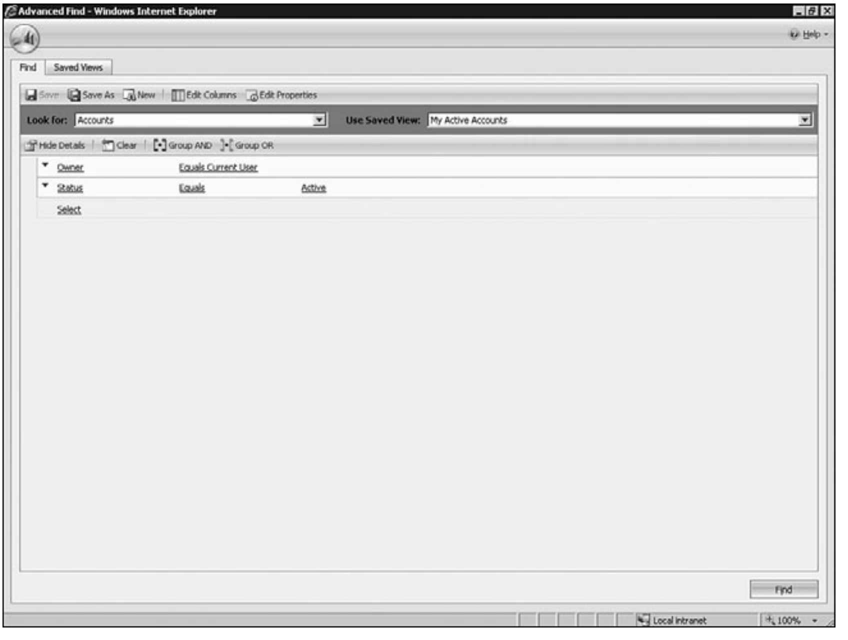

FIGURE 7.23 Advanced Find.

With Advanced Find, users can easily query on the following:

- All system Entities, such as Accounts and Contacts
- System objects, such as Workflows, Templates, Roles, and System Jobs
- Related Entity Attributes

Additionally, when working with Advanced Find, users can perform a variety of actions to get the data they want, including this:

- Selecting specific columns
- Selecting the sort column and sort order
- Adding grouping options
- Modifying a system view (but not overwriting it)

- Saving Advanced Find as a view that can be quickly run when working with that Entity later
- Exporting the results to Excel
- Performing a mail merge
- Performing duplicate detection on the resulting records
- Merging records
- Sending direct e-mail to the resulting records
- Reporting on the records
- Printing the records
- Assigning the records to another user
- Activating or deactivating
- Creating a Quick Campaign on the resulting records

When working with Advanced Find, the first step is to select the main Entity you want to work with. Choose the Entity or system object from the drop-down where it says Look For.

After you have selected the Entity, any associated system views are available for you to select in the Use Saved View drop-down.

TIP

Although you can modify a system view, you cannot overwrite it. However, you can save it as a user view that will be available as a view for the entity you're working with, found after the system views.

Figure 7.24 illustrates the system views for the Account Entity, as well as a new view that we created to show all Accounts.

The view that you're seeing on Advanced Find is the same view that is available when working with the Accounts Entity within Microsoft CRM (see Figure 7.25).

This is a nice feature because it enables you to create custom views into the data through Advanced Find that you can save and run quickly while working with the Entity directly (without having to go back to Advanced Find).

When working with Advanced Find, there are several components to it. These are discussed next.

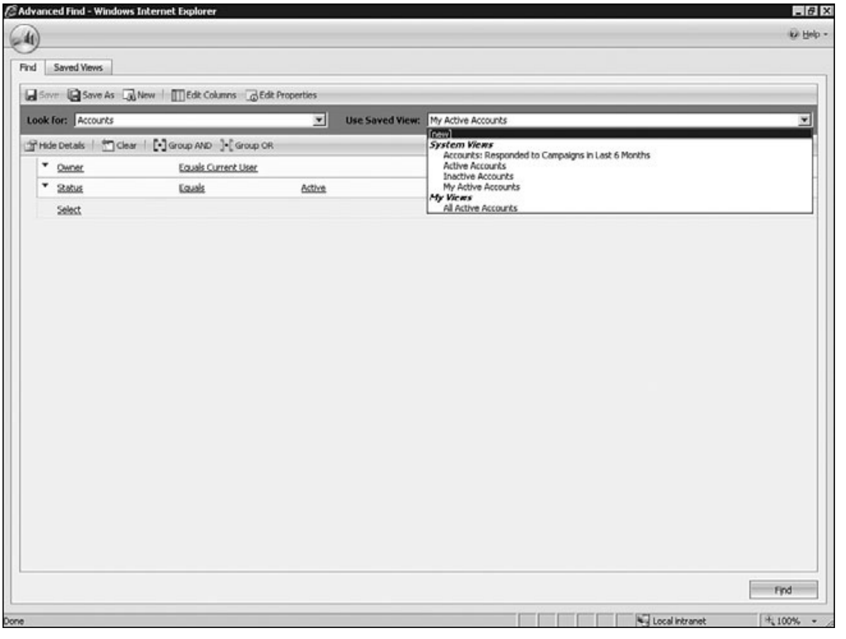

FIGURE 7.24 Advanced Find Saved views.

