

Contents

[Overview](#)

[Administrator Guide](#)

[What's supported](#)

[Set up mobile app](#)

[Configure mobile offline synchronization](#)

[Manage and secure devices](#)

[Dynamics 365 for Good device encryption](#)

[Company News Timeline](#)

[Install the mobile app](#)

[User Guide](#)

[Troubleshooting](#)

[Older version \(8.x\)](#)

[Overview](#)

[Administrator Guide](#)

[Configure and use mobile offline synchronization](#)

[Enable mobile offline synchronization](#)

[Enable entities for mobile offline synchronization](#)

[Create a mobile offline profile](#)

[Add users to a mobile offline profile](#)

[Publish a mobile offline profile](#)

[Setup and manage phones and tablets](#)

[Set up](#)

[Support](#)

[Secure and manage](#)

[Troubleshoot](#)

[Things to know and troubleshooting](#)

[Get the Company News Timeline](#)

[Reconfigure](#)

[Secure your mobile data with Microsoft Dynamics 365 for Customer Engagement](#)

[apps for Good](#)

[iFrame and web resource support](#)

[Troubleshoot a startup error](#)

[Troubleshoot error code 800c0019 on Windows Phones](#)

[User Guide](#)

[Install the mobile app](#)

[Signing in and signing out](#)

[Reconfigure](#)

[Basic navigation](#)

[The workspace - your personalized action hub](#)

[Notes](#)

[Scan barcodes](#)

[User your browser for non-mobile features](#)

[A note for Android users](#)

[More help and how-to information](#)

[Manage accounts, contacts, leads, and opportunities](#)

[Track your progress with charts](#)

[Track customer service cases](#)

[Manage quotes, orders, and invoices](#)

[Nurture leads through the sales process](#)

[Manage activities.md](#)

[Create a communication card](#)

[Email and call customers](#)

[Search and sort](#)

[Dashboard views](#)

[Use Cortana voice commands](#)

[Pin your favorites](#)

[Manage work orders, agreements, customer assets, and time off requests](#)


[Work offline](#)

Overview of Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

NOTE

Most of the topics in this guide apply to Dynamics 365 for Customer Engagement apps, version 9.x. Some apply to both 9.x and 8.x. Review the **Applies to** at the top of each topic. Topics in the **Version 8.x** folder, apply to 8.x only. To determine your revision of Dynamics 365 for Customer Engagement, in the upper-right corner of your Customer Engagement screen, choose the **Settings** gear  > **About**.

Use the Dynamics 365 for phones and Dynamics 365 for tablets apps for your sales, customer service, field service, and other tasks when you're on the go. With one download from your app store, you'll automatically have access to all the apps you need for your role. You will see apps with the new Unified Interface on your mobile device.

TIP

Customer Engagement has separate mobile apps for Field Service and Operations. Learn about [Dynamics 365 for Customer Engagement apps for Field Service \(Resco\) mobile app](#) and [Dynamics 365 for Customer Engagement apps for Operations mobile app](#).

What's supported

1/15/2019 • 3 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

You can access Dynamics 365 for Customer Engagement data from mobile devices in different ways. You can install and use the apps for Windows, iOS, and Android mobile devices, or you can run the Customer Engagement web app on the device's preferred browser for those devices described here.

Support for Dynamics 365 for phones and tablets

Device support

PLATFORM	VERSIONS	RAM (MINIMUM)	RAM (RECOMMENDED FOR OPTIMAL PERFORMANCE)
iOS	10 and above	1 GB	2 GB
Android	6.0 and above	2 GB	3 GB
Windows tablet	10	2 GB	4 GB

NOTE

On February 21, 2018, we announced the deprecation of the Windows Phone app for Dynamics 365 for Customer Engagement apps version 9.0. On May 22, 2018, the Windows Phone app will no longer be supported for Dynamics 365 for Customer Engagement apps version 9.0. The app is only supported on Windows Phone 10. The app is not supported on Windows Phone 8.1. Support for the app on Windows tablets and PCs remains unchanged. The Windows Phone app will continue to be available in the store and will be supported for Dynamics 365 for Customer Engagement apps, (version 8.2) and earlier supported versions. If you wish to continue to use the Windows Phone app, you should not update to Dynamics 365 for Customer Engagement apps, version 9.0 as the Windows Phone app will not be supported with version 9.x.

Support for Dynamics 365 for tablets

Windows tablets

You can run the Dynamics 365 for Customer Engagement apps for Windows tablets app on devices that meet the following requirements:

Operating system	10
Memory	Minimum RAM (memory) required is 2 GB. 4 GB RAM recommended for optimal performance
Resolution	1366 x 768 resolution (720p)

You can also run the Dynamics 365 for Customer Engagement apps web app on a supported web browser on these devices. For more information about web browser support, see [Web application requirements for Microsoft Dynamics 365 for Customer Engagement apps](#).

Download the Dynamics 365 for Customer Engagement apps from the Windows Marketplace for [Windows 10](#).

Apple iPad

You can run the Dynamics 365 for iPad app on devices that meet the following requirements:

- Device: iPad third generation or later
- Screen: 9-inch (diagonal) or larger

[Download Microsoft Dynamics 365 for Customer Engagement apps for iPad from the Apple Store](#)

How to find the version of your Dynamics 365 for iPad app

- In the Dynamics 365 for tablets app, go to the home screen, and then open the command bar. Tap **Settings**, and then tap **About**.

Android

You can run the Dynamics 365 for Android app on devices that meet the following requirements:

- Android versions 6.0
- Tablets with screens larger than 7 inches (optimized for 9 to 10 inches) using Dynamics 365 for Android.

[Download Microsoft Dynamics 365 for Customer Engagement apps for Android from Google play](#)

Web browser support for tablets

You can run Dynamics 365 for Customer Engagement in the default web browser on any Windows 10 device, including a Windows 10 PC, but the user interface is optimized for touch. For [Apple iPad](#) tablets, iOS 10 and above are supported. For [Android](#), versions 6.0 and above are supported for the tablets.

Using Dynamics 365 for Customer Engagement on a web browser on an Apple or Android mobile device provides a similar experience to using it with a web browser on a desktop or laptop computer. However, some features are not available, including:

- Pinch and zoom
- Yammer
- Reports
- Service Calendar
- Customization/Editors
- System Settings
- Advanced Find
- Process dialogs
- Skype for Business presence
- Entities that use classic forms such as Goal and Order Product see, [Entities using classic forms](#).

See also

[Set up and manage tablets and phones](#)

[Web application requirements for Dynamics 365 for Customer Engagement apps](#)

Setup overview for mobile apps

1/8/2019 • 23 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

Your users can access their Customer Engagement data while they're out in the field by using either of the following apps:

- **Dynamics 365 for phones:** With Dynamics 365 for phones, you can design your information architecture once and the customizations will automatically flow to all form factors. Much is shared with Dynamics 365 for tablets.

 [Video: Customize the Dynamics 365 for Customer Engagement apps mobile app \(1:51\)](#)

- **Dynamics 365 for tablets:** With the same basic features as Dynamics 365 for phones, tablet users will appreciate the Customer Engagement experience optimized for a larger screen.

Get started with Dynamics 365 for phones and Dynamics 365 for tablets

Requirements

For hardware and software requirements for Dynamics 365 for phones and Dynamics 365 for tablets, see [Support for Dynamics 365 for phones and Dynamics 365 for tablets](#).

Required privileges

Dynamics 365 for Customer Engagement uses a security privilege, **Dynamics 365 for mobile**, to provide access to Dynamics 365 for phones and Dynamics 365 for tablets. The privilege is pre-configured for Sales roles, but not other security roles, so you may want to add to other roles for your teams.

Follow these steps to check and assign the security privilege for a security role:

1. Go to **Settings > Security**.
2. Click **Security Roles**.
3. Choose a security role > **Business Management** tab.
4. In the **Privacy Related Privileges** section, verify that **Dynamics 365 for mobile** is set to **Organization**. If not, click **Dynamics 365 for mobile**.
5. Click **Save and Close** to save the changes to the security role.
6. Send an email to tablet-enabled users to let them know they can download the mobile app from the app store. Include the organization URL and sign-in information in the email.

This applies to new installations of Dynamics 365 for Customer Engagement, Dynamics CRM 2013 or later. You can add or remove this privilege from custom or default security roles to meet your business needs. Users who do not have this privilege will see the following error:

You haven't been authorized to use this app. Check with your system administrator to update your settings.

NOTE

Dynamics 365 for Customer Engagement includes the ability to audit user access. Audit events are logged if a user accesses your Dynamics 365 for Customer Engagement apps organization through Dynamics 365 for tablets. However, there is not a new event type that indicates the access was through Dynamics 365 for tablets. The audit login events would appear as **User Access via Web Services**.

In addition, particularly if you have created a custom security role, validate that these entities have **Read** permission.

1. Go to **Settings > Security**.
2. Click **Security Roles**.
3. Choose a security role > **Customization** tab. Verify that the **Read** permission is set for the following entities:
 - Custom Control
 - Custom Control Default Config
 - Custom Control Resource
 - System Application Metadata
 - System Form
 - User Application Metadata
 - View
 - Model-driven App
4. Choose a security role > **Business Management** tab. Verify that the **Read** permission is set for the following entity:
 - User Settings
5. Click **Save and Close** to save the changes to the security role.

What users need to do

See this topic: [Dynamics 365 for phones and tablets User's Guide](#)

Install Dynamics 365 for phones and Dynamics 365 for tablets

[Install Dynamics 365 for tablets and phones](#)

TIP

Be sure to provide users the URL and credentials they need to sign in.

What admins need to do

Security privileges

Dynamics 365 for Customer Engagement uses a security privilege, **Dynamics 365 for Customer Engagement apps for mobile**, to provide access to Dynamics 365 for phones and Dynamics 365 for tablets. This privilege is pre-configured for Sales roles, but not other security roles, so you may want to add to other roles for your teams.

Enable dashboards for Dynamics 365 for phones and Dynamics 365 for tablet users

Multiple dashboards are available for Dynamics 365 for phones and Dynamics 365 for tablets users. After you set up standard or custom dashboards for mobile access, users can easily modify which dashboards appear and how they appear on their phones or tablets.

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Under Components, click **Dashboards**.
4. Double-click or press and hold the dashboard you want to enable for phone or tablet access.
5. Click **Properties** > **Enable for mobile** > **OK**.
6. Click **Save**.

Show your users how to set and view the enabled dashboards on their phones or tablets. More information: [Get around in Dynamics 365 for phones and tablets](#)

You can assign security roles to a dashboard so the dashboard appears only to users with certain security roles. For example, to set who has access to the Sales Dashboard, click **Settings** > **Customizations** > **Customize the System** > **Components** > **Dashboards**, and then select the **Sales Dashboard**. Then, click **Enable Security Roles**.

Update the registry on managed mobile devices

If your mobile devices are managed under the control of group policy, the following steps describe what you need to do.

Caution

This task contains steps that tell you how to modify the registry. However, because serious problems may occur if you modify the registry incorrectly, it's important that you follow these steps carefully. For added protection, back up the registry before you modify it. Then, you can restore the registry if a problem occurs. For more information about how to back up and restore the registry, open the following link to view the article in the Microsoft Knowledge Base: [How to back up and restore the registry in Windows](#).

1. If you plan on using group policy to do a domain wide deployment of the registry change and your server is not running Windows Server 2012 R2 or later, download and install the [Windows Server Administrative Templates](#).
2. Open the Group Policy Management Editor.
3. Select an existing policy or create a new policy.
4. Go to **Computer Configuration** > **Policies** > **Administrative Templates** > **Windows Components** > **App runtime** and set **Turn on dynamic Content URI Rules for Windows store apps** to **Enabled**.
5. Click **Show**, and then add the URL for your organization. For example, <https://orgname.contoso.com>.
6. Close the group policy editor and save your changes.

More information: [How to update links to external web pages for an enterprise environment](#) and [Group Policy](#)

Update the registry on unmanaged mobile devices using a script

If your mobile devices are unmanaged, see the following sample PowerShell script that shows how to change the registry on each Windows 8.1 or later device.


```
# *****
#
# Copyright (c) Microsoft. All rights reserved.
# This code is licensed under the Microsoft Limited Public License.
# THIS CODE IS PROVIDED *AS IS* WITHOUT WARRANTY OF
# ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING ANY
# IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR
# PURPOSE, MERCHANTABILITY, OR NON-INFRINGEMENT.
#
# *****
param([string]$admin)

#Force PowerShell to relaunch in Admin mode
if($admin -ne 'LaunchingAsAdminNow')
{
    $Args = '-ExecutionPolicy Unrestricted -file "' + ((Get-Variable MyInvocation).Value.MyCommand.Path) + '"
    LaunchingAsAdminNow'
    $AdminProcess = Start-Process "$PsHome\PowerShell.exe" -Verb RunAs -ArgumentList $Args -PassThru
}
else
{
    # Create Packages key if it does not exist
    $packages=Get-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages -ErrorAction
    SilentlyContinue
    if($packages -eq $null)
    { New-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies -Name Packages}

    # Create Applications key if it does not exist
    $apps=Get-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications -
    ErrorAction SilentlyContinue
    if($apps -eq $null)
    { New-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages -Name Applications}

    # Add or overwrite EnableDynamicContentUriRules value to 1
    New-ItemProperty -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications -
    Name EnableDynamicContentUriRules -PropertyType DWord -Value 1 -force

    # Create ContentUriRules key if it does not exist
    $rules=Get-Item -Path
    HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications\ContentUriRules -ErrorAction
    SilentlyContinue
    if($rules -eq $null)
    {New-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications -Name
    ContentUriRules}

    # Prompt user for the domain uri
    $domainname = Read-Host 'Please provide the domain uri that you want to add to the allow list(such as
    https://*.contoso.com:444)'

    # Add uri to the allow list under ContentUriRules
    $urls=Get-Item -Path
    HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications\ContentUriRules -ErrorAction
    SilentlyContinue
    New-ItemProperty -Path
    HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications\ContentUriRules -Name
    ($urls.ValueCount+1) -PropertyType String -Value $domainname -force
}
}
```

Update the registry on unmanaged mobile devices using the Registry Editor

If your mobile devices are unmanaged, you can also change the registry on each Windows 8.1 or later device like this:

1. Start Registry Editor.

2. Before making changes to your registry, make a backup. Click **File > Export**, and then enter your settings.
3. Locate the following registry subkey:
HKEY_LOCAL_MACHINE\Software\Microsoft\Windows\CurrentVersion\policies
4. Right-click or tap **policies**, point to **New**, and then click **Key**.
5. Type **Packages**, and then press **ENTER**.
6. Right-click or tap **Packages**, point to **New**, and then click **Key**.
7. Type **Applications**, and then save the text.
8. Right-click or tap **Applications**, point to **New**, and then click **DWORD (32-bit) Value**.
9. Type `EnableDynamicContentUriRules` and then save the text.
10. Right-click or tap **EnableDynamicContentUriRules**, and then click **Modify**.
11. Type **1** in the **Value Data** box, and then click **OK**.
12. Right-click or tap **Applications**, point to **New**, and then click **Key**.
13. Type **ContentUriRules**, and then save the text.
14. Right-click or tap **ContentUriRules**, point to **New**, and then click **String Value**.
15. Type **1**, and then save the text.
16. Right-click or tap **1**, and then click **Modify**.
17. Type your Customer Engagement organization's URL in the **Value Data** box (for example, <https://contoso.com>), and then click **OK**.
18. Exit Registry Editor.

Now you can point your users to the Windows 8.1 app, so they can get the added functionality of the offline experience. More information: [Install the Dynamics 365 for tablets app](#)

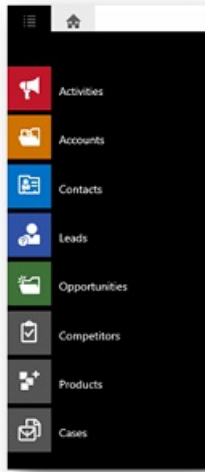
Configure Dynamics 365 for phones and Dynamics 365 for tablets

Navigation bar

If an entity is enabled for **Dynamics 365 for Customer Engagement apps for mobile** and appears in the nav bar (sitemap) for the web application, it will also appear on the nav bar in Dynamics 365 for phones and Dynamics 365 for tablets.

The Dynamics 365 for phones and Dynamics 365 for tablets apps show the entities as a flat list in the same order as the sitemap in the web application. They ignore any groupings within web application areas. You can add an entity to multiple groups on the web application, but Dynamics 365 for phones and Dynamics 365 for tablets display a flattened list and do not show any repeats. Dynamics 365 for phones and Dynamics 365 for tablets apply your Dynamics 365 for Customer Engagement security role, so you will not see an entity unless you have at least read access to that entity.

Custom entities use a fixed custom entity symbol.



Simple lists

The lists of records that appear on the Sales Dashboard and within a form appear as simple lists. These lists have a different appearance than the typical view of records. There are a few frequently used actions you can perform on a simple list.

NOTE

Simple lists are not available in Dynamics 365 for phones. Instead use the command bar ... and click **Select View** to change your view.

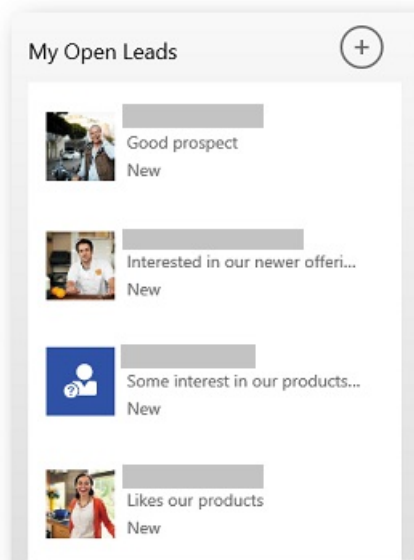
- Tap the list header to see the full list for the current view.
- Tap a list item to open the form for that item.
- Tap and hold an item to display the command bar.
- Tap the **New Item** button + to the right of the view name to create a new record of that type.

Some more things to note:

- You'll see the **New Item** button + to the right of the view name for any entity type that is read/write enabled for Dynamics 365 for tablets.
- Simple lists retrieve ten records at a time regardless of the **Records Per Page** setting in your **Personal Options** area of the web application. As you scroll to the bottom of the list, Dynamics 365 for tablets displays additional records.

Fields Displayed

A typical view of records displays all columns in the view definition. A simple list displays the first few columns from the selected view. Simple lists are also capable of displaying images for each record if the entity is enabled to display images.



The number of fields you'll see in the list is different depending on whether or not the entity is enabled for images. If it is, the image is the first thing to appear. Next to the image the primary field for the entity is displayed first and wraps up to two lines. The primary field is followed by the first two columns in the view that are not the primary field. Those fields will each appear on one line.

If the entity is not enabled for images, the primary field for the entity is displayed first. The primary field is followed by the first three columns in the view that are not the primary field.

There are a few special list types: Activity, Stakeholders, and Sales Team. These are discussed in the next sections.

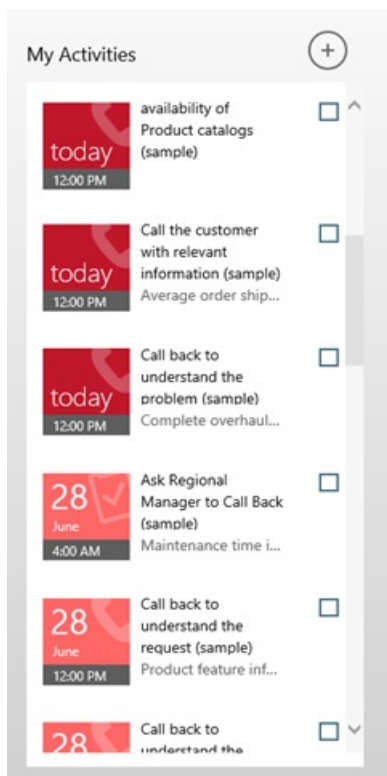
Activity Lists

The simple list for activities includes some special functionality that isn't available on other lists. Each standard activity type (such as Phone call and Task) includes a symbol to differentiate it from the other activity types. Next to the symbol, the primary field for the activity is displayed and will wrap up to three lines. The next field to display is the first field from the view (excluding the primary field), **Due Date**, and **Activity Type**. Activities that can be marked as complete have a check box next to them. Tap the check box to mark the activity as complete.

The activities list shows activities that are due today and past due activities in a darker color. Activities that are not due today or past due appear in a lighter color. Activities with a due date include the date and time of when they are due.

IMPORTANT

Dynamics 365 for Customer Engagement uses a composite Activity entity to store and retrieve data common between different activity types (like Task, Appointment, or Phone Call). The due date for activities is stored in the Actual End field for the composite Activity entity. Appointment activities have a Start Date and End Date. Because the due date for the activities list is retrieved from the Actual End field, the time that an appointment ends is displayed in the Activities list. This means an appointment that starts at 1pm and ends at 2pm will show a time of 2pm on the tile for the appointment in the activities simple list.

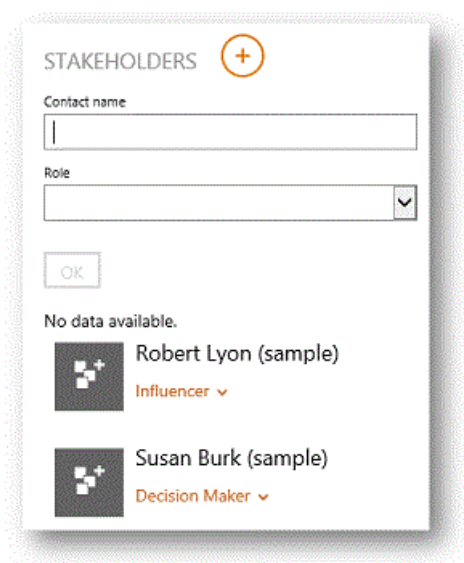


Some more things to note:

- The Description field for emails will not appear in lists.
- For Activities, the **New Item** button + opens a flyout so you can select the type of activity to create. This flyout contains a list of all the read/write enabled activities.

Stakeholders and Sales Team Lists

The Stakeholders and Sales Team lists that appear in an Opportunity display the primary field and role. These two entity lists have inline create and editing. When you tap the **New Item** button + on these lists, the existing list items move down, and a lookup and a drop-down list appear. Now you can select (or create) an entity to add to the list through the lookup, and assign a role through the drop-down list.



Editing is an inline experience as well. If you tap the down arrow next to the role name, the drop-down list appears in edit mode and you can change roles.

Select View

To change the view used to display a list of records, tap and hold the name of the list. The command bar

appears, which includes the **Select View** button. Tap the **Select View** button to select a different view.

Personal views are listed before system views. You can't create new views within Dynamics 365 for Customer Engagement.

Charts

All the charts you can create in the Chart Designer, such as Bar, Line, Pie, and Funnel charts, are viewable in Dynamics 365 for phones and Dynamics 365 for tablets.

Some more things to note:

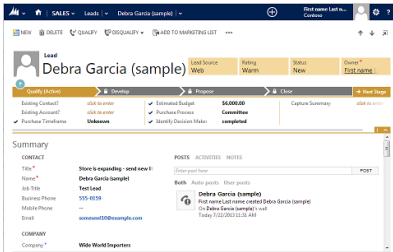
- Open a chart from the Sales Dashboard to get a page with a chart and the records used to generate the chart.
- Choose the chart sections to see the records filtered for that part of the chart.
- Charts are not available offline with Dynamics 365 for phones and Dynamics 365 for tablets.
- You can add charts to dashboards and chart pages only.

Forms

Forms in Dynamics 365 for tablets are based on the development principle of “Design once and deploy across clients.” Entity behavior and business processes in Dynamics 365 for tablets forms function similarly to forms in the web application, but with a flow tailored for a tablet. In Microsoft Dynamics 365 for Customer Engagement apps online, you can preview how forms look on tablets and phones when you customize them in the web app.

NOTE

Forms work a bit differently for Dynamics 365 for phones. See the section below [Things to know about Dynamics 365 for phones](#).



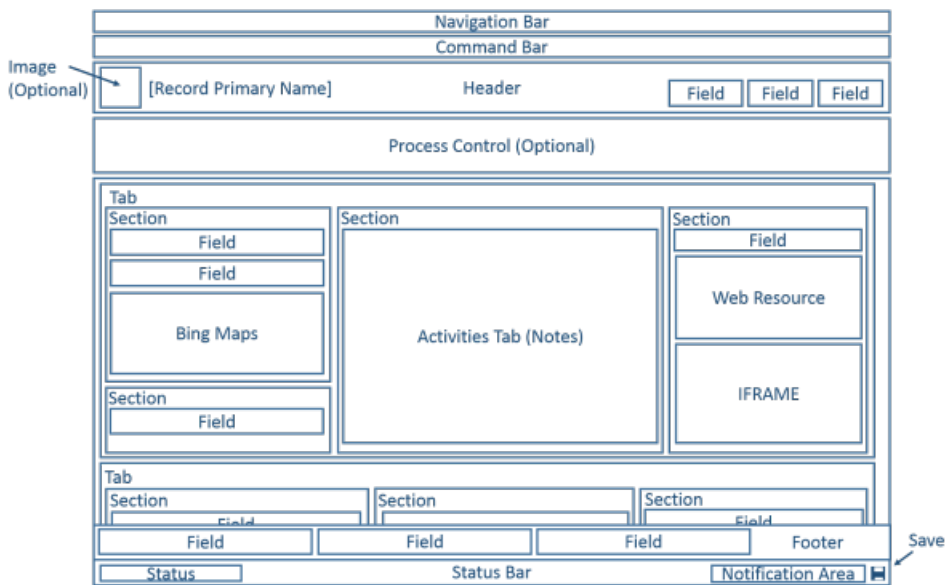
Sales Lead form in web application

>

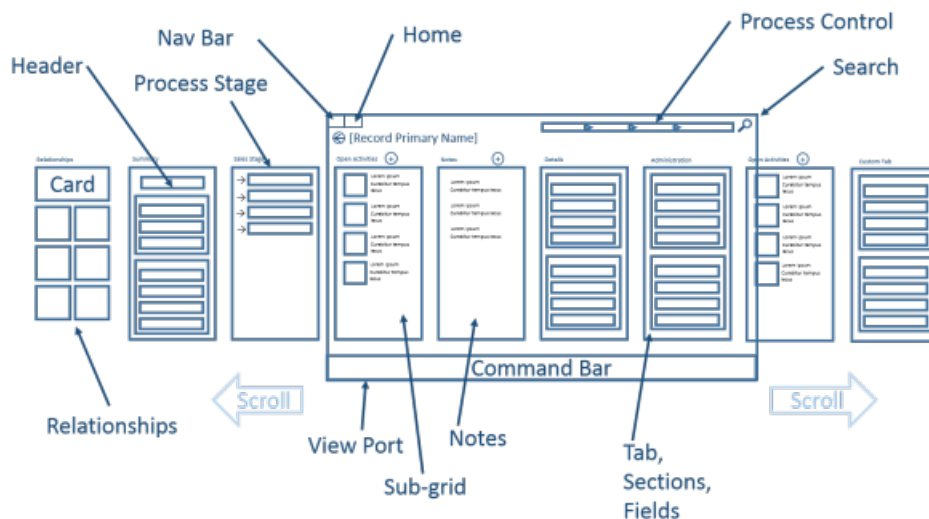


Sales Lead form in Dynamics 365 for tablets

This diagram shows common parts of the updated entity forms in the web application.



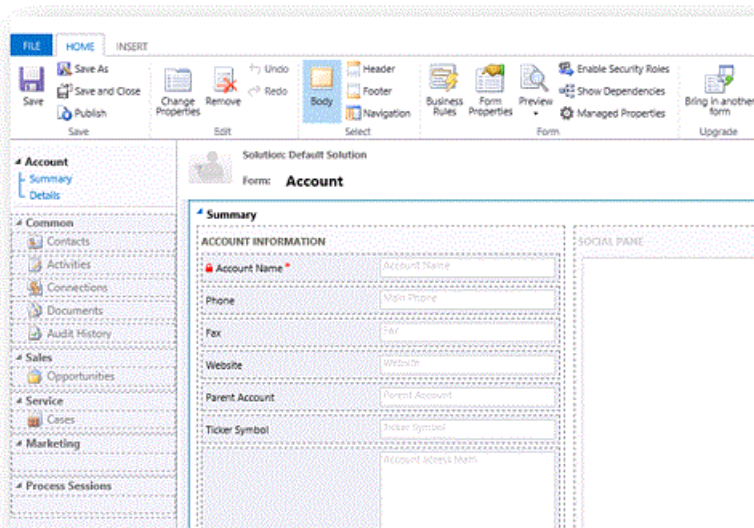
Dynamics 365 for tablets takes many of the Main form elements and presents them in a way that is optimized for tablets, as shown in the following diagram.



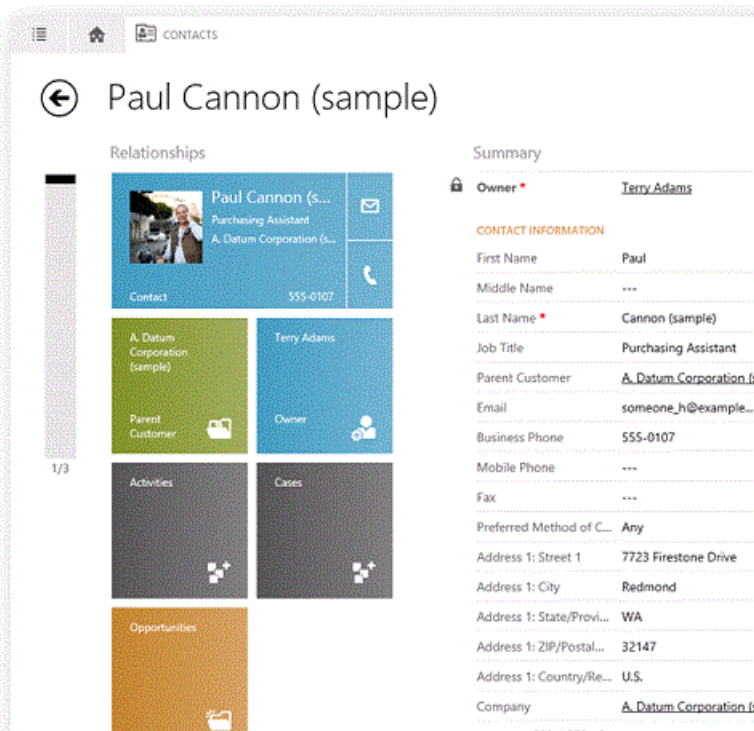
Relationships

The Relationships area of the form displays entity relationships that are configured in the Navigation area of a form. If an entity relationship is configured to appear in the Navigation area within the form customization, and the entity is enabled for Dynamics 365 for tablets, the entity relationship will appear in the Relationships section. The Connections relationship tile is not displayed in Dynamics 365 for tablets.

The relationships section also has a tile that represents the owner of the record, which is a Lookup field. In addition to the Owner tile, there are some other examples of hardcoded tiles that represent Lookup fields. For example, the Contact form has a tile for the parent account. You cannot choose additional Lookup fields as tiles in this section.



Form customization that shows navigation items on the left side of the screen



Relationships section within a form

NOTE

Activity Feeds and Yammer are not supported in Dynamics 365 for tablets.

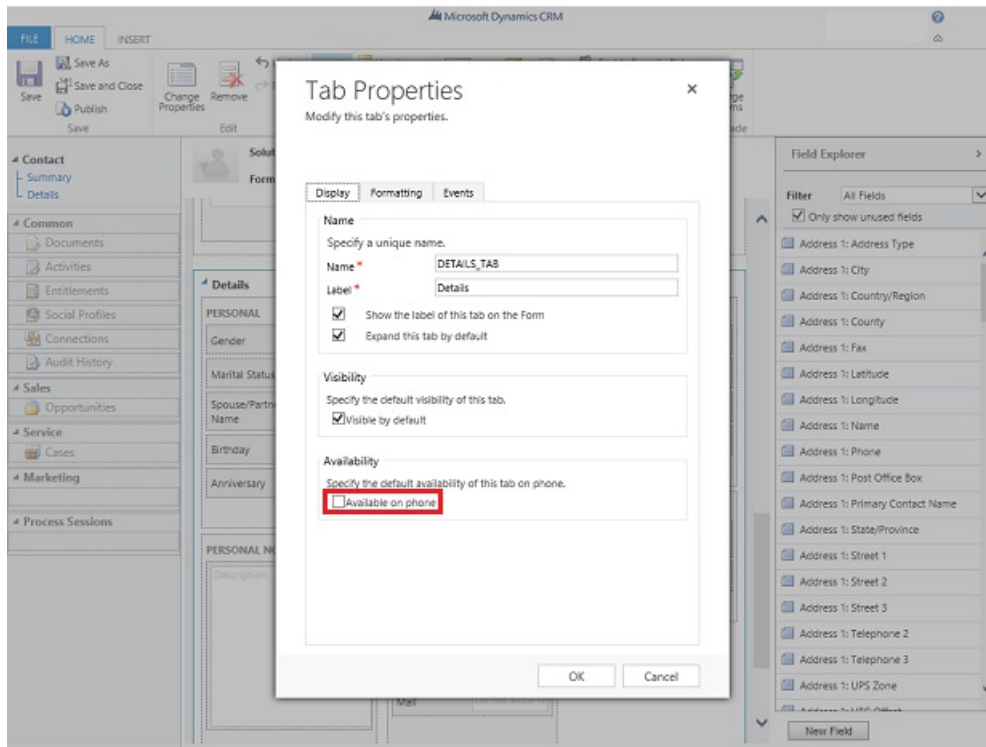
Things to know about Dynamics 365 for phones

Forms

Forms in Dynamics 365 for phones use the Main form type. Entity behavior and business processes in Dynamics 365 for phones forms function similarly to forms in the web application, but with a flow tailored for a phone.

To further simplify forms, you can hide components from appearing in the phone app. You can hide tabs, sections, subgrids, fields, and charts. For example, to hide the Details tab in the Contact form, click **Settings** >

Customizations > Customize the System > Components > expand Entities > expand the Contact entity > Forms. Select the **Contact** form, then scroll down and click **Details**. Click **Change Properties** and clear the **Available on phone** check box to hide the Detail tab from appearing on the Contact form for phone users.



Other differences with Dynamics 365 for tablets

There are a few differences between Dynamics 365 for phones and Dynamics 365 for tablets:

- Simple lists are not available in Dynamics 365 for phones. Instead use the command bar ... and click **Select View** to change your view.
- Duplicate detection is not available.
- The **Open in browser** feature is not available.

Supported languages for Dynamics 365 for phones and Dynamics 365 for tablets

Dynamics 365 for phones and Dynamics 365 for tablets support the following languages:

- Basque (Basque) - 1069
- Bulgarian (Bulgaria) - 1026
- Catalan (Catalan) - 1027
- Chinese (Hong Kong S.A.R.) - 3076
- Chinese (People's Republic of China) - 2052
- Chinese (Simplified) - 2052
- Chinese (Taiwan) - 1028
- Chinese (Traditional) - 1028
- Croatian (Croatia) - 1050
- Czech (Czech Republic) - 1029

- Danish - 1030
- Dutch - 1043
- English - 1033
- Estonian - 1061
- Finnish - 1035
- French - 1036
- Galician
- German - 1031
- Greek - 30
- Hindi (India) - 91
- Hungarian - 36
- Indonesian - 62
- Italian - 1040
- Japanese - 1041
- Kazakh - 705
- Korean - 82
- Latvian - 371
- Lithuanian - 370
- Norwegian - 47
- Polish - 48
- Portuguese (Brazil) - 55
- Portuguese (Portugal) - 2070
- Romanian - 40
- Russian - 7
- Serbian
- Slovak - 421
- Slovenian - 386
- Spanish - 3082
- Swedish - 46
- Thai - 66
- Turkish - 90
- Ukrainian - 380

When the application first loads after installation, it will determine the device language and load the user interface in that language. If the device language is not one of the supported languages, the application will

load in English. When the application has been configured in a Dynamics 365 for Customer Engagement organization, the application will load in the language specified in the user's personal options. If the user language is not one of the supported languages, the application will fall back to the base language of the Dynamics 365 for Customer Engagement apps organization, if it is in the supported language list. If the organization's base language isn't supported, English will be the final fallback if it is enabled on the server.

Entities and Dynamics 365 for phones and Dynamics 365 for tablets

You can enable a limited set of entities for Dynamics 365 for phones and Dynamics 365 for tablets. To see if an entity is enabled or to enable an entity, click **Settings > Customizations > Customize the System > Entities**. Select an entity and review the **Outlook & Mobile** settings.

Some more things to note:

- All custom entities can be enabled for Dynamics 365 for phones and Dynamics 365 for tablets.
- You can use the Lookup for entities that are not enabled for Dynamics 365 for phones and Dynamics 365 for tablets from a record that is enabled and see the data. However, you won't be able to edit the entity.

Entities that are visible and read/write in Dynamics 365 for phones and Dynamics 365 for tablets

ENTITY NAME	VISIBILITY PROPERTY	READ-ONLY PROPERTY
Account	Modifiable	Modifiable
Activity	Not modifiable	Not modifiable
Appointment	Modifiable	Modifiable
Case	Modifiable	Modifiable
Competitor	Modifiable	Modifiable
Connection	Not modifiable	Modifiable
Contact	Modifiable	Modifiable
Invoice	Modifiable	Modifiable
Lead	Modifiable	Modifiable
Note	Not modifiable	Not modifiable
Opportunity	Modifiable	Modifiable
Order	Modifiable	Modifiable
Phone Call	Modifiable	Modifiable
Quote	Modifiable	Modifiable
Social Activity	Modifiable	Modifiable
Social Profile	Modifiable	Modifiable

ENTITY NAME	VISIBILITY PROPERTY	READ-ONLY PROPERTY
Task	Modifiable	Modifiable

Entities that are visible and read-only in Dynamics 365 for phones and Dynamics 365 for tablets

ENTITY NAME	VISIBILITY PROPERTY	READ-ONLY PROPERTY
Attachment	Not modifiable	Not modifiable
Email	Modifiable	Not modifiable
Entitlement	Not modifiable	Not modifiable
Knowledge Article	Modifiable	Not modifiable
Price List	Not modifiable	Not modifiable
Product	Modifiable	Not modifiable
Queue	Modifiable	Not modifiable
Sharepoint Document	Not modifiable	Not modifiable
SLA KPI Instance	Not modifiable	Modifiable
Team	Not modifiable	Not modifiable
User	Not modifiable	Not modifiable
Web Resource	Not modifiable	Not modifiable

Authentication and Dynamics 365 for phones and Dynamics 365 for tablets

Dynamics 365 for phones and Dynamics 365 for tablets authenticate users with browser-based authentication, which means no credentials are stored on the phone.

Considerations and best practices for securing Dynamics 365 for Customer Engagement apps data on Dynamics 365 for phones and Dynamics 365 for tablets

Consider the following when planning security for Dynamics 365 for tablets:

- **Data transmission.** Dynamics 365 for tablets requires an Internet-facing deployment (IFD), so when your organization's mobile devices synchronize Customer Engagement data with your online Customer Engagement, the data is encrypted with Transport Layer Security (TLS) or Secure Sockets Layer (SSL).
- **Cached data.** Dynamics 365 for phones and Dynamics 365 for tablets only cache records and lists that you've recently accessed in the app. To clear cached data, users can either sign out or reconfigure.
- **Encrypting cached data.** Cached data is not encrypted. You can use [BitLocker](#) to encrypt the entire hard drive on a Windows 8 or later device. For Apple and Android devices, consider [Windows Intune](#) or a

product from another company to encrypt the hard drive on the mobile device.

Other features

Save

Records are saved in Dynamics 365 for tablets based on how you configured autosave in your organization settings. To view your save settings, click **Settings** > **Administration** > **System Settings** > **General** tab. View the settings under **Select the default save option for forms**.

If autosave is:

- Enabled for the organization, changes to forms are saved when users leave forms.
- Disabled for the organization, users must use the command bar and click **Save** to save form changes.

Images

Images, such as contact photos, are not stored in the browser cache. Images may not be displayed when users work offline with Dynamics 365 for tablets.

Privacy notice

The Dynamics 365 for Customer Engagement for tablets and phones, and Project Finder for Project Finder for Dynamics 365 (the "App") enables users to access their Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement instance from their tablet and phone device. In order to provide this service, the App processes and stores information, such as user's credentials and the data the user processes in Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App is provided for use only by end users of Microsoft customers who are authorized users of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App processes user's information on behalf of the applicable Microsoft customer, and Microsoft may disclose information processed by the App at the direction of the organization that provides users access to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. Microsoft does not use information users process via the App for any other purpose.

If users use the App to connect to Microsoft Dynamics CRM (online) or Dynamics 365 for Customer Engagement, by installing the App, users consent to transmission of their organization's assigned ID and assigned end user ID, and device ID to Microsoft for purposes of enabling connections across multiple devices, or improving Microsoft Dynamics CRM (online), Dynamics 365 for Customer Engagement or the App.

Location data. If users request and enable location-based services or features in the App, the App may collect and use precise data about their location. Precise location data can be Global Position System (GPS) data, as well as data identifying nearby cell towers and Wi-Fi hotspots. The App may send location data to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App may send the location data to Bing Maps and other third party mapping services, such as Google Maps and Apple Maps, a user designated in the user's phone to process the user's location data within the App. Users may disable location-based services or features or disable the App's access to user's location by turning off the location service or turning off the App's access to the location service. Users' use of Bing Maps is governed by the Bing Maps End User Terms of Use available at <https://go.microsoft.com/?linkid=9710837> and the Bing Maps Privacy Statement available at <https://go.microsoft.com/fwlink/?LinkID=248686>. Users' use of third party mapping services, and any information users provide to them, is governed by their service specific end user terms and privacy statements. Users should carefully review these other end user terms and privacy statements.

The App may include links to other Microsoft services and third party services whose privacy and security practices may differ from those of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. IF USERS SUBMIT DATA TO OTHER MICROSOFT SERVICES OR THIRD PARTY SERVICES, SUCH DATA IS GOVERNED BY THEIR RESPECTIVE PRIVACY STATEMENTS. For the avoidance of doubt, data shared outside of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement is not covered by users' Microsoft

Dynamics CRM or Dynamics 365 for Customer Engagement agreement(s) or the applicable Microsoft Dynamics Trust Center. Microsoft encourages users to review these other privacy statements.

