## CHAPTER 7

# **Common Functions**

 ${f M}$ icrosoft 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
- Notes

 Activities History

- 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

- Actions
- Activities
- History
- Notes
- Attachments
- Run Workflow
- Advanced Find
- Form Assistant
- Record Merge
- Send Direct E-mail
- Resource Center

A Gasave		40			Ri Reb
P		Account: New D Information			
Details: Information More Addresses Activities History Sub-Accounts Contacts Relationships Workflows	*	General Details Account Name * Account Number Parent Account Primary Contact Relationship Type	Administration Notes	Web Site	· · · · · · · · · · · · · · · · · · ·
Sales: Coportunities Quotes Orders Im Invoices	\$	Currency Address Address Name Street 1		ZIP/Postal Code	
Services Cases Contracts	\$	Street 2 Street 3		Phone Address Type	
Marketing: Marketing Lists Campaigns	Ŕ	Oty State/Province		Shipping Mithod	×
itatus: New					

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

	ount - Windows Internet Ex				_ 5 >
	Account: Sample Ac	on	ts> Actions -		6 Reb -
Details: Difformation More Addresses Attivities History Sub-Accounts Relationships Ge Workflows Sales:	General Details     Account Name *     Account Name *     Account Namber     Parent Account     Primary Contact     Relationship Type     Currency	Administration Notes	Man Phone Other Phone Fax Fax Emai Emai		
Sales: Coportunities Quotes Orders Invoices	Currency     Address     Address Name     Street 1		ZIP/Postal Code		
Service: Cases Contracts	* Street 2 Street 3		Phone Address Type		
Marketing: ∰ Marketing Lists ∰ Campaigns	<ul> <li>Oty</li> <li>State/Province</li> </ul>		Shipping Method Freight Terms		N
Status: Active					
one				Local intranet	100% -

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).

C Note: New	- Windows Intern	et Explorer			-0×
	Save and Close	6			Ø Help +
2	Note New				
Note					
Title *					
Regarding	Account				Q
(℃) File Atta	chmont				
( V) File Atta	cnment				
File Name:				Browse	Attach
Status: New					
			Local intra	net	⊕_100% <i>▼ //</i>

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.

C Attachment	: New - Windo	ws Interne	t Explorer		_I_I ×
Add Attach	nent				
Select the file yo	u want to attac	:h.			
<b>€</b> File Attac	iment				
File Name:				Browse	Attach
					Close
Done			Local in	ranet	€ 100% - //

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).

🖉 Account Delete Confirmation Webpage Dialog 🛛 🔀
Account Delete Confirmation You have selected 1 Account for deletion.
Deleting the Account will delete all records under the Account as well (for example, opportunities, activities, and contacts). Sub-accounts will be removed from the account, but not deleted.
To keep the records under the Account available for further use or reporting purposes, click Deactivate. To continue deleting the Account, click Delete.
Delete     Deactivate     Cancel     http://crm4/Webfortis/ grid/cmds/dig delete accour      Local intranet

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 dropdown (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).

Microsoft Dyn Select the options I Template Langua		Merge for Micro nalish	soft Office Wor	d	
Select the mai	l merge type:	V			
	ment ion mail merge templat nail merge template	te			9
C All records	ecords on current pag on current page on all pages	e			
Select data fiel To select the dat Data Fields	<b>lds:</b> a fields to use with thi	is mail merge, click Da	ta Fields.		
the flogshoet over	5/Webfortis/_grid/cmc	detalla unabarazilara	ann a biast tur - "-	OK	Cancel

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).

		Activities	Formats	E-mail Templates	E-mail	Privacy	Languages		
ec your	default sta	t page.							
efault P	ane	Settings				▼ De	ault Tab	Administration	
et the r	number of re		i per page i	n any list of recor	ds.				
ecords P	Per Page	50 25							
where the	ne default m	50							
		100							
dvanced	d Find Mode	250							
t the t	time zone yo	u are in							
ime Zon	e	(GMT+01:00	) Brussels, Co	penhagen, Madrid, I	Paris				
		,.							
elect a	default curr	ency							
		네 US Dollar				Q			
urrency									
	high contra:	st settings							
pport			High Contras	t settings in your bro	wser or op	erating syst	em.		
ipport elect thi		are using the	High Contras	t settings in your bro	wser or op	erating syst	em.		
ipport elect thi	is option if you	are using the	High Contras	t settings in your bro	wser or op	erating syst	em.		

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).