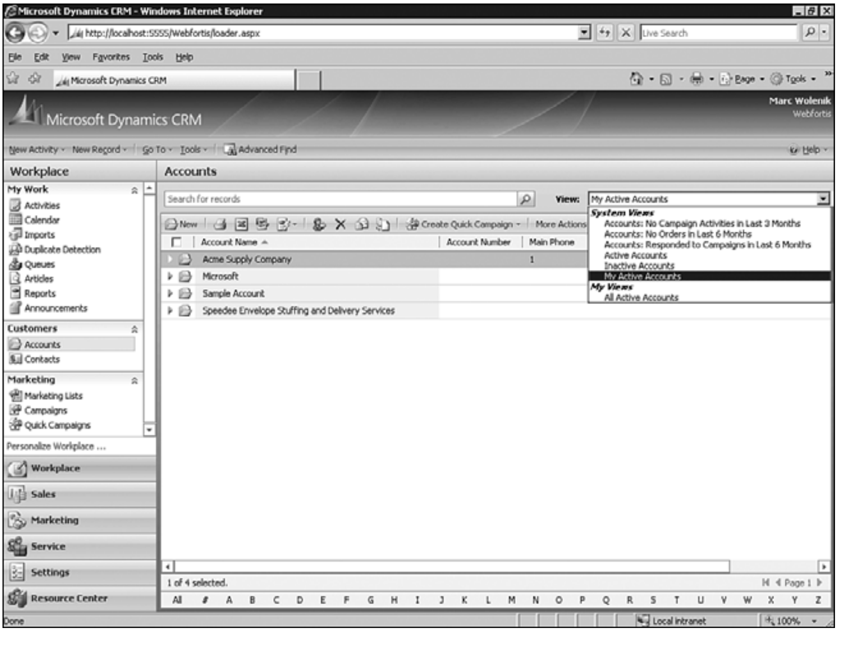

FIGURE 7.25 Accounts view.

Find and Saved Views Tabs

All the functionality for searching is located on the Find tab. The Saved Views tab, as its name implies, is where you will find the views listed as My Views from Use Save View (see Figure 7.26).

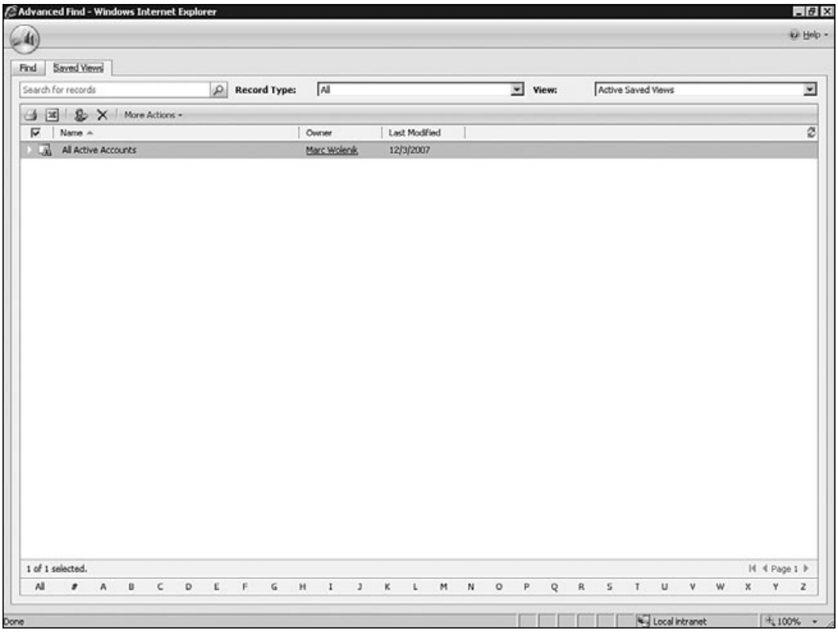

FIGURE 7.26 A saved view located under My Views in Advanced Find.

The Toolbar Options

The navigation options in the toolbar of the Find tab feature the following:

- Save
- Save As
- New
- Edit Columns
- Edit Properties

If you choose to work with an existing view, the view you select is displayed in detail on the form, enabling you to review with the logic.

As you'll see in the following example, Edit Columns enables you to select the columns from the underlying query that you would like to have returned on the view. The Change Properties link enables you to easily change the name and add a description, if desired.

TIP

By default, when working with an existing system view, Save is disabled, preventing you from making changes to it. However, you can choose to use Save As and save it under a different name.

Advanced Find Details

When working with queries in Advanced Find, you can look at the criteria in two ways: Detail mode and Simple mode.

When viewing the Accounts System view of Accounts: Responded to Campaigns in Last 6 Months, both Figures 7.27 and 7.28 show the same view. However, Figure 7.27 is in Simple mode and Figure 7.28 is in Detail mode. (Notice the menu option displayed that says either Show Details or Hide Details.)

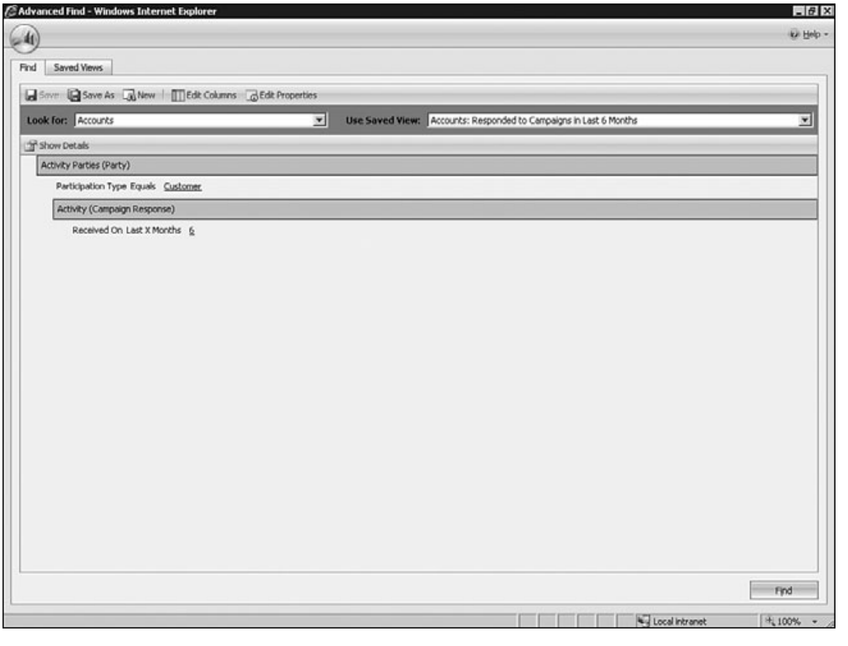

FIGURE 7.27 Accounts System view of Accounts: Responded to Campaigns in Last 6 Months in Simple mode.