Licensed Dynamics 365 Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using Dynamics 365 for tablets, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the tablet client. Users can then access Dynamics 365 (online) by using Dynamics 365 for tablets, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from Dynamics 365 (online) and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

See Also

[Secure and manage Dynamics 365 for phones and tablets](#)

[What's supported](#)

[Troubleshooting](#)

[Install Dynamics 365 for tablets and phones](#)

[Dynamics 365 for phones and tablets User's Guide](#)

Configure mobile offline synchronization to allow users to work in offline mode on their mobile device

12/10/2018 • 15 minutes to read • [Edit Online](#)

Provide an enhanced offline experience for mobile users using Dynamics 365 for Customer Engagement apps. Once offline synchronisation is turned on, mobile users can seamlessly work in offline mode on their mobile device when they don't have an internet connection.

This offline experience uses Azure services to periodically synchronize entities with the Dynamics 365 for Customer Engagement for phones and tablets apps so synchronized records are available when users' mobile devices are disconnected. To enable mobile offline synchronization, follow the steps below.

IMPORTANT

- Mobile offline synchronization isn't available for Trial, Preview or sandbox Customer Engagement organizations.
- We're working to improve mobile offline capabilities in Dynamics 365 for phones and tablets for release in the second quarter of 2019, and are currently onboarding only a limited set of new customers. When a preview program opens for mobile offline capabilities in Dynamics 365 for phones and tablets, we'll let customers know. Existing customers who are already using mobile offline capabilities are not affected.

Step 1: Enable entities for mobile offline synchronization

One of the first things that you need to do is enable entities that will be available to mobile users when they're using the mobile app in offline mode. Any entity that is enable for mobile can also be enabled for mobile offline. To find a list of entities that are available for mobile see, [Entities displayed in Dynamics 365 for phones and tablets](#).

The following entities are enabled for mobile offline by default:

- Account
- Appointment
- Attachment
- Competitor
- Competitor Address
- Contact
- Email
- Lead
- Note
- Opportunity
- Opportunity Product
- Product
- Task
- Case

- Queue
- Queue Item
- SLA KPI Instance
- Entitlement
- Team
- User

NOTE

- You can disable any of these above entities for offline or enable any entity from supported list for offline. Follow the steps below to enable or disable an entity.

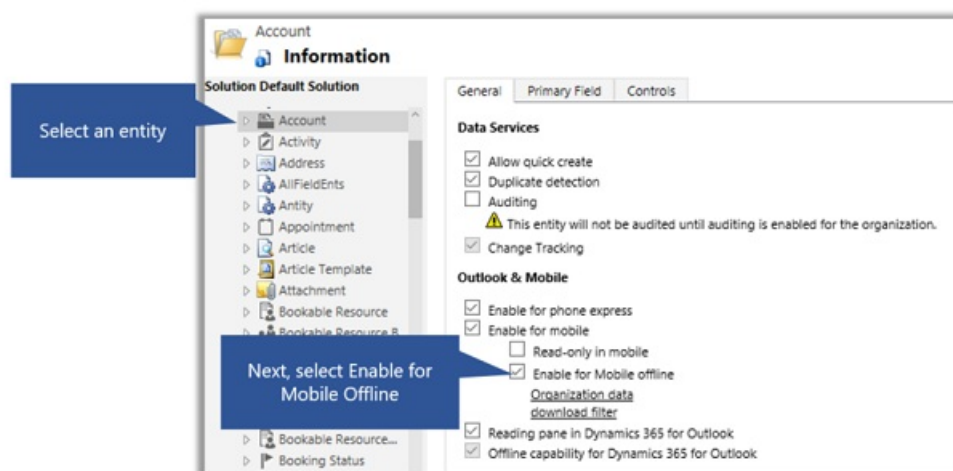
To enable more entities for offline, follow the steps below.

WARNING

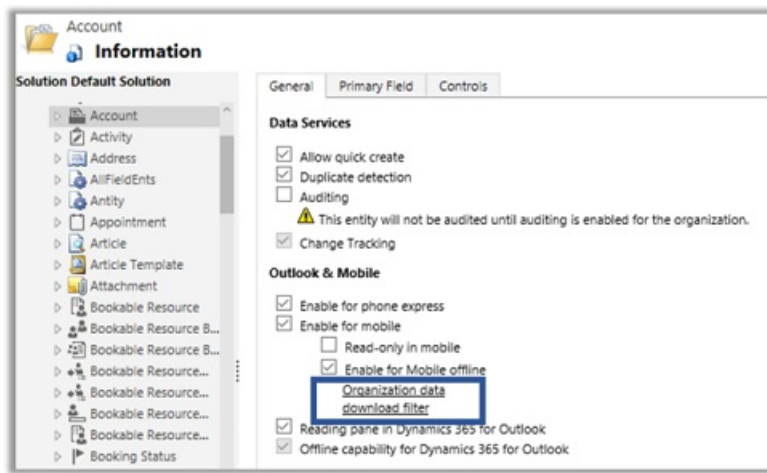
Keep in mind that the amount of data you make available to users while they're offline can affect the data usage rates for devices on cellular networks. The amount of data depends on:

- The number of entities you enable for mobile offline
- The number of days you specify since records were last modified
- The filters you set while creating mobile offline profiles

1. In the **Dynamics 365 for Customer Engagement apps - custom** app, go to **Settings > Customizations**.
2. Click **Customize the System**.
3. Expand **Entities** in the left pane.
4. Select the entity you want to enable for mobile offline (for example, **Account**).
5. Under **Outlook & Mobile**, select **Enable for mobile offline**.



6. Click **Organization data download filter** to filter the data and set the freshness of the data you want to make available offline. You can set up to three criteria when you define a filter. Select the field to filter by, select an operator, then set a value.



The entities that are enabled for mobile offline by default have **Modified On** set for **Last X Days** = 10, so the data modified or created in the last 10 days will be available for downloading to mobile devices.

7. Click **Save**.
8. When you're done enabling entities for mobile offline, click **Publish** so your changes take effect.

NOTE

Publishing customizations prompts the mobile apps to download changes when users next start their app, which can adversely affect their experience over slow connections.

Step 2: Enable mobile offline synchronization for your organization

In this step, you need to turn on mobile offline synchronization. The data for the entities that are enabled for mobile offline will be replicated in Azure service and will be available to sync with mobile clients

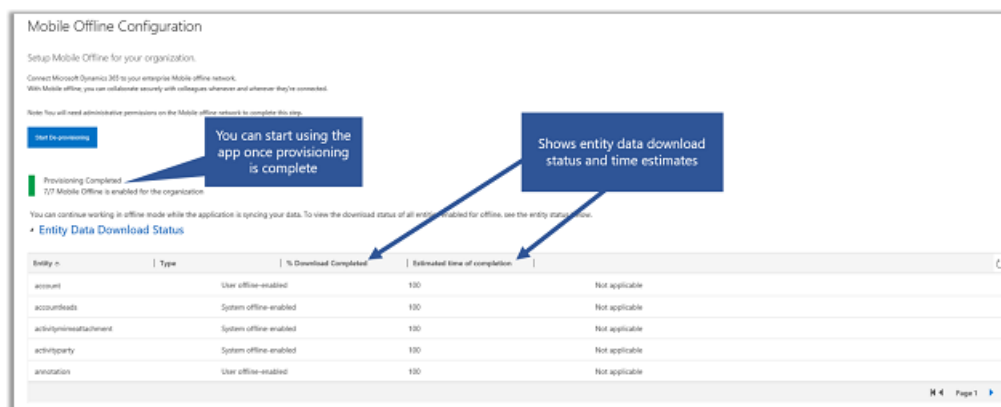
To enable offline synchronization, follow the steps below.

1. In the **Dynamics 365 for Customer Engagement apps - custom** app, go to **Settings > Mobile Offline**. If you don't see this option, please contact tech support.
2. Click **Mobile Offline Configuration**.
3. Click **Continue** to accept the terms of the disclaimer and allow data to be shared with an external system on Azure services.
4. Select **Start Provisioning**. This starts the provisioning process for mobile offline. When it completes, your mobile users will experience the new mobile offline capabilities.

Users can continue working in offline mode while the application is syncing your data. To view the download status of all entities enabled for offline, see **Entity Data Download Status**.

4.1 Track Offline Status: Users can track the status of offline provisioning from stage 1 to 7. In the 5th stage, you can also track the data download status in terms of percentage complete and time remaining to complete data download

4.2 Start Working Offline Right Away: Once mobile offline synchronization is turned on, users can start using it without having to wait for all the entity data to download. Once mandatory entity data is complete, you can start using mobile app in offline mode while the system continue to download other entity data that you have selected. You will also be notified how long the download will take along with detailed status for each entity.



IMPORTANT

Recommendation for changing data centers or geo locations

If you decide to move your org to a different data center or geo location, you need to disable and then enable mobile offline synchronization for your org after the move is complete:

1. Go to **Settings > Mobile Offline**.
2. Click **Mobile Offline Configuration**.
3. Select **Start De-provisioning**. This starts the de-provisioning process. If this option isn't available, mobile offline synchronization was disabled during the move to a different data center or geo location, and you can continue to the next step. When the de-provisioning is complete, select **Start Provisioning**.

Things to know when you start mobile offline provisioning

- Admins can see the status of provisioning and de-provisioning.
- The mobile offline configuration page is auto-refreshed at regular intervals to show updated status messages during provisioning and de-provisioning.
- You can stop provisioning at any stage during provisioning.
- You can de-provision your organization when the provisioning is complete.
- De-provisioning of an organization can't be stopped once initiated.
- You can initiate provisioning again only when de-provisioning is complete.
- In case of a provisioning or de-provisioning failure, consider retrying your provisioning before contacting support.
- All the provisioning and de-provisioning messages will be shown on the **Mobile Offline Configuration** screen along with the date and timestamp of when the status was last checked.

Step 3: Create a mobile offline profile to determine what data will be available while offline

You need to create mobile offline profiles for users to configure filters that determine how much of an entity's data (and related entities' data) will be available to the user while offline.

NOTE

- A user must have a security role that has Read permissions on the mobile offline profile to be able to use their mobile device in offline mode.

1. Go to **Settings > Mobile Offline**.
2. Click **Mobile Offline Profiles**.
3. Click **New** to create a new mobile offline profile. If you already have one that you want to edit, select it from the list.
4. Enter a name and description for your mobile offline profile.
5. Click **Save** to create the mobile offline profile so you can continue editing it.
6. In the **Mobile Offline Profile Item Details** area, click **+** to create a new mobile offline profile item. You need to create a mobile offline profile item for each entity you want to make available for this mobile offline profile.
7. Enter a name and select an entity. Only entities that you enabled for mobile offline appear in this list.
8. Admins can choose what information to sync to user's devices. This can help minimize impact to user's device's memory. Admins can define a custom filter based on the following rules. You can create filters up to three levels.

equal
not equal
gt – greater than
ge – greater than or equal to
le – less than or equal to
lt – less than
like
not-like
in
not-in
null
not-null
eq-userid
ne-userid
eq-userteams
eq-useroruserteams
eq-useroruserhierarchy

eq-useroruserhierarchyandteams
eq-businessid
ne-businessid
eq-userlanguage
begins-with
not-begin-with
ends-with
not-end-with

NOTE

Make sure that your users are using the latest version of the mobile app For Advanced Filters to work offline.

Select a data download filter based on the ownership type for the entity.

User or Team

- **Download related data only**. Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.
- **All records**. Make all records for this entity available offline.
- **Other data filter**. Make only the specified records for this entity available offline.

If you select **Other records**, you can choose from the following:

- **Download my records**. Make only your records available offline.
- **Download my team's records**. Make your team's records available offline.
- **Download my business unit's records**. Make your business unit's records available offline.

Organization

- **Download related data only**. Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.
- **All records**. Make all records for this entity available offline.

Business

- ****Download related data only****. Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.

- ****All records****. Make all records for this entity available offline.

- ****Other records****. Make only the specified records for this entity available offline.

If you select ****Other records****, you can choose from the following:

- ****Download my business unit's records****. Make your business unit's records available offline.

None

- ****Download related data only****. Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.

9. Click **Save** to create the mobile offline profile item so you can continue editing it.
10. In the **Mobile Offline Profile Item Association Details** area, click + to create a new mobile offline profile item association. You need to create a mobile offline profile item association for each related record you want to make available offline. In addition, you need to include any related entities in this mobile offline profile.

For example, if you create a mobile offline profile item association from the Lead entity, you need to add the Lead entity to this mobile offline profile.

11. Enter a name for the mobile offline profile item association, select a relationship, and then click **Save**.

When you're done adding mobile offline profile item associations to the mobile offline profile item, click **Save & Close** at the top of the **Mobile Offline Profile Item** screen.
12. When you're done adding mobile offline profile item details to the mobile offline profile item, click the **Save** button at the bottom right corner of the **Mobile Offline Profile Item** window.

Step 3.1: Add users to a mobile offline profile

Once you have created a mobile offline profile, you can start adding users to the profile.

NOTE

You can add a user to only one mobile offline profile.

1. If it's not already open, open the mobile offline profile you want to add users to.
2. In the **Users** area, click + to add a new user.
3. Click the lookup field that appears and select a user to add to this mobile offline profile.
4. When you're done adding users, choose the **Save** button in the bottom right corner of the **Mobile Offline Profile** window.

Step 3.2: Publish a mobile offline profile

To make a mobile offline profile available to users so they can get the mobile offline experience you've defined for them, you need to publish the profile.

1. If it's not already open, open the mobile offline profile you want to publish.
2. When you're done adding users and making any other changes to the mobile offline profile, click **Publish** so the data you specified can start syncing with your users' mobile devices.

TIP

Solution export and import

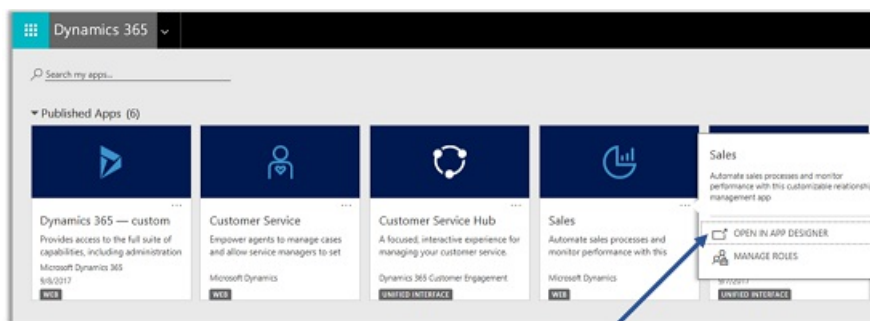
When exporting a solution that includes mobile offline profile, always select the **Include entity metadata** check box for each entity you export.

After importing the solution into the target organization, publish all mobile offline profiles.

Step 4: Enable the App Module for offline

Enable mobile offline for a specific app from MyApps page.

1. In the **Dynamics 365 for Customer Engagement apps- custom** app, go to **Settings > My Apps**.
2. From the list of published apps, select an app you want to enable for mobile offline.
3. On the selected app, choose **More Options (...)**.
4. Choose **OPEN IN APP DESIGNER**.



5. On the **Properties** tab, scroll down and select **Enable Mobile Offline** and then choose a profile.

NOTE

- You can add more than one profile for an app module.

The screenshot shows the 'Properties' tab for a Dynamics 365 app. The 'App Title' is 'Sales'. Under the 'Advanced' section, the 'Unique Name' is 'sales'. The 'Client' is set to 'Unified Interface'. The 'App URL Suffix' is empty. The 'Choose a welcome page for the app' checkbox is unchecked. The 'Enable Mobile Offline' checkbox is checked and highlighted with a blue box. Below it, the 'Mobile Offline Profiles' dropdown is set to 'Sample Sales Scenario' and is also highlighted with a blue box. A blue callout points to the dropdown with the text 'Select at least one offline profile'.

6. At the top choose **Save** and then **Publish**.

Tips

Here are a few things to keep in mind about mobile offline synchronization:

- Mobile offline synchronization with mobile devices occurs periodically. A synchronization cycle could last for several minutes, depending on Azure network latency, the volume of data that's set for synchronization, and mobile network speed. Users can still use the mobile apps during synchronization.
- Changes to a user's security privileges are updated during the next synchronization cycle. Until that time, users can still continue accessing data according to their previous security privileges, but any changes they make will be validated during the synchronization to the Customer Engagement server. If they no longer have privileges to make changes for a record, they will receive an error and the record won't be created, updated, or deleted.
- Any changes to a user's privilege to view a record won't take effect on the mobile device until the next synchronization cycle.

NOTE

Once you've enabled mobile offline synchronization, metadata changes are pushed to the mobile apps when the changes are published, not just on app start-up. To keep mobile offline synchronization up-to-date, users should always accept the prompt to download metadata changes.

Privacy notice

When you enable Dynamics 365 mobile offline, Dynamics 365 (online) data is downloaded to the SQL Azure database using the Azure cloud, based on the entities you enable for offline availability. When a user connects to the Azure Cloud service from a mobile app with the offline capability, data is downloaded from the SQL Azure database to a local database on the mobile device. Data transfer between the SQL Azure database on the Azure cloud and the Dynamics 365 mobile app with the offline capability is through a secure SSL connection. Ultimately, customer data is stored in SQL Azure database and on the mobile device.

An administrator determines whether or not an organization's users are permitted to go offline with Microsoft Dynamics 365 Mobile Offline Application by using security roles and Dynamics 365 Mobile profile customization. Dynamics 365 administrators can configure which entities are downloaded via Offline Sync by using the Sync Filters setting in the Setting –Mobile Offline dialog box.

Note that data stored in the user's device is controlled by the customer, not Microsoft. The Administrator has full control over the data that can be extracted at the user security role or entity levels. After the data is extracted, however, it will have left the security boundary provided by Dynamics 365 Online.

A list of the Azure components and services that are involved with Mobile offline functionality is provided below.

Note: For more information about additional Azure service offerings, see the [Microsoft Azure Trust Center](#).

Cloud Services (Web role)

Mobile Offline leverages two cloud services, one for provisioning and the other for data sync.

The provisioning service has a single web role that reads messages from the Service Bus (SB) queue for different events coming from Dynamics 365 such as provisioning or de-provisioning. Then it processes those messages by creating/deleting organization databases and submitting recurring work items (messages) on the data sync SB queue. During this process, it reads/writes configuration data either from the CSCFG file or from the Dynamics 365 SW API.

The data sync service has two web roles. One keeps the schema and data of the staging database in sync with a Dynamics 365 organization's metadata and data, while the other web role is for running the Sync server and processing client's sync requests. The first web role processes messages from the data sync SB Queue for different orgs and then contacts Dynamics 365 to get the metadata and data changes before committing them to the staging database. It also does the job on configuring Sync server with the organizations coming in and out of the system and their client models. The other web role runs the Sync server (unmanaged code) to host admin and sync endpoints. The admin endpoint is used by the other web role to send configuration data. The sync endpoint is used by external clients (Dynamics 365 Mobile Application) to do data sync. Just like provisioning service, both these roles read/write configuration data either from the CSCFG file or from the Dynamics 365 SW API.

Queue

Mobile Offline uses Azure Queues for message exchange between Dynamics 365 and Azure. It is used to maintain work items that are processed by the cloud services. Each message stores information such as the org id, entity name for which to sync data, and connection string for the org's OData endpoint.

SQL Database

Mobile Offline uses the Azure SQL Storage to store:

- Data replicated from Dynamics 365 orgs and for serving client sync requests.
- Configuration data such as org database connection strings.

Storage

Mobile Offline uses Azure Blob Storage to store logs and traces generated by cloud service.

Active Directory Service

Mobile Offline uses the Azure Active Directory Service to authenticate with other services such as Dynamics 365 or SW API or Azure Management APIs.

Azure DNS

Mobile Offline uses Azure DNS to redirect client requests, based on org names, to the correct cloud service endpoints.

Azure virtual Network

An Azure virtual Network (VNet) is a representation of your own network in the cloud. The Dynamics 365 Product Team can control your Azure network settings and define DHCP address blocks, DNS settings, security policies, and routing.

Azure Load Balancer

The Azure Load Balancer delivers high availability and network performance to your applications. It is a Layer-4 (TCP, UDP) type load balancer that distributes incoming traffic among healthy service instances in cloud services or virtual machines defined in a load balancer set. We use it to load balance our end points in a deployment.

Overview of securing and managing Dynamics 365 for phones and tablets

2/1/2019 • 6 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

As of December 3, 2018, Microsoft Dynamics 365 for Blackberry App is deprecated and will be removed from the iOS App Store on October 31, 2019. For more information, [Dynamics 365 for Blackberry is deprecated](#).

You can secure and manage Dynamics 365 for phones and Dynamics 365 for tablets with the following technologies:

1. **Intune.** You can use Intune to manage Dynamics 365 for phones and Dynamics 365 for tablets on Apple and Android tablets and phones. Intune provides mobile device management, mobile application management, and PC management capabilities from the cloud. Using Intune, you can provide your users with access to corporate applications, data, and resources from virtually anywhere on almost any device, while helping to keep corporate information secure.

IMPORTANT

This feature was introduced in CRM Online 2016 Update.

2. **Dynamics 365 for Good.** Dynamics 365 for Good, integrated with Good Dynamics, protects your Customer Engagement data even if your users lose or leave their mobile devices somewhere. For example, if someone leaves their device in a taxi cab and can't get it back right away, Customer Engagement data is protected by Good encryption. If someone loses their device entirely, all they have to do is notify you so you can remotely wipe Dynamics 365 for Good data from their device.

IMPORTANT

This feature was introduced in CRM Online 2016 Update.

Manage Dynamics 365 for Customer Engagement apps on mobile devices with Intune

If your organization is set up with Intune, you can use it to manage the Customer Engagement for phones and tablets apps on Apple, Android, and Windows 10 tablets and phones. Intune manages encryption at the device level, as well as app-to-app communications. With Intune, you can selectively wipe managed apps and related data on devices that are unenrolled, no longer compliant, lost, stolen, or retired from use.

With CRM Online 2016 Update 1, you can use Intune mobile application management (MAM) to manage Customer Engagement mobile applications for Apple and Android without enrolling the device. This protects company data in Customer Engagement without requiring you to enroll and deeply manage the end user's entire device. This is particularly useful for bring-your-own-device (BYOD) scenarios where end users don't want to or can't enroll their devices for IT management. This capability is also useful if a device is already enrolled in another mobile application management solution.

More information

For more information about getting and using Intune, see:

- [Microsoft Intune](#)
- [Documentation for Microsoft Intune](#)

Set up conditional access to Dynamics 365 for Customer Engagement apps

You can use System Center Configuration Manager conditional access to manage access to Customer Engagement from mobile devices based on conditions you specify. For more information about setting up conditional access, see [Conditional Access in Configuration Manager](#).

NOTE

To use conditional access, you must have an Azure Active Directory premium subscription.

IMPORTANT

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

Secure Customer Engagement on mobile devices with Dynamics 365 for Good

Dynamics 365 for Good is a special version of Dynamics 365 for tablets that works with the Good Technology mobile security platform. Dynamics 365 for Good is currently supported for Apple iPad and Apple iPhone running iOS 7 or later. To use Dynamics 365 for Good, you must have Good Dynamics server software and services from [Good Technology](#).

Prepare to use Dynamics 365 for Good

Your organization should have services set up with Good Technology. Then follow the common directions for configuring Dynamics 365 for tablets in [Set up Dynamics 365 for phones and Dynamics 365 for tablets](#).

In addition, the Good Dynamics admin should do the following:

1. Within the Good Control server, authorize the Dynamics 365 for Good app for mobile users.
2. Within the Good Control server, add connection URLs to the allowed list. Any domain that the app needs to access for connection or content must be in the **Allowed Domains** list.
3. Send users the email address and access key they will need to set up the app, or set up another secured application to act as an authentication delegate.

What users need to do

Users should update to the latest version of the Dynamics 365 for Good application. On the Apple App store, the latest version is 1.1. On the [Good Dynamics Marketplace](#) or Good Control Console, the latest version is listed as 1.1.0.

Direct your users to [Secure your mobile data with Microsoft Dynamics 365 for Customer Engagement apps for Good](#)

Install Dynamics 365 for Good

The app is listed in the [Good Dynamics Marketplace](#) and can be downloaded from the [Apple App Store](#).

Supported languages for Dynamics 365 for Good

Dynamics 365 for Good supports the same languages as Dynamics 365 for tablets. However, when users are

viewing Good Dynamics pages, only the following languages are supported:

- Dutch - 1043
- English - 1033
- French - 1036
- German - 1031
- Italian - 1040
- Spanish - 3082

While viewing Good Dynamics pages, if you're not using one of the languages listed, the screens will be in English.

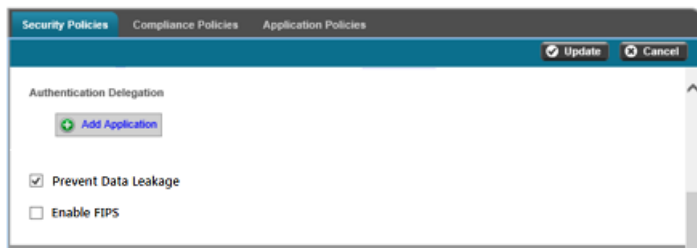
Things to know about Dynamics 365 for Good

- Requires Dynamics CRM 2015 or later. Connecting to earlier versions is not a supported secure configuration.
- The Dynamics 365 for Good Apple app requires Dynamics CRM Online 2015 Update 1 when running on an iPhone.
- There are multiple policies Good Dynamics administrators set to control data sharing between apps on the mobile device.
 1. **Prevent click-to-call:** Prevents users from initiating a phone call from within the Dynamics 365 for Good app.
 2. **Prevent click for mapping:** Prevents users from opening an address in the mobile device's native maps application.
 3. **Prevent opening OneNote:** Prevents users from opening OneNote notebooks from external sources from within the Dynamics 365 for Good app.
 4. **Prevent opening Word:** Prevents users from opening Word files from external sources within the Dynamics 365 for Good app.
 5. **Prevent opening Excel:** Prevents users from opening Excel files from external sources from within the Dynamics 365 for Good app.
 6. **Prevent opening PowerPoint:** Prevents users from opening PowerPoint files from external sources from within the Dynamics 365 for Good app.
 7. **Require a secure browser for opening URLs:** Enable to ensure browser windows launched from the Dynamics 365 for Good app use a secure browser application.

IMPORTANT

The policies for preventing opening OneNote, Word, Excel, and PowerPoint files block opening these files on external sources such as SharePoint, OneDrive for Business, and Office 365 Groups. These policies don't apply to items attached to notes in Customer Engagement or when exporting to Excel, Excel templates, and Word templates. These files download to Good-compliant encrypted file stores and require a Good-compliant application for viewing.

- Enable the **Prevent Data Leakage** setting in the **Security Policies** tab to cover other situations including using a secure app for email, and handling of copy/paste scenarios.



- All data stored on the client when using Dynamics 365 for Good is encrypted using Good Dynamics APIs.
- Remote wipe is available and will not affect non-secured apps leaving personal apps and information untouched.
- Contact [Good Technology](#) regarding the specific support that can be provided with your suite/pricing, as well as the correct server setup for your needs and situation.

See also

[Good Secure Mobility Platform](#)

[Dynamics 365 for phones and tablets User's Guide](#)

[Secure your mobile data with Dynamics 365 for Customer Engagement apps for Good](#)

Secure your mobile data from loss or theft

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

As of December 3, 2018, Microsoft Dynamics 365 for Blackberry App is deprecated and will be removed from the iOS App Store on October 31, 2019. For more information, [Dynamics 365 for Blackberry is deprecated](#).

Dynamics 365 for Good, integrated with Good Dynamics, protects your Customer Engagement data even if you lose or leave your mobile device somewhere. For example, if you leave your device in a taxi cab and can't get it back right away, your Customer Engagement data is protected by Good encryption. If you lose your device entirely, just notify your admin, who can remotely wipe your Dynamics 365 for Good data from your device.

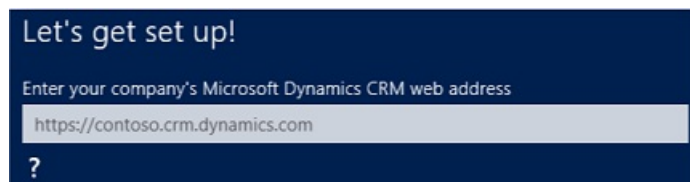
This app is intended for use only with Good Dynamics server software and services from Good Technology. If you're not using Good Dynamics, download Dynamics 365 for phones or Dynamics 365 for tablets instead from the [Apple App store](#).

Download the Dynamics 365 for Customer Engagement apps for Good app

You can download the Dynamics 365 for Good app from the [Apple App store](#). You can also find the app on the [Good Dynamics Marketplace](#).

Start and sign in to the Dynamics 365 for Customer Engagement apps for Good app

1. Open the Dynamics 365 for Good app.
2. When prompted, type in your email address and Good access key. (If you don't have a Good access key, contact your Good admin to get one.) Instead, the sign-in screen might ask for your Auth Delegate or password for other Good apps you might have installed for easy activation.
3. When prompted, select a Good security password.
4. On the **Let's get set up!** screen, enter your company's Customer Engagement web address.



5. Tap the **Arrow** button in the lower right corner to continue.
6. When prompted, type in your Customer Engagement credentials.

Now that you're signed in to the Dynamics 365 for Good app, check out the [Dynamics 365 for phones and tablets User's Guide](#) to find out all you can do.

Accessing email and other apps through Dynamics 365 for Customer Engagement apps for Good

If you get an alert when you try to use email or other apps through Dynamics 365 for Good, your admin may be

controlling communication to these apps for security purposes. Contact your Good admin to find out which apps your company uses in conjunction with Dynamics 365 for Good, along with any settings that need to be configured.

Information for admins

For a list of supported phones and tablets, see the compatibility information in [What's supported](#).

For information on what your enterprise needs to do before using Dynamics 365 for Good, see [Set up Dynamics 365 for phones and Dynamics 365 for tablets](#).

If you're having problems with the app, see [Troubleshooting and things to know about Dynamics 365 for phones and tablets](#).

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Stay current with the latest news about your customers with the Company News Timeline

1/23/2019 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

Gain valuable insights from the latest news about your customers on your phone or tablet. Staying on top of the news helps you stay ahead of your competition by showing you ways your customers can use your products or services right now. Install the Company News Timeline solution, which delivers relevant news from Bing News about your customers, and categorizes them in a useful feed inline while viewing your accounts.

NOTE

This solution is available globally for Dynamics 365 for Customer Engagement subscriptions but only available in English at this time.

IMPORTANT

This feature was introduced in Dynamics CRM Online 2016 Update 1.

Install the solution for Customer Engagement

1. Sign in to <https://portal.office.com> with your Global Administrator or Dynamics 365 for Customer Engagement System Administrator credentials.
2. Click **Admin > Dynamics 365 for Customer Engagement**.
3. On the **Manage all Dynamics 365 for Customer Engagement (online) instances** page, select the instance to add the solution to.
4. Click **Solutions**.
5. Select the **Company News Timeline** solution, and then click **Install**. Proceed through Terms of service to accept the terms.

The status for the solution changes to **Installation pending**. The status for the solution will change to **Installed** when the solution is ready. When the solution is ready, you can see the Company News Timeline on the Account, Contact, Lead, and Opportunity main forms in the mobile apps.

NOTE

When you install a solution, your Customer Engagement site is taken offline in maintenance mode for a short time. We recommend you install the solution when it's least disruptive to users.

Privacy notice

When you enable the Company News and Social Timeline solution, Customer Data from the name, address, and industry fields of your account records will be sent to Bing (a consumer service). Therefore, Customer Data sent to Bing will be subject to [Microsoft Privacy and Cookies](#). By installing this solution, you agree for this limited set of

data to be sent to the Bing service. Data sent to Bing will be stripped of your company's information and stored for diagnostics purposes. Note that you may uninstall the solution at any time to discontinue use of this functionality.

Install Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

Dynamics 365 for phones and Dynamics 365 for tablets are apps that you install on your mobile device. Once you install the app and sign-in, you'll automatically have access to all the apps you need for your role.

Is your mobile device supported?

If you're not sure if your device is supported, [check the list of supported devices](#)







Privileges required to run the app

IMPORTANT

You won't be able to use this app if you don't have the correct privileges. Your system administrator can configure privileges for you: [Find your Dynamics 365 for Customer Engagement apps administrator or support person](#). If you're an administrator, [learn how to set privileges](#).

Install the app from your device's app store

Choose the download link for your device:

Dynamics 365 for phones app	Dynamics 365 for tablets app
	
	
	

User Guide (Dynamics 365 for phones and tablets)

3/6/2019 • 19 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

Use the Dynamics 365 for phones and Dynamics 365 for tablets apps for your sales, customer service, field service, and other tasks when you're on the go. With one download from your app store, you'll automatically have access to all the apps you need for your role. You will see apps with the new Unified Interface on your mobile device.

NOTE

- On February 21, 2018, we announced the deprecation of the Windows Phone app for Dynamics 365 for Customer Engagement apps version 9.0. On May 22, 2018, the Windows Phone app will no longer be supported for Dynamics 365 for Customer Engagement apps version 9.0. Support for the app on Windows tablets and PCs remains unchanged. The Windows Phone app will continue to be available in the store and will be supported for Dynamics 365 for Customer Engagement apps, (version 8.2) and earlier supported versions. If you wish to continue to use the Windows Phone app, you should not update to Dynamics 365 for Customer Engagement apps, version 9.0 as the Windows Phone app will not be supported with version 9.x.
- Customer Engagement has separate mobile apps for Field Service and Operations. Learn about [Dynamics 365 for Customer Engagement apps for Field Service \(Resco\) mobile app](#) and [Dynamics 365 for Customer Engagement apps for Operations mobile app](#).
- We're working to improve mobile offline capabilities in Dynamics 365 for phones and tablets for release in the second quarter of 2019, and are currently onboarding only a limited set of new customers. When a preview program opens for mobile offline capabilities in Dynamics 365 for phones and tablets, we'll let customers know. Existing customers who are already using mobile offline capabilities are not affected.

Install the app from your device's app store

More information: [Install Dynamics 365 for phones and tablets](#)

Preview: Introducing new sign-in experience for iOS users

For more information, see [Preview: New sign in experience](#).

Signing in and signing out

To sign in, you'll need your Customer Engagement web address, user name, and password. If you don't have any of these, contact your Customer Engagement admin.

1. Open your app, enter your Dynamics 365 for Customer Engagement apps web address, and tap .

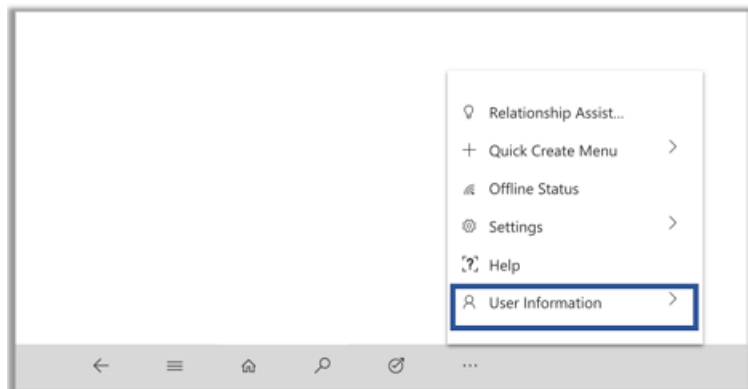


2. On the next screen, enter your user name and password, and tap **Sign in**.

Here's how to sign out in case someone else needs to use your device.

1. From nav bar, tap **...**.

2. Tap **User Information**.



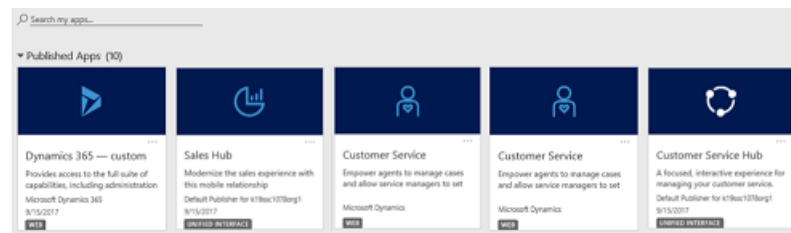
3. Tap **Sign out**.

You can sign in again as the same or a different user, or you can sign in to a different organization.

Basic navigation

1. When you sign in, you'll see the MyApps page with all your apps listed.

2. Select the App that you want to work with.

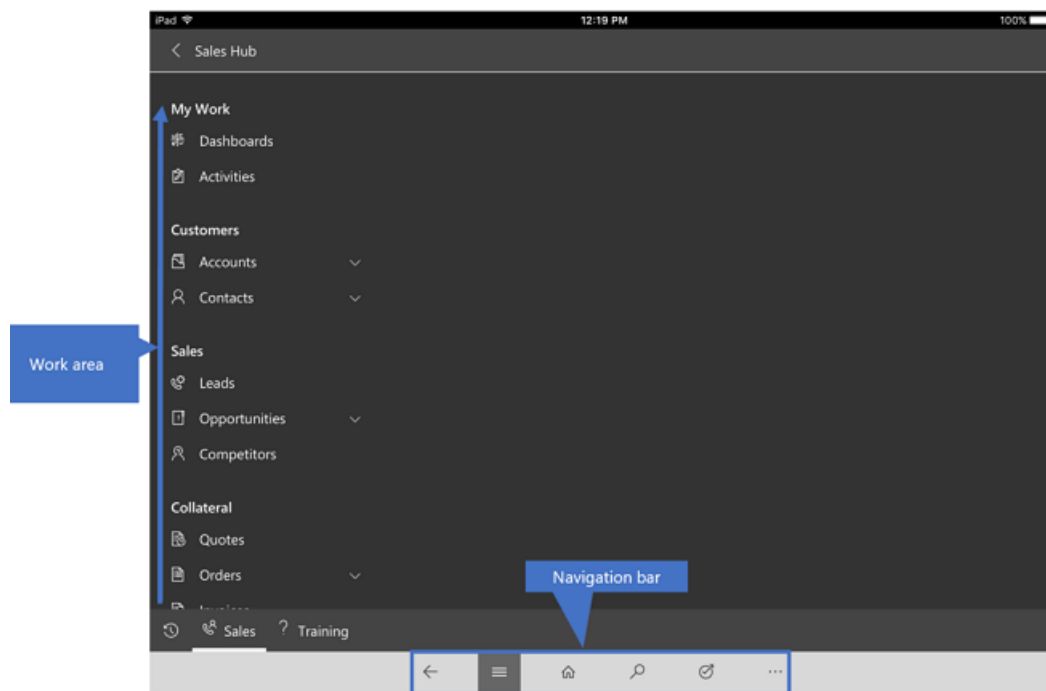


Screen orientation


For phones, portrait mode is set as the default screen orientation. For tablets, landscape mode is set as the default. Screen orientation for Dynamics 365 for phones and Dynamics 365 for tablets apps cannot be changed.

The navigation bar

Use the nav bar to get to your work area, create a new record, search, or do other tasks. To access more commands, tap **...**.





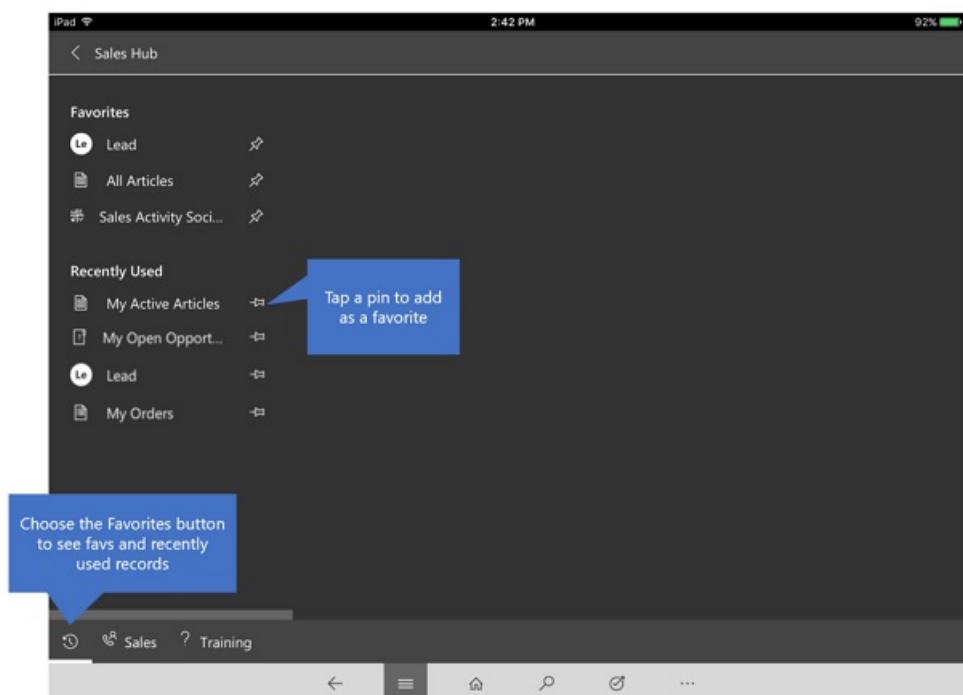
Get help while using the app

If you ever need help while you're in the mobile app, on the nav bar tap , and then tap **Help**.