Display Name     Account Name       Account Name     Pr       Account Number     Pr	ccount ccount eferred Facility/Equipme imary Contact (Contact) eferred User (User) dified By (User) arent Account (Account)			
Record Type A	ccount ccount eferred Facility/Equipme imary Contact (Contact) eferred User (User) dified By (User) arent Account (Account)			
Display Name         Account Name           Account Name         Pr           Account Number         Pr	ccount eferred Facility/Equipme imary Contact (Contact) eferred User (User) odified By (User) arent Account (Account)			-
Address 1: Address T; Address 1: City Address 1: Country/R Address 1: Country/R Address 1: Country/R Address 1: Country /R Address 1: Country /R	wner (User) eferred Service (Service erritory (Territory) reated By (User) ice List (Price List)			
Address 1: Freight Ter	riginating Lead (Lead) urrent User (User)	agarozzz_noigretormisegag	piciese	
Address 1: Latitude		address1_latitude	float	
Address 1: Longitude		address1_longitude	float	
Address 1: Name		address1_name	text	
Address 1: Post Office Bo	x	address1_postofficebox	text	
Address 1: Primary Conta	act Name	address1 primarycontactname	text	-
Number of selected data fields: 2	9 (max. 62)			
u III. II. seere ku lif aa ku	the entry least i	OK		Cancel

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).

Data Source		Account_Name	Address_1_	_Street_1 💌	Address_1Street_2	<ul> <li>Addr</li> </ul>
C:\Documents and	7	Acme Motor Company	0			
C:\Documents and	~	ad3				
C:\Documents and	2	ad4				
C:\Documents and	2	ad5				
C:\Documents and	7	Adventure Works				Belle
C:\Documents and	~	Adventure Works24				
C:\Documents and	2	Alpine Ski House				Seat
C:\Documents and	2	Baldwin Museum of Science				Tacc
C:\Documents and	7	Blue Yonder Airlines				Tacc
C:\Documents and	7	City Power and Light				Seat
C:\Documents and	2	Coho Vineyard				Port
C:\Documents and	2	Coho Winery				Seat
4						Þ
ata Source		Refine recipient list	:			
C:\Documents and Se	ttin	s\crr A Sort				
c, pocumenta ana se	curiy	Z + <u>Sort</u>				
		Filter				
		E Find duplicat	es			
		-1 Pind recipien	t			
		· · · · · · · · · · · · · · · · · · ·				
	lefre	Validate add	resses			

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).

	7.13)	÷				Mail_Merge_	45674	[1].doc [0	Compatit	Silley F	Mode] - Microso	oft Word				- 0	13
Hor	ne Inse	rt Page	Layout	Reference	tes	Mailings	Revi	lew	View	Ad	td-Ins						
Paste J	Times New B													AaBbCcI ¶Normal	AA Change Styles -	A Find * 원들c Replace 및 Select *	
Clipboard G		Fo	int		5		Parage	raph		12			Styles		6	Editing	
G Security V	Warning N	Hacros have !	been disable	d. C	Options	····											15

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.

00 0 00 0	.).			Do	cument2 - Micros	oft Word					- 0
Home 1	Insert Page	Layout Refere	nces Mailing	s Revie	w View						
Envelopes Labels Create		ect Edit ents ~ Recipient Li fail Merge	st Merge Fields	Block	eeting Insert Mer Line Field *	Q Rules +     Rules +     D Match Fields     D Update Labels	Preview Results	H 4 1 Pind Recip Auto Check Preview Result	for Errors	Finish &	
-	100000			-					- Hall	Herge	*
									Hitlet C C User Ste	ect starting d we do you want ttps? Use the curren Start from ess start from ess the current. art from the do ard to add reci- formation.	to set up your nt document emplate sting document <b>document</b> cument shown Mai Merge
										p 1 of 4 Next: Write y	your letter
-							_		R.		
Page: 1 of 1 Words	and the second se							000	12 10 1	account of a second	0 (
Start 🖸 🖉	0110	Microsoft Dynamics	CRM @ Mor	osoft Dynam	CS CRM 🗐 D	ocument2 - Microso	have			5	<ul><li>※ Ⅲ 1:47 PM</li></ul>

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.

Insert Merge Field	×
Insert:	
○ Address Fields ○ Database Fields	
Eields:	
Account Z	
Account_Number	ш
Address_1City Address_1Country_Region	ш
Address_1Street_1 Address 1 Street 2	ш
Address_1Street_3	- 1
Address_1ZIP_Postal_Code Address_1State_Province	
Credit_Limit	
E_mail Fax	
Account_Name	-1
Primary_Contact	-
Match Fields Insert Cancel	

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).