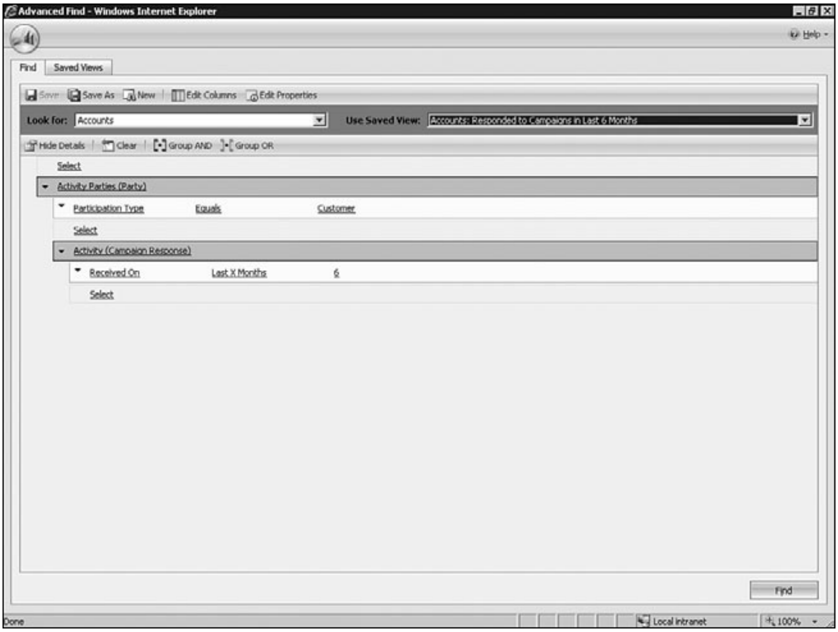

FIGURE 7.28 Accounts System view of Accounts: Responded to Campaigns in Last 6 Months in Detail mode.

You can find and set the default settings for Advanced Find mode in the Personal Options form.

When working in Details mode, you are further presented with the option to add an And clause or an Or clause to our query.

As an example of how the And and Or clauses work, let's query on Account names:

1. Open Advanced Find and select Account as the Entity. Be sure that the Use Saved View is selected to New.
2. Working in Detail mode (be sure the Advanced Find says Hide Details directly below the text Look for:), mouse over the word Select (which will expand), and select Account Name and Begins With, using the letter `a`.
3. Adding another row, select the same criteria, but this time use the letter `b`. This query should look similar to Figure 7.29.

   If you were to run this query as it stands, you would have no records returned because it is looking for all records that have an Account name starting with `a` and `b`. It uses Boolean `and` logic, so results will only be returned if the account name starts with both `a` and `b`. Since Account Names can only start with one letter, we'll never see results.

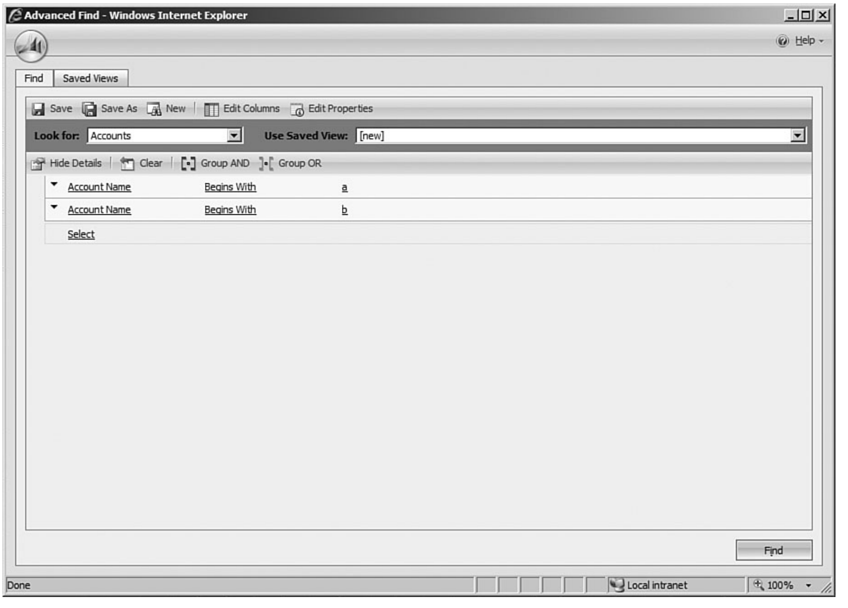

FIGURE 7.29 Advanced Find with two select clauses.

4. Select each row as illustrated in Figure 7.30.

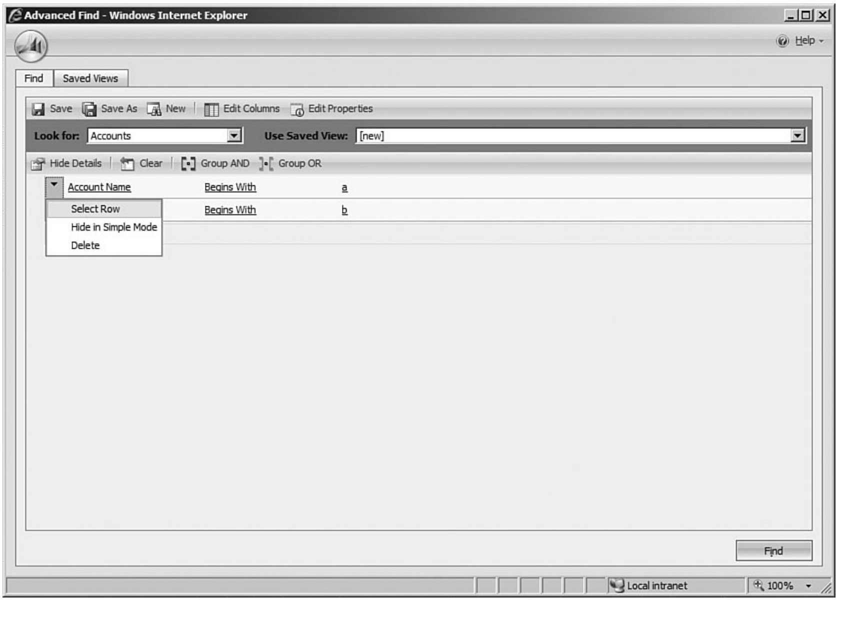

FIGURE 7.30 Selecting rows in Advanced Find.