Favorites and recently used records

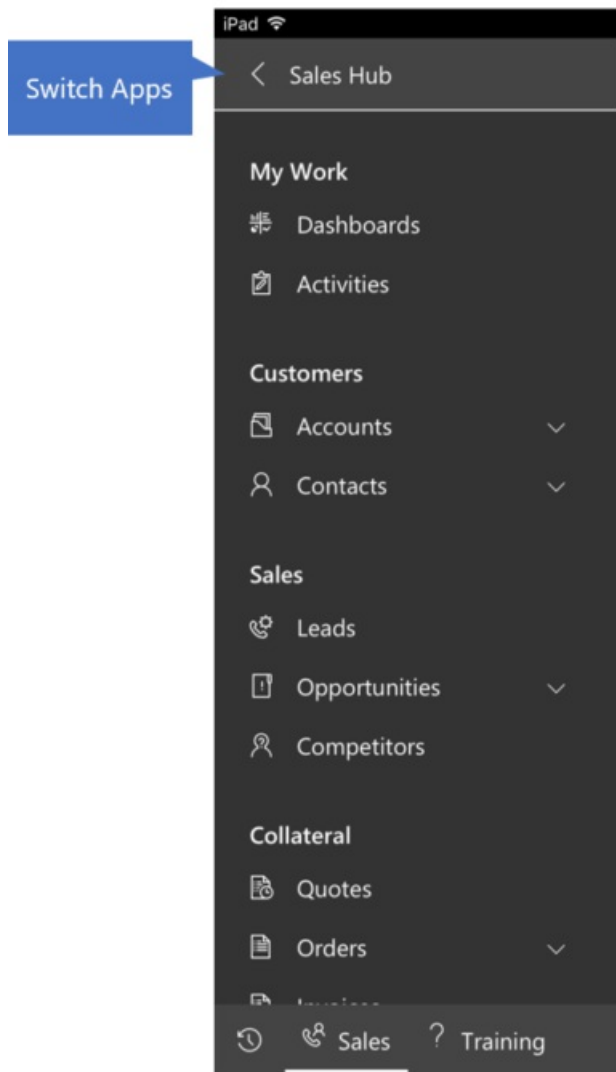
The Favorites and Recently Used sections provide quick access to your records, views, and dashboards.

- To access these sections, tap the **Menu**  button on the nav bar, and then tap the **Favorites and Recent**  button.
- To pin an item as a favorite, from the list of **Recently Used** items, tap the pin. This will pin and move the item to **Favorites**.
- To unpin an item from **Favorites**, tap the pin again.



Switch apps

Go back to the MyApps pages and switch to a different app.

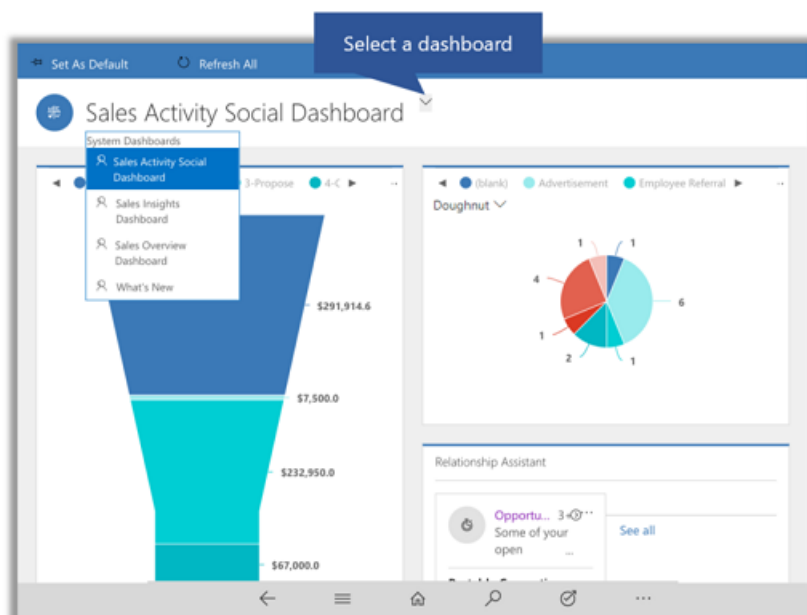


Dashboards

Dashboards give you an overview of valuable information. Tap on the Home icon any time to get your dashboards.

If you want to use a different dashboard, it's easy to switch back and forth.

From the Home screen, tap dashboards menu and then select the dashboard you want to use.

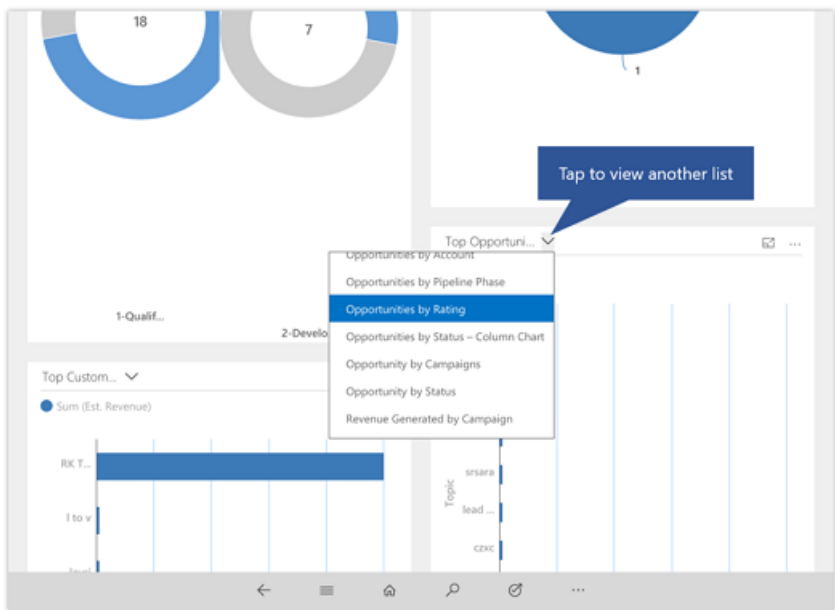


Here are some of the ways you can work with dashboards.

TO DO THIS:	DO THIS:
View all the records for a record type on the dashboard (for example, Accounts).	Tap the header of the list. This opens your records in a grid view on your mobile device.
Open the form for a record on the dashboard.	Tap the record.
To create new dashboards in Dynamics 365 for Customer Engagement apps and enable them for use in Dynamics 365 for phones and tablets.	See, Create or customize dashboards .

Change views for a list on the dashboard

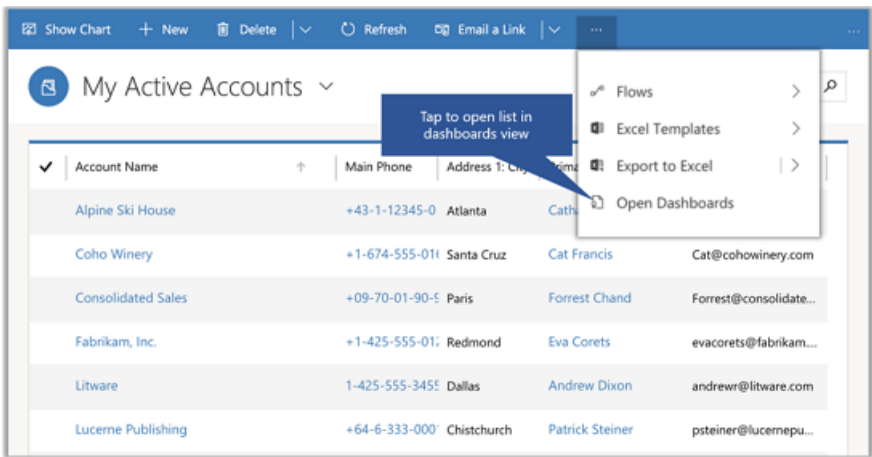
Tap the name of the list and select the list that you want to see.

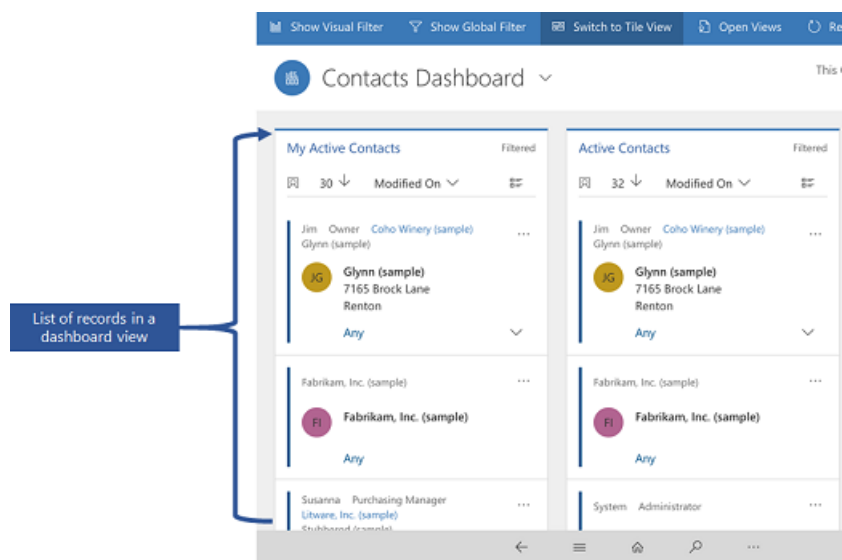


To create new dashboards in Dynamics 365 for Customer Engagement apps and enable them for use in Dynamics 365 for Customer Engagement apps for phones and tablets, see [Create or customize dashboards](#).

Open a list of records in a dashboard view

- From a list of records (for example, **Accounts**), tap **Open Dashboards**.







Work with records

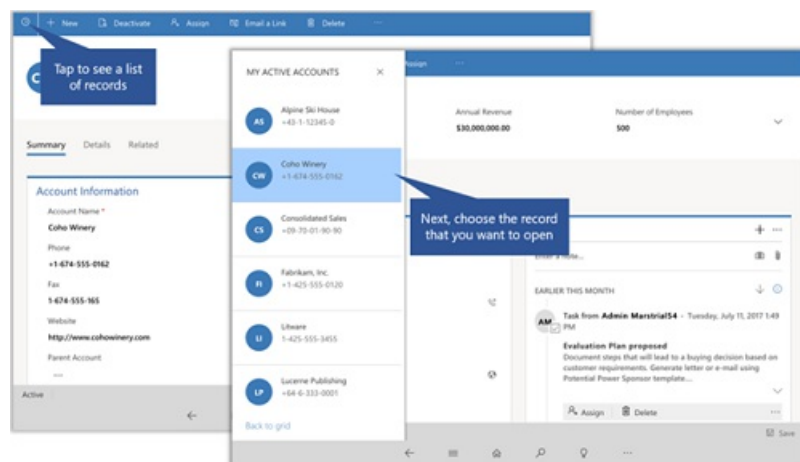
As a sales or service professional you'll be working the following types of records and more:

- **Accounts** Account records contain information about the companies you do business with.
- **Contacts** Contact records contain information about the people you know and work with. Usually, multiple contacts are associated with one account. Contacts could include people responsible for making purchasing decisions, people in charge of paying invoices, support technicians, or anyone you work with at the company.

1. To add a record, on the nav bar tap .
2. Tap **Quick Create Menu** and choose a record type.
3. Select a record type to create.
4. Enter the required information and then tap **Save**.

Quickly open a record

When you have a record open and you need to view another record in the same list, tap  to choose another record.

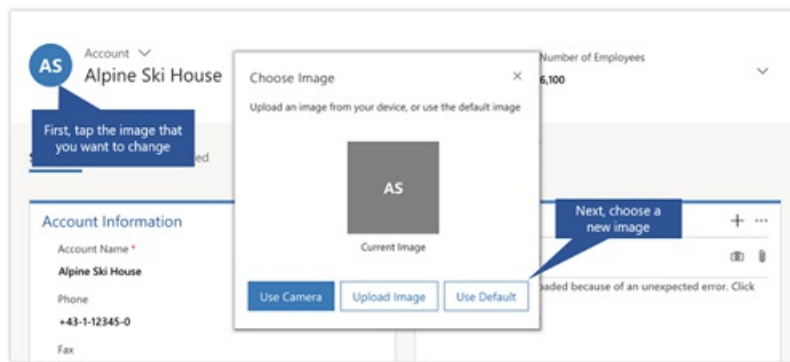


Take action on record

Take action on a record without opening the record. From a list of records, select the record that you want to update, then on the command bar select an action such as **Assign**, **Deactivate** or **Delete**. You can take a similar action when you select multiple records.

Update an image for a record

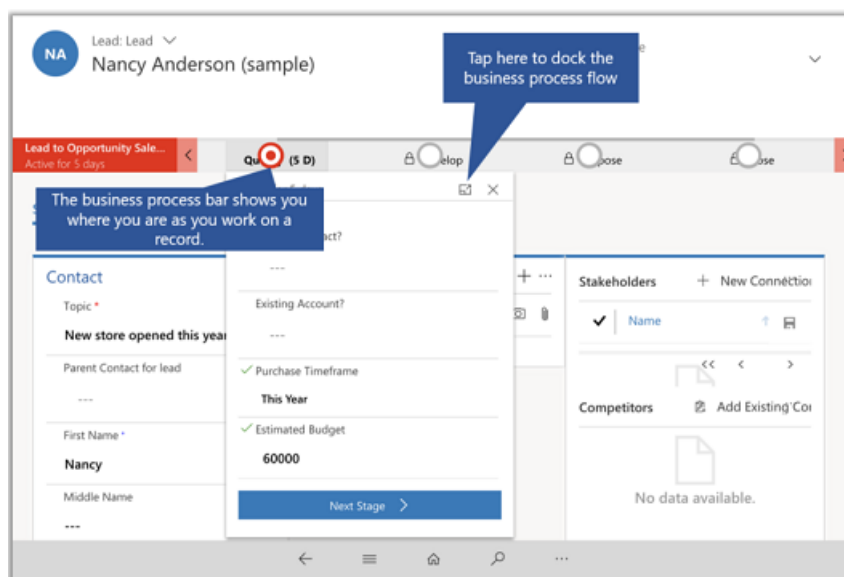
To add an image to a record, open the record and tap the image for the record. Next, select the image that you want to use.



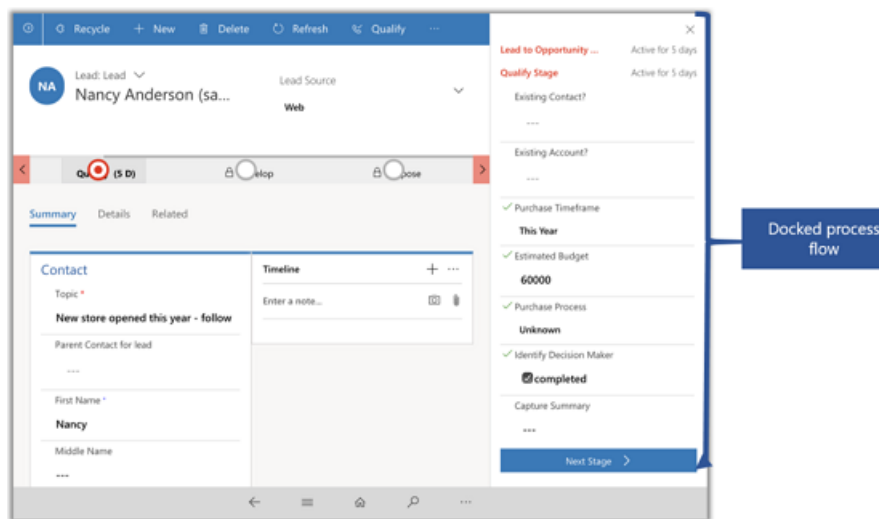
Business process flow

The business process bar on forms gives a clear step-by-step guide for building customer relationships. You can see at a glance exactly where you are with a customer and what you need to do next.

For example, as you work on a new customer record, the business process flow helps you see each step that you need to take to create the new record and fill out the required information according to your organization's business process.




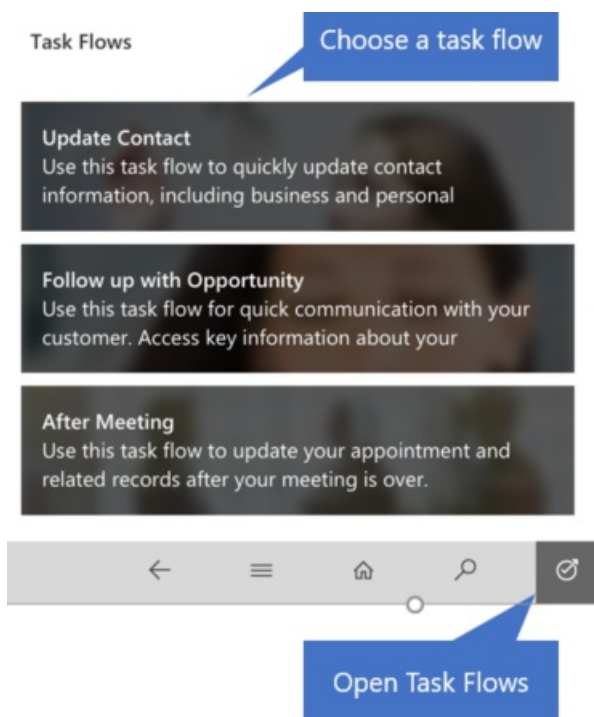
The process bar can be docked to the right side of the screen for easy reference as you work with a customer record.



For more information on how to work with business process flows, see [Business process flows overview](#).

Task Flows

Use Task Flows to complete common set of tasks. For example, if you need to perform a series of follow-up steps on a regular basis then tap Start Task Flow  button on the nav bar. This will lead you through the entire task from start to finish so, you don't forget an important step.



On a phones, tap , on the nav bar and then tap **Start Task Flow**.



NOTE

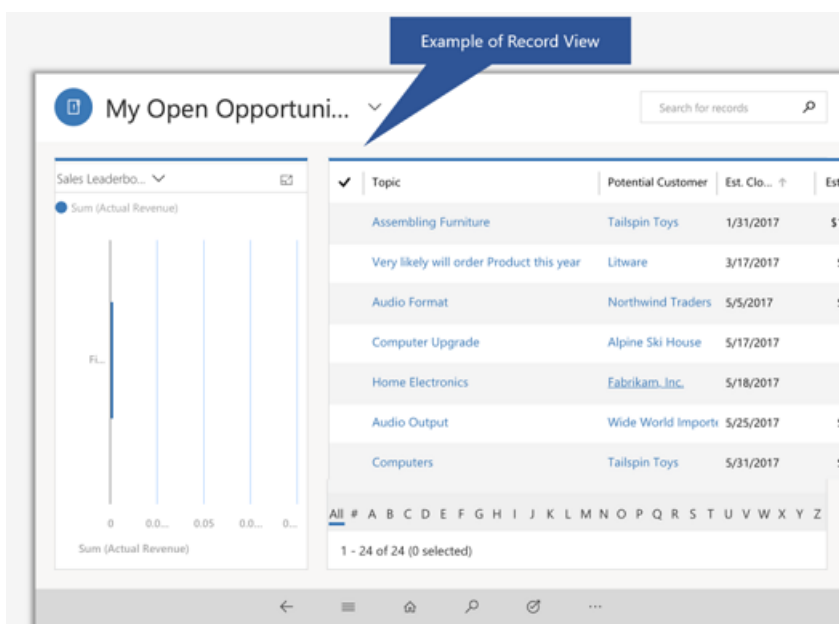
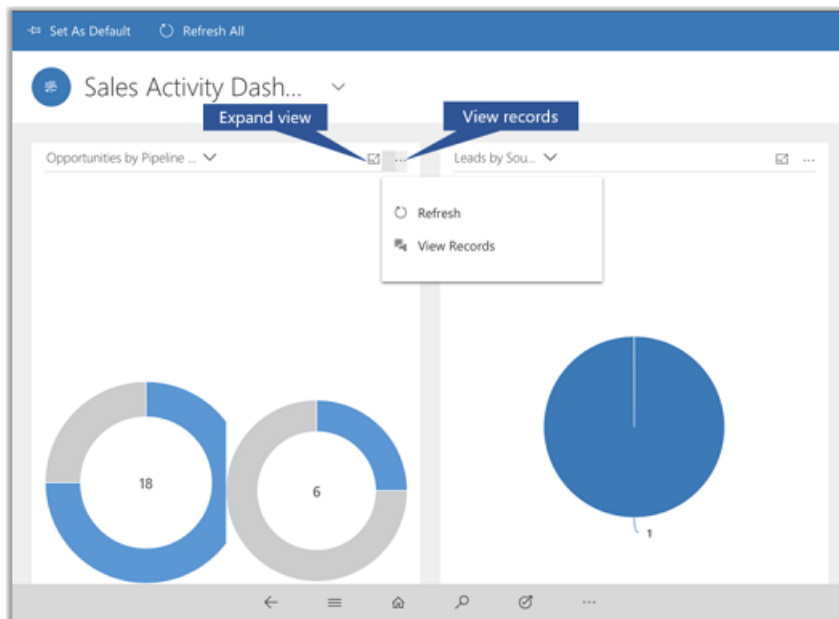
Tasked based flows need to be turned on by your admin. More information: [Create a mobile task flow](#)

Track your progress with charts

Charts give you a quick view of how you're tracking to your goals. They're interactive, so you can tap an area of a chart to get more info.

- Tap once on a chart section to see a tooltip that provides quick info about that area of the chart.

- Tap again on the same section to see a grid view with more details about the data in the chart.
- To expand a chart, from the charts Home page grid, tap the **Expand Chart**  button.
- To view records in chart or refresh the chart, tap  and then choose an action: **Refresh** or **View Records**.

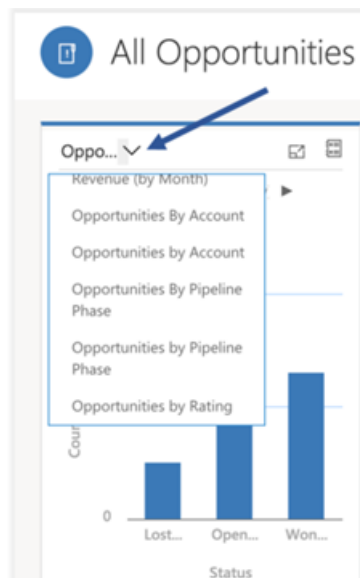


Two dimensions charts like Line, Bar, Column, and Area support zooming. Single dimension charts like, Funnel, Doughnut, Pie, and Tag chart don't support zooming.



Change the chart view

Changing the chart view shows you a different breakdown of your data, such as opportunities opened within a specific time period. You can change a chart view by selecting the View selector on the Grid page.



For example, tap "All Opportunities", then select a different view, both chart and grid will get refreshed.

Search for records

You can search for records across multiple entities by using Relevance Search or Categorized Search. Relevance Search delivers fast and comprehensive results across multiple entities, in a single list, sorted by relevance. Categorized Search returns search results grouped by entity types, such as accounts, contacts or leads.

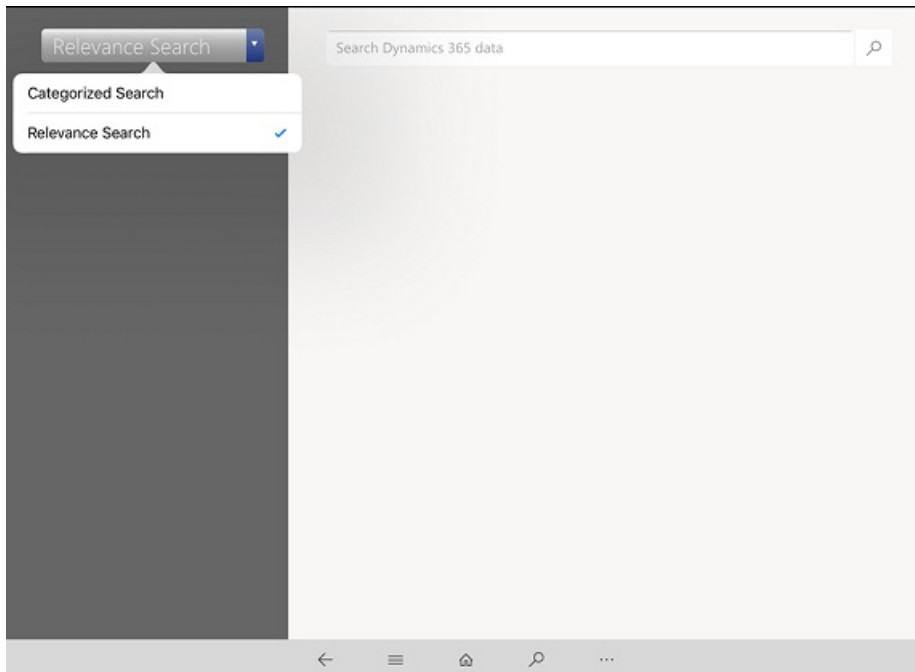
When Relevance Search is enabled for your organization, it becomes the default search experience.

Switch between Relevance and Categorized search

1. On the nav bar tap the Search button.



2. From the menu, select a search type.

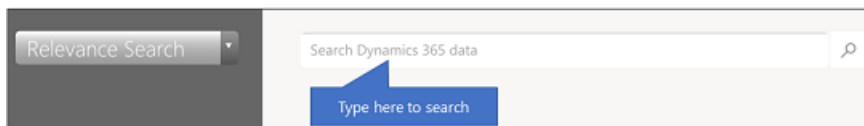


Use Relevance Search

1. On the nav bar tap Search button.



2. Type in the search box, and then tap Search.



Use syntax in your search term to get the results you want. For example, type "car silver 2-door" to include matches for any word in the search term in the search results. Type "car+silver+2-door" to find only matches that include all three words. Type "car|silver|2-door" to get results that contain "car" or "silver" or "2-door", or all three words.

Use Categorized Search

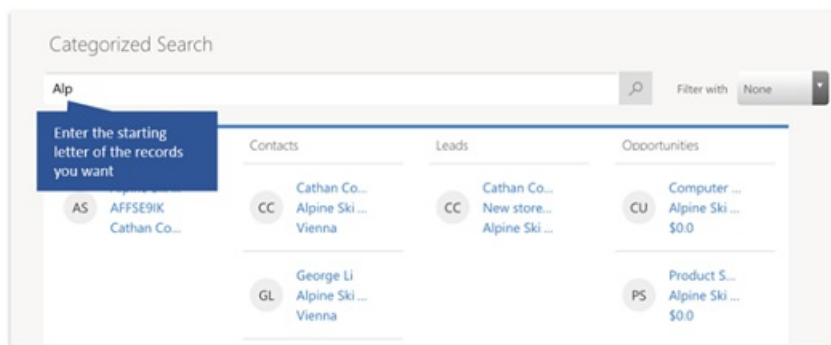
1. On the nav bar tap Search button.



2. Type in the search box, and then tap Search.

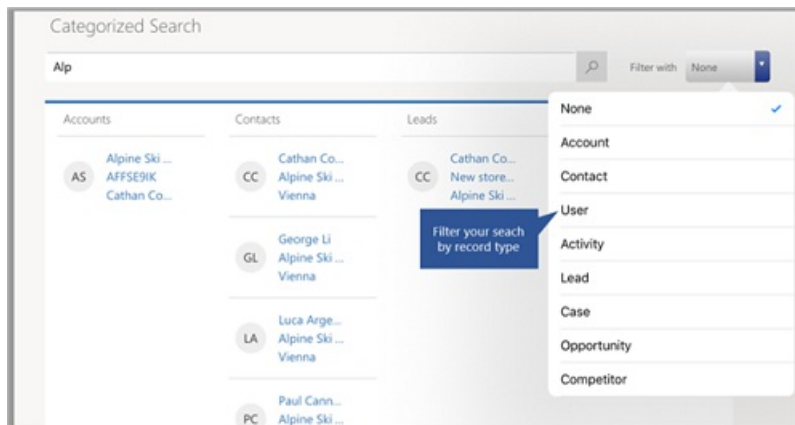


Search results include only records that begin with the letters you type. For example, if you want to search for "Alpine Ski House," type **alp** in the search box. If you type **ski**, the record won't show up.



Filter search results

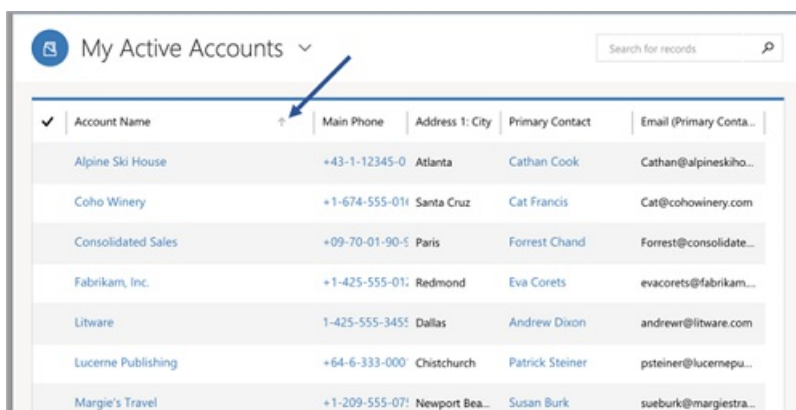
To filter results by record type, choose a record type from the **Filter with:** drop-down box.



Sort items in a grid view

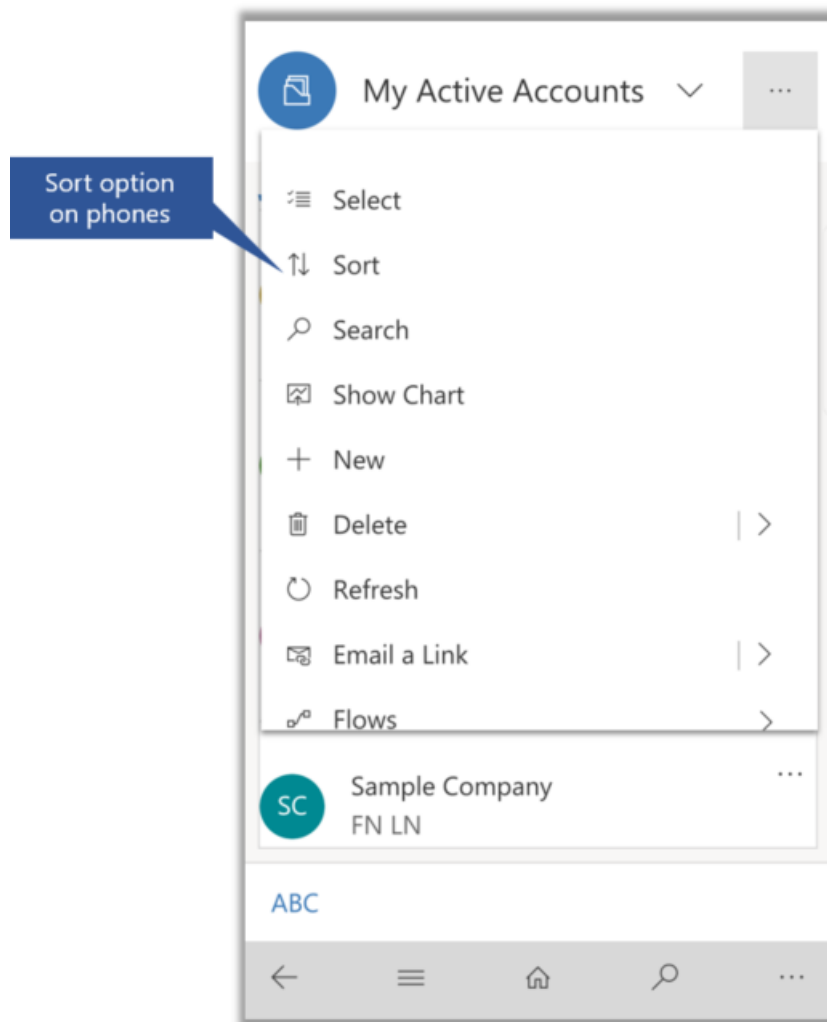
To help you find a record quickly, you can sort items in a grid view. For example, when you're looking at a list of your active accounts, tap the arrow to sort the records in ascending or descending order.

- To sort in ascending order by a column, tap that column's heading.
- To sort in descending order, tap the column's heading again.



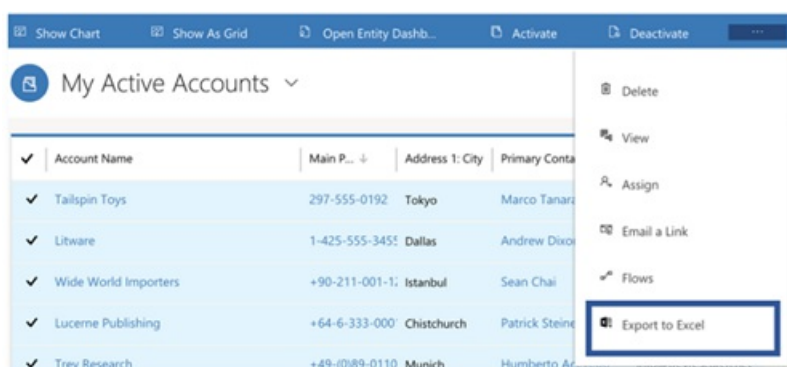
You can do the same from a list view in Dynamics 365 for phones.

- Tap **...**, tap **Sort** and then choose how you want to sort the data.



Export records to Excel

In the list of records in Customer Engagement mobile apps, you can export records to Microsoft Excel, just like you can in the web app. From a grid view in Customer Engagement for tablets or a list of records in Dynamics 365 for phones tap **...** on the command bar and then tap **Export to Excel**.



More information: [Export data to excel](#)


Relationship Assistant

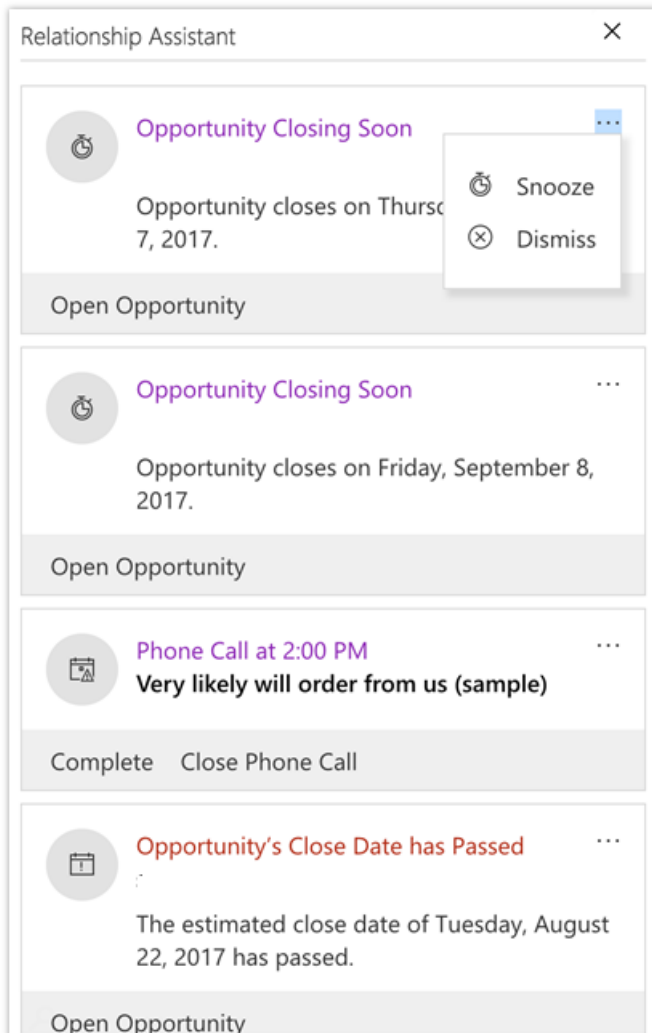
The relationship assistant is designed to deliver the most important and relevant information in relation to what you are doing right now. The assistant works by analyzing all of the data at its disposal and generating a collection of action cards, each of which includes a message summarizing what the card is about, plus a set of links for taking action. The assistant sorts the cards by priority and filters them for your current context.

The assistant reminds you of upcoming activities; it evaluates your communications and suggests when it

might be time to reach out to a contact that's been inactive for a while; it identifies email messages that may be waiting for a reply from you; it alerts you when an opportunity is nearing its close date; and much more.

When you start your day by signing in to Dynamics 365 for Customer Engagement apps, the assistant draws your attention to your most important items and tasks, drawn from all areas of the application.

1. To access the assistant, on the nav bar, tap .
2. Tap **Relationship Assistant**.

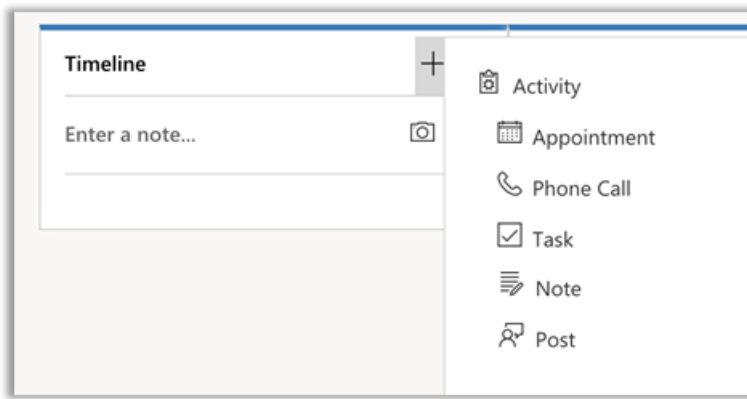


Update your activities in the Timeline

The timeline view helps you collaborate with your team by tracking communication history on a single page in an easy-to-read 360 view. You can see everything from posts and voice attachments, to email and notes and more.

Add an activity

- Open a record and in the **Timeline** area, tap **+**, and select the type of activity that you want to add.

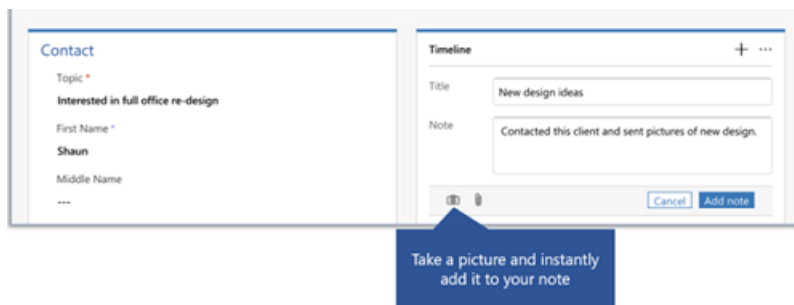


- Tap and then tap **Open Filter Pane** to filter the records in the timeline by record type.
- Tap to change the sort order for the records from ascending to descending and vice versa.

Take notes

The mobile app also lets you take notes and attach photos to a note, or take a new photo with your device's camera. So, if for example, you're out at a site and need to document a customer's issue with a product, you can capture and add it to a note right away, rather than taking the photo, then adding it from your camera roll later.

To add a note, open a record and in the notes area enter your note.

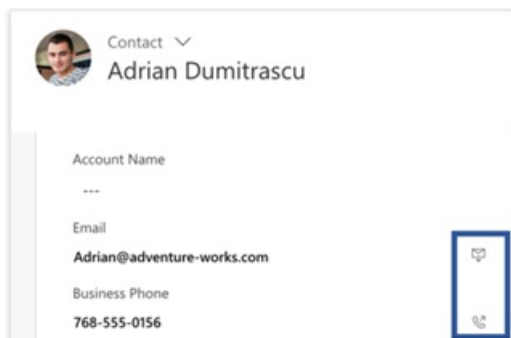


Scan barcodes

Rather than manually typing a barcode number into a field, you can scan barcodes by using your device's camera. Tap the icon to the right of the field to start the scanner. This makes it easy to capture info about inventory and other issues when you're out in the field. You'll need to ask your admin to set this feature up for you.

Send an email or make a call

Call or send email to your customers easily from the mobile apps. Tap any phone number in a record to start a call, or tap the email button to send an email.



In the Dynamics 365 for tablets app, tapping the phone button starts a Skype call. In Dynamics 365 for phones, it starts a phone call.

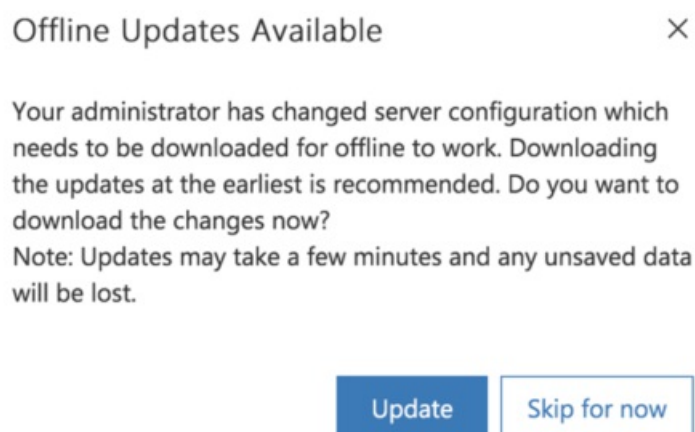
When you're finished with your call, the app prompts you to enter details about the call.

Work offline

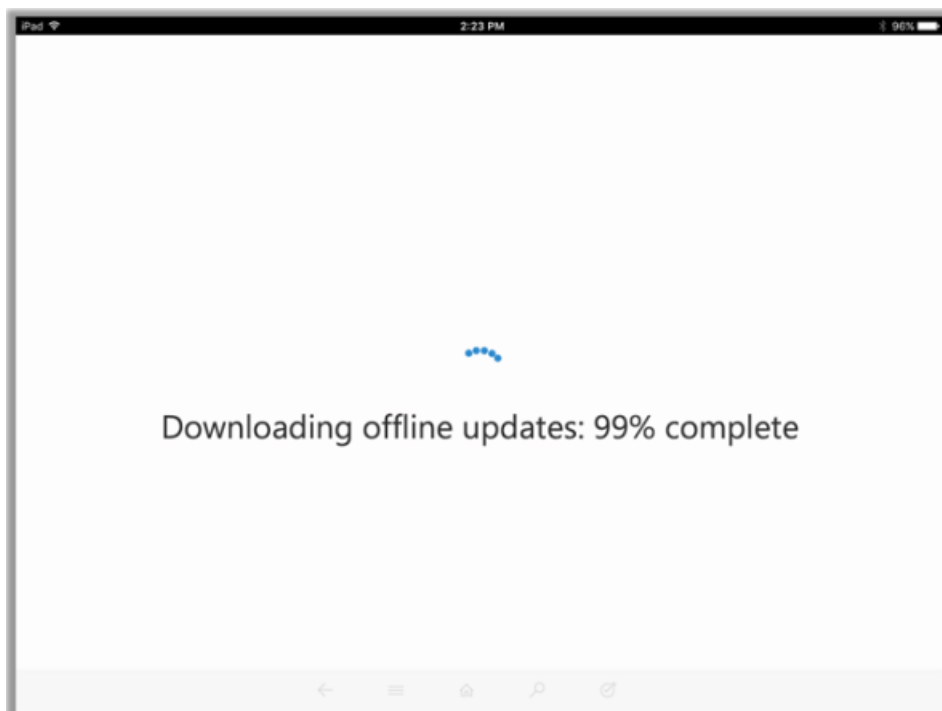
Seamless work offline with mobile offline synchronization. You can work with mobile app in offline mode when the device is disconnected from the internet. The app provides a rich offline experience which lets you to work with basic commands like create, read, update, and delete and business processes - so you always stay productive. Once you're back online, changes you've made are synchronized with Customer Engagement.