Mic	rosoft Dynamics CRM Mail Merge for Microsoft Office Word
	te Activities
Select	the options for the Microsoft Dynamic CRM activities that will be created.
	ck Activities in Microsoft Dynamics CRM Mail Merge
0	
	No activities will be created in Microsoft Dynamic CRM after the mail merge is completed.
•	Create Microsoft Dynamics CRM activities Activity Details
	Create activities in Microsoft Dynamics CRM when running mail merge.
Acc	ign activities to:
0	Me
C	The owners of the records that are included in this mail merge
c	
U.	Another user or queue
7	Automatically close the activities as completed
	Create a new quick campaign
	Name:
	OK Cancel

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.

ender		Address		
ecipient		Direction	C Incoming C Outg	going
ubject *	Mail merge activity created on 10	/14/2007 3:57 PM by CRM Admin		
				A.
anarding				
wner *	30 minutes	v Priority	Normal	9
wner * uration			Normal	
wner * uration	30 minutes	Priority	Normal	9
egarding wner * uration ue ategory			-	9

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).

	Confirm Assignment Webpage Dialog	×
100000	ssign Account u have selected 1 Account. To whom would you like to assign it?	
C	Assign to me Assign the selected Account to yourself.	
ه	Assign to another user Assign the selected Account to the following user:	q
http:	Help OK Cancel ://crm4/Webfortis/_grid/cmds/dlg_frmassign.aspx 😪 Local intranet	

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 ► Orders
- ► Contacts ► Reports
- ► Cases ► Opportunities
- Campaigns
   Marketing Lists
- ► Invoices ► Leads
- ► Quotes ► 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).

		Read	Write	Delete	Append	Assign	Share
Add User/Team	🗖 🔱 Damian Sinay	ম			V		
Remove Selected Items	🗖 🔱 Marc Wolenik	<b>v</b>			V		
Toggle All Permissions of the Selected Items	🗖 🔱 Nicole Berlant	V	V			V	
Reset	🗖 🔱 Paula Budris	<b>V</b>					

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
  Letter
  Appointment
  Service Activity
- ► E-mail ► 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.

### 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.

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1ª		Account: Sample Account	
Details: Information More Addresses Activities History Sub-Accounts	*	General Detals Administration Notes Notes Cick here to enfore a new code Table: Note created on 12/3/2007 444 AM by Marc Walensk	®
🔝 Contacts 😤 Relationships Gá Workflows		12/2/2007 4444 AM by Marc Wolenik: Edited 12/3/2007 4444 AM by N Songle Note	farc Wolenik
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Service: Cases Contracts	\$		
Marketing: Marketing Lists @ Campaigns	*		
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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.

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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).

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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.

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* Ratus	Kauala	Active	Inactive Accounts My Active Accounts	
Select			My Views All Active Accounts	

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).

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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

Edit Columns

Save As

Edit Properties

► New

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.)

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

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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.

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FIGURE 7.29 Advanced Find with two select clauses.

4. Select each row as illustrated in Figure 7.30.

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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).

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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).

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

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Journal		Account Name A	Primary Contact	Main Phone	Address 1: City	3
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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).

ull Name 🔺	Business Phone	Common Tasks
	View results are displayed here.	Configure Sorting Configure S
Note: When there are too many	r columns to fit on a page, the view will be shortened and scrollbars will	be added.

FIGURE 7.34 Edit Columns on Advanced Find for Contacts.

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~	Address 1: Country/Region	address1_country	text	
	Address 1: County	address1_county	text	
	Address 1: Fax	address1_fax	text	
	Address 1: Freight Terms	address1_freighttermscode	picklist	
	Address 1: Latitude	address1_latitude	float	
	Address 1: Longitude	address1_longitude	float	
	Address 1: Name	address1_name	text	
	Address 1: Phone	address 1_telephone 1	text	
	Address 1: Post Office Box	address1_postofficebox	text	
	Address 1: Primary Contact Name	address1_primarycontactname	text	
	Address 1: Shipping Method	address1_shippingmethodcode	picklist	
7	Address 1: State/Province	address1_stateorprovince	text	
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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.

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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).

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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).

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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.

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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.

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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.

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master Record :	interio suppry company	
Account Name *	Select all fields in this section     Acme Supply Company	Select all fields in this section     Microsoft
	Acme Supply Company     James Madison	C Microsoft
Primary Contact	James Madison     US Dollar	C US Dollar
Currency Main Phone	<ul> <li>US Dollar</li> <li>1</li> </ul>	C US Dollar
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	© 5	0
Fax Web Site	© http://8	0
	• ncp;);•	0
E-mail Address		
Street 1	Select all fields in this section     9	Select all fields in this section
Street 2	© 10	0
Street 3	© 11	0
Note: The master record	Select all fields with data. If both records have data in d will inherit all of the subordinate record's child records. T	

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).

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FIGURE 7.44 Send direct e-mail option.

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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.