5. Now select the Group Or option. The two selected rows are grouped with an `OR` next to them (see Figure 7.31).

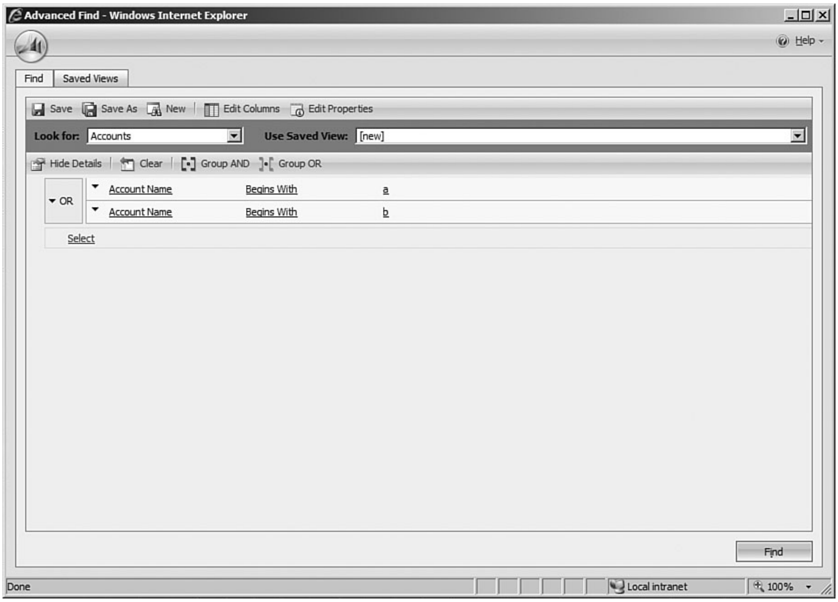

FIGURE 7.31 Selected rows with a group `OR` applied.

Running the query now returns all Account records in which the Account name begins with either `a` or `b`.

The Grouping options can be applied multilevel, grouping And or Or clauses by selecting different criteria. In Figure 7.32, multiple And and Or clauses have been applied to selectively return desired records.

Advanced Find Example

As previously mentioned, the Advanced Find feature is incredibly powerful. The following example demonstrates how to perform a popular find: returning all the Contacts that have had an Account created in the last 10 days so you can send a welcome mail.

1. Open Advanced Find. Advanced Find is always located on the main navigation screen on the web client and as part of the CRM toolbar within Outlook (see Figure 7.33).

7

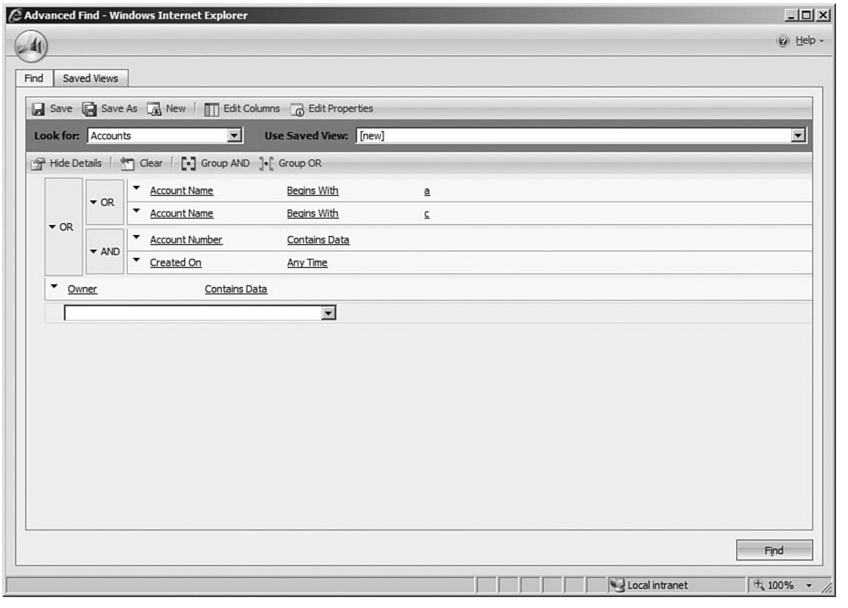

FIGURE 7.32 Selected rows with a group And and Or applied.

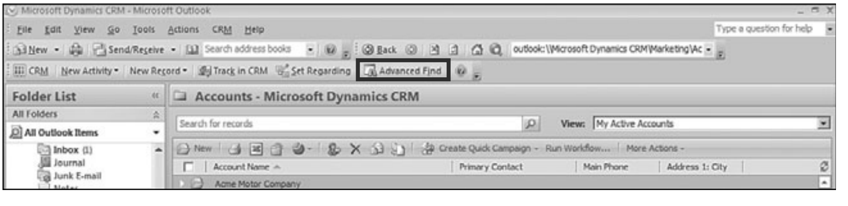

FIGURE 7.33 Advanced Find on the CRM Outlook toolbar.

2. By default, Advanced Find automatically selects the Entity that you're working with as its default Look For. If you were not working with Contacts when you started the Advanced Find, change the Look For to Contacts.

   Because you're going to be sending a piece of mail, you need to edit the columns to make sure that you're returning the right columns for your mailer. Select Edit Columns from the top toolbar and the Edit Columns dialog box is displayed (see Figure 7.34).

3. By default, when working with Contacts, only the full name and business phone are returned. Because you're going to be working with Mail, you need to select Add Columns located on the right navigation pane of the dialog box. Select the columns you want to have added to the results, and click OK to continue (see Figure 7.35).