When you're admin has enabled mobile offline, the next time that you access the mobile app, you will be prompted to download updates. Once you download the updates, you can start using the mobile app in offline mode.

1. When you see the **Offline Updates Available** dialog box, choose **Update**.




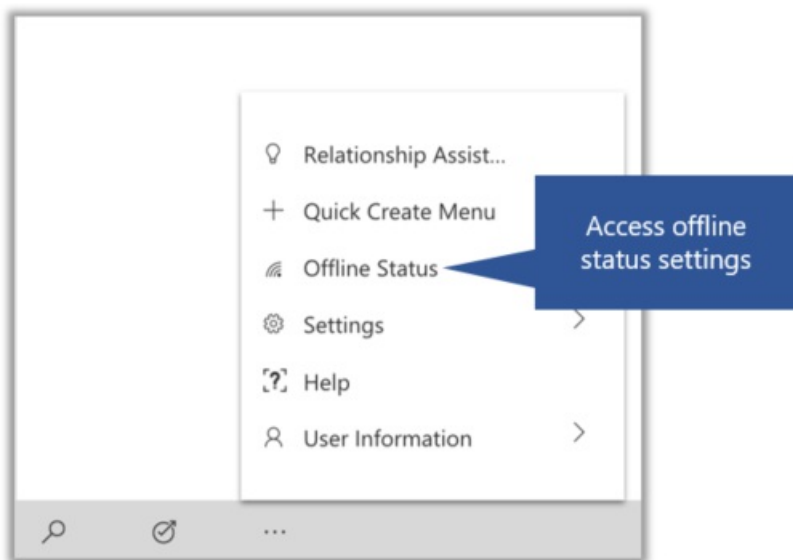
2. You'll see a progress indicator while the updates are being downloaded. When the download load is complete, it's a good idea to verify offline mode is available.



See if offline mode is available

When the updates have download, you can check to see if mobile offline is available.

1. From the nav bar, tap  and then tap, **Offline Status**.

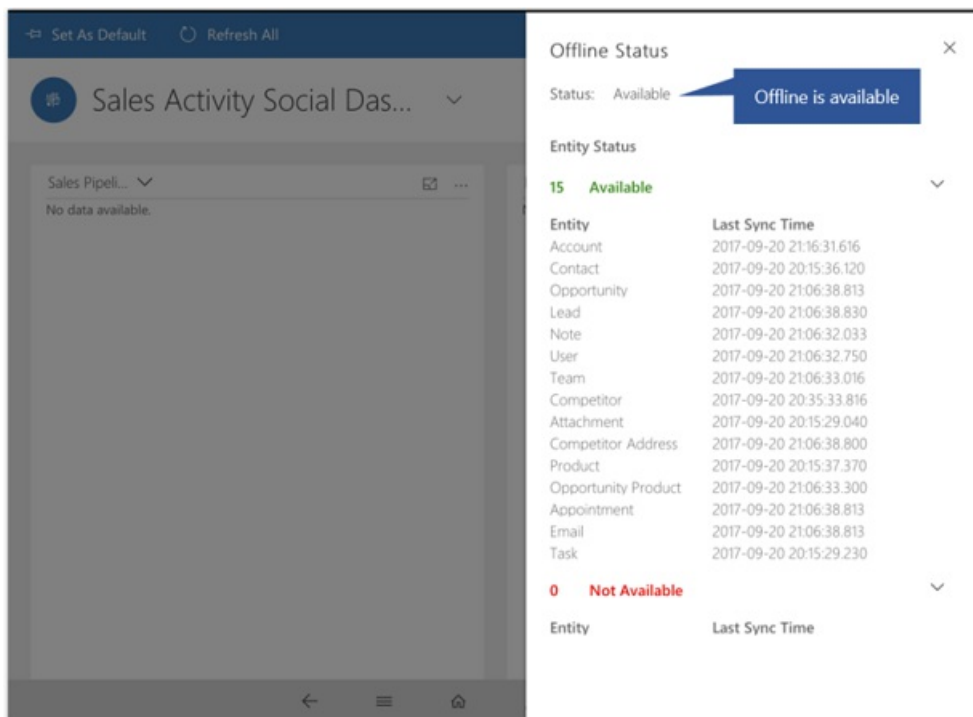



2. **Offline Status**, tracks offline status of the whole app, and also the status of each entity individually. When the status shows as **Available**, it indicates offline is available and data has synced successfully.

NOTE

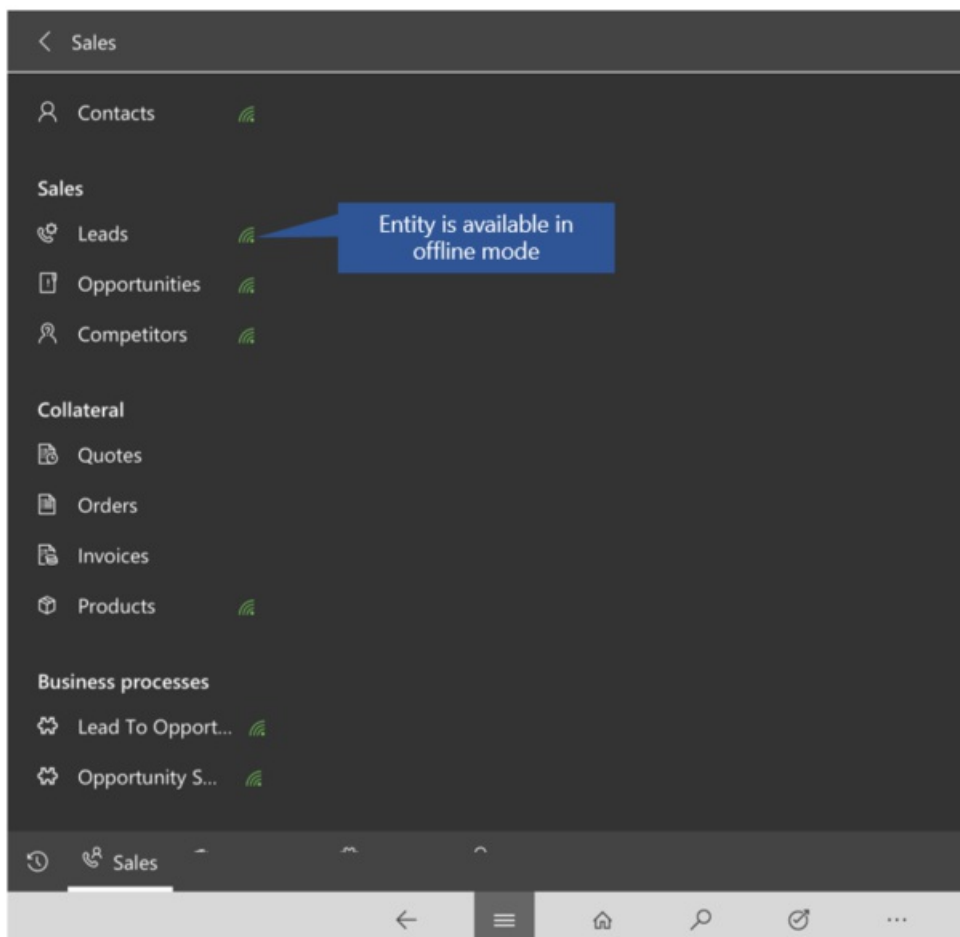
The status here can be **Not Available** due to an error or if you missed downloading offline updates. If the status is **Not Available** due to missing the latest offline updates, then try downloading the updates again.

- **Entity Status**, provides the offline status of each entity individually. For the available entities you can also track the last time the entity synced.



You can also track offline status of entities from the **Menu**  button.

- Green Wi-Fi icon next to the entity name indicates that it is available in offline mode.
- Red Wi-Fi icon indicates that this entity is enabled for offline but is not available to work in offline mode due to an error or missing updates.
- No Wi-Fi icon indicates that your admin has not enabled the entity to use in offline mode.



Background sync

Background sync is enabled even when the app is minimized so long as a network connection is detected. But when the app is in the background, metadata changes will not be accepted automatically.

Other things to keep in mind about background sync:

- Sync will run until you sign in to the mobile app.
- While the app is running in the background, sync is automatically disabled when a network is disabled.
- When you bring the app to the foreground, regular sync is detected and enabled.
- Background sync is disabled when the device is locked and enabled when the device is unlocked.
- While the app is running in the background, metadata changes will not be accepted automatically. The mobile app will stop the background sync.
- When you bring the app to the foreground, you are prompted to accept the metadata changes.
- While the app is running in the foreground, after metadata is updated, the app will switch to regular sync.

Background sync will be disabled if:

- Your user token expires in the background.
- The application closes for some reason.
- Your device locks.

Background sync is available on all supported devices. See [support for Dynamics 365 for phones and Dynamics 365 for tablets](#).

Sync conflict resolution

If multiple entries are made in the same field by offline users (for example, two or more "close by" dates), the conflict is clearly marked and you can choose the correct entry.

If a record has changed on the server between the time your device retrieved the record and when it tries to update or delete that record, you'll see an exclamation mark ("!") by the relevant field, and will need to resubmit your updated changes.


Reconfigure the app

If you used the mobile app on a phone or tablet temporarily and want to remove all your cache data before giving the device to someone else, you need to reconfigure the app.

Reconfiguring deletes all data and metadata from the cache, though you shouldn't rely on this as a security measure.

If you sign out of one organization and sign in to another, and then use the **Reconfigure** option on the organization you signed in to, your metadata will still remain for the organization you signed out of. To remove your metadata from the organization you signed out of, you'll need to sign in to it and use the **Reconfigure** option there, as well.

Here's how to do it:

1. Tap .
2. Tap **User Information**.
3. Tap **Reconfigure**.

Privacy notices

The Dynamics 365 for Customer Engagement for tablets and phones, and Project Finder for Project Finder for Dynamics 365 (the "App") enables users to access their Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement instance from their tablet and phone device. In order to provide this service, the App processes and stores information, such as user's credentials and the data the user processes in Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App is provided for use only by end users of Microsoft customers who are authorized users of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App processes user's information on behalf of the applicable Microsoft customer, and Microsoft may disclose information processed by the App at the direction of the organization that provides users access to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. Microsoft does not use information users process via the App for any other purpose.

If users use the App to connect to Microsoft Dynamics CRM (online) or Dynamics 365 for Customer Engagement, by installing the App, users consent to transmission of their organization's assigned ID and assigned end user ID, and device ID to Microsoft for purposes of enabling connections across multiple devices, or improving Microsoft Dynamics CRM (online), Dynamics 365 for Customer Engagement or the App.

Location data. If users request and enable location-based services or features in the App, the App may collect and use precise data about their location. Precise location data can be Global Position System (GPS) data, as well as data identifying nearby cell towers and Wi-Fi hotspots. The App may send location data to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App may send the location data to Bing Maps and other third party mapping services, such as Google Maps and Apple Maps, a user designated in the user's phone to process the user's location data within the App. Users may disable location-based services or features or disable the App's access to user's location by turning off the location service or turning off the App's access to the location service. Users' use of Bing Maps is governed by the Bing Maps End User Terms of Use available at <https://go.microsoft.com/?linkid=9710837> and the Bing Maps Privacy Statement available at

<https://go.microsoft.com/fwlink/?LinkID=248686>. Users' use of third party mapping services, and any information users provide to them, is governed by their service specific end user terms and privacy statements. Users should carefully review these other end user terms and privacy statements.

The App may include links to other Microsoft services and third party services whose privacy and security practices may differ from those of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. IF USERS SUBMIT DATA TO OTHER MICROSOFT SERVICES OR THIRD PARTY SERVICES, SUCH DATA IS GOVERNED BY THEIR RESPECTIVE PRIVACY STATEMENTS. For the avoidance of doubt, data shared outside of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement is not covered by users' Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement agreement(s) or the applicable Microsoft Dynamics Trust Center. Microsoft encourages users to review these other privacy statements.

Licensed Dynamics 365 Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using Dynamics 365 for tablets, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the tablet client. Users can then access Dynamics 365 (online) by using Dynamics 365 for tablets, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from Dynamics 365 (online) and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

By enabling the **User Content and Location** setting, you allow your Dynamics 365 for Customer Engagement or Microsoft Dynamics CRM administrator and system customizers to access precise location data and files on your mobile device. The administrator or customizer may choose to send the information to Dynamics 365 for Customer Engagement, Dynamics CRM, and/or other services at their discretion. You can subsequently disable this functionality by disabling the **User Content and Location** setting. Note that this setting does not impact the privacy settings specified in the mobile device operating system.

See Also

[What's supported](#)

[Troubleshooting](#)

Potential issues and resolutions

3/8/2019 • 20 minutes to read • [Edit Online](#)

Applies to Dynamics 365 for Customer Engagement apps version 9.x

Troubleshoot *We can't find any apps for your role* error message on Dynamics 365 for phones and tablets.

When using Dynamics 365 for phones and tablets, you encounter the following message:

We can't find any apps for your role. To check for recently-added apps, select Refresh. If you can't find your app, change your search criteria and try again.

For more information see, [Troubleshoot "We can't find any apps for your role" error message](#).

Troubleshoot issues where user does not have the Dynamics 365 for mobile privilege

Make sure you have these [required privileges](#) before using the mobile app.

Troubleshoot error code 800c0019 on Windows Phones

If you get error code 800c0019 when you try to sign in to your Microsoft account while using the Dynamics 365 for phones or CRM for phones express apps, chances are that you have the wrong date and time settings on your Windows 8 phone. This can occur after updating your Windows 8 phone, removing and replacing the battery, or after a time change.

In most cases, your phone's date and time is set automatically by your mobile operator. If it's not, you need to set it manually so you can sign in to your Microsoft account successfully. Here's how:

1. On **Start**, flick left to the **App** list and tap **Settings**.
2. Tap **Date+time**.
3. Turn off **Set automatically**.
4. Set the correct values for **Time zone**, **Date**, and **Time**.

Troubleshoot a Windows app start-up error

If you receive this error:

Additional steps may be needed to configure Dynamics 365 for Customer Engagement for this organization. Please contact your system administrator.

If you're using a computer or tablet

Users:	Notify your Customer Engagement administrator that you received this error.
Admins:	To enable the Dynamics 365 for Windows 8.1 app for on-premises Customer Engagement deployments, you need to make some configuration changes. More information: Set up Dynamics 365 for phones and tablets Important: Customer Engagement on-premises deployments require Windows 10 and the Dynamics 365 for Customer Engagement apps for Windows app built for Windows 10 .

If you're using a Windows phone

You received this error because you're trying to connect to an on-premises deployment of Customer Engagement, which is not supported for your version on Windows Phones. Windows Phone connection to Microsoft Dynamics 365 on-premises requires the [Dynamics 365 for Customer Engagement apps for Windows app built for Windows 10](#). More information: [Support for Dynamics 365 for phones and tablets](#)

Error message: "This record is unavailable."

If this message appears when a user starts the mobile app, taps the **Home** button, or selects **Dashboards** from the menu, the user likely doesn't have access to the expected dashboards.

If you're an admin, you can avoid users getting this error by making sure all mobile users have access to the sales dashboard:

1. In the web app, go to **Settings > Customizations > Customize the System**.
2. Click **Dashboards**.
3. Select **Sales Dashboard**.
4. Click **Enable Security Roles**.
5. Select **Display to everyone** and then click **OK**. If you prefer to display only to select security roles, be sure to select your user's security role.
6. Click **Publish**.
7. Have your user close and open the mobile app so your dashboard changes will download.

If you're an end user and you're seeing this message on your home page, you can choose a different dashboard and set it as your home page:

8. From the mobile app, tap the menu and then tap **Dashboards**.
9. On the command bar, tap **Select Dashboard** and then select the dashboard you would like to use as your home page.
10. On the command bar, tap **Set as Home**.

If you're an end user and you're seeing this message on the dashboards page, you can create a personal dashboard through the web app and enable it for mobile:

11. In the web app, go to **Sales > Dashboards**.
12. Click **New**.
13. Click **Properties**.
14. Enter a name for your dashboard and select **Enable for mobile**.
15. Add the components you want on your dashboard and click **Save**.
16. In the mobile app, follow the previous procedure to select your new dashboard and set it as your home page.

Error message: "Your server is not available or does not support this application."

Cause 1: The Customer Engagement server is down. Verify that the server is on and connected to your network.

Sample Trace Message for Cause 1:

```
"Dynamics CRM [Error] | Connection error: 404"
```

Cause 2: Your Dynamics 365 for Customer Engagement apps version is not supported. See [What's supported](#) for version support information.

Cause 4: This error can also occur if you enter an invalid URL. Make sure the same URL you have provided works to access Dynamics 365 for Customer Engagement in your browser on your device.

Sample Trace Messages for Cause 4:

```
"XMLHttpRequest: Network Error 0x2ee7, Could not complete the operation due to error 00002ee7."
```

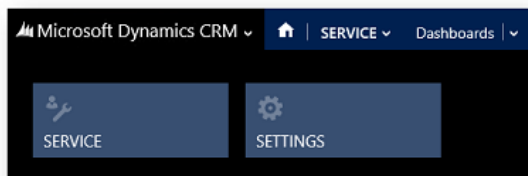
```
"Dynamics CRM [Error] | Connection error: 0"
```

Error message: "You haven't been authorized to use this app. Check with your system administrator to update your settings."

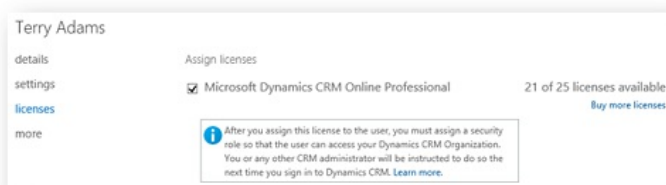
Cause 1: Verify that your Dynamics 365 for Customer Engagement security role includes the **Use Dynamics 365 for tablets**

privilege. See "Required privileges" in [Get started with Dynamics 365 for phones and Dynamics 365 for tablets](#).

Cause 2: This error can occur if you have a Dynamics 365 for Customer Engagement organization and your user has not been assigned a Dynamics 365 for Customer Engagement license. If you add a Dynamics 365 for Customer Engagement subscription to an existing Office 365 tenant, your user may not have a Dynamics 365 for Customer Engagement license assigned. If the user has the Global Administrator or Service Administrator role in the [Microsoft Online Service Portal](#), you're able to sign in to the Dynamics 365 for Customer Engagement web application to perform certain administrative actions, but you can't perform end user tasks, such as creating records (for example, accounts, contacts, and leads) or configuring Dynamics 365 for tablets. When you sign in to the web application, you may notice that not all areas appear within the navigation (for example, Sales and Marketing are missing):



Access the **Users and Groups** section within the [Microsoft Online Service Portal](#) and verify you have a Dynamics 365 for Customer Engagement license assigned to your user record.



Error message: "You need an internet connection to use this app. Reconnect and try again."

Cause 1: This error can occur if you do not have an Internet connection. Verify you are connected to the Internet and can access the same URL in your web browser.

Cause 2: Check if you are using a preview build of Windows 8.1. So far this issue has only been reported with the preview version of Windows 8.1.

Error message: "Sorry, something went wrong while initializing the app. Please try again, or restart the app."

Cause 1: Permissions might not be set properly. See "Required privileges" in [Get started with Dynamics 365 for phones and Dynamics 365 for tablets](#).

Cause 2: See the following KB article:

An error occurs in the Dynamics 365 for Customer Engagement app for users in child business units. For more information, see [Sorry, something went wrong while initializing the app](#).

Sample Trace Message for Cause 2:

```
Error Message: System.NullReferenceException: Object reference not set to an instance of an object.
Microsoft.Crm.Application.WebServices.ApplicationMetadataService.<>c__DisplayClass30.<UserRolesChanged>b__2d(Entity role)
at System.Linq.Enumerable.Any[TSource](IEnumerable<T> source, Func<T, bool> predicate)
at Microsoft.Crm.Application.WebServices.ApplicationMetadataService.UserRolesChanged(Guid[] clientUserRoles, DateTime syncTime,
ExecutionContext context)
at Microsoft.Crm.Application.WebServices.ApplicationMetadataService.RetrieveUserContext(UserContextRetrieveRequest
userContextRetrieveRequest)
```

Cause 3: This can occur if the download of the metadata failed. The next attempt to connect will fully regenerate the metadata and successfully connect. Microsoft is aware of an issue where metadata may fail to download due to a timeout and plans to address this issue in a future update.

Sample Trace Messages for Cause 3:

"Error occurred during complete refresh of Application/Entity/Attribute metadata"

"XMLHttpRequest: Network Error 0x2ef3, Could not complete the operation due to error 00002ef3."

Error message: "The language installed on your company's system isn't available on the app. Please contact your system administrator to set up a supported language."

Cause: This error will occur if one of the supported languages is not enabled in Dynamics 365 for Customer Engagement. For more information on the supported languages, see [Dynamics 365 for tablets: Set up and use](#) and expand **What you need to use Dynamics 365 for tablets** and **Supported Languages**.

Error message: "The process assigned to this record is unavailable or has been deleted."

If you receive this message for a record which has a non-deleted process assigned to it, you should manually synchronize Dynamics 365 for tablets with your Dynamics 365 for Customer Engagement data. Close the Dynamics 365 for tablets app, reopen, and then choose to download the latest customizations. This procedure forces Dynamics 365 for tablets to check for updated customizations. Recently viewed data while you were connected is cached and synched. Record data like Accounts or Contacts are not synched. You can't choose which data synchronizes to the device like you can with Microsoft Dynamics 365 for Outlook.

Error message: "This operation failed because you're offline. Reconnect and try again."

This error may occur for the following scenarios when you are using a Windows 8 device and you have a Dynamics 365 for Customer Engagement organization that uses Microsoft account (formerly named Live ID). This issue doesn't occur for organizations provisioned through Office 365.

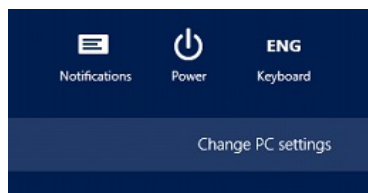
Cause 1: You are automatically authenticated as a different Microsoft account that is not a member of the Dynamics 365 for Customer Engagement organization. This may happen if you sign into your Windows 8 device and your domain account is connected to a Microsoft account. For example: you sign in to your device as <userid>@contoso.com (your domain account) and that account is connected to <userid>@live.com (a Microsoft account). If your connected account (for example, <userid>@live.com) is not a member of the Dynamics 365 for Customer Engagement organization, you will encounter this error. In this scenario, the error occurs after providing your URL, but you are never prompted for credentials. When you connect your domain account to a Microsoft account, that account will be used to automatically sign in to apps and services that use Microsoft account for authentication. If you're using a Windows 8 device, use the steps listed here to check if your domain account is connected to a Microsoft account. If you're using a Windows RT device, see the **Windows RT** section.

Windows 8

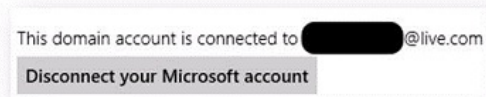
1. Swipe from the right side of the screen to access the charms bar and then tap **Settings**.



2. Tap **Change PC settings**.



3. Tap **Users**.
4. Check to see if under the **Your Account** section it says "This domain account is connected to <Your Microsoft account>"



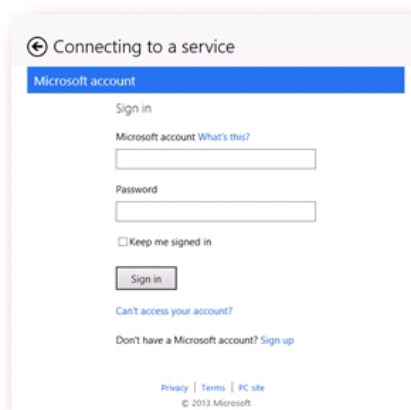
Windows RT

If you are using a Windows RT device and need to authenticate as a Microsoft account that is different than the one you use to log on to your device, you must create another account and switch to that account when using the app. For example: you currently sign in to your Windows RT device as <userid>@live.com, but want to access your Dynamics 365 for Customer Engagement organization via the tablet app as <userid>@outlook.com. For more information on how to create a new account on your device, see [Video: Create a user account](#).

Sample Trace Message for Cause 1:

```
The app couldn't navigate to https://port.crm.dynamics.com/portal/notification/notification.aspx?lc=1033&organizationid=<OrganizationId> because of this error: FORBIDFRAMING.
```

Cause 2: This error may occur if you previously authenticated to the app as a different Microsoft account and chose the option "Keep me signed in". Even after uninstalling and reinstalling the app, the token for the previous credentials is still stored on your device. If you are trying to connect as a different user, you will need to remove the token. To completely clear the app, after you uninstall the app, you must clear the Indexed DB folder (Drive:\Users\%USERNAME%\AppData\Local\Microsoft\Internet Explorer\Indexed DB). You may have to sign in as a different user and use the command prompt as an administrator to clear the Indexed DB folder. That is because some files in this folder can be held by the Host Process for Windows Tasks. Once the token is successfully removed, you should see the sign-in page after you enter your URL in the app.



The same error as Cause 1 may be found in the traces.

Cause 3: You have not accepted your invitation to the Dynamics 365 for Customer Engagement organization. If you attempt to access the same URL through your browser, you see a notification that you are invited to the organization but need to accept the invitation. Once you accept the invitation, you are able to configure the app successfully.

Sample Trace Message for Cause 3:

```
The app couldn't navigate to https://port.crm.dynamics.com/portal/response/Response.aspx?token=KFES-CK5C-NL8R-X1U0&expiration=635211904207200000&cs=Lkya6zs9Ee0tJXjttRc6AeZa5xqt94YAppfqrXFGZa5slnq2iaabTmwfX0AR4HLGvz&cb=invite&cbcxt=invite&wlid=<username>%40live.com&lc=1033 because of this error: FORBIDFRAMING.
```

For each of the causes listed previously, you may also see the following event logged in the traces:

"Authentication: Failed - cookie setup"

Cause 4: If you connect to a Dynamics 365 for Customer Engagement organization on an Android device, this error can occur if the certificate from the Dynamics 365 for Customer Engagement website or the federated server, such as AD FS, is not trusted by the device. To avoid this scenario, make sure to use a publicly trusted certificate or add the Certificate Authority certificate to the device. For more information, see KB article: [While configuring Dynamics CRM for phones and tablets, you receive an error message](#).

Error message, Dynamics 365 for Good: "We're sorry. Your server is not available or does not support this application"

Users must update to the latest version of the Dynamics 365 for Good application prior to updating to Dynamics CRM Online 2015 Update 1. On the [Apple App store](#), the version the users need is 1.1. On the [Good Dynamics Marketplace](#) or (Good Control Console), the version needed is listed as 1.1.0.

Users who have not updated their app prior to connecting to Dynamics CRM Online 2015 Update 1, will likely see the following error approximately 2 minutes after connecting to Dynamics CRM Online 2015 Update 1.

Error: We're sorry. Your server is not available or does not support this application.

To fix this error, the user must uninstall and reinstall the Dynamics 365 for Good app using the version listed above.

Event 10001 messages appear in the Event Log when you run Dynamics 365 for Windows 8

The following event may be recorded multiple times to the Event Log, when **Show Analytic and Debug Logs** is enabled, on the device where Dynamics 365 for Windows 8 is running. Notice that, by default, **Show Analytic and Debug Logs** is disabled in Event Viewer and these messages won't be recorded. More information: [Enable Analytic and Debug Logs](#)

- Event Id: 10001

- Message: SEC7131 : Security of a sandboxed iframe is potentially compromised by allowing script and same origin access.

Verify the source of the messages. If the source is Dynamics 365 Server, these events don't pose a security threat and can be ignored.

By design: "--d" added to URL

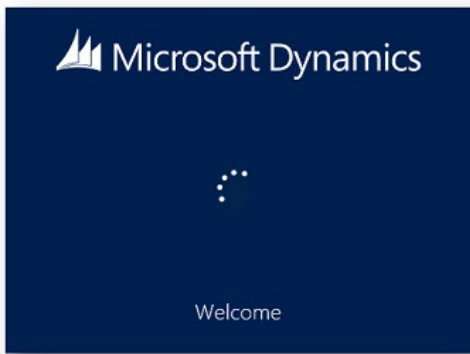
For Dynamics 365 for Customer Engagement users

To improve the reliability of DNS resolutions to Dynamics 365 for Customer Engagement organizations, Dynamics 365 for tablets modifies the organization URL used when signing in. When a user signs in, Dynamics 365 for tablets adds "--d" (two dashes + d) to the URL. For example, if the organization URL is <https://contoso.crm.dynamics.com>, Dynamics 365 for tablets will change the URL to <https://contoso--d.crm.dynamics.com>.

If a user needs to retry signing in, they'll see "--d" in the web address. They can sign in with the modified URL or reset it to the URL normally used.

After providing credentials the app appears to load indefinitely and never completes

This can occur if the time on the device is not within a certain variance of the Dynamics 365 for Customer Engagement server. For example: you may encounter this issue if the time on the server is 2 PM on November 11th but the device is set to 2 PM on November 12th.



You may see events like the following logged multiple times in the trace files:

```
Dynamics CRM [PAL] | Authentication: Token Expired with Token Timeout value (-255674015) --- Retrieving new Auth Token from shim
```

For possible resolution, see [Microsoft Dynamics CRM for Phone and Tablets cannot connect to Dynamics CRM organization due to length of TokenLifetime](#)

Dynamics 365 for tablets users are repeatedly prompted for sign-in credentials and can't sign in

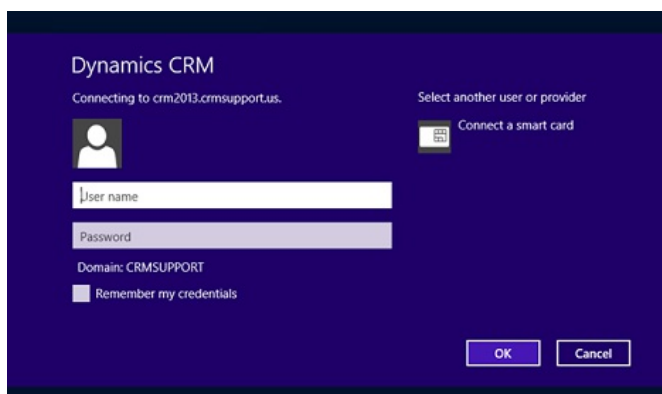
Cause: This can occur if certain directories under the Dynamics 365 for Customer Engagement website have Windows Authentication enabled. For Dynamics 365 for tablets to successfully connect to a new deployment of Dynamics CRM Server 2013 or Dynamics CRM Server 2015, you must run a **Repair** of Dynamics CRM Server 2013 or Dynamics CRM Server 2015, on the server running IIS where the Web Application Server role is installed after the Internet-Facing Deployment Wizard is successfully completed.

IMPORTANT

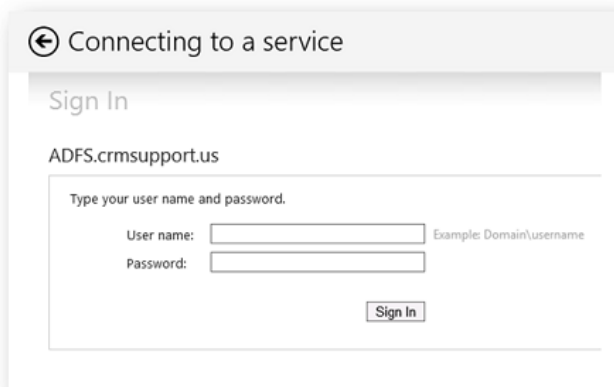
To resolve this issue by running **Repair**, the Dynamics 365 for Customer Engagement deployment must already be configured for claims-based authentication and IFD.

NOTE

When the logon prompt appears, it is an Active Directory logon prompt instead of the sign-in page of your Secure Token Service (STS) such as Active Directory Federation Services (AD FS). The prompt looks like the one shown here.



After you tap **Cancel** or enter credentials 3 times, you see the correct sign-in prompt.



Redirected URLs do not work when you configure Dynamics 365 for tablets or Dynamics 365 for phones

URLs that redirect, such as IIS host headers or link-shortening websites such as tinyurl or bitly, do not work when you use the URL in the **Dynamics 365 for Customer Engagement apps web address** field with Dynamics 365 for tablets or Dynamics 365 for phones during configuration.

For example, an <https://www.contosocrm.com> host header for a Dynamics 365 for Customer Engagement apps online website URL that is actually <https://crm.contososever001.com>, will not work and will display an error message. To work around this behavior, you must enter the actual web address for the Dynamics 365 for Customer Engagement organization. When this issue occurs and you have enabled logging, the information logged is similar to the following. Notice that the URLs in lines 2 and 3 are different. That difference indicates a redirected URL.

1. User entered URL: *https://URL_entered*
2. Constructed server URL: *https://URL_after_CRMforTablets_processing*
3. HTTP Response location: *https://URL_that_the_response_came_from*

Users not getting customizations

Users will not get customizations made to Customer Engagement if there are draft records present. Users should be encouraged to save records as soon as they go online.

Data cached for offline viewing remains after the entity is no longer enabled for Dynamics 365 for tablets

In Dynamics 365 for tablets, record data is cached as the user visits the record so the user can access the data when going offline.

This cached data persists after the entity is no longer enabled for Dynamics 365 for tablets (**Settings > Customizations > Customize the System > [select an entity] > under Outlook & Mobile, deselect Dynamics 365 for tablets**).

To remove the cached data, the user must sign out of Dynamics 365 for tablets, or Dynamics 365 for tablets must be reconfigured or uninstalled.

Customization changes do not appear in Dynamics 365 for tablets

Cause 1: The customizations (metadata) from your Dynamics 365 for Customer Engagement organization are cached on your device. The app checks for updated metadata after 24 hours or any time you reopen the app. For customization changes to become available immediately, you must completely close and then reopen the app. If new metadata is found, you will be prompted to download it. For more information on how to completely close an app, refer to the help for your operating system or reference one of the articles provided:

- **Windows 8:** [How do I close an app?](#)
- **iPad:** [Force an app to close](#)
- **Android:** [How to force close Android apps](#)

Cause 2: You may be seeing a different form than the one you customized. If you have multiple forms for an entity, you will see

the first form in the form order that you have access to. This is different than the web application where you see the last form you used and have the ability to change between forms.

Private Browsing not supported in Safari

If you enable Private Browsing on your iPad in your Safari browser, you will see the following error message when you attempt to connect to your Customer Engagement organization: "Dynamics 365 for Customer Engagement has encountered an error." You will need to disable Private Browsing. Tap the address bar, and then tap **Private**.

Web app differences in mobile browsers

For differences you can expect to find in the web app when you're accessing it from a mobile device, see [Support for Dynamics 365 for phones](#) and [Dynamics 365 for tablets](#).

Clipboard data – available to admins and customizers

Dynamics 365 for Customer Engagement System Administrators or System Customizers can access other users' Clipboard data for users of Windows 8 and 8.1 devices.

Users can view queue items in another person's queue

A user viewing records in Dynamics 365 for tablets can view records in another user's queue.

Update the Dynamics 365 for Good app before updating to Dynamics CRM Online 2015 Update 1

Users must update to the latest version of the Dynamics 365 for Good application prior to updating to Dynamics CRM Online 2015 Update 1. On the [Apple App store](#), the version the users need is 1.1. On the [Good Dynamics Marketplace](#) or Good Control Console, the version needed is listed as 1.1.0.

Users who haven't updated their app prior to connecting to Dynamics CRM Online 2015 Update 1, will likely see the following error approximately 2 minutes after connecting to Dynamics CRM Online 2015 Update 1.

Error: We're sorry. Your server is not available or does not support this application.

To fix this error, the user must uninstall and reinstall the Dynamics 365 for Good app using the version listed previously.

App restart required after reconfiguring Dynamics 365 for Good

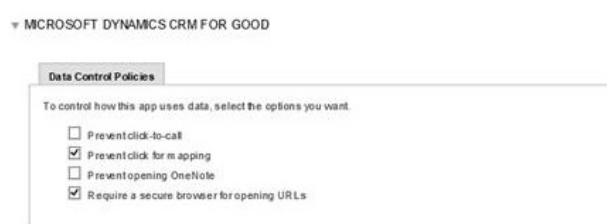
After you reconfigure Dynamics 365 for Good, the app can get stuck in a loop. You need to close and reopen the app.

1. On your iPad, press the **Home** button two times quickly. You'll see small previews of your recently used apps.
2. Swipe to find the Dynamics 365 for Good app.
3. Swipe up on the app's preview to close it.
4. Tap the Dynamics 365 for Good app icon to launch the app and configure for the new org.

Prevent click for mapping and Dynamics CRM Online 2015 Update 1

For users of version 1.0 (1.0.0) of the Dynamics 365 for Good app that have updated to Dynamics CRM Online 2015 Update 1, note that the **Prevent click for mapping** setting does not work.

To prevent click for mapping in version 1.0 (1.0.0), admins should enable the **Require a secure browser for opening URLs** setting in the Good Control server, as shown here.



The **Prevent click for mapping** setting works as expected in Dynamics 365 for Good app version 1.1 (1.1.0). We recommend

updating to the latest version of the Dynamics 365 for Good app rather than applying this workaround.

Issue still not resolved?

If the information provided previously doesn't resolve your issue, either [Post your issue in the Dynamics CRM Community](#) or [Contact Technical Support](#).

The following are some suggested details to provide:

- What are the specific symptoms you encounter? For example, if you encounter an error, what is the exact error message?
- Does the issue only occur for users with certain Dynamics 365 for Customer Engagement security roles?
- Does the issue only occur on certain devices but works correctly for the same user on another device?
- If you attempt to connect to a different Dynamics 365 for Customer Engagement organization that does not include your customizations, does the same issue occur? If the issue only occurs with your customizations, provide a copy of the customizations if possible.
- Does the issue still occur after uninstalling the app and reinstalling it?
- What type of device (ex. iPad 4th Generation, Microsoft Surface, etc...) are you using and what is the version of the operating system (ex. iOS 6.0, Windows 8, etc...)?

See also

[Set up Dynamics 365 for phones and tablets](#)

[Dynamics 365 for phones and tablets User's Guide](#)


About this content

12/10/2018 • 4 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

The topics in this folder apply to Dynamics 365 for Customer Engagement apps, version 8.x. Other topics apply to Dynamics 365 for Customer Engagement apps, version 9.x or both 9.x and 8.x. Review the **Applies to** at the top of each topic.

TIP

To determine your revision of Dynamics 365 for Customer Engagement, in the upper-right corner of your Customer Engagement screen, choose the **Settings** gear  > **About**.

Privacy notice

When you enable Dynamics 365 mobile offline, Dynamics 365 (online) data is downloaded to the SQL Azure database using the Azure cloud, based on the entities you enable for offline availability. When a user connects to the Azure Cloud service from a mobile app with the offline capability, data is downloaded from the SQL Azure database to a local database on the mobile device. Data transfer between the SQL Azure database on the Azure cloud and the Dynamics 365 mobile app with the offline capability is through a secure SSL connection. Ultimately, customer data is stored in SQL Azure database and on the mobile device.

An administrator determines whether or not an organization's users are permitted to go offline with Microsoft Dynamics 365 Mobile Offline Application by using security roles and Dynamics 365 Mobile profile customization. Dynamics 365 administrators can configure which entities are downloaded via Offline Sync by using the Sync Filters setting in the Setting –Mobile Offline dialog box.

Note that data stored in the user's device is controlled by the customer, not Microsoft. The Administrator has full control over the data that can be extracted at the user security role or entity levels. After the data is extracted, however, it will have left the security boundary provided by Dynamics 365 Online.

A list of the Azure components and services that are involved with Mobile offline functionality is provided below.

Note: For more information about additional Azure service offerings, see the [Microsoft Azure Trust Center](#).

Cloud Services (Web role)

Mobile Offline leverages two cloud services, one for provisioning and the other for data sync.

The provisioning service has a single web role that reads messages from the Service Bus (SB) queue for different events coming from Dynamics 365 such as provisioning or de-provisioning. Then it processes those messages by creating/deleting organization databases and submitting recurring work items (messages) on the data sync SB queue. During this process, it reads/writes configuration data either from the CSCFG file or from the Dynamics 365 SW API.

The data sync service has two web roles. One keeps the schema and data of the staging database in sync with a Dynamics 365 organization's metadata and data, while the other web role is for running the Sync server and processing client's sync requests. The first web role processes messages from the data sync SB Queue for different orgs and then contacts Dynamics 365 to get the metadata and data changes before committing them to the staging database. It also does the job on configuring Sync server with the organizations coming in and out of the system and their client models. The other web role runs the Sync server (unmanaged code) to host admin and sync

endpoints. The admin endpoint is used by the other web role to send configuration data. The sync endpoint is used by external clients (Dynamics 365 Mobile Application) to do data sync. Just like provisioning service, both these roles read/write configuration data either from the CSCFG file or from the Dynamics 365 SW API.

Queue

Mobile Offline uses Azure Queues for message exchange between Dynamics 365 and Azure. It is used to maintain work items that are processed by the cloud services. Each message stores information such as the org id, entity name for which to sync data, and connection string for the org's OData endpoint.

SQL Database

Mobile Offline uses the Azure SQL Storage to store:

- Data replicated from Dynamics 365 orgs and for serving client sync requests.
- Configuration data such as org database connection strings.

Storage

Mobile Offline uses Azure Blob Storage to store logs and traces generated by cloud service.

Active Directory Service

Mobile Offline uses the Azure Active Directory Service to authenticate with other services such as Dynamics 365 or SW API or Azure Management APIs.

Azure DNS

Mobile Offline uses Azure DNS to redirect client requests, based on org names, to the correct cloud service endpoints.

Azure virtual Network

An Azure virtual Network (VNet) is a representation of your own network in the cloud. The Dynamics 365 Product Team can control your Azure network settings and define DHCP address blocks, DNS settings, security policies, and routing.

Azure Load Balancer

The Azure Load Balancer delivers high availability and network performance to your applications. It is a Layer-4 (TCP, UDP) type load balancer that distributes incoming traffic among healthy service instances in cloud services or virtual machines defined in a load balancer set. We use it to load balance our end points in a deployment.