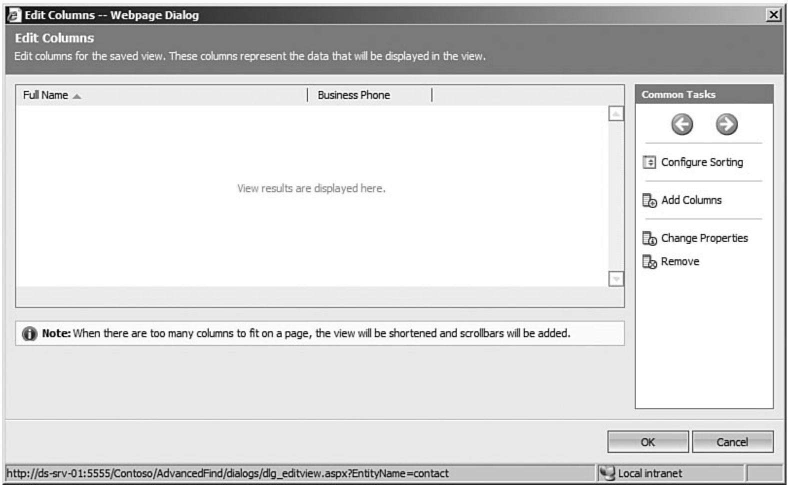

FIGURE 7.34 Edit Columns on Advanced Find for Contacts.

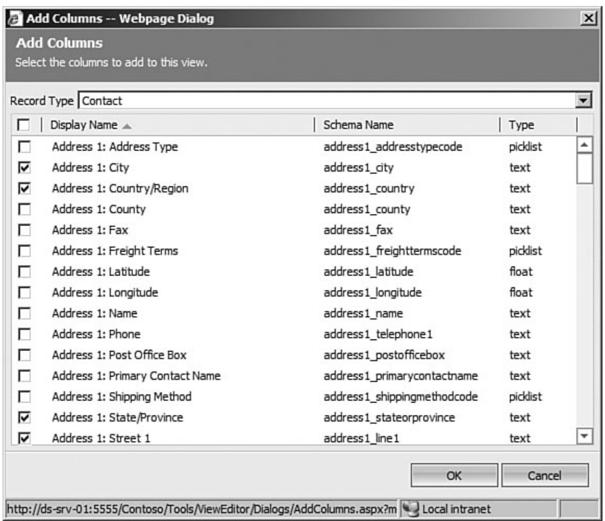

FIGURE 7.35 Selecting columns from Advanced Find for Contacts.

4. From here you can configure the sort order of the returned records by selecting Configure Sorting (see Figure 7.36). Click OK twice to continue.

5. You need to add the criteria now to your Find because you have selected only the Contacts and the fields you want returned. If you were to run your query now, you would return every Contact, not just those that are associated with an Account created 10 days ago. To add this logic, mouse over the Select option; it changes to a drop-down (see Figure 7.37).

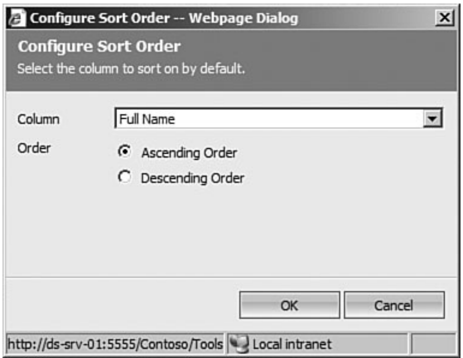

FIGURE 7.36 Selecting sorting from Advanced Find for Contacts.

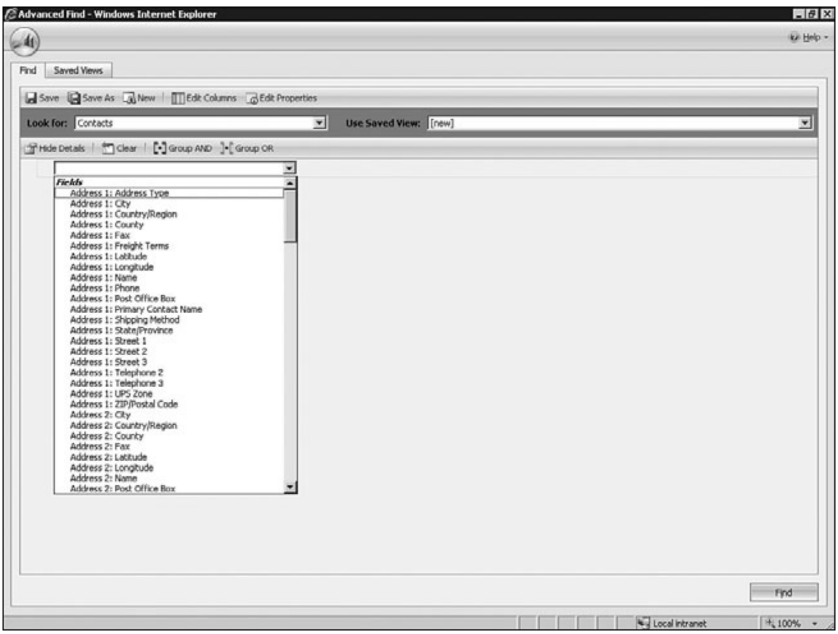

FIGURE 7.37 Selecting Fields and Related from Advanced Find.

TIP

Notice that, in the drop-down, these are the same fields you saw when you added fields to your query. However, selecting them here does not add them as a column to the returned records; selecting them here only enables you to add a filter on them.

6. Scrolling down the drop-down, you'll notice that the available fields to apply a filter to are broken into two sections:

    - Fields
    - Related

    Fields are the base fields for the entity you're working with—in this case, the fields for the Contact entity. Notice that every field applicable to the Contact entity is listed there, along with any custom fields you might have added.

    Related enables you to select related entities to the primary entity you're working with—in this case, the entities related to the Contact entity. Again, every relationship to the Contact entity should be listed there, along with any custom ones added.

TIP

The Related section shows you the relation and then the entity in parenthesis. If you're unsure of what entity the relation ties to, check the value in parenthesis listed right after the relation.

Select the Parent Customer (Account) from the Related section (see Figure 7.38).

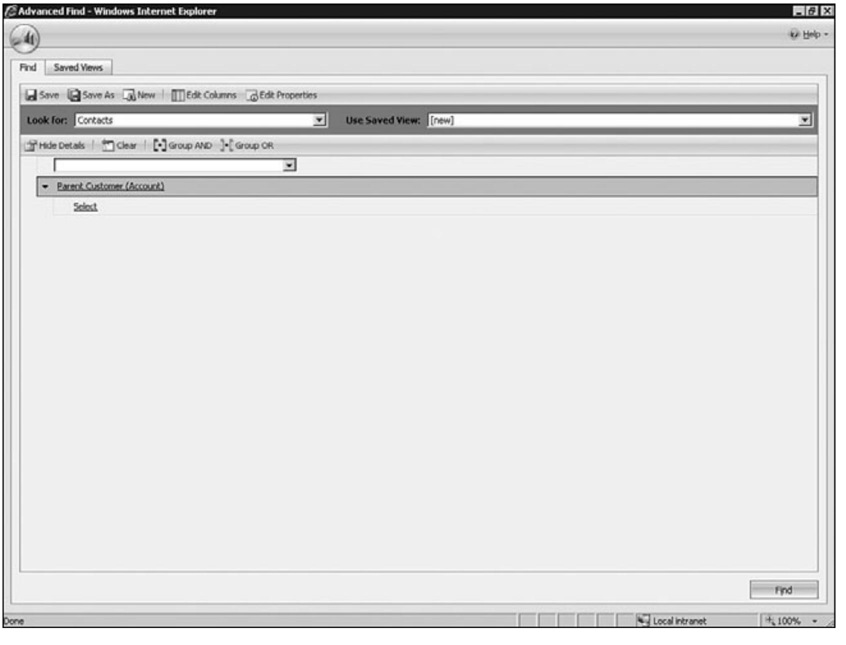

FIGURE 7.38 Parent Customer (Account) selected on Advanced Find.

Now that you have the relation established on your Advanced Find, you need to add the last bit of logic, Accounts added within the last 10 days.

7. Mouse over the Select under Parent Customer (Account), and select Created On. Notice that the fields displayed are of the base entity Account—this is because you're now working and able to query on the fields for the related entity. Change the option to Last x Days and enter **10** as the value (see Figure 7.39).

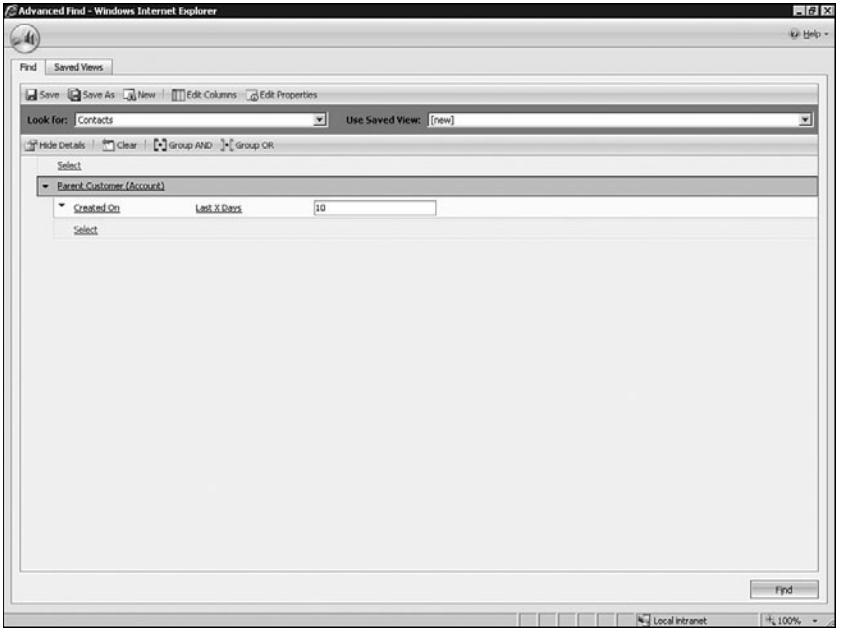

FIGURE 7.39 Adding criteria to a related entity.

Selecting Find returns all Contacts related to Accounts added within the last 10 days. If your query does not return any records, it may be because you have not adding anything in the last 10 days. Try expanding your search to 20 or 30 days or until results are returned.

As mentioned in the first part of this section, you can do several things with your results, including saving them, performing a mail merge, exporting them to Excel, or even creating a Quick Campaign with them to track whether any of your mail has been responded to.

Form Assistant

The Form Assistant is ubiquitous throughout the application and can always be found on the right side of any form you're working with. If you open a new Contact, you'll see it on the right side of the form (see Figure 7.40). Note that your data will likely differ from the information displayed in Figure 7.40, as it will be applicable to your organization.

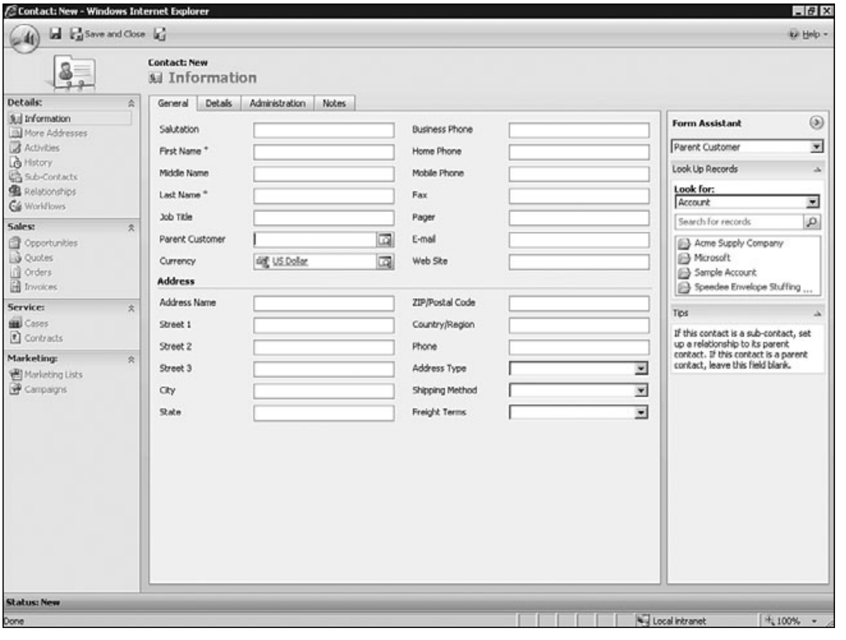

FIGURE 7.40 Contact form with the Form Assistant expanded.

If you don't see the Form Assistant, it might be collapsed (see Figure 7.41). You can expand it either by selecting the left arrow in the upper-right corner of the form or by pressing Ctrl+Shift+F. This is a very helpful resource and can aid in quick entry of data that requires lookup fields.