See also

[Microsoft Dynamics 365 for Customer Engagement apps Online releases](#)

Configure mobile offline synchronization

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You can provide an enhanced offline experience for mobile users if your organization is using Dynamics CRM Online 2016 Update 1 and meets one or both of the following licensing requirements:

- At least 5 Professional Customer Engagement licenses OR
- At least 1 Enterprise Customer Engagement license

NOTE

Keep the following in mind when enabling mobile offline synchronization:

- You need to make sure the licenses are assigned to a user before you can enable mobile offline synchronization. Customer Engagement won't recognize the licenses if they're not in use.
- Mobile offline synchronization isn't available for Trial, Preview or sandbox Customer Engagement organizations.
- Offline drafts mode (the existing offline experience) will continue to be available for all users if they aren't using the new offline capabilities.

This offline experience uses Azure services to periodically synchronize entities with the Dynamics 365 for Customer Engagement for phones and tablets apps so synchronized records are available when users' mobile devices are disconnected. To enable mobile offline synchronization in an eligible organization, you need to do the following:

NOTE

A user must have a security role that has Read permissions on the mobile offline profile to be able to use their mobile device in offline mode.

1. [Enable mobile offline synchronization](#)
2. [Enable entities for mobile offline synchronization](#)
3. [Create a mobile offline profile](#)
4. [Add users to a mobile offline profile](#)
5. [Publish a mobile offline profile](#)

Here are a few things to keep in mind about mobile offline synchronization:

- Mobile offline synchronization with mobile devices occurs periodically. A synchronization cycle could last for several minutes, depending on Azure network latency, the volume of data that's set for synchronization, and mobile network speed. Users can still use the mobile apps during synchronization.
- Changes to a user's security privileges are updated during the next synchronization cycle. Until that time, users can still continue accessing data according to their previous security privileges, but any changes they make will be validated during the synchronization to the Customer Engagement server. If they no longer have privileges to make changes for a record, they will receive an error and the record won't be created, updated, or deleted.

- Any changes to a user's privilege to view a record won't take effect on the mobile device until the next synchronization cycle.

NOTE

Once you've enabled mobile offline synchronization, metadata changes are pushed to the mobile apps when the changes are published, not just on app start-up. To keep mobile offline synchronization up-to-date, users should always accept the prompt to download metadata changes.

Enable mobile offline synchronization

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Enable mobile offline synchronization so users can stay productive wherever they are.

1. In the web app, go to **Settings > Mobile Offline**. If you don't see this option, your organization might not meet the requirements for enabling mobile offline synchronization.
2. Click **Mobile Offline Configuration**.
3. Click **Continue** to accept the terms of the disclaimer and allow data to be shared with an external system on Azure services.
4. Select **Enable** and click **Save**. This starts the provisioning process for mobile offline. When it completes, your mobile users will automatically experience the new mobile offline capabilities. Users can opt out by choosing **Settings > Disable Sync** in their mobile app.

WARNING

If your user count falls below 1 Enterprise or 5 Professional licenses, mobile offline synchronization will be disabled for your organization.

IMPORTANT

Recommendation for changing data centers or geo locations

If you decide to move your org to a different data center or geo location, you need to disable and then enable mobile offline synchronization for your org after the move is complete:

1. Go to **Settings > Mobile Offline**.
2. Click **Mobile Offline Configuration**.
3. Click **Continue**.
4. Select **Disable**, click **Save**, and then click **OK**. This starts the de-provisioning process. If this option isn't available, mobile offline synchronization was disabled during the move to a different data center or geo location, and you can continue to the next step. When the de-provisioning is complete, select **Enable**, and then click **Save**.

Enable entities for mobile offline synchronization

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You can enable any entity for mobile offline that is enabled for mobile. By default, no entities are enabled for mobile offline, so you need to follow these steps for each entity you want to make available for users when they're offline. You can find a list of entities available for mobile in [Entities and Dynamics 365 for phones and tablets](#).

The following entities are enabled for mobile by default:

- Account
- Appointment
- Attachment
- Competitor
- Competitor Address
- Contact
- Email
- Lead
- Note
- Opportunity
- Opportunity Product
- Product
- Task
- Case
- Queue
- Queue Item
- SLA KPI Instance
- Entitlement
- Team
- User

WARNING

Keep in mind that the amount of data you make available to users while they're offline can affect the data usage rates for devices on cellular networks. The amount of data depends on:

- The number of entities you enable for mobile offline
 - The number of days you specify since records were last modified
 - The filters you set while creating mobile offline profiles in [Create a mobile offline profile](#)

1. Go to **Settings > Customizations**.
2. Click **Customize the System**.
3. Expand **Entities** in the left pane.
4. Select the entity you want to enable for mobile offline (for example, **Account**).
5. Under **Outlook & Mobile**, select **Enable for mobile offline**.
6. Click **Organization data download filter** to filter the data and set the freshness of the data you want to make available offline. You can set up to three criteria when you define a filter. Select the field to filter by, select an operator, then set a value.

The entities that are enabled for mobile offline by default have **Modified On** set for **Last X Days = 10**, so the data modified or created in the last 10 days will be available for downloading to mobile devices.

7. Click **Save**.
8. When you're done enabling entities for mobile offline, click **Publish** so your changes take effect.

NOTE

Publishing customizations prompts the mobile apps to download changes when users next start their app, which can adversely affect their experience over slow connections.

Create a mobile offline profile

12/10/2018 • 3 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You need to create mobile offline profiles for users to configure filters that determine how much of an entity's data (and related entities' data) will be available to the user while offline.

1. Go to **Settings > Mobile Offline**.
2. Click **Mobile Offline Profiles**.
3. Click **New** to create a new mobile offline profile. If you already have one that you want to edit, select it from the list.
4. Enter a name and description for your mobile offline profile.
5. Click **Save** to create the mobile offline profile so you can continue editing it.
6. In the **Mobile Offline Profile Item Details** area, click **+** to create a new mobile offline profile item. You need to create a mobile offline profile item for each entity you want to make available for this mobile offline profile.
7. Enter a name and select an entity. Only entities that you enabled for mobile offline appear in this list.
8. Select a data download filter based on the ownership type for the entity:

User or Team

- **Download related data only.** Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.
- **All records.** Make all records for this entity available offline.
- **Other records.** Make only the specified records for this entity available offline.

If you select **Other records**, you can choose from the following:

- **Download my records.** Make only your records available offline.
- **Download my team's records.** Make your team's records available offline.
- **Download my business unit's records.** Make your business unit's records available offline.

Organization

- **Download related data only.** Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.
- **All records.** Make all records for this entity available offline.

Business

- **Download related data only.** Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.
- **All records.** Make all records for this entity available offline.
- **Other records.** Make only the specified records for this entity available offline.

If you select **Other records**, you can choose from the following:

- **Download my business unit's records.** Make your business unit's records available offline.

None

- **Download related data only.** Make related data for this entity available offline. If you don't set any relationships, no records for this entity will be available.

9. Click **Save** to create the mobile offline profile item so you can continue editing it.

10. In the **Mobile Offline Profile Item Association Details** area, click **+** to create a new mobile offline profile item association. You need to create a mobile offline profile item association for each related record you want to make available offline. In addition, you need to include any related entities in this mobile offline profile.

For example, if you create a mobile offline profile item association from the Lead entity, you need to add the Lead entity to this mobile offline profile.

11. Enter a name for the mobile offline profile item association, select a relationship, and then click **Save & Close**.

12. When you're done adding mobile offline profile item associations to the mobile offline profile item, click **Save & Close** at the top of the **Mobile Offline Profile Item** screen.

13. When you're done adding mobile offline profile item details to the mobile offline profile item, click the **Save** button at the bottom right corner of the **Mobile Offline Profile** window.

Enhanced sync filters

Admins can choose what information to sync to user's devices. This can help minimize impact to user's device's memory.

NOTE

Make sure that you're using the latest version of the mobile app For Advanced Filters to work offline.

Admins can define a custom filter based on the following rules. You can create filters up to three levels.

equal
not equal
gt – greater than
ge – greater than or equal to
le – less than or equal to
lt – less than
like
not-like

in
not-in
null
not-null
eq-userid
ne-userid
eq-userteams
eq-useroruserteams
eq-useroruserhierarchy
eq-useroruserhierarchyandteams
eq-businessid
ne-businessid
eq-userlanguage
begins-with
not-begin-with
ends-with
not-end-with

For admins: Enhanced sync status for provisioning

About enhanced sync status:

- Admins can see the status of provisioning and de-provisioning.
- The mobile offline configuration page is auto-refreshed at regular intervals to show updated status messages during provisioning and de-provisioning.
- You can stop provisioning at any stage during provisioning.
- You can de-provision your organization only when the provisioning is complete.
- De-provisioning of an organization can't be stopped once initiated.
- You can initiate provisioning again only when de-provisioning is complete.
- In case of a provisioning or de-provisioning failure, consider retrying your provisioning before contacting support.
- All the provisioning and de-provisioning messages will be shown on the mobile offline configuration page along with the date and timestamp of when the status was last checked.

Add users to a mobile offline profile

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Now that you've created a mobile offline profile, it's time to add users to it.

NOTE

You can add a user to only one mobile offline profile.

1. If it's not already open, open the mobile offline profile you want to add users to.
2. In the **Users** area, click + to add a new user.
3. Click the lookup field that appears and select a user to add to this mobile offline profile.
4. When you're done adding users, click the **Save** button on the bottom right corner of the **Mobile Offline Profile** window.

Publish a mobile offline profile

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

To make the mobile offline profile available to users so they can get the mobile offline experience you've defined for them, you need to publish it.

1. If it's not already open, open the mobile offline profile you want to publish.
2. When you're done adding users and making any other changes to the mobile offline profile, click **Publish** so the data you specified can start syncing with your users' mobile devices.

TIP

Solution export and import

When exporting a solution that includes mobile offline synchronization, always check Include entity metadata for each entity you export.


After importing the solution into the target organization, publish all mobile offline profiles.

Set up Dynamics 365 for phones and Dynamics 365 for tablets

1/15/2019 • 26 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Your users can access their Customer Engagement data while they're out in the field by using either of the following apps:

- **Dynamics 365 for phones:** With Dynamics 365 for phones, you can design your information architecture once and the customizations will automatically flow to all form factors. Much is shared with Dynamics 365 for tablets.
-  [Video: Customize the Dynamics 365 for Customer Engagement apps mobile app \(1:51\)](#)
- **Dynamics 365 for tablets:** With the same basic features as Dynamics 365 for phones, tablet users will appreciate the Customer Engagement experience optimized for a larger screen.

Get started with Dynamics 365 for phones and Dynamics 365 for tablets

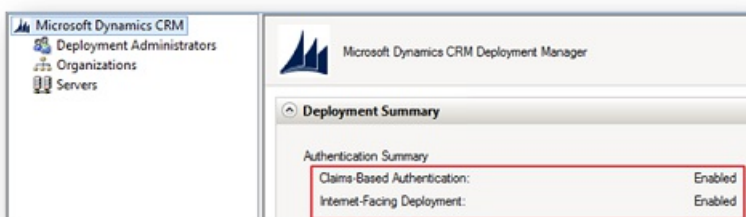
Requirements

For hardware and software requirements for Dynamics 365 for phones and Dynamics 365 for tablets, see [Support for Dynamics 365 for phones and Dynamics 365 for tablets](#).

Microsoft Dynamics 365 for Customer Engagement apps organizations using Dynamics 365 for tablets require the Microsoft Dynamics CRM Online Fall '13 release or later.

IMPORTANT

For Dynamics 365 for phones and Dynamics 365 for tablets, Microsoft Dynamics 365 for Customer Engagement apps (on-premises) deployments require Internet-facing deployment (IFD) for users to access their data. If you have your Microsoft Dynamics 365 for Customer Engagement apps website available over the internet but it is not using the Microsoft Dynamics 365 for Customer Engagement apps IFD configuration, it is not supported. To verify that your on-premises deployment is configured for IFD, open Microsoft Dynamics 365 for Customer Engagement apps Deployment Manager on your Microsoft Dynamics 365 for Customer Engagement apps Server. The Authentication Summary section should show that both Claims-Based Authentication and Internet-facing deployment (IFD) are enabled. More information: [Configure IFD for Microsoft Dynamics 365 for Customer Engagement apps](#).



Required privileges

Dynamics 365 for Customer Engagement uses a security privilege, **Dynamics 365 for Customer Engagement apps for mobile**, to provide access to Dynamics 365 for phones and Dynamics 365 for tablets. The privilege is

pre-configured for Sales roles, but not other security roles, so you may want to add to other roles for your teams.

Follow these steps to check and assign the security privilege for a security role:

1. Go to **Settings > Security**.
2. Click **Security Roles**.
3. Choose a security role > **Business Management** tab.
4. In the **Privacy Related Privileges** section, verify that **Dynamics 365 for Customer Engagement apps for mobile** is set to **Organization**. If not, click **Dynamics 365 for Customer Engagement apps for mobile**.
5. Click **Save and Close** to save the changes to the security role.
6. Send an email to tablet-enabled users to let them know they can download the mobile app from the app store. Include the organization URL and sign-in information in the email.

This applies to new installations of Dynamics 365 for Customer Engagement, Dynamics CRM 2013 or later. You can add or remove this privilege from custom or default security roles to meet your business needs. Users who do not have this privilege will see the following error:

You haven't been authorized to use this app. Check with your system administrator to update your settings.

NOTE

Dynamics 365 for Customer Engagement includes the ability to audit user access. Audit events are logged if a user accesses your Dynamics 365 for Customer Engagement apps organization through Dynamics 365 for tablets. However, there is not a new event type that indicates the access was through Dynamics 365 for tablets. The audit login events would appear as **User Access via Web Services**.

In addition, particularly if you have created a custom security role, validate that these entities have **Read** permission.

1. Go to **Settings > Security**.
2. Click **Security Roles**.
3. Choose a security role > **Customization** tab. Verify that the **Read** permission is set for the following entities:
 - Custom Control
 - Custom Control Default Config
 - Custom Control Resource
 - System Application Metadata
 - System Form
 - User Application Metadata
 - View
4. Choose a security role > **Business Management** tab. Verify that the **Read** permission is set for the following entity:
 - User Settings

5. Click **Save and Close** to save the changes to the security role.

What users need to do

Install Dynamics 365 for phones and Dynamics 365 for tablets

[Install Dynamics 365 for phones and tablets](#)

TIP

Be sure to provide users the URL and credentials they need to sign in.

What admins need to do

Security privileges

Dynamics 365 for Customer Engagement uses a security privilege, **Dynamics 365 for Customer Engagement apps for mobile**, to provide access to Dynamics 365 for phones and Dynamics 365 for tablets. This privilege is pre-configured for Sales roles, but not other security roles, so you may want to add to other roles for your teams.

Enable dashboards for Dynamics 365 for phones and Dynamics 365 for tablet users

Multiple dashboards are available for Dynamics 365 for phones and Dynamics 365 for tablets users. After you set up standard or custom dashboards for mobile access, users can easily modify which dashboards appear and how they appear on their phones or tablets.

1. Go to **Settings > Customizations**.
2. Click **Customize the System**.
3. Under Components, click **Dashboards**.
4. Double-click or press and hold the dashboard you want to enable for phone or tablet access.
5. Click **Properties > Enable for mobile > OK**.
6. Click **Save**.

Show your users how to set and view the enabled dashboards on their phones or tablets. More information: [Basic navigation in Dynamics 365 for phones and tablets](#)

You can assign security roles to a dashboard so the dashboard appears only to users with certain security roles. For example, to set who has access to the Sales Dashboard, click **Settings > Customizations > Customize the System > Components > Dashboards**, and then select the **Sales Dashboard**. Then, click **Enable Security Roles**.

Get your on-premises deployment ready for Dynamics 365 for Customer Engagement apps for Windows 8.1 tablets

IMPORTANT

The following content covering registry changes applies to Dynamics 365 for tablets and **not** Dynamics 365 for phones.

The new Dynamics 365 for tablets Windows 10 app does not require registry changes.

To deploy the Dynamics 365 for Customer Engagement apps for Windows 8.1 app, review the following scenarios.

	ADMIN ACTION
You're using Microsoft Dynamics CRM Online Spring '14 or later.	None. You can skip the steps in this section. They apply only to on-premises Microsoft Dynamics 365 for Customer Engagement apps.
You're using an on-premises version of Dynamics 365 for Customer Engagement apps that is earlier than Microsoft Dynamics CRM 2013 Service Pack 1 (SP1).	Update to Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) or later, and then follow the steps in this section.
Your organization is running Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) or later.	Follow the steps in this section.

NOTE

If you need to delay updating to Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) or later, your users can use the Windows 8 app.

Before your users install the Windows 8.1 app, complete these steps:

1. Make sure your Dynamics 365 for Customer Engagement apps server is updated to Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) or later.
2. Update a registry setting on your mobile devices.

NOTE

If users have installed the Dynamics 365 for Customer Engagement apps for Windows 8.1 app prior to you making these registry changes, they will need to restart the tablet app after the changes are complete.

Update the registry on managed mobile devices

If your mobile devices are managed under the control of group policy, the following steps describe what you need to do.

Caution

This task contains steps that tell you how to modify the registry. However, because serious problems may occur if you modify the registry incorrectly, it's important that you follow these steps carefully. For added protection, back up the registry before you modify it. Then, you can restore the registry if a problem occurs. For more information about how to back up and restore the registry, open the following link to view the article in the Microsoft Knowledge Base: [How to back up and restore the registry in Windows](#).

1. If you plan on using group policy to do a domain wide deployment of the registry change and your server is not running Windows Server 2012 R2 or later, download and install the [Windows Server Administrative Templates](#).
2. Open the Group Policy Management Editor.
3. Select an existing policy or create a new policy.
4. Go to **Computer Configuration > Policies > Administrative Templates > Windows Components > App runtime** and set **Turn on dynamic Content URI Rules for Windows store apps** to **Enabled**.
5. Click **Show**, and then add the URL for your organization. For example, <https://orgname.contoso.com>.
6. Close the group policy editor and save your changes.

More information: [How to update links to external web pages for an enterprise environment](#) and [Group](#)

Update the registry on unmanaged mobile devices using a script

If your mobile devices are unmanaged, see the following sample PowerShell script that shows how to change the registry on each Windows 8.1 or later device.

```
# *****
#
# Copyright (c) Microsoft. All rights reserved.
# This code is licensed under the Microsoft Limited Public License.
# THIS CODE IS PROVIDED *AS IS* WITHOUT WARRANTY OF
# ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING ANY
# IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR
# PURPOSE, MERCHANTABILITY, OR NON-INFRINGEMENT.
#
# *****
param([string]$admin)

#Force PowerShell to relaunch in Admin mode
if($admin -ne 'LaunchingAsAdminNow')
{
    $Args = '-ExecutionPolicy Unrestricted -file "' + ((Get-Variable MyInvocation).Value.MyCommand.Path) + '"
LaunchingAsAdminNow'
    $AdminProcess = Start-Process "PsHome\PowerShell.exe" -Verb RunAs -ArgumentList $Args -PassThru
}
else
{
    # Create Packages key if it does not exist
    $packages=Get-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages -ErrorAction
SilentlyContinue
    if($packages -eq $null)
    { New-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies -Name Packages}

    # Create Applications key if it does not exist
    $apps=Get-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications -
ErrorAction SilentlyContinue
    if($apps -eq $null)
    { New-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages -Name Applications}

    # Add or overwrite EnableDynamicContentUriRules value to 1
    New-ItemProperty -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications -
Name EnableDynamicContentUriRules -PropertyType DWord -Value 1 -force

    # Create ContentUriRules key if it does not exist
    $rules=Get-Item -Path
HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications\ContentUriRules -ErrorAction
SilentlyContinue
    if($rules -eq $null)
    {New-Item -Path HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications -Name
ContentUriRules}

    # Prompt user for the domain uri
    $domainname = Read-Host 'Please provide the domain uri that you want to add to the allow list(such as
https://*.contoso.com:444) '

    # Add uri to the allow list under ContentUriRules
    $urls=Get-Item -Path
HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications\ContentUriRules -ErrorAction
SilentlyContinue
    New-ItemProperty -Path
HKLM:\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\Packages\Applications\ContentUriRules -Name
($urls.ValueCount+1) -PropertyType String -Value $domainname -force
}
```

Update the registry on unmanaged mobile devices using the Registry Editor

If your mobile devices are unmanaged, you can also change the registry on each Windows 8.1 or later device like this:

1. Start Registry Editor.
2. Before making changes to your registry, make a backup. Click **File** > **Export**, and then enter your settings.
3. Locate the following registry subkey:
HKEY_LOCAL_MACHINE\Software\Microsoft\Windows\CurrentVersion\policies
4. Right-click or tap **policies**, point to **New**, and then click **Key**.
5. Type **Packages**, and then press **ENTER**.
6. Right-click or tap **Packages**, point to **New**, and then click **Key**.
7. Type **Applications**, and then save the text.
8. Right-click or tap **Applications**, point to **New**, and then click **DWORD (32-bit) Value**.
9. Type `EnableDynamicContentUriRules` and then save the text.
10. Right-click or tap **EnableDynamicContentUriRules**, and then click **Modify**.
11. Type **1** in the **Value Data** box, and then click **OK**.
12. Right-click or tap **Applications**, point to **New**, and then click **Key**.
13. Type **ContentUriRules**, and then save the text.
14. Right-click or tap **ContentUriRules**, point to **New**, and then click **String Value**.
15. Type **1**, and then save the text.
16. Right-click or tap **1**, and then click **Modify**.
17. Type your Customer Engagement organization's URL in the **Value Data** box (for example, <https://contoso.com>), and then click **OK**.
18. Exit Registry Editor.

Now you can point your users to the Windows 8.1 app, so they can get the added functionality of the offline experience. More information: [Install the Dynamics 365 for tablets app](#)

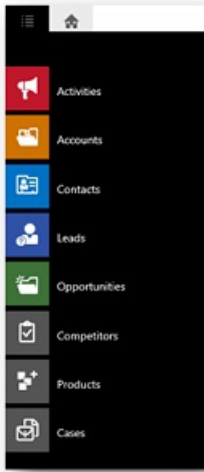
Configure Dynamics 365 for phones and Dynamics 365 for tablets

Navigation bar

If an entity is enabled for **Dynamics 365 for Customer Engagement apps for mobile** and appears in the nav bar (sitemap) for the web application, it will also appear on the nav bar in Dynamics 365 for phones and Dynamics 365 for tablets.

The Dynamics 365 for phones and Dynamics 365 for tablets apps show the entities as a flat list in the same order as the sitemap in the web application. They ignore any groupings within web application areas. You can add an entity to multiple groups on the web application, but Dynamics 365 for phones and Dynamics 365 for tablets display a flattened list and do not show any repeats. Dynamics 365 for phones and Dynamics 365 for tablets apply your Dynamics 365 for Customer Engagement security role, so you will not see an entity unless you have at least read access to that entity.

Custom entities use a fixed custom entity symbol.



Simple lists

The lists of records that appear on the Sales Dashboard and within a form appear as simple lists. These lists have a different appearance than the typical view of records. There are a few frequently used actions you can perform on a simple list.

NOTE

Simple lists are not available in Dynamics 365 for phones. Instead use the command bar ... and click **Select View** to change your view.

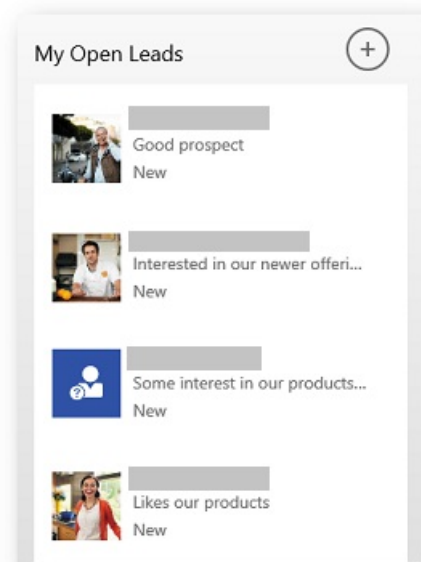
- Tap the list header to see the full list for the current view.
- Tap a list item to open the form for that item.
- Tap and hold an item to display the command bar.
- Tap the **New Item** button + to the right of the view name to create a new record of that type.

Some more things to note:

- You'll see the **New Item** button + to the right of the view name for any entity type that is read/write enabled for Dynamics 365 for tablets.
- Simple lists retrieve ten records at a time regardless of the **Records Per Page** setting in your **Personal Options** area of the web application. As you scroll to the bottom of the list, Dynamics 365 for tablets displays additional records.

Fields Displayed

A typical view of records displays all columns in the view definition. A simple list displays the first few columns from the selected view. Simple lists are also capable of displaying images for each record if the entity is enabled to display images.



The number of fields you'll see in the list is different depending on whether or not the entity is enabled for images. If it is, the image is the first thing to appear. Next to the image the primary field for the entity is displayed first and wraps up to two lines. The primary field is followed by the first two columns in the view that are not the primary field. Those fields will each appear on one line.

If the entity is not enabled for images, the primary field for the entity is displayed first. The primary field is followed by the first three columns in the view that are not the primary field.

There are a few special list types: Activity, Stakeholders, and Sales Team. These are discussed in the next sections.

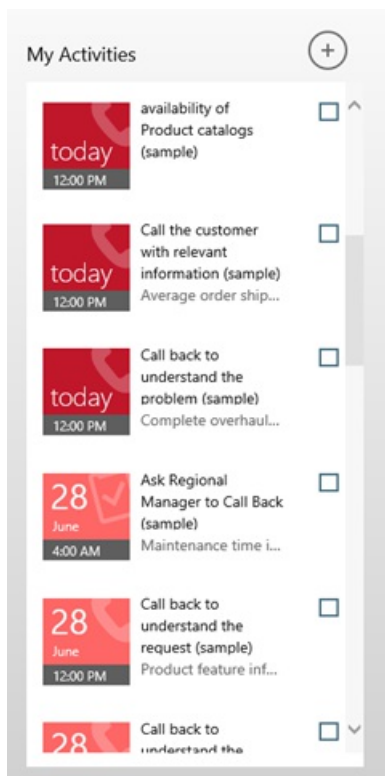
Activity Lists

The simple list for activities includes some special functionality that isn't available on other lists. Each standard activity type (such as Phone call and Task) includes a symbol to differentiate it from the other activity types. Next to the symbol, the primary field for the activity is displayed and will wrap up to three lines. The next field to display is the first field from the view (excluding the primary field), **Due Date**, and **Activity Type**. Activities that can be marked as complete have a check box next to them. Tap the check box to mark the activity as complete.

The activities list shows activities that are due today and past due activities in a darker color. Activities that are not due today or past due appear in a lighter color. Activities with a due date include the date and time of when they are due.

IMPORTANT

Dynamics 365 for Customer Engagement uses a composite Activity entity to store and retrieve data common between different activity types (like Task, Appointment, or Phone Call). The due date for activities is stored in the Actual End field for the composite Activity entity. Appointment activities have a Start Date and End Date. Because the due date for the activities list is retrieved from the Actual End field, the time that an appointment ends is displayed in the Activities list. This means an appointment that starts at 1pm and ends at 2pm will show a time of 2pm on the tile for the appointment in the activities simple list.

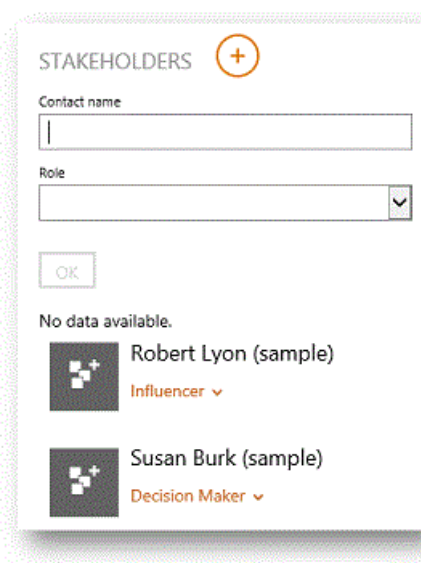


Some more things to note:

- The Description field for emails will not appear in lists.
- For Activities, the **New Item** button + opens a flyout so you can select the type of activity to create. This flyout contains a list of all the read/write enabled activities.

Stakeholders and Sales Team Lists

The Stakeholders and Sales Team lists that appear in an Opportunity display the primary field and role. These two entity lists have inline create and editing. When you tap the **New Item** button + on these lists, the existing list items move down, and a lookup and a drop-down list appear. Now you can select (or create) an entity to add to the list through the lookup, and assign a role through the drop-down list.



Editing is an inline experience as well. If you tap the down arrow next to the role name, the drop-down list appears in edit mode and you can change roles.

Select View

To change the view used to display a list of records, tap and hold the name of the list. The command bar

appears, which includes the **Select View** button. Tap the **Select View** button to select a different view.

Personal views are listed before system views. You can't create new views within Dynamics 365 for Customer Engagement.

Charts

All the charts you can create in the Chart Designer, such as Bar, Line, Pie, and Funnel charts, are viewable in Dynamics 365 for phones and Dynamics 365 for tablets.

Some more things to note:

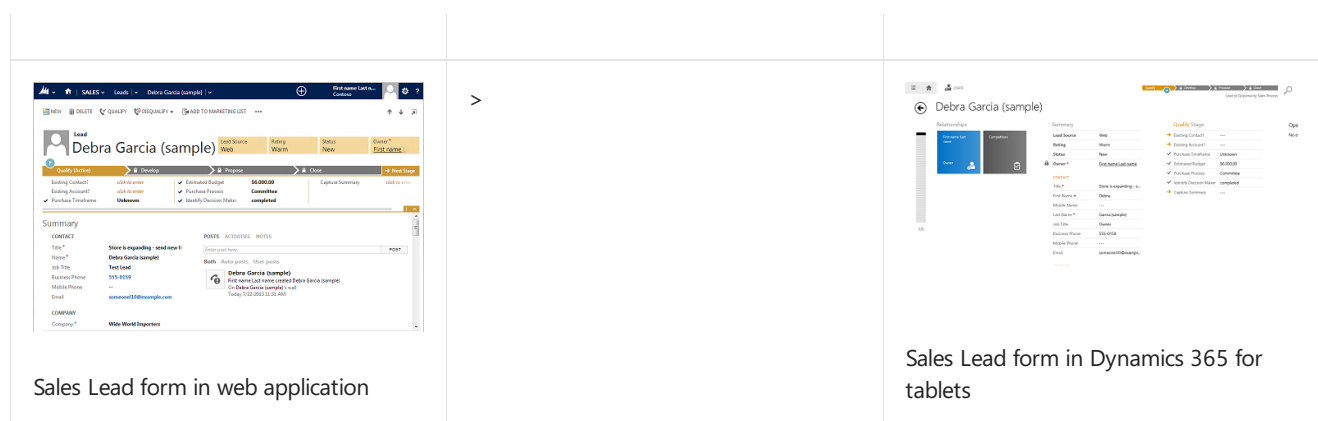
- Open a chart from the Sales Dashboard to get a page with a chart and the records used to generate the chart.
- Choose the chart sections to see the records filtered for that part of the chart.
- Charts are not available offline with Dynamics 365 for phones and Dynamics 365 for tablets.
- You can add charts to dashboards and chart pages only.

Forms

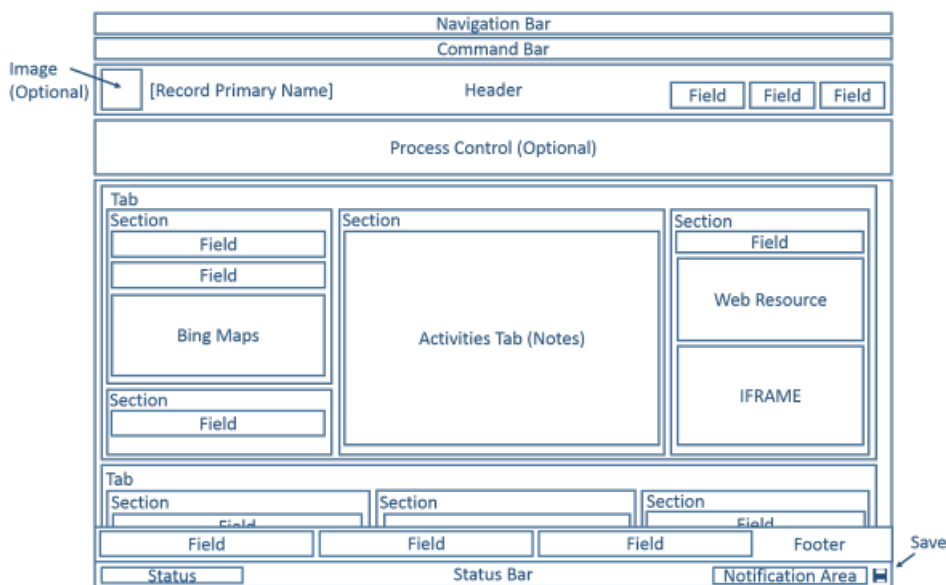
Forms in Dynamics 365 for tablets are based on the development principle of “Design once and deploy across clients.” Entity behavior and business processes in Dynamics 365 for tablets forms function similarly to forms in the web application, but with a flow tailored for a tablet. In Microsoft Dynamics 365 for Customer Engagement apps online, you can preview how forms look on tablets and phones when you customize them in the web app.

NOTE

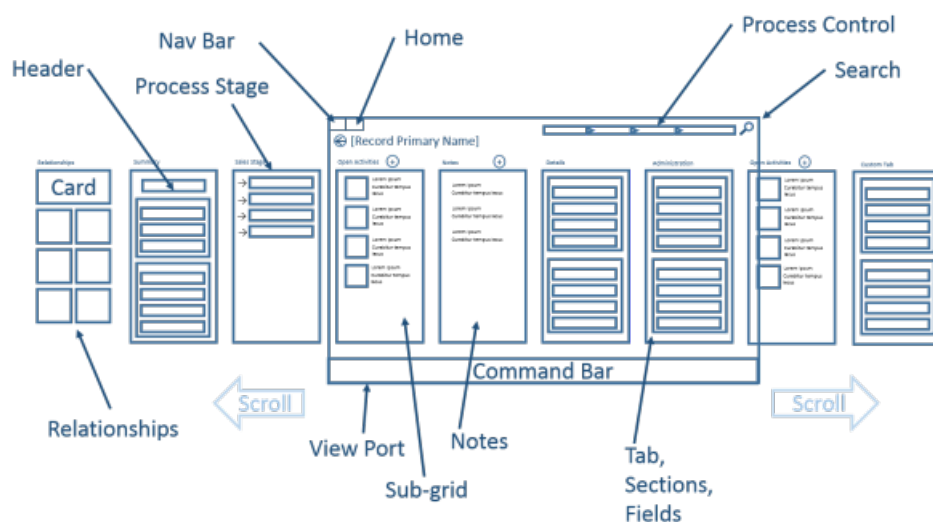
Forms work a bit differently for Dynamics 365 for phones. See the section below [Things to know about Dynamics 365 for phones](#).



This diagram shows common parts of the updated entity forms in the web application.



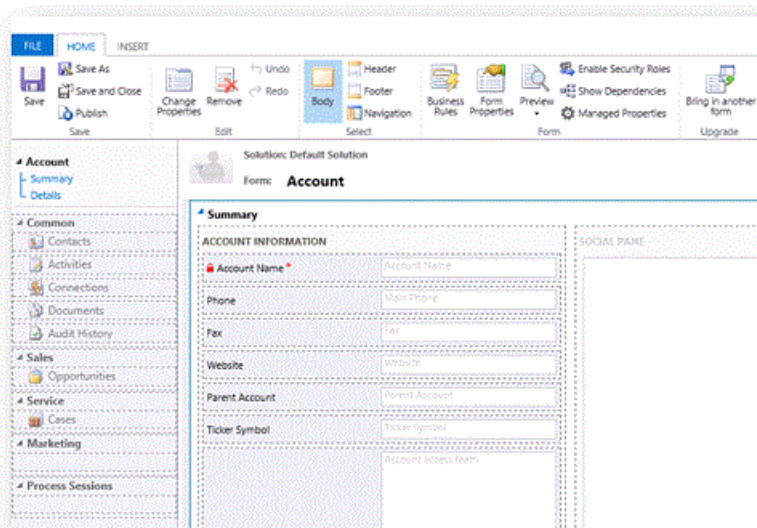
Dynamics 365 for tablets takes many of the Main form elements and presents them in a way that is optimized for tablets, as shown in the following diagram.



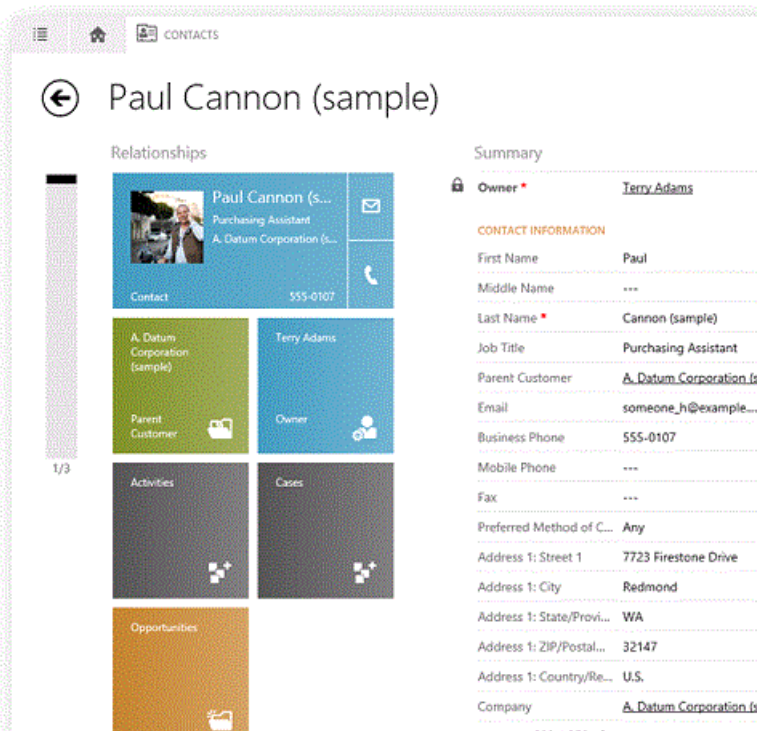
Relationships

The Relationships area of the form displays entity relationships that are configured in the Navigation area of a form. If an entity relationship is configured to appear in the Navigation area within the form customization, and the entity is enabled for Dynamics 365 for tablets, the entity relationship will appear in the Relationships section. The Connections relationship tile is not displayed in Dynamics 365 for tablets.

The relationships section also has a tile that represents the owner of the record, which is a Lookup field. In addition to the Owner tile, there are some other examples of hardcoded tiles that represent Lookup fields. For example, the Contact form has a tile for the parent account. You cannot choose additional Lookup fields as tiles in this section.



Form customization that shows navigation items on the left side of the screen



Relationships section within a form

Some more things to note:

- Forms in Dynamics 365 for tablets are limited to 5 tabs (or 75 fields and 10 lists). This limit includes hidden fields.
- Activity Feeds and Yammer are not supported in Dynamics 365 for tablets.

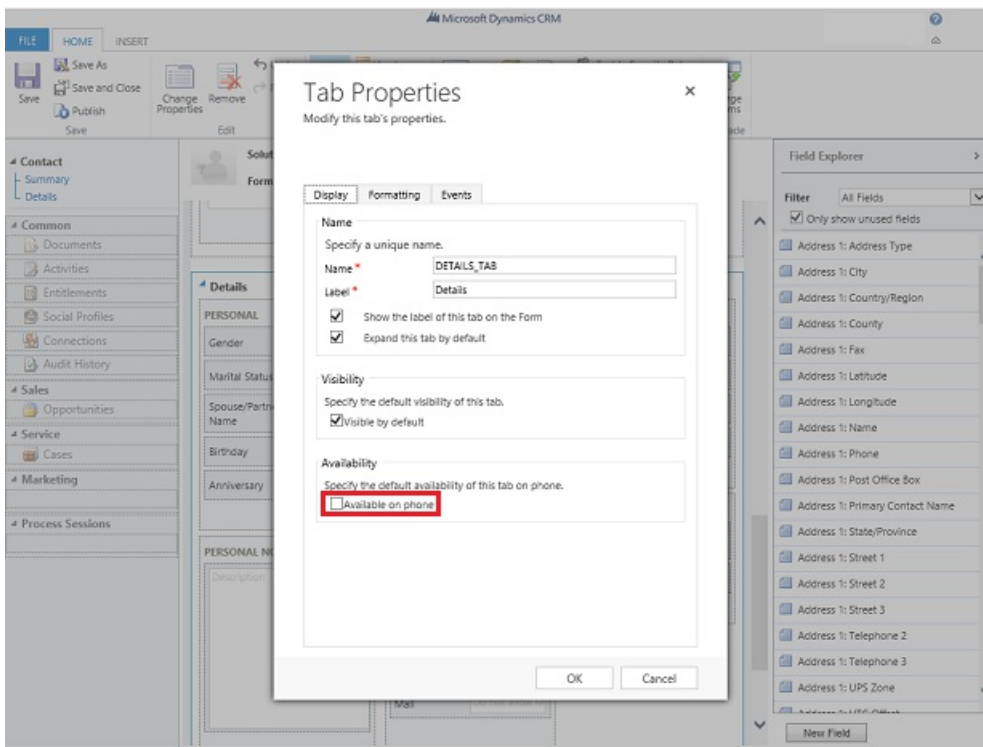
Things to know about Dynamics 365 for phones

Forms

Forms in Dynamics 365 for phones use the Main form type. Entity behavior and business processes in Dynamics 365 for phones forms function similarly to forms in the web application, but with a flow tailored for a phone.

To further simplify forms, you can hide components from appearing in the phone app. You can hide tabs, sections,

subgrids, fields, and charts. For example, to hide the Details tab in the Contact form, click **Settings** > **Customizations** > **Customize the System** > **Components** > expand **Entities** > expand the **Contact** entity > **Forms**. Select the **Contact** form, then scroll down and click **Details**. Click **Change Properties** and clear the **Available on phone** check box to hide the Detail tab from appearing on the Contact form for phone users.