The Form Assistant has the capability to select an entry for virtually every field on the page that has a lookup field associated with it, without having to open the lookup pop-up window. Additionally, it enables you to populate all lookup fields on a page without having to tab to each. Finally, it has the same search functionality built in and can quickly locate records when searched.

NOTE

For all the great and easy-to-use features that the Form Assistant provides, it does have some limitations. You do not have the ability to view properties of prospective records, and you can't do a Quick Add of the entity, as you can when working with the full pop-up lookup.

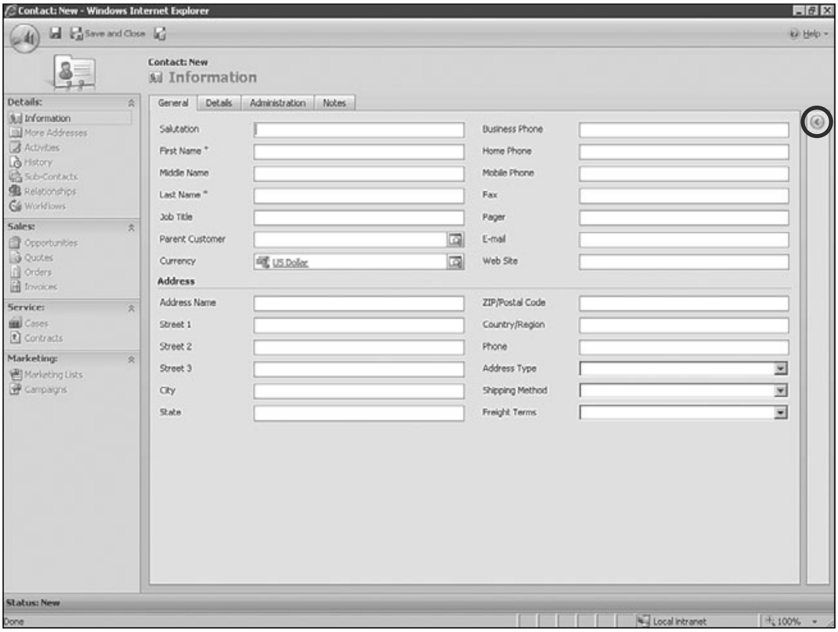

FIGURE 7.41 Contact form with the Form Assistant collapsed.

Record Merge

When working with records, it is possible that you need to merge two records into one record. This might be because a customer consolidated or shut down offices or locations, or because you found a duplicate record in the system.

This functionality is included in the toolbar by selecting the Merge icon, as shown in the Web client in Figure 7.42.

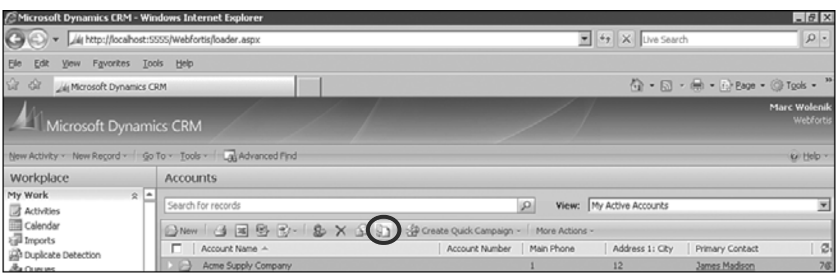

FIGURE 7.42 Merge icon.

When you select to merge two records, the records are displayed on the Merge Records interface allowing you to select which one has the master data (see Figure 7.43). By selecting the fields you want to keep from each section, you tell the system which record it should have after the merge. The other data in the field is discarded.

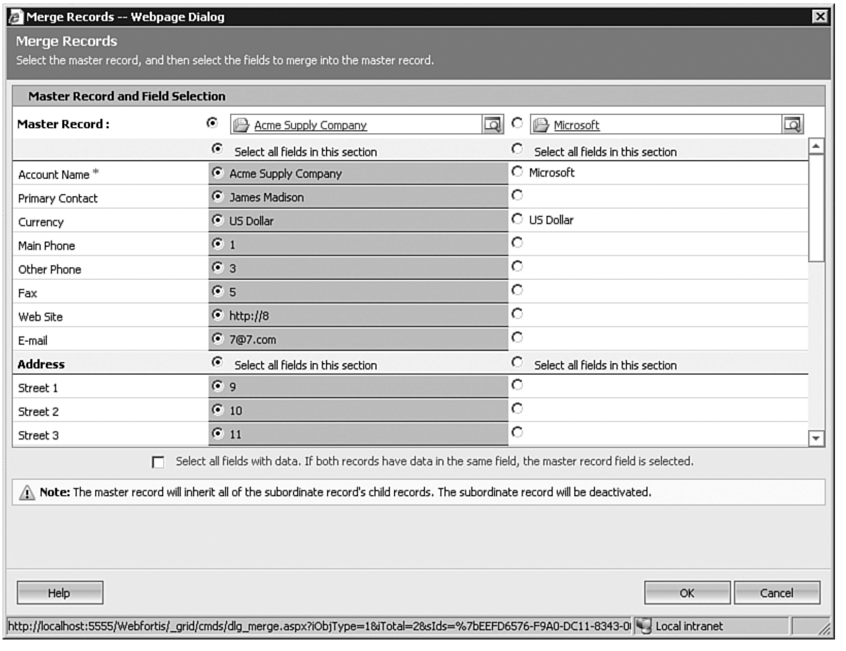

FIGURE 7.43 Merge Records dialog box.

When the merge is complete, the selected records are kept, and the subordinate record is deactivated. If the subordinate record had associations to Contacts (in the case of Accounts), the new Master record now has the Contacts.

Fields that aren't listed in Figure 7.43, such as Notes, are merged into one record.

Send Direct E-mail

The option to quickly and easily send a direct e-mail exists for most entities in the system. Found on the toolbar next to Mail Merge (see Figure 7.44), it allows you to send an e-mail directly from CRM to one or more selected records.

Note that until the e-mail router is configured, this option will not work unless you open the Outlook client.