Other differences with Dynamics 365 for tablets

There are a few differences between Dynamics 365 for phones and Dynamics 365 for tablets:

- Simple lists are not available in Dynamics 365 for phones. Instead use the command bar ... and click **Select View** to change your view.
- Duplicate detection is not available.
- The **Open in browser** feature is not available.

Supported languages for Dynamics 365 for phones and Dynamics 365 for tablets

Dynamics 365 for phones and Dynamics 365 for tablets support the following languages:

- Basque (Basque) - 1069
- Bulgarian (Bulgaria) - 1026
- Catalan (Catalan) - 1027
- Chinese (Hong Kong S.A.R.) - 3076
- Chinese (People's Republic of China) - 2052
- Chinese (Simplified) - 2052
- Chinese (Taiwan) - 1028
- Chinese (Traditional) - 1028
- Croatian (Croatia) - 1050

- Czech (Czech Republic) - 1029
- Danish - 1030
- Dutch - 1043
- English - 1033
- Estonian - 1061
- Finnish - 1035
- French - 1036
- Galician
- German - 1031
- Greek - 30
- Hindi (India) - 91
- Hungarian - 36
- Indonesian - 62
- Italian - 1040
- Japanese - 1041
- Kazakh - 705
- Korean - 82
- Latvian - 371
- Lithuanian - 370
- Norwegian - 47
- Polish - 48
- Portuguese (Brazil) - 55
- Portuguese (Portugal) - 2070
- Romanian - 40
- Russian - 7
- Serbian
- Slovak - 421
- Slovenian - 386
- Spanish - 3082
- Swedish - 46
- Thai - 66
- Turkish - 90
- Ukrainian - 380

When the application first loads after installation, it will determine the device language and load the user interface in that language. If the device language is not one of the supported languages, the application will load in English. When the application has been configured in a Dynamics 365 for Customer Engagement organization, the application will load in the language specified in the user’s personal options. If the user language is not one of the supported languages, the application will fall back to the base language of the Dynamics 365 for Customer Engagement apps organization, if it is in the supported language list. If the organization’s base language isn’t supported, English will be the final fallback if it is enabled on the server.

Entities and Dynamics 365 for phones and Dynamics 365 for tablets

You can enable a limited set of entities for Dynamics 365 for phones and Dynamics 365 for tablets. To see if an entity is enabled or to enable an entity, click **Settings > Customizations > Customize the System > Entities**. Select an entity and review the **Outlook & Mobile** settings.

Some more things to note:

- All custom entities can be enabled for Dynamics 365 for phones and Dynamics 365 for tablets.
- You can use the Lookup for entities that are not enabled for Dynamics 365 for phones and Dynamics 365 for tablets from a record that is enabled and see the data. However, you won’t be able to edit the entity.

Entities that are visible and read/write in Dynamics 365 for phones and Dynamics 365 for tablets

ENTITY NAME	VISIBILITY PROPERTY	READ-ONLY PROPERTY
Account	Modifiable	Modifiable
Activity	Not modifiable	Not modifiable
Appointment	Modifiable	Modifiable
Case	Modifiable	Modifiable
Competitor	Modifiable	Modifiable
Connection	Not modifiable	Modifiable
Contact	Modifiable	Modifiable
Invoice	Modifiable	Modifiable
Lead	Modifiable	Modifiable
Note	Not modifiable	Not modifiable
Opportunity	Modifiable	Modifiable
Order	Modifiable	Modifiable
Phone Call	Modifiable	Modifiable
Quote	Modifiable	Modifiable
Social Activity	Modifiable	Modifiable

ENTITY NAME	VISIBILITY PROPERTY	READ-ONLY PROPERTY
Social Profile	Modifiable	Modifiable
Task	Modifiable	Modifiable

Entities that are visible and read-only in Dynamics 365 for phones and Dynamics 365 for tablets

ENTITY NAME	VISIBILITY PROPERTY	READ-ONLY PROPERTY
Attachment	Not modifiable	Not modifiable
Email	Modifiable	Not modifiable
Entitlement	Not modifiable	Not modifiable
Knowledge Article	Modifiable	Not modifiable
Price List	Not modifiable	Not modifiable
Product	Modifiable	Not modifiable
Queue	Modifiable	Not modifiable
Sharepoint Document	Not modifiable	Not modifiable
SLA KPI Instance	Not modifiable	Modifiable
Team	Not modifiable	Not modifiable
User	Not modifiable	Not modifiable
Web Resource	Not modifiable	Not modifiable

Authentication and Dynamics 365 for phones and Dynamics 365 for tablets

Dynamics 365 for phones and Dynamics 365 for tablets authenticate users with browser-based authentication, which means no credentials are stored on the phone.

Microsoft Dynamics 365 for Customer Engagement apps

Dynamics 365 for phones and Dynamics 365 for tablets users transitioned to Microsoft Dynamics 365 for Customer Engagement apps on Microsoft Online Services environment will automatically renew their sign-in for **up to 30** days.

Microsoft Dynamics CRM 2015 or later (on-premises versions)

Dynamics 365 for tablets connections to Microsoft Dynamics CRM 2015 or later require an [Internet-facing deployment](#).

NOTE

Microsoft Dynamics CRM 2013 or later is required for Dynamics 365 for tablets users to connect to their Microsoft Dynamics 365 for Customer Engagement apps organization. Organizations that are using earlier versions of on-premises editions of Microsoft Dynamics 365 for Customer Engagement apps will need to upgrade.

Considerations and best practices for securing Dynamics 365 for Customer Engagement apps data on Dynamics 365 for phones and Dynamics 365 for tablets

Consider the following when planning security for Dynamics 365 for tablets:

- **Data transmission.** Dynamics 365 for tablets requires an Internet-facing deployment (IFD), so when your organization's mobile devices synchronize Customer Engagement data with your online Customer Engagement, the data is encrypted with Transport Layer Security (TLS) or Secure Sockets Layer (SSL).
- **Cached data.** Dynamics 365 for phones and Dynamics 365 for tablets only cache records and lists that you've recently accessed in the app. To clear cached data, users can either sign out or reconfigure.
- **Encrypting cached data.** Cached data is not encrypted. You can use [BitLocker](#) to encrypt the entire hard drive on a Windows 8 or later device. For Apple and Android devices, consider [Windows Intune](#) or a product from another company to encrypt the hard drive on the mobile device.

Other features

Save

Records are saved in Dynamics 365 for tablets based on how you configured autosave in your organization settings. To view your save settings, click **Settings** > **Administration** > **System Settings** > **General** tab. View the settings under **Select the default save option for forms**.

If autosave is:

- Enabled for the organization, changes to forms are saved when users leave forms.
- Disabled for the organization, users must use the command bar and click **Save** to save form changes.

Images

Images, such as contact photos, are not stored in the browser cache. Images may not be displayed when users work offline with Dynamics 365 for tablets.

Privacy notice

The Dynamics 365 for Customer Engagement for tablets and phones, and Project Finder for Project Finder for Dynamics 365 (the "App") enables users to access their Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement instance from their tablet and phone device. In order to provide this service, the App processes and stores information, such as user's credentials and the data the user processes in Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App is provided for use only by end users of Microsoft customers who are authorized users of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App processes user's information on behalf of the applicable Microsoft customer, and Microsoft may disclose information processed by the App at the direction of the organization that provides users access to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. Microsoft does not use information users process via the App for any other purpose.

If users use the App to connect to Microsoft Dynamics CRM (online) or Dynamics 365 for Customer Engagement,

by installing the App, users consent to transmission of their organization's assigned ID and assigned end user ID, and device ID to Microsoft for purposes of enabling connections across multiple devices, or improving Microsoft Dynamics CRM (online), Dynamics 365 for Customer Engagement or the App.

Location data. If users request and enable location-based services or features in the App, the App may collect and use precise data about their location. Precise location data can be Global Position System (GPS) data, as well as data identifying nearby cell towers and Wi-Fi hotspots. The App may send location data to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App may send the location data to Bing Maps and other third party mapping services, such as Google Maps and Apple Maps, a user designated in the user's phone to process the user's location data within the App. Users may disable location-based services or features or disable the App's access to user's location by turning off the location service or turning off the App's access to the location service. Users' use of Bing Maps is governed by the Bing Maps End User Terms of Use available at <https://go.microsoft.com/?linkid=9710837> and the Bing Maps Privacy Statement available at <https://go.microsoft.com/fwlink/?LinkID=248686>. Users' use of third party mapping services, and any information users provide to them, is governed by their service specific end user terms and privacy statements. Users should carefully review these other end user terms and privacy statements.

The App may include links to other Microsoft services and third party services whose privacy and security practices may differ from those of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. IF USERS SUBMIT DATA TO OTHER MICROSOFT SERVICES OR THIRD PARTY SERVICES, SUCH DATA IS GOVERNED BY THEIR RESPECTIVE PRIVACY STATEMENTS. For the avoidance of doubt, data shared outside of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement is not covered by users' Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement agreement(s) or the applicable Microsoft Dynamics Trust Center. Microsoft encourages users to review these other privacy statements.

Licensed Dynamics 365 Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using Dynamics 365 for tablets, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the tablet client. Users can then access Dynamics 365 (online) by using Dynamics 365 for tablets, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from Dynamics 365 (online) and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

Support for Dynamics 365 for phones and Dynamics 365 for tablets

1/15/2019 • 4 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You can access Dynamics 365 for Customer Engagement data from mobile devices in different ways. You can install and use the apps for Windows, iOS, and Android mobile devices, or you can run the Customer Engagement web app on the device's preferred browser for those devices described here.

CRM Online 2015 Update 1 introduced a new version of Dynamics 365 for phones that's based on and shares many of the features of Dynamics 365 for tablets. To use this new version of Dynamics 365 for phones, you must be running CRM Online 2015 Update 1 or later or Dynamics CRM 2016 on-premises or later.

NOTE

Tablet support requires Microsoft Dynamics CRM Online Fall '13 or later, or Microsoft Dynamics CRM 2015 or later.

For on-premises deployments of Dynamics 365 for Customer Engagement apps, the mobile apps require an [Internet-facing deployment](#) of Microsoft Dynamics 365 for Customer Engagement apps Server that uses claims-based authentication.

Support for Dynamics 365 for phones

Version support

Dynamics 365 for phones requires and can only connect to Microsoft Dynamics CRM Online 2015 Update 1 (online) or later (Windows Phone*, iPhone, and Android) or Microsoft Dynamics CRM 2016 (on-premises) or later (Windows Phone, iPhone, Android).

Dynamics CRM for phones express is deprecated and will not connect to releases **after** Microsoft Dynamics CRM 2016.

*Windows Phone requires the [new Dynamics 365 for Customer Engagement apps for Windows app](#) and Microsoft Dynamics CRM 2016 (on-premises) or later .

Device support

PLATFORM	VERSIONS	RAM (MINIMUM)
iOS	8.1 and above	1 GB
Android	4.4,5.0, 6.0, 7.0	1 GB
Windows Phone 8.1 Windows Phone 10	8.1 and 10	2 GB*

*Enhancements to the app require this minimum memory amount.

Support for Dynamics 365 for tablets

Windows tablets

You can run the Dynamics 365 for Customer Engagement apps for Windows tablets app on devices that meet the following requirements. You can also run the Dynamics 365 for Customer Engagement apps web app on a supported web browser on these devices. For more information about web browser support, see [Web application requirements for Microsoft Dynamics 365 for Customer Engagement apps](#).

Download the Microsoft Dynamics 365 for Customer Engagement apps from the Windows Marketplace for [Windows 8.1 tablets](#) and [Windows 10 tablets](#).

Operating system	Windows 8 or later
Memory	2 GB*
Resolution	1366 x 768 resolution (720p)

*Enhancements to the app require this minimum memory amount.

IMPORTANT

For on-premises deployments, support requires a Microsoft Windows registry modification on the user's Windows 8.1 device. Not required for the new Windows 10 app. For more information, see "Get your on-premises deployment ready for Dynamics 365 for Customer Engagement apps for Windows 8.1 tablets" in [What admins need to do](#).

Additional screen sizes and resolutions are supported because Windows can use system scaling.

Apple iPad

You can run the Dynamics 365 for iPad app on devices that meet the following requirements:

- Device: iPad third generation or later
- Screen: 9-inch (diagonal) or larger

[Download Microsoft Dynamics 365 for Customer Engagement apps for iPad from the Apple Store](#)

IMPORTANT

- For CRM 2015, this app is supported on iOS 7, 8, 9, and 10.
- For Microsoft Dynamics 365 for Customer Engagement apps (online & on-premises), this app is supported on iOS 7, 8, 9, and 10.
- For Microsoft Dynamics CRM Online 2016 Update 1 and Microsoft Dynamics CRM 2016 Service Pack 1, this app is supported on iOS 8.1 and above.

How to find the version of your Dynamics 365 for iPad app

- In the Dynamics 365 for tablets app, go to the home screen, and then open the command bar. Tap **Settings**, and then tap **About**.

Android

You can run the Dynamics 365 for Android app on devices that meet the following requirements:

- Android versions 4.4¹, 5.0², and 6.0³ are supported for tablets with screens larger than 7 inches (optimized for 9 to 10 inches) using Microsoft Dynamics 365 for Customer Engagement apps for Android.
1. This feature is available only if your organization has updated to Microsoft Dynamics CRM 2015 Update 0.1 or later.
 2. This feature is available only if your organization has updated to Microsoft Dynamics CRM 2015 Update 1.1 or

later.

3. This feature is available only if your organization has updated to Microsoft Dynamics CRM 2015 Update 1.1 or later.

[Download Microsoft Dynamics 365 for Customer Engagement apps for Android from Google play](#)

Web browser support for tablets

You can run Microsoft Dynamics 365 for Customer Engagement apps in the default web browser on any of the supported [Windows tablets](#) listed earlier. For [Apple iPad tablets](#), iOS 7, iOS 8, and iOS 9 are supported. For [Android](#), versions 4.2.2, 4.3, 4.4, 5.0, and 6.0 are supported for the tablets listed earlier.

Using Dynamics 365 for Customer Engagement on a web browser on an Apple or Android mobile device provides a similar experience to using it with a web browser on a desktop or laptop computer. However, some features are not available, including:

- Pinch and zoom
- Yammer
- Reports
- Customization/Editors
- System Settings
- Advanced Find
- Process dialogs
- Skype for Business presence
- Adding attachments to Notes—for Apple iPad users with Dynamics 365 for Customer Engagement apps (on-premises)
- Entities that use classic forms such as Goal and Order Product see, [Entities using classic forms](#).

Secure and manage Dynamics 365 for phones and tablets

12/10/2018 • 5 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You can secure and manage Dynamics 365 for phones and Dynamics 365 for tablets with the following technologies:

1. **Intune.** You can use Intune to manage Dynamics 365 for phones and Dynamics 365 for tablets on Apple and Android tablets and phones. Intune provides mobile device management, mobile application management, and PC management capabilities from the cloud. Using Intune, you can provide your users with access to corporate applications, data, and resources from virtually anywhere on almost any device, while helping to keep corporate information secure.

IMPORTANT

This feature was introduced in CRM Online 2016 Update.

2. **Dynamics 365 for Good.** Dynamics 365 for Good, integrated with Good Dynamics, protects your Customer Engagement data even if your users lose or leave their mobile devices somewhere. For example, if someone leaves their device in a taxi cab and can't get it back right away, Customer Engagement data is protected by Good encryption. If someone loses their device entirely, all they have to do is notify you so you can remotely wipe Dynamics 365 for Good data from their device.

IMPORTANT

This feature was introduced in CRM Online 2016 Update.

Manage Dynamics 365 for Customer Engagement apps on mobile devices with Intune

If your organization is set up with Intune, you can use it to manage the Customer Engagement for phones and tablets apps on Apple, Android, and Windows 10 tablets and phones. Intune manages encryption at the device level, as well as app-to-app communications. With Intune, you can selectively wipe managed apps and related data on devices that are unenrolled, no longer compliant, lost, stolen, or retired from use.

With CRM Online 2016 Update 1, you can use Intune mobile application management (MAM) to manage Customer Engagement mobile applications for Apple and Android without enrolling the device. This protects company data in Customer Engagement without requiring you to enroll and deeply manage the end user's entire device. This is particularly useful for bring-your-own-device (BYOD) scenarios where end users don't want to or can't enroll their devices for IT management. This capability is also useful if a device is already enrolled in another mobile application management solution.

More information

For more information about getting and using Intune, see:

- [Microsoft Intune](#)

- [Documentation for Microsoft Intune](#)

Set up conditional access to Dynamics 365 for Customer Engagement apps

You can use System Center Configuration Manager conditional access to manage access to Customer Engagement from mobile devices based on conditions you specify. For more information about setting up conditional access, see [Conditional Access in Configuration Manager](#).

NOTE

To use conditional access, you must have an Azure Active Directory premium subscription.

IMPORTANT

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

Secure Customer Engagement on mobile devices with Dynamics 365 for Good

Dynamics 365 for Good is a special version of Dynamics 365 for tablets that works with the Good Technology mobile security platform. Dynamics 365 for Good is currently supported for Apple iPad and Apple iPhone running iOS 7 or later. To use Dynamics 365 for Good, you must have Good Dynamics server software and services from [Good Technology](#).

Prepare to use Dynamics 365 for Good

Your organization should have services set up with Good Technology. Then follow the common directions for configuring Dynamics 365 for tablets in [Set up Dynamics 365 for phones and Dynamics 365 for tablets](#).

In addition, the Good Dynamics admin should do the following:

1. Within the Good Control server, authorize the Dynamics 365 for Good app for mobile users.
2. Within the Good Control server, add connection URLs to the allowed list. Any domain that the app needs to access for connection or content must be in the **Allowed Domains** list.

If you're using an on-premises deployment, see [Configure a Microsoft Dynamics 365 for Customer Engagement apps Internet-facing deployment](#).

3. Send users the email address and access key they will need to set up the app, or set up another secured application to act as an authentication delegate.

What users need to do

Users should update to the latest version of the Dynamics 365 for Good application. On the Apple App store, the latest version is 1.1. On the [Good Dynamics Marketplace](#) or Good Control Console, the latest version is listed as 1.1.0.

Direct your users to [Secure your mobile data with Microsoft Dynamics 365 for Customer Engagement apps for Good](#)

Install Dynamics 365 for Good

The app is listed in the [Good Dynamics Marketplace](#) and can be downloaded from the [Apple App Store](#).

Supported languages for Dynamics 365 for Good

Dynamics 365 for Good supports the same languages as Dynamics 365 for tablets. However, when users are viewing Good Dynamics pages, only the following languages are supported:

- Dutch - 1043
- English - 1033
- French - 1036
- German - 1031
- Italian - 1040
- Spanish - 3082

While viewing Good Dynamics pages, if you're not using one of the languages listed, the screens will be in English.

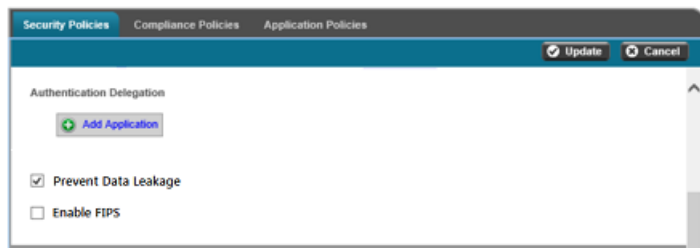
Things to know about Dynamics 365 for Good

- Requires Dynamics CRM 2015 or later. Connecting to earlier versions is not a supported secure configuration.
- The Dynamics 365 for Good Apple app requires Dynamics CRM Online 2015 Update 1 when running on an iPhone.
- There are multiple policies Good Dynamics administrators set to control data sharing between apps on the mobile device.
 1. **Prevent click-to-call:** Prevents users from initiating a phone call from within the Dynamics 365 for Good app.
 2. **Prevent click for mapping:** Prevents users from opening an address in the mobile device's native maps application.
 3. **Prevent opening OneNote:** Prevents users from opening OneNote notebooks from external sources from within the Dynamics 365 for Good app.
 4. **Prevent opening Word:** Prevents users from opening Word files from external sources within the Dynamics 365 for Good app.
 5. **Prevent opening Excel:** Prevents users from opening Excel files from external sources from within the Dynamics 365 for Good app.
 6. **Prevent opening PowerPoint:** Prevents users from opening PowerPoint files from external sources from within the Dynamics 365 for Good app.
 7. **Require a secure browser for opening URLs:** Enable to ensure browser windows launched from the Dynamics 365 for Good app use a secure browser application.

IMPORTANT

The policies for preventing opening OneNote, Word, Excel, and PowerPoint files block opening these files on external sources such as SharePoint, OneDrive for Business, and Office 365 Groups. These policies don't apply to items attached to notes in Customer Engagement or when exporting to Excel, Excel templates, and Word templates. These files download to Good-compliant encrypted file stores and require a Good-compliant application for viewing.

- Enable the **Prevent Data Leakage** setting in the **Security Policies** tab to cover other situations including using a secure app for email, and handling of copy/paste scenarios.



- All data stored on the client when using Dynamics 365 for Good is encrypted using Good Dynamics APIs.
- Remote wipe is available and will not affect non-secured apps leaving personal apps and information untouched.
- Contact [Good Technology](#) regarding the specific support that can be provided with your suite/pricing, as well as the correct server setup for your needs and situation.

Troubleshooting and things to know

12/10/2018 • 21 minutes to read • [Edit Online](#)

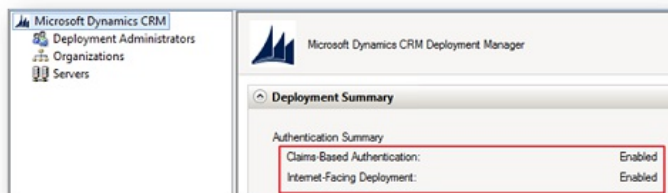
Applies to Dynamics 365 (online), version 8.x

The following are known issues with Dynamics 365 for tablets.

Important considerations

Before you begin to configure Dynamics 365 for tablets, it's important to review the requirements:

- **Understand what operating systems, devices, and languages are supported.** Review the requirements in [Support for Dynamics 365 for tablets](#).
- Be aware that **Internet-facing deployment (IFD) is required if you're using Dynamics 365 for Customer Engagement apps (on-premises)**. The system administrator must configure claims-based authentication before users can access Dynamics 365 for Customer Engagement apps data with Dynamics 365 for tablets. If you have your Dynamics 365 for Customer Engagement apps website available over the Internet but it is not using the Dynamics 365 for Customer Engagement apps IFD configuration, **it is not supported**. To verify that your on-premises deployment is configured for IFD, open Microsoft Dynamics 365 for Customer Engagement apps Deployment Manager on your Dynamics 365 for Customer Engagement apps server. The **Authentication Summary** section should show that both claims-based authentication and Internet-facing deployment are enabled. More information: [Configure IFD for Microsoft Dynamics 365 for Customer Engagement apps](#)



- Customer Engagement uses a security privilege, **Customer Engagement for mobile**, to provide access to Dynamics 365 for phones and Dynamics 365 for tablets. The privilege is pre-configured for Sales roles, but not other security roles, so you may want to add to other roles for your teams.

Potential issues and resolutions

Errors and connection issues

Troubleshoot error code 800c0019 on Windows Phones

If you get error code 800c0019 when you try to sign in to your Microsoft account while using the Dynamics 365 for phones or CRM for phones express apps, chances are that you have the wrong date and time settings on your Windows 8 phone. This can occur after updating your Windows 8 phone, removing and replacing the battery, or after a time change.

In most cases, your phone's date and time is set automatically by your mobile operator. If it's not, you need to set it manually so you can sign in to your Microsoft account successfully. Here's how:

1. On **Start**, flick left to the **App** list and tap **Settings**.
2. Tap **Date+time**.
3. Turn off **Set automatically**.
4. Set the correct values for **Time zone**, **Date**, and **Time**.

Troubleshoot a Windows app start-up error

If you receive this error:

Additional steps may be needed to configure Dynamics 365 for Customer Engagement for this organization. Please contact your system administrator.

If you're using a computer or tablet

Users:	Notify your Customer Engagement administrator that you received this error.
Admins:	To enable the Dynamics 365 for Windows 8.1 app for on-premises Customer Engagement deployments, you need to make some configuration changes. More information: Set up Dynamics 365 for phones and tablets Important: Customer Engagement on-premises deployments require Windows 10 and the Dynamics 365 for Customer Engagement apps for Windows app built for Windows 10 .

If you're using a Windows phone

You received this error because you're trying to connect to an on-premises deployment of Customer Engagement, which is not supported for your version on Windows Phones. Windows Phone connection to Microsoft Dynamics 365 on-premises requires the [Dynamics 365 for Customer Engagement apps for Windows app built for Windows 10](#). More information: [Support for Dynamics 365 for phones and tablets](#)

Error message: "This record is unavailable."

If this message appears when a user starts the mobile app, taps the **Home** button, or selects **Dashboards** from the menu, the user likely doesn't have access to the expected dashboards.

If you're an admin, you can avoid users getting this error by making sure all mobile users have access to the sales dashboard:

1. In the web app, go to **Settings > Customizations > Customize the System**.
2. Click **Dashboards**.
3. Select **Sales Dashboard**.
4. Click **Enable Security Roles**.
5. Select **Display to everyone** and then click **OK**. If you prefer to display only to select security roles, be sure to select your user's security role.
6. Click **Publish**.
7. Have your user close and open the mobile app so your dashboard changes will download.

If you're an end user and you're seeing this message on your home page, you can choose a different dashboard and set it as your home page:

8. From the mobile app, tap the menu and then tap **Dashboards**.
9. On the command bar, tap **Select Dashboard** and then select the dashboard you would like to use as your home page.
10. On the command bar, tap **Set as Home**.

If you're an end user and you're seeing this message on the dashboards page, you can create a personal dashboard through the web app and enable it for mobile:

11. In the web app, go to **Sales > Dashboards**.
12. Click **New**.
13. Click **Properties**.
14. Enter a name for your dashboard and select **Enable for mobile**.
15. Add the components you want on your dashboard and click **Save**.
16. In the mobile app, follow the previous procedure to select your new dashboard and set it as your home page.

Error message: "Your server is not available or does not support this application."

Cause 1: The Customer Engagement server is down. Verify that the server is on and connected to your network.

Sample Trace Message for Cause 1:

```
"Dynamics CRM [Error] | Connection error: 404"
```

Cause 2: Your Dynamics 365 for Customer Engagement apps version is not supported. See [What's supported](#) for version support information.

Cause 4: This error can also occur if you enter an invalid URL. Make sure the same URL you have provided works to access Dynamics 365 for Customer Engagement in your browser on your device.

Sample Trace Messages for Cause 4:

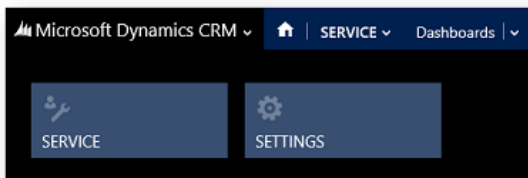
```
"XMLHttpRequest: Network Error 0x2ee7, Could not complete the operation due to error 00002ee7."
```

```
"Dynamics CRM [Error] | Connection error: 0"
```

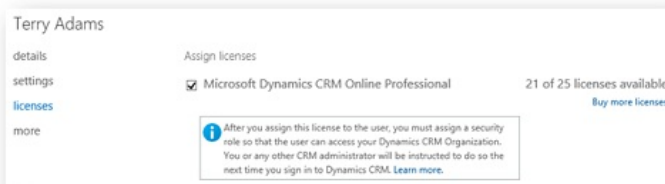
Error message: "You haven't been authorized to use this app. Check with your system administrator to update your settings."

Cause 1: Verify that your Dynamics 365 for Customer Engagement security role includes the **Use Dynamics 365 for tablets** privilege. See "Required privileges" in [Set up Dynamics 365 for phones and Dynamics 365 for tablets](#).

Cause 3: This error can occur if you have a Dynamics 365 for Customer Engagement organization and your user has not been assigned a Dynamics 365 for Customer Engagement license. If you add a Dynamics 365 for Customer Engagement subscription to an existing Office 365 tenant, your user may not have a Dynamics 365 for Customer Engagement license assigned. If the user has the Global Administrator or Service Administrator role in the [Microsoft Online Service Portal](#), you're able to sign in to the Dynamics 365 for Customer Engagement web application to perform certain administrative actions, but you can't perform end user tasks, such as creating records (for example, accounts, contacts, and leads) or configuring Dynamics 365 for tablets. When you sign in to the web application, you may notice that not all areas appear within the navigation (for example, Sales and Marketing are missing):



Access the **Users and Groups** section within the [Microsoft Online Service Portal](#) and verify you have a Dynamics 365 for Customer Engagement license assigned to your user record.



Error message: "You need an internet connection to use this app. Reconnect and try again."

Cause 1: This error can occur if you do not have an Internet connection. Verify you are connected to the Internet and can access the same URL in your web browser.

Cause 2: Check if you are using a preview build of Windows 8.1. So far this issue has only been reported with the preview version of Windows 8.1.

Error message: "Sorry, something went wrong while initializing the app. Please try again, or restart the app."

Cause 1: Permissions might not be set properly. See "Required privileges" in [Set up Dynamics 365 for phones and Dynamics 365 for tablets](#).

Cause 2: See the following KB article:

An error occurs in the Dynamics 365 for Customer Engagement app for users in child business units. For more information, see [Sorry, something went wrong while initializing the app](#).

Sample Trace Message for Cause 2:

```
Error Message:System.NullReferenceException: Object reference not set to an instance of an object.
```

```
Microsoft.Crm.Application.WebServices.ApplicationMetadataService.<>c__DisplayClass30.<UserRolesChanged>b__2d(Entity role)
```

```
at System.Linq.Enumerable.Any[TSource](IEnumerable 1 source, Func 2 predicate)
```



```
at Microsoft.Crm.Application.WebServices.ApplicationMetadataService.UserRolesChanged(Guid[] clientUserRoles, DateTime syncTime, ExecutionContext context)
```

```
at Microsoft.Crm.Application.WebServices.ApplicationMetadataService.RetrieveUserContext(UserContextRetrieveRequest userContextRetrieveRequest)
```

Cause 3: This can occur if the download of the metadata failed. The next attempt to connect will fully regenerate the metadata and successfully connect. Microsoft is aware of an issue where metadata may fail to download due to a timeout and plans to address this issue in a future update.

Sample Trace Messages for Cause 3:

```
"Error occurred during complete refresh of Application/Entity/Attribute metadata"
```

```
"XMLHttpRequest: Network Error 0x2ef3, Could not complete the operation due to error 00002ef3."
```

Error message: "The language installed on your company's system isn't available on the app. Please contact your system administrator to set up a supported language."

Cause: This error will occur if one of the supported languages is not enabled in Dynamics 365 for Customer Engagement. For more information on the supported languages, see [Dynamics 365 for tablets: Set up and use](#) and expand **What you need to use Dynamics 365 for tablets** and **Supported Languages**.

Error message: "The process assigned to this record is unavailable or has been deleted."

If you receive this message for a record which has a non-deleted process assigned to it, you should manually synchronize Dynamics 365 for tablets with your Dynamics 365 for Customer Engagement data. Close the Dynamics 365 for tablets app, reopen, and then choose to download the latest customizations. This procedure forces Dynamics 365 for tablets to check for updated customizations. Recently viewed data while you were connected is cached and synched. Record data like Accounts or Contacts are not synched. You can't choose which data synchronizes to the device like you can with Microsoft Dynamics 365 for Outlook.

Error message: "This operation failed because you're offline. Reconnect and try again."

This error may occur for the following scenarios when you are using a Windows 8 device and you have a Dynamics 365 for Customer Engagement organization that uses Microsoft account (formerly named Live ID). This issue doesn't occur for organizations provisioned through Office 365.

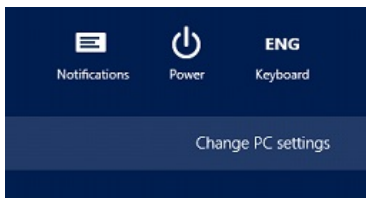
Cause 1: You are automatically authenticated as a different Microsoft account that is not a member of the Dynamics 365 for Customer Engagement organization. This may happen if you sign into your Windows 8 device and your domain account is connected to a Microsoft account. For example: you sign in to your device as <userid>@contoso.com (your domain account) and that account is connected to <userid>@live.com (a Microsoft account). If your connected account (for example, <userid>@live.com) is not a member of the Dynamics 365 for Customer Engagement organization, you will encounter this error. In this scenario, the error occurs after providing your URL, but you are never prompted for credentials. When you connect your domain account to a Microsoft account, that account will be used to automatically sign in to apps and services that use Microsoft account for authentication. If you're using a Windows 8 device, use the steps listed here to check if your domain account is connected to a Microsoft account. If you're using a Windows RT device, see the **Windows RT** section.

Windows 8

1. Swipe from the right side of the screen to access the charms bar and then tap **Settings**.



2. Tap **Change PC settings**.



3. Tap **Users**.
4. Check to see if under the **Your Account** section it says "This domain account is connected to <Your Microsoft account>"



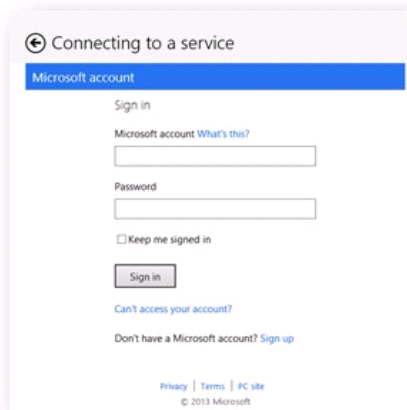
Windows RT

If you are using a Windows RT device and need to authenticate as a Microsoft account that is different than the one you use to log on to your device, you must create another account and switch to that account when using the app. For example: you currently sign in to your Windows RT device as <userid>@live.com, but want to access your Dynamics 365 for Customer Engagement organization via the tablet app as <userid>@outlook.com. For more information on how to create a new account on your device, see [Video: Create a user account](#).

Sample Trace Message for Cause 1:

```
The app couldn't navigate to https://port.crm.dynamics.com/portal/notification/notification.aspx?lc=1033&organizationid=<OrganizationId> because of this error: FORBIDFRAMING.
```

Cause 2: This error may occur if you previously authenticated to the app as a different Microsoft account and chose the option "Keep me signed in". Even after uninstalling and reinstalling the app, the token for the previous credentials is still stored on your device. If you are trying to connect as a different user, you will need to remove the token. To completely clear the app, after you uninstall the app, you must clear the Indexed DB folder (Drive:\Users%\USERNAME%\AppData\Local\Microsoft\Internet Explorer\Indexed DB). You may have to sign in as a different user and use the command prompt as an administrator to clear the Indexed DB folder. That is because some files in this folder can be held by the Host Process for Windows Tasks. Once the token is successfully removed, you should see the sign-in page after you enter your URL in the app.



The same error as Cause 1 may be found in the traces.

Cause 3: You have not accepted your invitation to the Dynamics 365 for Customer Engagement organization. If you attempt to access the same URL through your browser, you see a notification that you are invited to the organization but need to accept the invitation. Once you accept the invitation, you are able to configure the app successfully.

Sample Trace Message for Cause 3:

```
The app couldn't navigate to https://port.crm.dynamics.com/portal/response/Response.aspx?token=KFES-CK5C-NL8R-X1U0&expiration=635211904207200000&cs=Lkya6zs9Ee0tJXjttRc6AeZa5xqt94YAppfqrXfgZa5s1inq2iaabTmwFX0AR4HLGvz&cb=invite&cbcxt=invite&wlid=<username>%40live.com&lc=1033 because of this error: FORBIDFRAMING.
```

For each of the causes listed previously, you may also see the following event logged in the traces:

"Authentication: Failed - cookie setup"

Cause 4: If you connect to a Dynamics 365 for Customer Engagement organization on an Android device, this error can occur if the certificate from the Dynamics 365 for Customer Engagement website or the federated server, such as AD FS, is not trusted by the device. To avoid this scenario, make sure to use a publicly trusted certificate or add the Certificate Authority certificate to the device. For more information, see KB article: [While configuring Dynamics CRM for phones and tablets, you receive an error message](#).

Error message, Dynamics 365 for Good: "We're sorry. Your server is not available or does not support this application"

Users must update to the latest version of the Dynamics 365 for Good application prior to updating to Dynamics CRM Online 2015 Update 1. On the [Apple App store](#), the version the users need is 1.1. On the [Good Dynamics Marketplace](#) or (Good Control Console), the version needed is listed as 1.1.0.

Users who have not updated their app prior to connecting to Dynamics CRM Online 2015 Update 1, will likely see the following error approximately 2 minutes after connecting to Dynamics CRM Online 2015 Update 1.

Error: We're sorry. Your server is not available or does not support this application.

To fix this error, the user must uninstall and reinstall the Dynamics 365 for Good app using the version listed above.

Event 10001 messages appear in the Event Log when you run Dynamics 365 for Windows 8

The following event may be recorded multiple times to the Event Log, when **Show Analytic and Debug Logs** is enabled, on the device where Dynamics 365 for Windows 8 is running. Notice that, by default, **Show Analytic and Debug Logs** is disabled in Event Viewer and these messages won't be recorded. More information: [Enable Analytic and Debug Logs](#)

- Event Id: 10001
- Message: `SEC7131 : Security of a sandboxed iframe is potentially compromised by allowing script and same origin access.`

Verify the source of the messages. If the source is Dynamics 365 Server, these events don't pose a security threat and can be ignored.

By design: "--d" added to URL

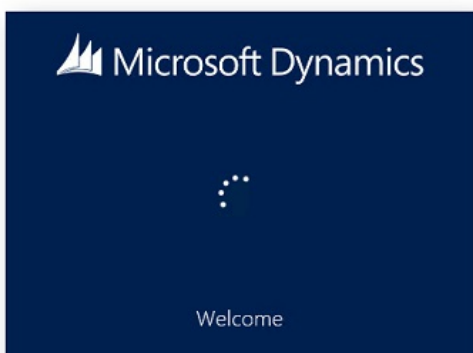
For Dynamics 365 for Customer Engagement users

To improve the reliability of DNS resolutions to Dynamics 365 for Customer Engagement organizations, Dynamics 365 for tablets modifies the organization URL used when signing in. When a user signs in, Dynamics 365 for tablets adds "--d" (two dashes + d) to the URL. For example, if the organization URL is <https://contoso.crm.dynamics.com>, Dynamics 365 for tablets will change the URL to <https://contoso--d.crm.dynamics.com>.

If a user needs to retry signing in, they'll see "--d" in the web address. They can sign in with the modified URL or reset it to the URL normally used.

After providing credentials the app appears to load indefinitely and never completes

This can occur if the time on the device is not within a certain variance of the Dynamics 365 for Customer Engagement server. For example: you may encounter this issue if the time on the server is 2 PM on November 11th but the device is set to 2 PM on November 12th.



You may see events like the following logged multiple times in the trace files:

Dynamics CRM [PAL] | Authentication: Token Expired with Token Timeout value (-255674015) --- Retrieving new Auth Token from shim

For possible resolution, see [Microsoft Dynamics CRM for Phone and Tablets cannot connect to Dynamics CRM organization due](#)

to length of TokenLifetime

Dynamics 365 for tablets users are repeatedly prompted for sign-in credentials and can't sign in

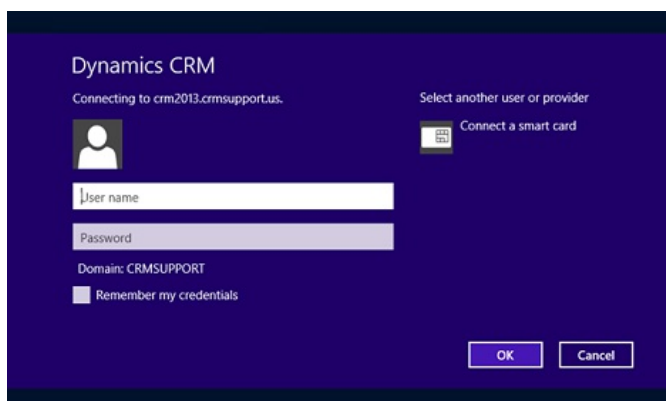
Cause: This can occur if certain directories under the Dynamics 365 for Customer Engagement website have Windows Authentication enabled. For Dynamics 365 for tablets to successfully connect to a new deployment of Dynamics CRM Server 2013 or Dynamics CRM Server 2015, you must run a **Repair** of Dynamics CRM Server 2013 or Dynamics CRM Server 2015, on the server running IIS where the Web Application Server role is installed after the Internet-Facing Deployment Wizard is successfully completed.

IMPORTANT

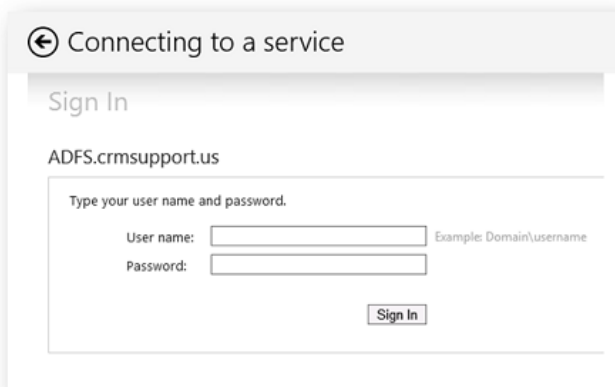
To resolve this issue by running **Repair**, the Dynamics 365 for Customer Engagement deployment must already be configured for claims-based authentication and IFD.

NOTE

When the logon prompt appears, it is an Active Directory logon prompt instead of the sign-in page of your Secure Token Service (STS) such as Active Directory Federation Services (AD FS). The prompt looks like the one shown here.



After you tap **Cancel** or enter credentials 3 times, you see the correct sign-in prompt.



Redirected URLs do not work when you configure Dynamics 365 for tablets or Dynamics 365 for phones

URLs that redirect, such as IIS host headers or link-shortening websites such as tinyurl or bitly, do not work when you use the URL in the **Dynamics 365 for Customer Engagement apps web address** field with Dynamics 365 for tablets or Dynamics 365 for phones during configuration.

For example, an <https://www.contosocrm.com> host header for a Dynamics 365 for Customer Engagement apps online website URL that is actually <https://crm.contososever001.com>, will not work and will display an error message. To work around this behavior, you must enter the actual web address for the Dynamics 365 for Customer Engagement organization. When this issue occurs and you have enabled logging, the information logged is similar to the following. Notice that the URLs in lines 2 and 3 are different. That difference indicates a redirected URL.

1. User entered URL: *https://URL_entered*
2. Constructed server URL: *https://URL_after_CRMforTablets_processing*

3. HTTP Response location: https://URL_that_the_response_came_from

Regarding customization

Users not getting customizations

Users will not get customizations made to Customer Engagement if there are draft records present. Users should be encouraged to save records as soon as they go online.

Data cached for offline viewing remains after the entity is no longer enabled for Dynamics 365 for tablets

In Dynamics 365 for tablets, record data is cached as the user visits the record so the user can access the data when going offline.

This cached data persists after the entity is no longer enabled for Dynamics 365 for tablets (**Settings > Customizations > Customize the System** > [select an entity] > under **Outlook & Mobile**, deselect **Dynamics 365 for tablets**).

To remove the cached data, the user must sign out of Dynamics 365 for tablets, or Dynamics 365 for tablets must be reconfigured or uninstalled.

Customization changes do not appear in Dynamics 365 for tablets

Cause 1: The customizations (metadata) from your Dynamics 365 for Customer Engagement organization are cached on your device. The app checks for updated metadata after 24 hours or any time you reopen the app. For customization changes to become available immediately, you must completely close and then reopen the app. If new metadata is found, you will be prompted to download it. For more information on how to completely close an app, refer to the help for your operating system or reference one of the articles provided:

- **Windows 8:** [How do I close an app?](#)
- **iPad:** [Force an app to close](#)
- **Android:** [How to force close Android apps](#)

Cause 2: You may be seeing a different form than the one you customized. If you have multiple forms for an entity, you will see the first form in the form order that you have access to. This is different than the web application where you see the last form you used and have the ability to change between forms.

Regarding mobile browser

Private Browsing not supported in Safari

If you enable Private Browsing on your iPad in your Safari browser, you will see the following error message when you attempt to connect to your Customer Engagement organization: "Dynamics 365 for Customer Engagement has encountered an error." You will need to disable Private Browsing. Tap the address bar, and then tap **Private**.

Web app differences in mobile browsers

For differences you can expect to find in the web app when you're accessing it from a mobile device, see [Support for Dynamics 365 for phones and Dynamics 365 for tablets](#).

Other

Clipboard data – available to admins and customizers

Dynamics 365 for Customer Engagement System Administrators or System Customizers can access other users' Clipboard data for users of Windows 8 and 8.1 devices.

Users can view queue items in another person's queue

A user viewing records in Dynamics 365 for tablets can view records in another user's queue.

Update the Dynamics 365 for Good app before updating to Dynamics CRM Online 2015 Update 1

Users must update to the latest version of the Dynamics 365 for Good application prior to updating to Dynamics CRM Online 2015 Update 1. On the [Apple App store](#), the version the users need is 1.1. On the [Good Dynamics Marketplace](#) or Good Control Console, the version needed is listed as 1.1.0.

Users who haven't updated their app prior to connecting to Dynamics CRM Online 2015 Update 1, will likely see the following error approximately 2 minutes after connecting to Dynamics CRM Online 2015 Update 1.

Error: We're sorry. Your server is not available or does not support this application.

To fix this error, the user must uninstall and reinstall the Dynamics 365 for Good app using the version listed previously.

App restart required after reconfiguring Dynamics 365 for Good

After you reconfigure Dynamics 365 for Good, the app can get stuck in a loop. You need to close and reopen the app.

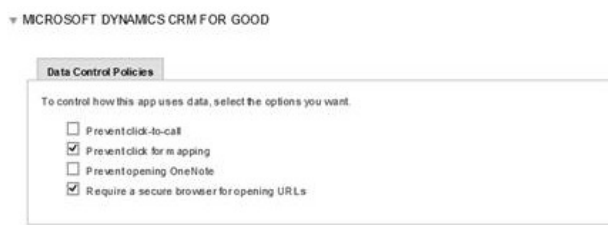
1. On your iPad, press the **Home** button two times quickly. You'll see small previews of your recently used apps.

2. Swipe to find the Dynamics 365 for Good app.
3. Swipe up on the app's preview to close it.
4. Tap the Dynamics 365 for Good app icon to launch the app and configure for the new org.

Prevent click for mapping and Dynamics CRM Online 2015 Update 1

For users of version 1.0 (1.0.0) of the Dynamics 365 for Good app that have updated to Dynamics CRM Online 2015 Update 1, note that the **Prevent click for mapping** setting does not work.

To prevent click for mapping in version 1.0 (1.0.0), admins should enable the **Require a secure browser for opening URLs** setting in the Good Control server, as shown here.



The **Prevent click for mapping** setting works as expected in Dynamics 365 for Good app version 1.1 (1.1.0). We recommend updating to the latest version of the Dynamics 365 for Good app rather than applying this workaround.

Issue still not resolved?

If the information provided previously doesn't resolve your issue, either [Post your issue in the Dynamics CRM Community](#) or [Contact Technical Support](#).

The following are some suggested details to provide:

- What are the specific symptoms you encounter? For example, if you encounter an error, what is the exact error message?
- Does the issue only occur for users with certain Dynamics 365 for Customer Engagement security roles?
- Does the issue only occur on certain devices but works correctly for the same user on another device?
- If you attempt to connect to a different Dynamics 365 for Customer Engagement organization that does not include your customizations, does the same issue occur? If the issue only occurs with your customizations, provide a copy of the customizations if possible.
- Does the issue still occur after uninstalling the app and reinstalling it?
- What type of device (ex. iPad 4th Generation, Microsoft Surface, etc...) are you using and what is the version of the operating system (ex. iOS 6.0, Windows 8, etc...)?

Get the Company News Timeline for Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Gain valuable insights from the latest news about your customers on your phone or tablet. Staying on top of the news helps you stay ahead of your competition by showing you ways your customers can use your products or services right now. Install the Company News Timeline solution, which delivers relevant news from Bing News about your customers, and categorizes them in a useful feed inline while viewing your accounts.

NOTE

This solution is available globally for Dynamics 365 for Customer Engagement subscriptions but only available in English at this time.

IMPORTANT

This feature was introduced in Dynamics CRM Online 2016 Update 1.

Install the solution for Dynamics 365 for Customer Engagement apps

1. Sign in to <https://portal.office.com> with your Global Administrator or Dynamics 365 for Customer Engagement apps System Administrator credentials.
2. Click **Admin > Dynamics 365 for Customer Engagement apps**.
3. On the **Manage all Dynamics 365 for Customer Engagement apps instances** page, select the instance to add the solution to.
4. Click **Solutions**.
5. Select the **Company News Timeline** solution, and then click **Install**. Proceed through Terms of service to accept the terms.

The status for the solution changes to **Installation pending**. The status for the solution will change to **Installed** when the solution is ready. When the solution is ready, you can see the Company News Timeline on the Account, Contact, Lead, and Opportunity main forms in the mobile apps.

NOTE

When you install a solution, your Customer Engagement site is taken offline in maintenance mode for a short time. We recommend you install the solution when it's least disruptive to users.

Privacy notice

When you enable the Company News and Social Timeline solution, Customer Data from the name, address, and industry fields of your account records will be sent to Bing (a consumer service). Therefore, Customer Data sent to Bing will be subject to [Microsoft Privacy and Cookies](#). By installing this solution, you agree for this limited set of

data to be sent to the Bing service. Data sent to Bing will be stripped of your company's information and stored for diagnostics purposes. Note that you may uninstall the solution at any time to discontinue use of this functionality.

Reconfigure Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)


Applies to Dynamics 365 (online), version 8.x

Reconfigure the Dynamics 365 for tablets app

Reconfiguring deletes all data and metadata from the cache, though you shouldn't rely on this as a security measure.

If you sign out of one organization and sign in to another, and then use the Reconfigure option on the organization you signed in to, your metadata will still remain for the organization you signed out of. To remove your metadata from the organization you signed out of, you'll need to sign in to it and use the Reconfigure option there, as well.

Here's how to do it:

1. Tap .
2. Tap **Settings**.
3. Tap **Reconfigure**.

You can now sign in to a different server or organization.

Secure your mobile data with Microsoft Dynamics 365 for Customer Engagement apps for Good

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

As of December 3, 2018, Microsoft Dynamics 365 for Blackberry App is deprecated and will be removed from the iOS App Store on October 31, 2019. For more information, [Dynamics 365 for Blackberry is deprecated](#).

Dynamics 365 for Good, integrated with Good Dynamics, protects your Customer Engagement data even if you lose or leave your mobile device somewhere. For example, if you leave your device in a taxi cab and can't get it back right away, your Customer Engagement data is protected by Good encryption. If you lose your device entirely, just notify your admin, who can remotely wipe your Dynamics 365 for Good data from your device.

This app is intended for use only with Good Dynamics server software and services from Good Technology. If you're not using Good Dynamics, download Dynamics 365 for phones or Dynamics 365 for tablets instead from the [Apple App store](#).

Download the Microsoft Dynamics 365 for Customer Engagement apps for Good app

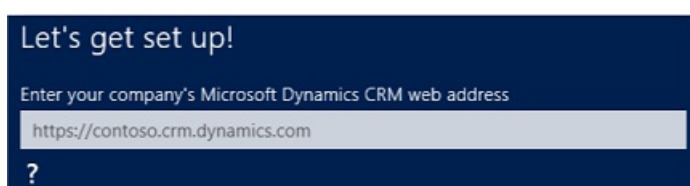
You can download the Dynamics 365 for Good app from the [Apple App store](#). You can also find the app on the [Good Dynamics Marketplace](#).

IMPORTANT

Dynamics 365 for Good requires iOS 7.0 or later. To use the app on an iPad, you need Dynamics CRM 2015 or later. To use the app on an iPhone, you need Dynamics CRM Online 2015 Update 1 or later or Microsoft Dynamics 365.

Start and sign in to the Microsoft Dynamics 365 for Customer Engagement apps for Good app

1. Open the Dynamics 365 for Good app.
2. When prompted, type in your email address and Good access key. (If you don't have a Good access key, contact your Good admin to get one.) Instead, the sign-in screen might ask for your Auth Delegate or password for other Good apps you might have installed for easy activation.
3. When prompted, select a Good security password.
4. On the **Let's get set up!** screen, enter your company's Customer Engagement web address.



5. Tap the **Arrow** button in the lower right corner to continue.
6. When prompted, type in your Customer Engagement credentials.

Now that you're signed in to the Dynamics 365 for Good app, check out the [CRM for Phones and Tablets User's Guide](#) to find out all you can do.

Accessing email and other apps through Microsoft Dynamics 365 for Customer Engagement apps for Good

If you get an alert when you try to use email or other apps through Dynamics 365 for Good, your admin may be controlling communication to these apps for security purposes. Contact your Good admin to find out which apps your company uses in conjunction with Dynamics 365 for Good, along with any settings that need to be configured.

Information for admins

For a list of supported phones and tablets, see the compatibility information in [TechNet: Support for Dynamics 365 for phones and Dynamics 365 for tablets](#).

For information on what your enterprise needs to do before using Dynamics 365 for Good, see [TechNet: Set up Dynamics 365 for phones and Dynamics 365 for tablets](#).

If you're having problems with the app, see [TechNet: Troubleshooting and things to know about Dynamics 365 for phones and tablets](#).

iFrame and web resource support in Dynamics 365 for tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You can add iFrames and web resources in forms and dashboards in the Dynamics 365 for Customer Engagement web app, and they will appear in Dynamics 365 for tablets as well. For example, if you add a news feed to a dashboard in the web app, the news feed will also appear in the tablet app. For more information about using iFrames and web resources, see [MSDN: Create web resources and iFrame content for use with the Dynamics 365 for tablets client](#).

NOTE

iFrames and web resources are supported on Apple iPad, Android, and Windows 10 tablets. Tablets running Windows 8.1 and earlier are not supported.

IMPORTANT

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises) by the name of Interactive Service hub.

With the December 2017 update, Interactive Service hub is now known as Customer Service Hub.

Interested in getting this feature? [Find your CRM administrator or support person](#).

Known issues

- You can't use popups for authentication or other purposes from within iFrames and web resources on Dynamics 365 for tablets.
- Authentication for embedded sites isn't available.
- Errors and memory leaks in iFrames and web resources can cause Dynamics 365 for tablets to stop responding, and can cause client side data loss.
- Some iFrames and web resources can adversely affect application performance.
- Microsoft Silverlight and image web resources aren't available on Dynamics 365 for tablets.

See also

[MSDN: Create web resources and iFrame content for use with the Dynamics 365 for tablets client](#)

Troubleshoot a Dynamics 365 for Customer Engagement apps for Windows app start-up error

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Did you receive this error?

Additional steps may be needed to configure Dynamics 365 for Customer Engagement for this organization. Please contact your system administrator.

If you're using a computer or tablet

Users:	Notify your Customer Engagement administrator that you received this error.
Admins:	To enable the Dynamics 365 for Windows 8.1 app for on-premises Customer Engagement deployments, you need to make some configuration changes. More information: TechNet: Set up Dynamics 365 for phones and tablets Important: Customer Engagement on-premises deployments require Windows 10 and the Dynamics 365 for Customer Engagement apps for Windows app built for Windows 10 .

If you're using a Windows phone

You received this error because you're trying to connect to an on-premises deployment of Customer Engagement, which is not supported for your version on Windows Phones. Windows Phone connection to Microsoft Dynamics 365 on-premises requires the [Dynamics 365 for Customer Engagement apps for Windows app built for Windows 10](#). More information: [TechNet: Support for Dynamics 365 for phones and tablets](#)

See also

[Install Dynamics 365 for phones and tablets](#)

[TechNet: Support for Dynamics 365 for phones and tablets](#)

[TechNet: Set up Dynamics 365 for phones and tablets](#)

[Troubleshooting and things to know about Dynamics 365 for phones and tablets](#)

Troubleshoot error code 800c0019 on Windows Phones

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

If you get error code 800c0019 when you try to sign in to your Microsoft account while using the Dynamics 365 for phones or CRM for phones express apps, chances are that you have the wrong date and time settings on your Windows 8 phone. This can occur after updating your Windows 8 phone, removing and replacing the battery, or after a time change.

In most cases, your phone's date and time is set automatically by your mobile operator. If it's not, you need to set it manually so you can sign in to your Microsoft account successfully. Here's how:

1. On **Start**, flick left to the **App** list and tap **Settings**.
2. Tap **Date+time**.
3. Turn off **Set automatically**.
4. Set the correct values for **Time zone**, **Date**, and **Time**.

See also

[TechNet: Troubleshooting and things to know about CRM for phones express](#)

[TechNet: Troubleshooting and things to know about Dynamics 365 for phones and tablets](#)

Install Dynamics 365 for phones and tablets

12/10/2018 • 4 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

First things first: Is your mobile device supported?

If you're not sure if your device is supported, [check the list of supported devices on TechNet](#)







Privileges required to run the app

IMPORTANT

You won't be able to use this app if you don't have the correct privileges. Your system administrator can configure privileges for you: [Find your Dynamics 365 for Customer Engagement apps administrator or support person](#). If you're an administrator, [learn how to set privileges](#).

Install the app from your device's app store

Choose the download link for your device:

Dynamics 365 for phones app	Dynamics 365 for tablets app
	
	
	

Looking for a different version of the Dynamics 365 for phones app?

If your organization isn't ready to use the latest Dynamics 365 for phones app, you may be able to use the earlier version called CRM for phones express.

Help and how-to from TechNet

- [Check to see if your device is supported](#)
- [Troubleshoot performance issues](#)
- [General troubleshooting](#)

Privacy notice

The Dynamics 365 for Customer Engagement for tablets and phones, and Project Finder for Project Finder for Dynamics 365 (the "App") enables users to access their Microsoft Dynamics CRM or Dynamics 365 for Customer

Engagement instance from their tablet and phone device. In order to provide this service, the App processes and stores information, such as user's credentials and the data the user processes in Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App is provided for use only by end users of Microsoft customers who are authorized users of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App processes user's information on behalf of the applicable Microsoft customer, and Microsoft may disclose information processed by the App at the direction of the organization that provides users access to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. Microsoft does not use information users process via the App for any other purpose.

If users use the App to connect to Microsoft Dynamics CRM (online) or Dynamics 365 for Customer Engagement, by installing the App, users consent to transmission of their organization's assigned ID and assigned end user ID, and device ID to Microsoft for purposes of enabling connections across multiple devices, or improving Microsoft Dynamics CRM (online), Dynamics 365 for Customer Engagement or the App.

Location data. If users request and enable location-based services or features in the App, the App may collect and use precise data about their location. Precise location data can be Global Position System (GPS) data, as well as data identifying nearby cell towers and Wi-Fi hotspots. The App may send location data to Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. The App may send the location data to Bing Maps and other third party mapping services, such as Google Maps and Apple Maps, a user designated in the user's phone to process the user's location data within the App. Users may disable location-based services or features or disable the App's access to user's location by turning off the location service or turning off the App's access to the location service. Users' use of Bing Maps is governed by the Bing Maps End User Terms of Use available at <https://go.microsoft.com/?linkid=9710837> and the Bing Maps Privacy Statement available at <https://go.microsoft.com/fwlink/?LinkID=248686>. Users' use of third party mapping services, and any information users provide to them, is governed by their service specific end user terms and privacy statements. Users should carefully review these other end user terms and privacy statements.

The App may include links to other Microsoft services and third party services whose privacy and security practices may differ from those of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement. IF USERS SUBMIT DATA TO OTHER MICROSOFT SERVICES OR THIRD PARTY SERVICES, SUCH DATA IS GOVERNED BY THEIR RESPECTIVE PRIVACY STATEMENTS. For the avoidance of doubt, data shared outside of Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement is not covered by users' Microsoft Dynamics CRM or Dynamics 365 for Customer Engagement agreement(s) or the applicable Microsoft Dynamics Trust Center. Microsoft encourages users to review these other privacy statements.

Licensed Dynamics 365 Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using Dynamics 365 for tablets, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the tablet client. Users can then access Dynamics 365 (online) by using Dynamics 365 for tablets, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from Dynamics 365 (online) and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

See also

[Signing in and signing out on Dynamics 365 for phones and tablets](#)
[TechNet: Phone and tablet support](#)


Signing in and signing out on Dynamics 365 for phones and tablets

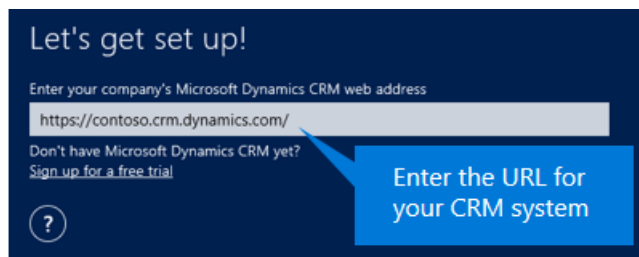
12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Signing in and signing out

To sign in, you'll need your Dynamics 365 for Customer Engagement web address, user name, and password. If you don't have any of these, contact your Customer Engagement admin.


1. Open your app, enter your Customer Engagement web address, and tap .



2. On the next screen, enter your user name and password, and tap **Sign in**.

A few basic navigation tips appear while your app starts up. Be sure to stay on this screen while your app starts up so any changes can download successfully to your device. If you switch to another app during this time, the processing will restart when you open this one again.

Here's how to sign out in case someone else needs to use your device.

3. From your Home page, tap .
4. Tap **Settings**.
5. Tap **Sign Out**.

You can sign in again as the same or a different user, or you can sign in to a different organization.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Reconfigure Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)


Applies to Dynamics 365 (online), version 8.x

Reconfigure the Dynamics 365 for tablets app

Reconfiguring deletes all data and metadata from the cache, though you shouldn't rely on this as a security measure.

If you sign out of one organization and sign in to another, and then use the Reconfigure option on the organization you signed in to, your metadata will still remain for the organization you signed out of. To remove your metadata from the organization you signed out of, you'll need to sign in to it and use the Reconfigure option there, as well.

Here's how to do it:

1. Tap .
2. Tap **Settings**.
3. Tap **Reconfigure**.

You can now sign in to a different server or organization.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Basic navigation in Dynamics 365 for phones and tablets

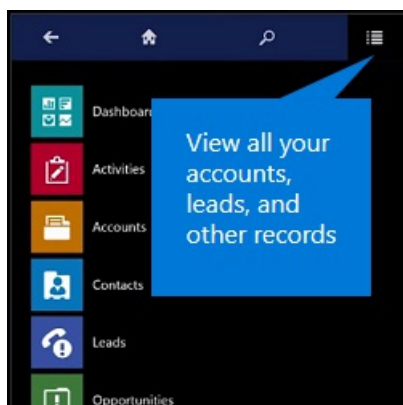
12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

The menu

When you want to view all of your accounts, contacts, leads, or other records, use the menu.

Tap the menu icon on the top of the page, then select the type of record you want to work with.

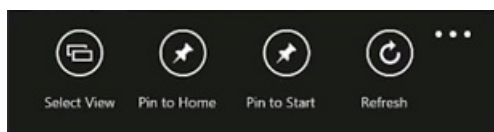


The command bar

You can add a new record, change views, or do other tasks from the command bar.

Just tap  on the bottom right-hand corner of the page.

You can also press and hold an item to display the command bar.



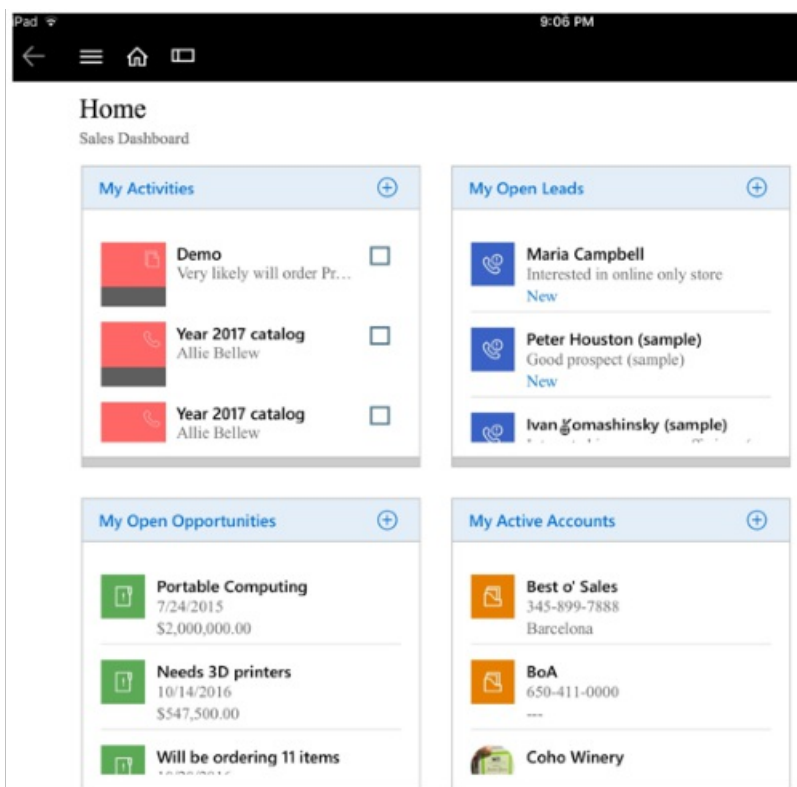
The command bar is context-sensitive, and the available commands change depending on where you are in the app. When you display the command bar for a specific item (when you press and hold the item), the commands that appear are relevant to that item.

The Home page: your dashboards

If you want to use a different dashboard, it's easy to switch back and forth.

Tap **Dashboards** in the menu and then select the dashboard you want to use.

When you want to go back to your Home screen, tap **Home**.



To create new dashboards in Customer Engagement and enable them for use in Customer Engagement for phones and tablets, see [Create or customize dashboards](#).

Screen orientation

For phones, portrait mode is set as the default screen orientation. For tablets, landscape mode is set as the default. Screen orientation for Dynamics 365 for phones and Dynamics 365 for tablets apps cannot be changed.

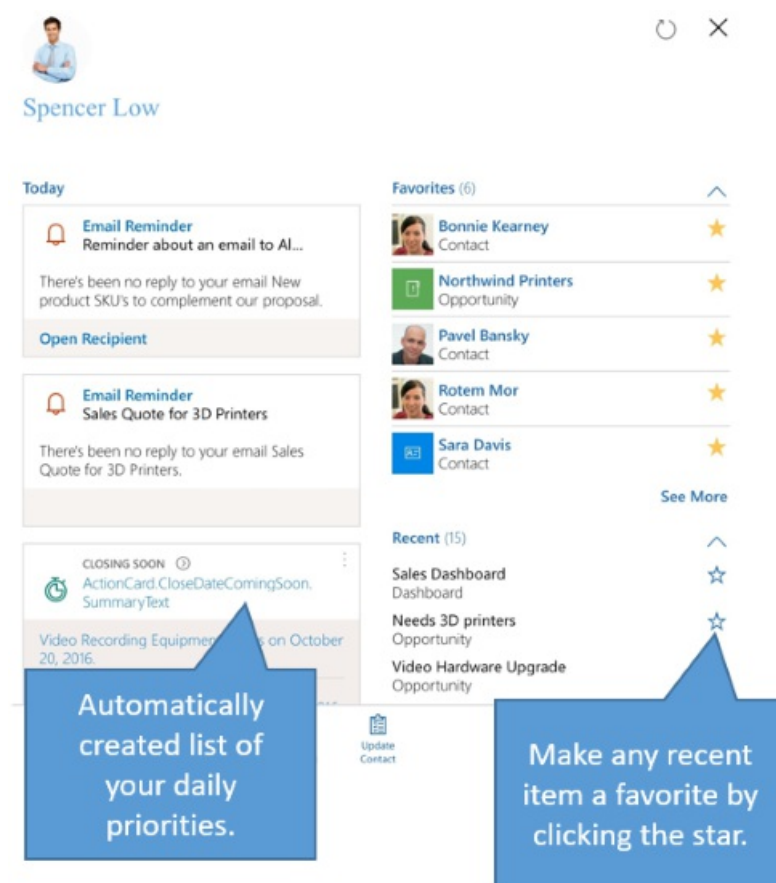
The workspace, your personalized action hub in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

When you first sign in to Dynamics 365 for phones and tablets, a pane slides in. This is your all-new workspace, a personalized action hub to help you get to common tasks more quickly.

From the workspace, you can instantly create new activities, records, and notes. It features a list of suggested priorities (“intelligent cards”) in the left column. These may include upcoming meetings, info relevant to that day’s activities, and other things that require attention, and are part of a suite of new features collectively called [Embedded intelligence](#). The workspace also has a list of favorite and recent items. Items that appear in the **Recent** feed can be added to **Favorites** by hitting the star icon. You can also click on your profile picture to upload or capture a new one.

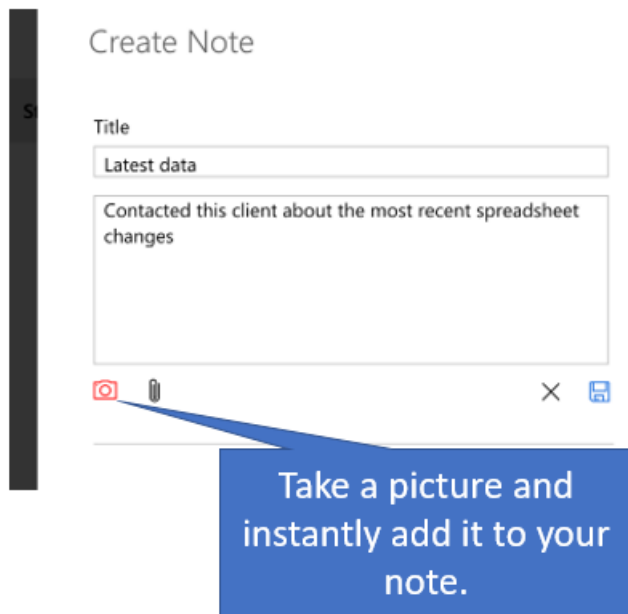


Notes in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Taking a cue from easy-to-use social media apps, the mobile app now lets you start a note from anywhere, and attach the note to whatever you're doing at that moment. You can also attach photos to a note, or take a new photo with your device's camera. So if, for example, you're out at a site and need to document a customer's issue with a product, you can capture and add it to a note right away, rather than taking the photo, then adding it from your camera roll later.



See also

[Dynamics 365 for phones and tablets User's Guide](#)

Scan barcodes in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Rather than manually typing a barcode number into a field, you can scan barcodes by using your device's camera. Tap the icon to the right of the field to start the scanner. This makes it easy to capture info about inventory and other issues when you're out in the field. You'll need to ask your admin to set this feature up for you.

The screenshot shows the 'Details' pane in Dynamics 365. On the left, a vertical pane contains the number '101'. The main 'Details' pane is titled 'Details' and contains the following information:

Professional Information	
Industry	Wholesale
Annual Revenue	\$30,000,000.00
Ownership	Public
No. of Employees	580
Ticker Symbol	WHIK
SIC Code	<input type="text"/>
Territory	---

A blue callout box points to a small barcode scanner icon located to the right of the 'SIC Code' text input field. The callout box contains the text: 'Click this icon to scan a barcode with your device's camera.'

See also

[Field Service Mobile App User's Guide](#)

Use your browser for non-mobile features in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Use your browser for features not in the app

The following features in the web application aren't available in Customer Engagement for phones and tablets:

- Yammer and activity feeds
- Bing Maps integration
- Parature, from Microsoft knowledge base integration

If you need to use these features or want to view a record in the web application, you can do that in your tablet's browser. (You can only do this in the tablet app.)

1. Press and hold the record or view you want to see.
2. Tap **Open in browser**.
3. Sign in to the web application when it appears. The web app goes right to the record that you were working on in the mobile app.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

A note for Android users of Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Navigation on Android tablets is a little different than on iPad or Windows tablets.

When you scroll on an Android tablet by swiping left or right, the app scrolls a whole page at a time instead of a partial page. You can also use the arrow buttons at the bottom of the screen to scroll left or right.



Depending on where you are in the app, the Android **Back** button takes you to the previous form, cancels dialog boxes or error messages, closes the keyboard, or performs other actions depending on the context.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

More help and how-to for users of Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Get help while using the app

If you ever need help while you're in the mobile app, just tap **Help** on the command bar.

Get deployment and troubleshooting help

If you're an admin looking for resources to help you set up or troubleshoot Customer Engagement for phones and tablets, try these resources:

[TechNet: Set up Dynamics 365 for phones and tablets](#)

[TechNet: Set up CRM for phones express](#)

[TechNet: Create and edit mobile forms](#)

[TechNet: Troubleshoot problems with Dynamics 365 for phones and tablets](#)

[TechNet: Troubleshoot problems with CRM for phones express](#)

[Troubleshoot a Dynamics 365 for Customer Engagement apps for Windows app start-up error](#)

See also

[Use Cortana voice commands in Dynamics 365 for phones](#)

Manage accounts, contacts, leads, and opportunities in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

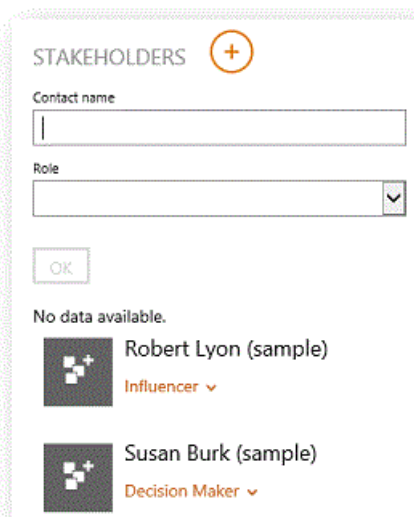
Types of records

As a sales professional, you'll be working a lot with the following types of records:

- **Accounts** Account records contain information about the companies you do business with.
- **Contacts** Contact records contain information about the people you know and work with. Usually, multiple contacts are associated with one account. Contacts could include people responsible for making purchasing decisions, people in charge of paying invoices, support technicians, or anyone you work with at the company.
- **Leads** Leads are potential sales, and you or your company can get leads from many different sources. For example, you can generate sales leads from marketing campaigns, inquiries from your website, mailing lists, social media posts, or in person at a trade convention.
- **Opportunities** When you qualify a lead, it becomes an opportunity, or a deal that you're getting ready to close.

Create or edit stakeholders or sales team members

1. In **Stakeholders** or **Sales Team** for a lead or opportunity, tap the **New Item** button +.
2. Enter a contact name to look up in the drop-down menu that appears.
3. Select from the contacts that appear, or, if it's a new contact, tap the **Add** button and complete the information in the form.
4. Select a role for the contact.



The screenshot shows a mobile interface for the 'STAKEHOLDERS' section. At the top, there's a header 'STAKEHOLDERS' with an orange plus icon in a circle. Below the header, there's a 'Contact name' field with a text input and a dropdown arrow. Underneath is a 'Role' field with a dropdown menu. An 'OK' button is visible. Below the form, there's a message 'No data available.' followed by two sample entries: 'Robert Lyon (sample)' with a role of 'Influencer' and 'Susan Burk (sample)' with a role of 'Decision Maker'. Each entry has a small icon to its left.

Privacy notice

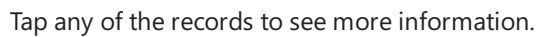
By enabling the **User Content and Location** setting, you allow your Dynamics 365 for Customer Engagement or Microsoft Dynamics CRM administrator and system customizers to access precise location data and files on your mobile device. The administrator or customizer may choose to send the information to Dynamics 365 for Customer Engagement, Dynamics CRM, and/or other services at their discretion. You can subsequently disable this functionality by disabling the **User Content and Location** setting. Note that this setting does not impact the privacy settings specified in the mobile device operating system.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

12/10/2018 • 2 minutes to read • [Edit Online](#)

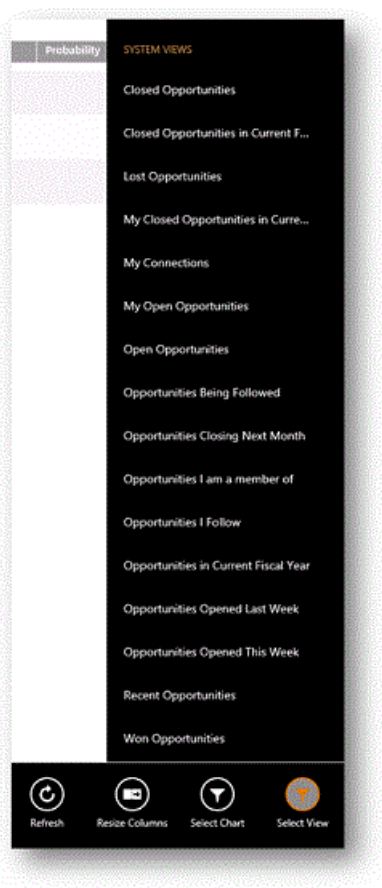
Charts give you a quick view of how you're tracking to your goals. They're interactive, so you can tap an area of a chart to see the data for that area, or you can tap the area outside the chart to see the data for the entire chart. In the phone app, swipe left and right to view the chart and its associated records.



Changing the chart view shows you a different breakdown of your data, such as opportunities opened within a specific time period.

- 
- Refresh Resize Columns Select Chart **Select View**

2. Select the view you want.



Show a different chart

You can change the chart to show data for a different type of record in much the same way.

1. Tap **Select Chart** on the command bar.
2. Select the chart you want to display.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Track customer service cases in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

As a Customer Service Manager or Customer Service Rep, use the Customer Engagement for phones and tablets app to keep track of activities in your customer service organization while on the go. The app's dashboard lets you track your team's performance, monitor high priority cases, and route cases from your mobile device.

If your organization has updated to Dynamics CRM Online 2016 Update 1, you can also search the knowledge database or create new knowledge articles.

Differences in the customer service area between the web app and the mobile apps

Customer Engagement for phones and tablets is optimized for Customer Service Managers and Reps who are always on the move and need to keep track of activities in their customer service organization. Due to these optimizations, the service areas in the mobile apps have a different appearance and functionality than the web app in some cases, as shown in the following table:

WEB APP FEATURE	DIFFERENCE IN THE MOBILE APPS
Merge cases	Not available.
KB article lookup	This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises) by the name of Interactive Service hub. With the December 2017 update, Interactive Service hub is now known as Customer Service Hub. Interested in getting this feature? Find your CRM administrator or support person.
Queue filter in Queue Items list	Not available. However, you can change the view so that it filters items by queues. More information: TechNet: Customize Dynamics 365 for phones and tablets
Queue Item Details button on forms for items that you can route to a queue; for example, cases	Not available.
Similar Cases area on the case form	Not available.
Customer contact card on the case form	Tap the customer name on the case form to view the customer record and communication card.
Case origin symbols on the Cases list	The Cases list shows the list of cases without the symbols. The case origin appears on the individual case form.
Subject lookup in Case Details area	Instead of selecting from a tree view, type in letters to start a search.
Find Case step in Identify , Similar Cases step in Research , and Resolve Case step in Resolve business process flow	These actions don't appear in the case process. However, to resolve a case, you can use Resolve on the command bar.

WEB APP FEATURE	DIFFERENCE IN THE MOBILE APPS
-----------------	-------------------------------

Entitlement lookup	You can't filter results in entitlement lookup.
Parature, from Microsoft knowledge base integration	This feature is available in Dynamics CRM Online 2016 Update 1 or later.

Open a case in the web app to work on it in more detail

If you need to perform more actions on a case than you can in the mobile app, you can easily open the case in your browser.

1. On the case screen, open the command bar.
2. Tap **Open in browser**.
3. Sign in to the web application when it appears. The web app goes right to the case you had open in the mobile app.

See also

[Manage activities in Dynamics 365 for phones and tablets](#)

[Use Cortana voice commands in Dynamics 365 for phones](#)

Manage quotes, orders, and invoices in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

As a sales professional, you'll frequently work with the following types of records:

- **Quotes:** Most sales begin with a price quote, which eventually leads to an order.
- **Orders:** When a quote is accepted and approved, it becomes an order.
- **Invoices:** Once an order is shipped or delivered, an invoice is created.


With Dynamics 365 for Customer Engagement, it's easy to customize for the way your organization does business, so you might see different types of records in your Customer Engagement system.

NOTE

Managing quotes, orders, and invoices is not supported in an offline environment.

This feature was introduced in Dynamics CRM 2016 Service Pack 1 On-Premises and Dynamics CRM Online 2016 Update 1.

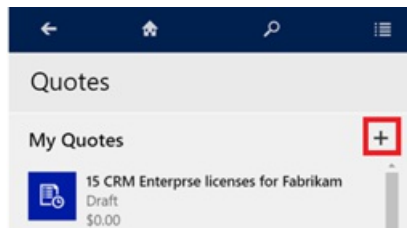
View or change records

1. Tap the menu button , and then tap the record type you want from the drop-down list.
2. Open the record type.
3. Tap the record.
4. Make your changes.

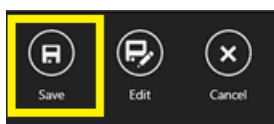
Create a new quote

Phone

1. Go to the **Quote** screen.
2. Tap the Add button + to the right of the header.

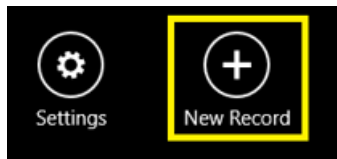


3. Enter the information, and then save the record.



Tablet

1. On the **Home** screen, tap the ellipsis button (...) at the bottom-right corner of the screen.
2. Tap **New Record**.

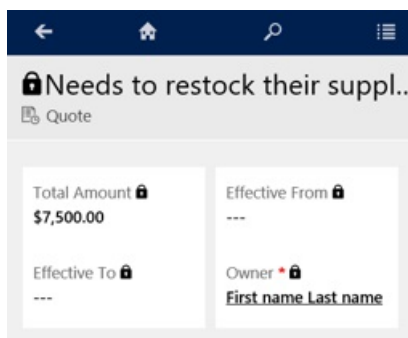


3. Select **Quote** from the list.
4. Enter the information for the quote, and then tap **Save**.

Create a quote from an opportunity

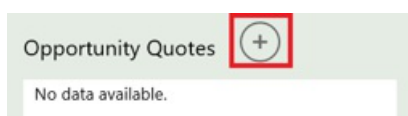
Phone

1. Open the opportunity.
2. With the opportunity open, swipe left to the **Product Line Items** screen and make sure a price list is selected.
3. Go to the next tab on the right. If a product isn't automatically selected, tap the Add button +.
4. Select the product(s) you want, and then tap **Save**.
5. Go to the **Opportunity Quotes** screen, and then tap the Add button +.
6. On the **Quotes** page, verify that the quote is listed.



Tablet

1. Open the opportunity.
2. Go to **Opportunity Quotes** on the far right, and then tap the Add button +.



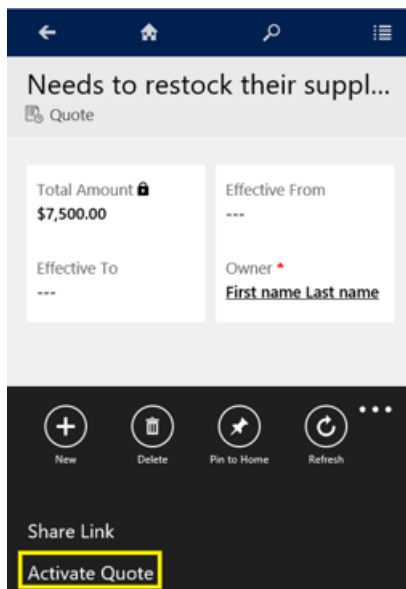
3. Review the quote.



Activate a quote

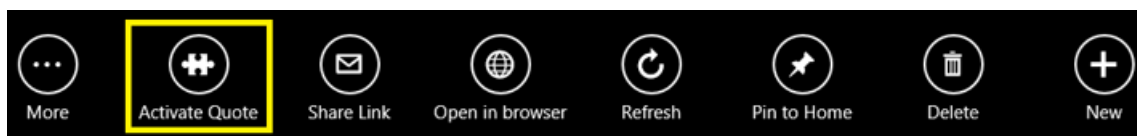
Phone

1. Open the quote, and then tap the ellipsis (...) at the bottom-right corner of the screen.
2. Tap **Activate Quote**.



Tablet

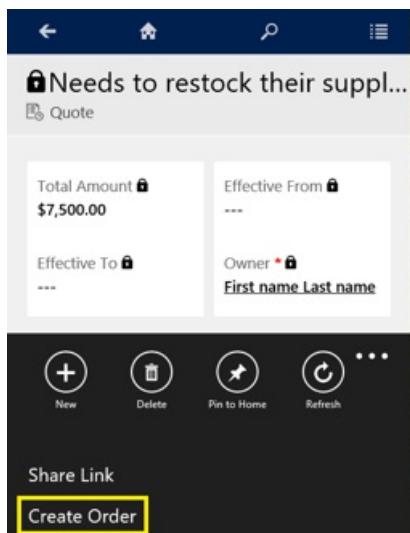
1. Open the quote, and then tap the ellipsis (...) at the bottom-right corner of the screen.
2. Tap **Activate Quote**.