The e-mail can consist of either a global or specific to the entity template (see Figure 7.45).

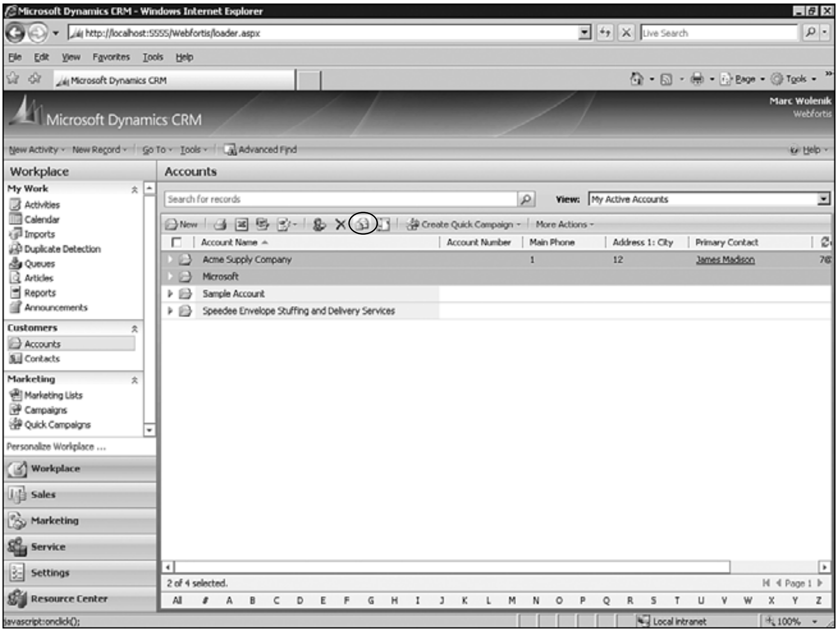

FIGURE 7.44 Send direct e-mail option.

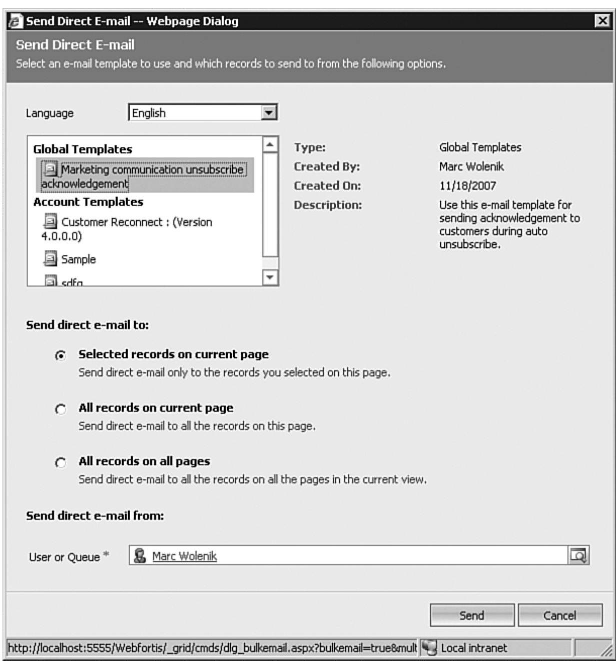

FIGURE 7.45 E-mail templates.

Resource Center

The Resource Center is a new addition to Microsoft Dynamics CRM that, by default, connects to Microsoft for updated content. The content on the Resource Center includes the following:

- Microsoft Dynamics Communities and Blogs
- Learning and Training Resources
- Articles related to Microsoft Dynamics

The Resource Center is located by navigating to the last option in the near navigation (see Figure 7.46).

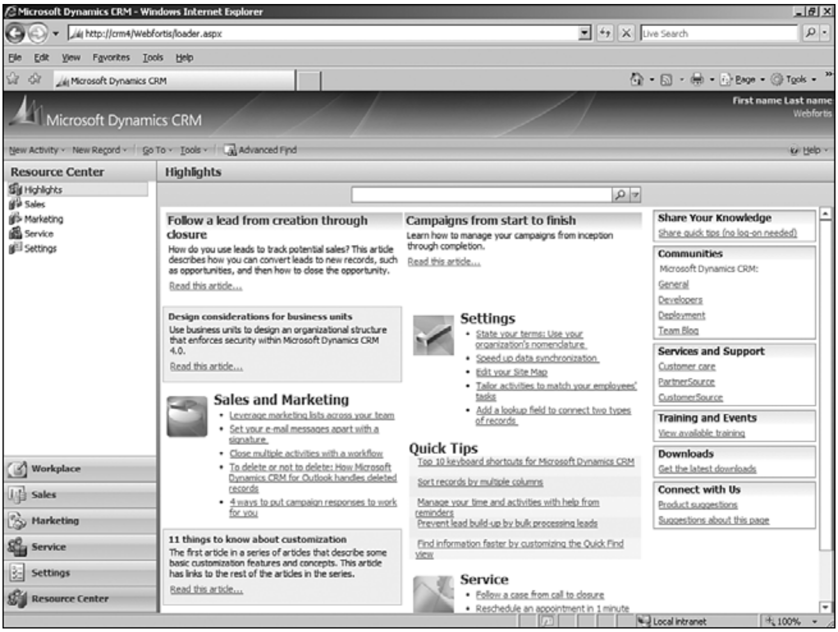

FIGURE 7.46 The Resource Center.

When working with the Resource Center, it should be noted that the content is delivered dynamically from Microsoft.com and might or might not be relevant to your particular situation. You can remove the Resource Center from the application by modifying the site map, or you can change what the users see when accessing the Resource Center (see Chapter 19, “Customizing Entities,” for more information on working with the site map). An example of the latter might be to change the Resource Center to point to an internal intranet site that displays company information.

Summary

We have looked at a number of features that are similar throughout the application and not specific to any one Entity.

When working with the various features of Microsoft Dynamics CRM, such as Advanced Find or Mail Merge, it is important to understand that the system is incredibly flexible. Any customizations and modifications that have been made to the system are available to be queried. This provides for a powerful tool when searching and creating a set of records dynamically.

Although there are some differences in functionality depending on where you're accessing them from, these features are common throughout the application.