Create an order from a quote

Phone

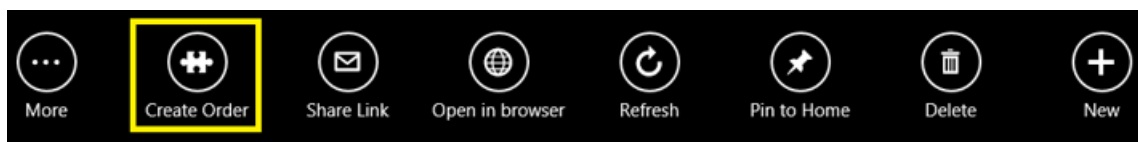
1. Open an active quote, and then tap the ellipsis (...) at the bottom-right corner of the screen.
2. Tap **Create Order**.



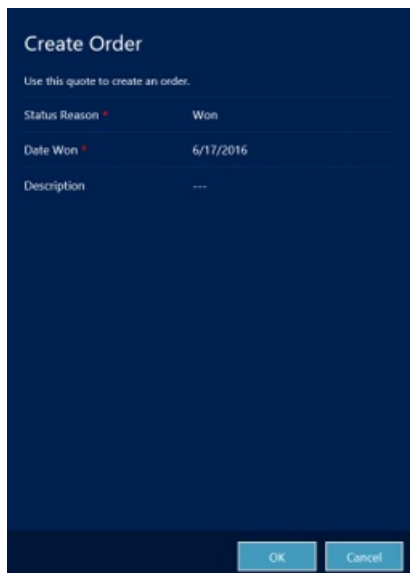
3. On the **Create Order** page, verify that all information is correct, enter a description (optional), and then tap **OK**.

Tablet

1. Open an active quote, and tap the ellipsis (...) at the bottom-right corner of the screen.
2. Tap **Create Order**.



3. Review the order, add a description (optional), and then tap **OK**.

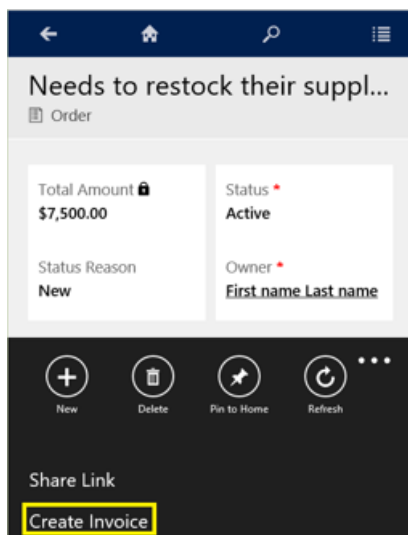


4. Open the orders list, and verify that the new order is there.

Create an invoice from an order

Phone

1. Open the order, and then tap the ellipsis (...) at the bottom-right corner of the screen.
2. Tap **Create Invoice**.



Tablet

1. Open the order, and then tap the ellipsis (...) at the bottom-right corner of the screen.
2. Tap **Create Invoice**.



See also

[Install Dynamics 365 for phones and tablets](#)

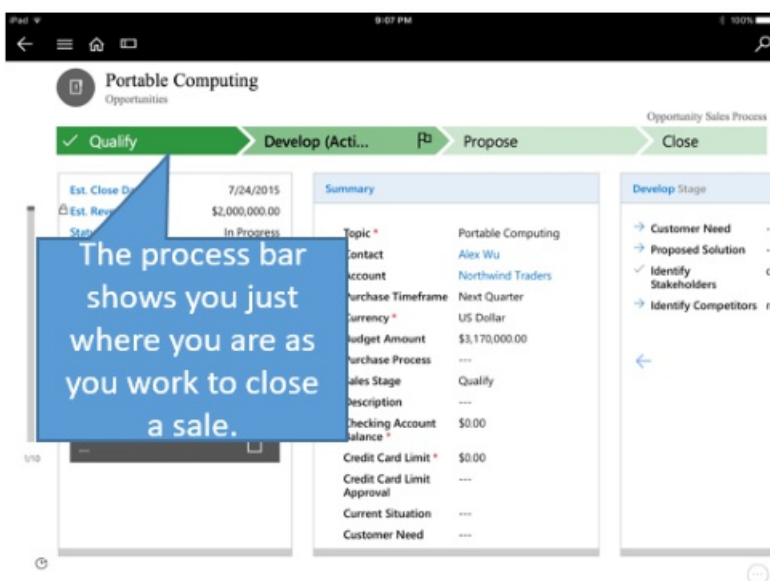
Nurture leads through the sales process in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Track leads through the sales process

Move customers through the sales process, from lead to close, with the process bar. Once you've completed the steps in one stage, you can move on to the next one. The process bar highlights the stage you're in so you know where you are in the process, and shows you what to do next.



For example, in the illustration above, you start the process with a lead. In the first stage (**Qualify**), you qualify or disqualify the lead based on criteria established by your company. If you qualify the lead, it's converted to an opportunity. The process bar then walks you through the rest of the stages: **Develop**, **Propose**, and **Close**.

The process bar helps you and everyone on your sales team follow best practices. The process bar that your company uses might have different stages than the one illustrated, to match the way you do business.

Qualify, Disqualify, or Reopen an opportunity

To change the status of an opportunity, tap **Qualify**, **Disqualify**, or **Reopen Opportunity** on the command bar.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Manage activities in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

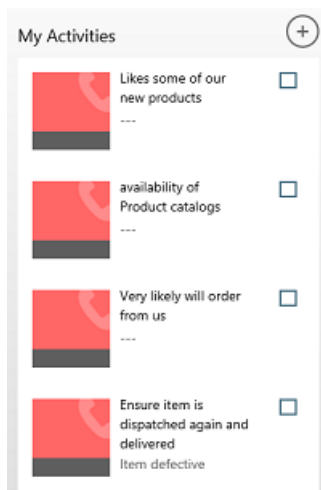
Applies to Dynamics 365 (online), version 8.x

My Activities

Use activities to keep track of all your customer communications. For example, during the course of a sale, you might send emails, make phone calls, set up appointments, or assign tasks. All of these are considered activities, and the Customer Engagement for phones and tablets app helps you track them so you don't miss an important follow-up activity.

On your dashboard, **My Activities** shows activities that are past due or due today in a darker color than those that aren't. You can do the following from your activity feed:

- To view an activity, select it from your **My Activities** feed on the dashboard.
- To add an activity, tap + at the top of your **My Activities** feed.
- To mark an activity complete, tap the check box next to the activity in the feed.
- To see a subset of your activities:
 - On a tablet, press and hold **My Activities** and tap **Select View** on the command bar.
 - On a phone, tap **Select View** on the command bar.



See also

[Dynamics 365 for phones and tablets User's Guide](#)

Create a communication card in Dynamics 365 for phones and tablets

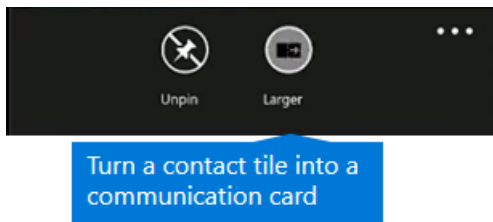
12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Create a communication card

Communication cards provide a quick way to email or call your contact just by tapping the email address or phone number on the card. Communication cards appear on contact forms, but you can also create a communication card from a contact in the Pinned Tiles section of your Home screen by expanding the pinned tile.

Press and hold a contact tile that's pinned to the dashboard, and then tap **Larger** on the command bar.



See also

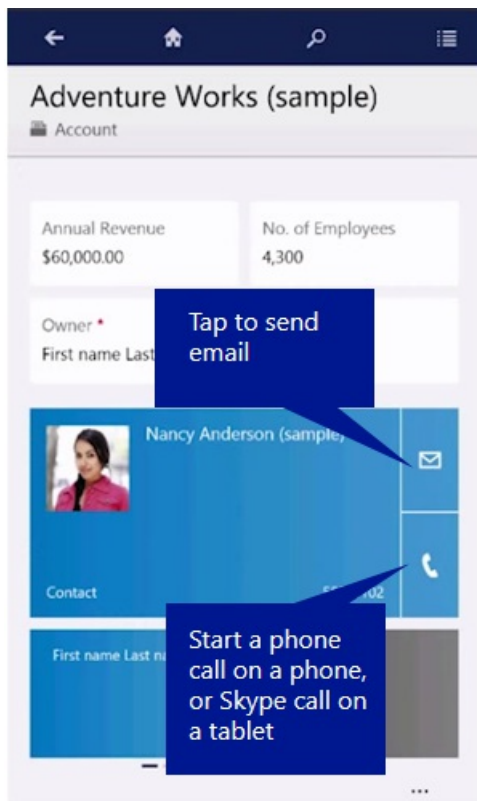
[Dynamics 365 for phones and tablets User's Guide](#)

Email and call customers in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Call or send email to your customers easily from the mobile apps. Tap any phone number in a record to start a call, or on the communication card for a contact, tap the email button to send an email, or the phone button to start a call.



In Dynamics 365 for tablets, tapping the phone button starts a Skype call. In Dynamics 365 for phones, it starts a phone call.

When you're finished with your call, the app prompts you to enter details about the call. If you're using a Windows 8 or later tablet, you can enter details while you're on the call, because Skype snaps to the screen next to the Dynamics 365 for tablets app.

See also



[Pin your favorites in Dynamics 365 for phones and tablets](#)

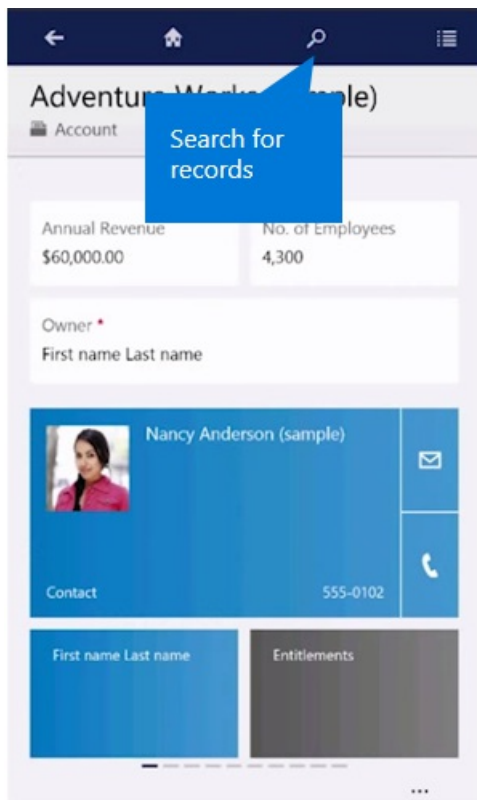
[Search and sort in Dynamics 365 for phones and tablets](#)

Search and sort in Dynamics 365 for phones and tablets

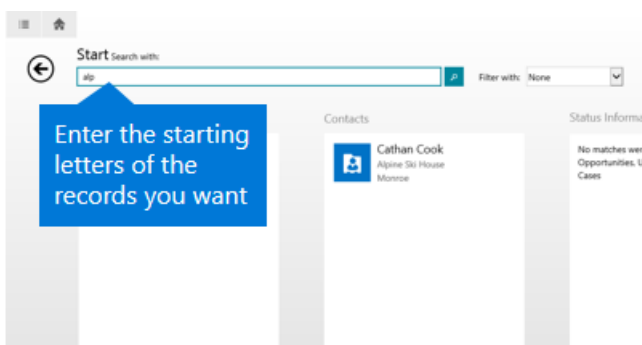
12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

To search, tap  on the top of the page, type in the search box, and tap  next to the search box.

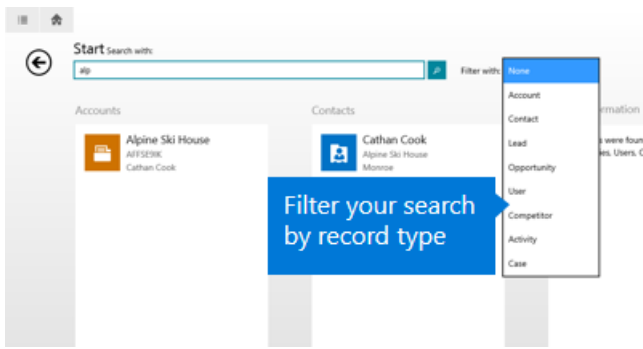


Search results include only records that begin with the letters you type. For example, if you want to search for "Alpine Ski House," type **alp** in the search box. If you type **ski**, the record won't show up.



Filter search results

To filter results by record type, choose a record type from the **Filter with:** drop-down box.



Resize columns

You can resize columns in a grid in the Dynamics 365 for tablets app, and the app will remember your settings the next time you view that grid.

1. On the command bar, tap **Resize Columns**.
2. Drag the column handles that appear above the grid to the width you want.

Regarding	Priority	Start Date	Due Date	Re
Basic Company (sample)	Normal	No
...	Normal	1/22/2012	1/22/2012	No

Sort items

You can also sort items in a grid in the Dynamics 365 for tablets app:

- To sort in ascending order by a column, tap that column's heading.
- To sort in descending order, tap the column's heading again.

Export records to Excel

In Dynamics 365 for phones and Dynamics 365 for tablets, you can export records to Excel, just like you can in the web app. From a grid view in Dynamics 365 for tablets or a list of records in Dynamics 365 for phones, tap ... to open the command bar and then tap **Export to Excel**.

More information: [Export data to Excel](#)

IMPORTANT

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises) by the name of Interactive Service hub.

With the December 2017 update, Interactive Service hub is now known as Customer Service Hub.

Interested in getting this feature? [Find your CRM administrator or support person.](#)

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Dashboard views in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Work with records on the dashboard

Where [The workspace, your personalized action hub in Dynamics 365 for phones and tablets](#) shows you common tasks and daily priorities, dashboards give you an overview of important information. Click the home icon any time to get your dashboards. Here are some of the ways you can work with them.

TO DO THIS:	DO THIS:
View all the records for a record type on the dashboard in Dynamics 365 for tablets (for example, Leads).	Tap the header of the list. This opens your records in a grid view on your tablet.
Open the form for a record on the dashboard.	Tap the record.
Create a new record from the dashboard.	Tap the + on the right side of the header of the type of record you want to create (for example, My Activities).

Change views for a list on the dashboard

- In Dynamics 365 for tablets, press and hold the name of the list and tap **Select View** on the command bar.
- In Dynamics 365 for phones, tap ... and tap **Select View** on the command bar.

See also

[Dynamics 365 for phones and tablets User's Guide](#)

Use Cortana voice commands in Dynamics 365 for phones

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

You can use the following Customer Engagement voice commands with Cortana if you're using Cortana on Windows 8.1 phones or later. Cortana voice commands for Customer Engagement are only available in English at this time.

These commands work with either the Dynamics 365 for phones app or the previous phone app, CRM for phones express.

TO DO THIS IN DYNAMICS 365 FOR CUSTOMER ENGAGEMENT APPS	SAY THIS
Open an item	<p>Dynamics 365 for Customer Engagement apps open <item> called <item name>.</p> <p><i>Example:</i></p> <p>"CRM open account called Contoso."</p> <p><i>Variation:</i></p> <p>"CRM open account <i>named</i> Contoso."</p>
Show a view	<p>Dynamics 365 for Customer Engagement apps show <view name>.</p> <p><i>Example:</i></p> <p>"CRM show my active accounts."</p> <p><i>Variation:</i></p> <p>"CRM <i>show me</i> my active accounts."</p>
Search for an item	<p>Dynamics 365 for Customer Engagement apps find <item> called <name>.</p> <p><i>Example:</i></p> <p>"CRM find account called Contoso."</p> <p><i>Variation:</i></p> <p>"CRM find account <i>named</i> Contoso."</p>

TO DO THIS IN DYNAMICS 365 FOR CUSTOMER ENGAGEMENT APPS	SAY THIS
Create a new item	<p>Dynamics 365 for Customer Engagement apps create <item type> called <item name>.</p> <p><i>Example:</i></p> <p>"CRM create contact called Maria Campbell."</p> <p><i>Variation:</i></p> <p>"CRM add new contact named Maria Campbell."</p>
Create a phone call activity	<p>Dynamics 365 for Customer Engagement apps remind me to call <call name>.</p> <p><i>Example:</i></p> <p>"CRM remind me to call Maria Campbell to set up appointment."</p>
Create an appointment	<p>Dynamics 365 for Customer Engagement apps schedule meeting to <subject>.</p> <p><i>Example:</i></p> <p>"CRM schedule meeting to discuss quote with Maria Campbell."</p>
Create a task	<p>Dynamics 365 for Customer Engagement apps remind me to <task name>.</p> <p><i>Example:</i></p> <p>"CRM remind me to email Maria Campbell."</p> <p><i>Variations:</i></p> <p>"CRM follow up Maria Campbell."</p> <p>"CRM follow up with Maria Campbell."</p> <p>"CRM follow up on Contoso."</p>
Open task list	<p>Dynamics 365 for Customer Engagement apps what should I do next?</p> <p><i>Example:</i></p> <p>"CRM what should I do next?"</p>

NOTE

The **create** commands work only with Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online 2015 Update or later. The other commands work with Dynamics CRM 2013 and Dynamics CRM Online as well as Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online 2015 Update or later.

For more information about using Cortana, see [Meet Cortana](#).

[] [Track customer service cases](#)

Privacy notice

Cortana does not have access to the data stored in the Dynamics 365 database. Cortana only captures your voice commands. When you make a voice command through Cortana, in order to both understand the request and improve Microsoft speech recognition-related products and services, Microsoft uses proprietary technologies such as, for example, acoustic and natural language processing models to record and interpret your user's request. Voice-dictated Bing search queries are treated like other text-based search requests and may be used to improve Bing search results; however, the Dynamics 365-voice-dictated commands listed here are not used to provide advertising. For more information about privacy and Cortana, see [Cortana and my privacy FAQ](#).

If you are an administrator, you can manage enterprise access to Cortana with the PolicyManager configuration service provider through a separate device management service. The policy for this is set at the phone level and can't be set just for the Dynamics 365 for phones app. For more information, see the MSDN topic [PolicyManager configuration service provider](#).

See also

[Meet Cortana](#)

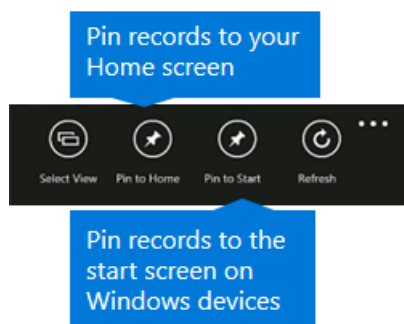
Pin your favorites in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Pinned tiles provide quick access to your records, contacts, views, and dashboards. You can pin as many tiles as you want to the Pinned Tiles section of your Home screen or to the Start screen or menu of Windows 8 and Windows 10 devices.

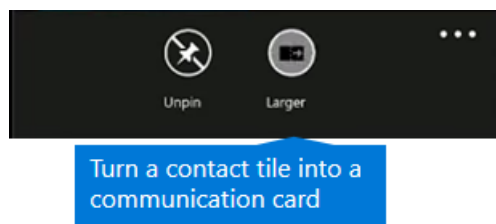
Press and hold the item you want to pin, or display the command bar while viewing a record, and then tap **Pin to Home**.



Create a communication card

Communication cards provide a quick way to email or call your contact just by tapping the email address or phone number on the card. Communication cards appear on contact forms, but you can also create a communication card from a contact in the Pinned Tiles section of your Home screen by expanding the pinned tile.

Press and hold a contact tile that's pinned to the dashboard, and then tap **Larger** on the command bar.



See also

[Dynamics 365 for phones and tablets User's Guide](#)

Manage work orders, agreements, customer assets, and time off requests in Dynamics 365 for phones and tablets

12/10/2018 • 2 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Field agents can use the mobile app to review work orders and get all the information they need to complete a job. Create a work order, agreement, customer asset, or submit a time off request the same way you create any record in the mobile app. For more information on field service, see the [Dynamics 365 for Customer Engagement apps for Field Service - User's Guide](#).

NOTE

To use these features on the mobile app, you'll need the Microsoft Dynamics 365 for Customer Engagement apps for Field Service solution. Note also that Field Service is currently supported in online mode only.

Work orders

Work orders have information on what work needs to be done at a customer site. They're used to coordinate and schedule resources and activities, and can be used for installations, repairs, or preventative maintenance.

To find and open a work order:

1. Tap the menu icon, and then tap **Work Orders**.
2. From the list of work orders, tap a work order number to open it.
3. When the work order opens, you can add notes, attachments, photos, and more.

Agreements

Agreements is where you can see customer contracts. Agreements provide the framework for automatically-generated work orders and invoices, and are ideal for preventative maintenance work.

An agreement lets you choose how often work orders are generated (daily, weekly, monthly, or yearly), and provide work order details like incidents, products, services, and service tasks.

To find and open an agreement:

1. Tap the menu icon, and then tap **Agreements**.
2. From the list of agreements, tap an agreement number to open it.

Customer assets

Customer assets shows which products a customer uses. This is where you maintain a list of serviceable items that are related to a service location.

To find and open a customer asset:

1. Tap the menu icon, and then tap **Customer Assets**.

2. From the list of customer assets, tap an asset number to open it.

Time off requests

If a field tech is taking some time off, log the request so that dispatchers can see the time off request on the schedule board when they're scheduling work orders.

To submit a time off request:

1. Tap the menu icon, and then tap **Time Off Requests**.
2. Tap the ellipses , and then tap **New**.
3. Enter the required information, and then tap **Save**.

See also

[Dynamics 365 for Customer Engagement apps for Field Service - User's Guide](#)

Work offline with Dynamics 365 for phones and tablets

1/30/2019 • 13 minutes to read • [Edit Online](#)

Applies to Dynamics 365 (online), version 8.x

Your Dynamics 365 for Customer Engagement for phones and tablets users aren't always going to be connected to a network. Admins can enable and configure mobile offline so even when no network is available users can still be productive with up-to-date information at hand.

NOTE

Mobile offline functionality for version 8.x customers will not be available post general availability (second quarter of 2019) of the new offline solution for version 9.0. This is in line with the guidelines already provided to version 8.x customers about upgrading to the latest generally available version by January 31, 2019. To leverage the upcoming offline capabilities, we recommend upgrading to the latest server version as soon as possible.

Mobile offline capabilities for administrators

Dynamics 365 for Customer Engagement for phones and tablets provides the following for administrators:

- Manage the offline capability for your org by provisioning and deprovisioning it.
- Control the right amount of data for mobile with the following filter capability:
 - Mobile offline entity filter. Once admins enable an entity for mobile offline, they can set an entity filter to download the data to mobile middleware. Note: if no rules are set on a mobile enabled entity data, users will not have any data available offline for that entity.
 - Profile definition with filter. Admins can create a profile which will define the data available on user in mobile offline. These filters will be applied on the middleware data set available for your org based on the mobile offline entity filter. Admins must assign the profile to users and publish it, for the profile to become active. Note: only the mobile offline enabled entity can be part of the profile.
For more information, see [Filter your data for mobile offline usage on Microsoft Dynamics 365 for Customer Engagement apps](#).
- All the data will be downloaded to the mobile client based on user security access.
- If a user is following a record in Microsoft Dynamics 365 and the corresponding entity is part of the profile, then the record will be available to the user when offline. If the user stops following the record, it will be removed from offline in the mobile client.

Mobile offline capabilities for end users

Dynamics 365 for Customer Engagement for phones and tablets provides the following for end users:

- Offline enabled entities: Dynamics 365 for Customer Engagement mobile-enabled entities can be enabled for mobile offline.
 - Users can perform create, read, update, and delete (CRUD) operations on entities when offline based on the Dynamics 365 for Customer Engagement security model.
 - Business process flows are supported in offline mode. Users can move the business process stage when offline for a single entity.
 - Business process flows with multiple entities or business process flows with child processes are not

supported.

- Other than create, read, update, and delete operations in offline mode, users can perform before commands:
 - Business process: Next/Previous stage commands, Set Active commands
 - Lead entity: Qualify and Disqualify commands
 - Opportunity entity: Command to perform Close as won\lost
 - Case entity: Command to Resolve case
 - Activity: Convert to opportunity command, Close activity through 'Mark Complete' command in Activity form and Activity Grid
- Lookup supported to offline records: Look up are supported for the entities that are mobile offline enabled. All the entities participating in the lookup should be mobile offline enabled.
- Offline views: Only system views are supported in mobile offline. There are limitation of Views supported in offline.
- Offline search:
 - Available only for offline entities. User can only search one entity at a time. Only categorized search is supported in offline and not relevant search.
 - Date field not available for mobile offline search.
- Security modelling:
 - Mobile offline honors the Dynamics 365 for Customer Engagement security model. It also supports the hierarchical security model.
 - Field level security and attribute sharing are not supported for offline.
- If user was working on a record and loose the network connection, the updates on the record will be saved in the offline mode and will be synchronized to Dynamics 365 for Customer Engagement once the user goes back online. The record, once synchronized to Dynamics 365 for Customer Engagement, will follow the filter rule for availability in offline mode.

For more information, see [Work offline in Dynamics 365 for phones and tablets](#).

For a list of entities supported in mobile offline, see [Entities displayed in Dynamics 365 for phones and tablets](#).

Other offline capabilities

- Offline data is refreshed periodically. Duration of the refresh depends on the mobile offline profile and amount of data that is enabled for offline.
- Automatic replay for offline actions. All the data created or modified by user in offline are replayed to Dynamics 365 for Customer Engagement automatically without user intervention.
- Actions are replayed from the offline synchronization in queue. The changes are played back in the same sequence as they were created/modified/ deleted. This ensure that the data state is maintained and there are no data mismatch on Dynamics 365 for Customer Engagement.
- Mobile offline supports conflict detection and error resolution. Conflict error for any update and delete will be detected and users can resolve the error in the Dynamics 365 for Customer Engagement web client and on the mobile client. Any other errors created in offline will also be available for users to edit and resubmit.
- The org can enhance business functionality available in mobile offline using Xrm.Mobile.offline. For more information, see [Xrm.Mobile.offline \(client-side reference\)](#).

Mobile offline blogs

- Feature overview: [The new full offline experience with mobile Dynamics CRM apps](#)
- Filtering in mobile offline: [Filter your data for mobile offline usage on Microsoft Dynamics 365 for Customer Engagement apps](#)

Mobile offline videos

- [Working offline with Dynamics 365 for Customer Engagement apps](#)
- [Microsoft Dynamics CRM Online 2016 Update 1 New Features- Mobile Offline](#)

Work in disconnected mode with Dynamics 365 for phones and tablets

You can continue to work in the mobile apps when the device is disconnected from the internet when you've enabled mobile offline synchronization.

With mobile offline synchronization enabled, the app provides a rich offline experience. You can work with all the basic commands like create, read, update, delete in addition to certain business processes. Upon reconnecting, these offline changes will be automatically synchronize to Dynamics 365 for Customer Engagement apps. The data is periodically synchronized from Dynamics 365 for Customer Engagement apps to your device for offline usage based on the sync profile configured by administrator.

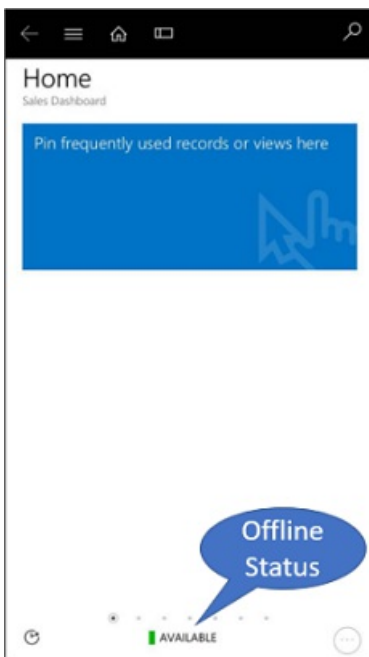
Download app updates for offline

When you log onto the Dynamics 365 for Customer Engagement apps mobile app, you will see the list of app modules that you have access to. When you navigate to any app module that your admin has configured for offline, you'll receive a prompt to download these config updates to setup your app to work in offline mode.

Offline synchronization status






Status on footer

To verify offline synchronization is enabled on your app look at the offline synchronization status in the footer of the app. The status also lets you know the entities that are available in offline and, for each of these available entities, when the data is last synchronized with Dynamics 365 for Customer Engagement apps.



The following table lists the various status icons and what they mean.

MOBILE OFFLINE SYNCHRONIZATION STATUS ICON	STATUS	DESCRIPTION
	Available	Offline synchronization is available as the device database is available.


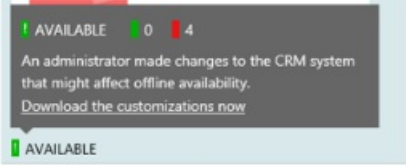
MOBILE OFFLINE SYNCHRONIZATION STATUS ICON	STATUS	DESCRIPTION
	Available	Warning due to metadata mismatch. You can tap on the link in the status to download the metadata if it's pending from Dynamics 365 for Customer Engagement apps.
	Initializing	Offline database is being setup.
	Not available	Offline synchronization is not available as the database is not created on your mobile device.
	Not available	Offline synchronization is not available. A background fix is in process.
	Error	The database is not available.

NOTE

If there is no status in the footer, offline synchronization is not enabled for your app or the user has not been added to the mobile offline profile.

Status flyout

You can check the reason for the offline synchronization status by clicking on this status. This opens a flyout which shows the number of entities enabled for offline along with status reasons, if any.

 <p>Number of entities enabled</p>	 <p>Status reasons</p>
---	--

Last Sync Time

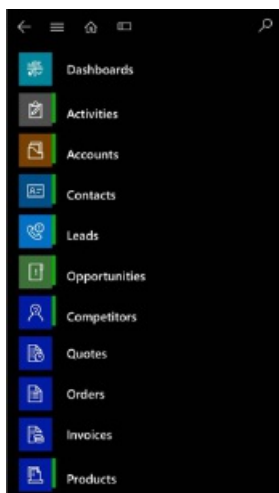
For offline available entities, when you navigate to the entities grid or form, you can check in the footer when data is last synchronized with Dynamics 365 for Customer Engagement apps.



Status on sitemap

You can also check the status of entities enabled for offline on the sitemap. A vertical rectangle on right side of the entity's image represents the offline status.

- Green – entity is enabled for offline and is available to work in when offline
- Red – entity is enabled for offline but is not available to work in when offline due to an error
- No rectangle – entity is not enabled for offline



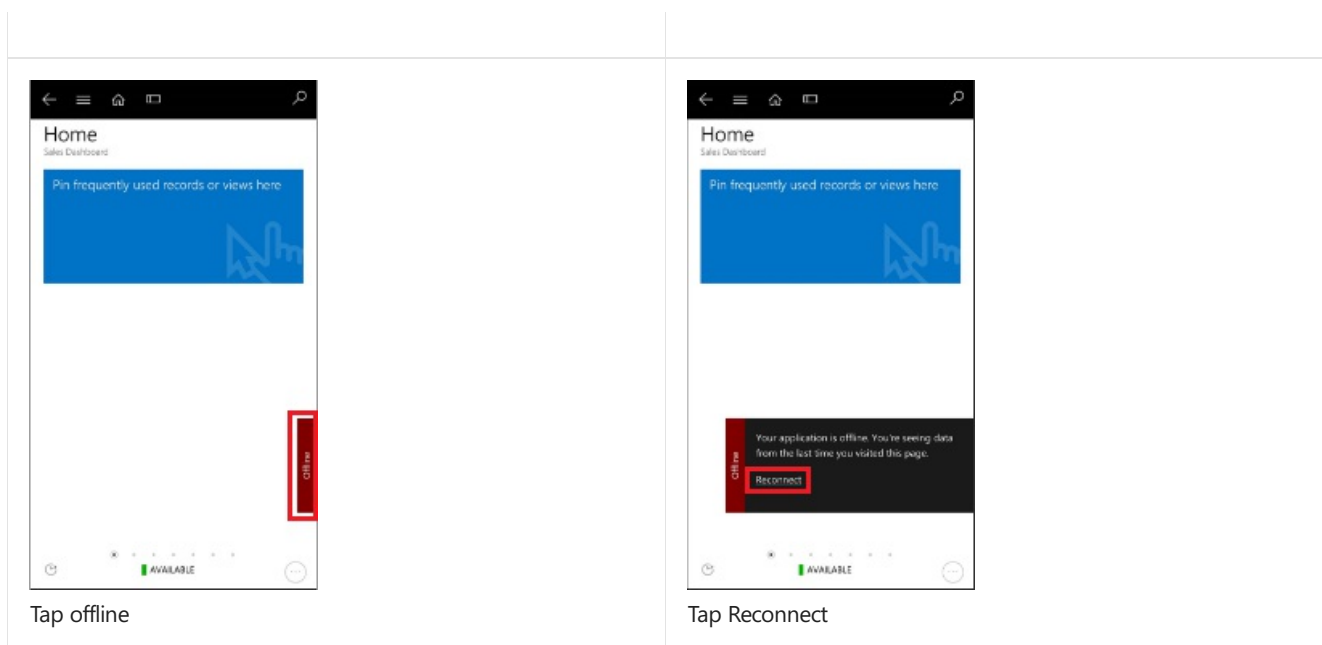
Offline data

Users will have the following data in offline mode:

- Data of all available entities as per the filters defined by admin in the profile.
- Any records of offline available entities that you follow on Dynamics 365 for Customer Engagement apps will be available in when offline.
- Any records of offline available entities that you are working on when you lose the connectivity will be available when offline, and you can continue working on these records. The changes in these records will be synchronized to Dynamics 365 for Customer Engagement apps when you reconnect and will be available when offline again as per your filters.

Offline indicator

As soon as the application is disconnected from the server you will see an indication on the application that it is offline. Once you have reconnected to your phone service or internet, tap this offline indicator to reconnect to Dynamics 365 for Customer Engagement apps.



Working in offline mode

You can seamlessly work in offline mode with all available entities. In offline mode you have support for:

- Create, read, update, and delete (CRUD) actions
- Business processes:
 - Next Stage
 - Previous Stage
 - Set Active
- Commands
 - Lead – Qualify\Disqualify
 - Opportunity – Close as won\lost
 - Case – Resolve
 - Activity – Convert to opportunity
 - Close activity through Mark Complete command in Activity form and Activity grid.
- Entity Views
- Search
- Lookup for offline records

NOTE

See [Dynamics 365 for Customer Engagement apps Readme / Known Issues](#) to understand limitations in offline mode.

Watch a short [video](#) (3:06) about working offline with Dynamics 365 for Customer Engagement apps.

Automatic playback

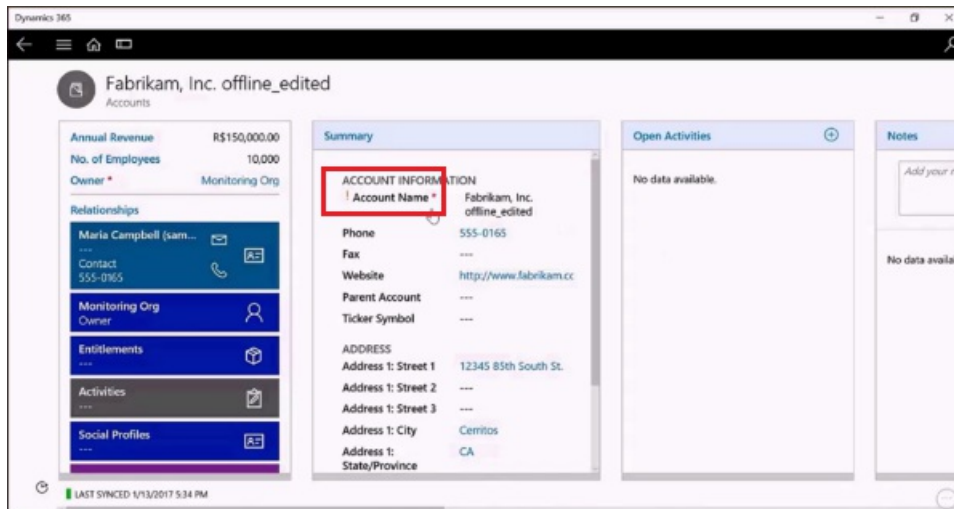
On reconnecting to the Dynamics 365 for Customer Engagement apps, all offline actions are automatically played back to the Dynamics 365 for Customer Engagement apps. Any errors during this automatic play back are captured and stored in the Sync Error entity.

Sync conflict resolution

Changes done in offline mode on your device that create conflicts with Dynamics 365 for Customer Engagement apps are detected and captured in the Sync Error entity. You can view and resolve these errors either in Dynamics 365 for Customer Engagement apps or on the device. Sync Error conflict resolution gives you an option to either keep the offline changes on the device or reject them for the changes in Dynamics 365 for Customer Engagement

apps.

When resolving a sync error, an exclamation mark (!) highlights the conflict fields before you update them. If a record has changed Dynamics 365 for Customer Engagement apps between the time your device retrieved the record and when it tries to update or delete that record, you'll see an exclamation mark (!) by the relevant field and you'll need to resubmit your updated changes.



Background sync

Background sync is enabled even when the app is minimized as long as a network connection is detected. But when the app is in the background, metadata changes will not be accepted automatically. When you bring the app to the foreground, you will be prompted to accept the metadata changes.

About background sync

- Sync will run until you sign in to the mobile app.
- While the app is running in the background, sync is automatically enabled when a network is detected.
- While the app is running in the background, sync is automatically disabled when a network is disabled.
- When you bring the app to the foreground, regular sync is detected and enabled.
- Background sync is disabled when the device is locked and enabled when the device is unlocked.
- While the app is running in the background, metadata changes will not be accepted automatically; the mobile app will stop the background sync.
- When you bring the app to the foreground, you are prompted to accept the metadata changes.
- While the app is running in the foreground, after metadata is updated, the app will switch to regular sync.

Background sync will be disabled if:

- Your user token expires in the background.
- The application closes for some reason.
- Your device locks.

Background sync is available on all supported devices. See [Support for Dynamics 365 for phones and Dynamics 365 for tablets](#).

Offline synchronization vs. Offline drafts

You'll have one of two possible offline experiences, depending on which one your admin set up:

- **Seamless mobile offline synchronization.** You can view, edit, and create records while you're disconnected from the Internet. Once you're back online, changes you've made are synchronized with Dynamics 365 for Customer Engagement.

- OR -

- **Offline drafts.** This experience is available to everyone. In this case, the app keeps records you've used recently, so you can still access them when you're disconnected.

You can also capture new information by creating drafts of new records - like accounts, contacts, and activities - and save the records the next time you go online.

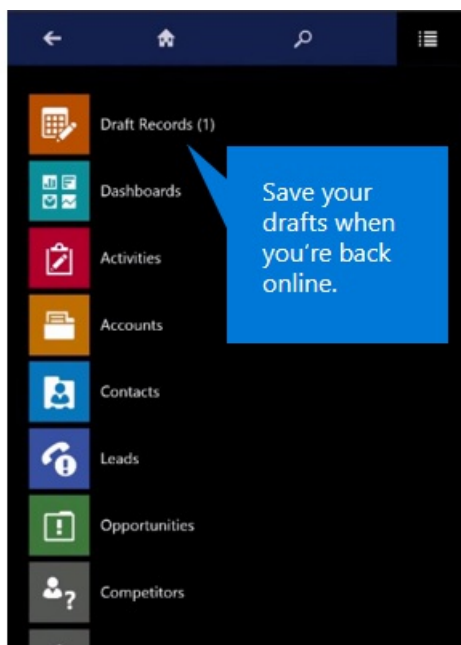
Your offline experience might look a little different than your online experience, because charts and some images aren't available offline.

[Watch a short video \(3:06\) about working offline with Dynamics 365 for Customer Engagement apps.](#)

Working with offline drafts

You can view and create records offline and save them as drafts. Once you're reconnected, save them as soon as you can. Unsaved drafts are available only on your mobile device.

1. From the menu, tap **Draft Records**.



2. Select each record individually and tap **Save**.

A few things to note about offline drafts

- While offline, you can only create and edit new records. To edit existing records, you need to be connected.
- While offline, you can only create standalone records or associate records to those that are available for offline access on your device. For example, you can create an opportunity for an account only if that account was created before you went offline, and if it's available for offline access. You can't create an opportunity for an account while offline if you also created the account while offline.
- While offline, you can't set the value for lookup fields. If you create a record that is associated with another record, such as adding a phone call to a contact, some lookup fields might populate automatically (in this case, the To and From fields might pre-populate). You need to fill these fields in once you re-connect while you review and save your drafts.

About cached data

The records you've recently used are kept on your mobile device, and are also known as cached data. Cached data is specific to your device, so if you use both the phone and tablet apps, the cached data on each device will be different, depending on the records you've viewed on each one.

WARNING

Cached data is not encrypted. You can use BitLocker to encrypt the entire hard drive on a Windows 8 or Windows 10 device.

If you're prompted to sign in while you're disconnected

If you're prompted to sign in while you're offline, tap the **Back** button on the sign-in page and you'll still be able to work in offline mode on iPad and Windows 8 tablets until you can reconnect. On all other phones and Android tablets, however, you can no longer work in offline mode and will be redirected to the **Let's get started** page until you can reconnect and sign in again.

Working offline with on-premises deployments

If you're using the mobile app with Dynamics CRM 2015 (on-premises) or later, you can continue to use Dynamics 365 for tablets while disconnected. However, with the Windows 8 app, once you close the app (like when you start another app), you can't use it until you can connect to the internet. With the Windows 8.1 app, you can continue to access your data even if you close the app. If you're not sure whether your organization has an on-premises deployment, contact your Dynamics 365 for Customer Engagement apps admin to find out.

Note that offline synchronization is not supported by on-premises deployments.