Common Functions – MSD

Lenovo Global Service Education

Initial version: October 2019
Latest Update: 12/11/2019 | version 2.0

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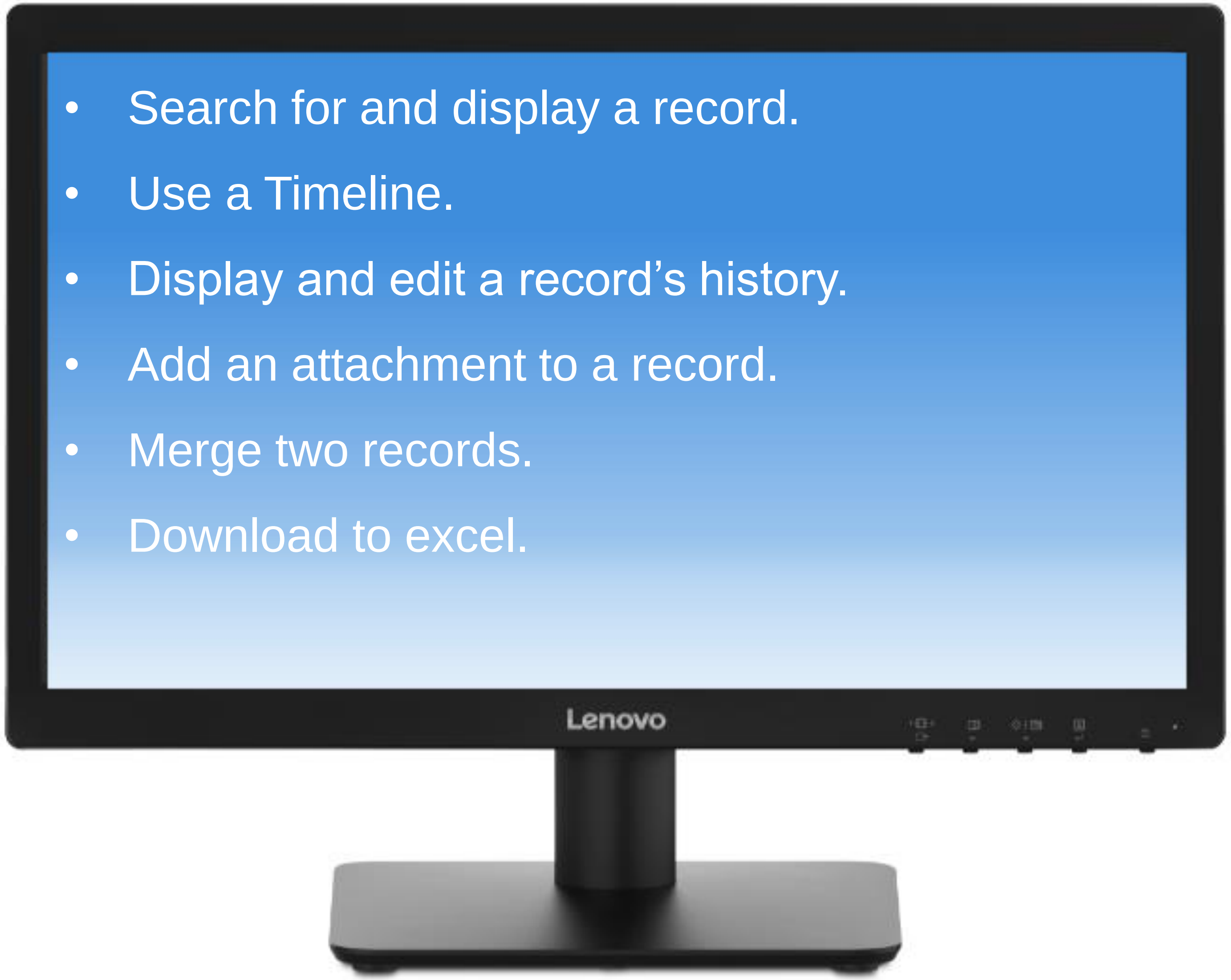
#Polaris #MSD #D365 #Dynamics #Common Functions #Merge Records

Learning Outcomes



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Common Functions

Function	Accounts	Contacts	Cases	Work Orders	Customer Assets	Activities	Queues
Global Search	☑	☑	☑	☑	☑	☑	☑
Records Search Bar	☑	☑	☑	☑	☑	☑	☑
View	☑	☑	☑	☑	☑	☑	☑
Timeline	☑	☑	☑	☑			
Service History Tab	☑	☑	☑		☑		
Admin Tab	☑	☑	☑	☑	☑		
Audit History Tab	☑	☑	☑	☑	☑	☑	☑
Attachments Tab			☑	☑			
Merge Records		☑	☑				

Common functions and the entities that have them.

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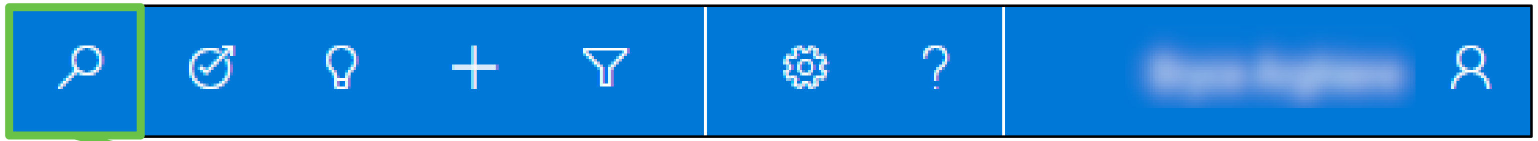
Global Search

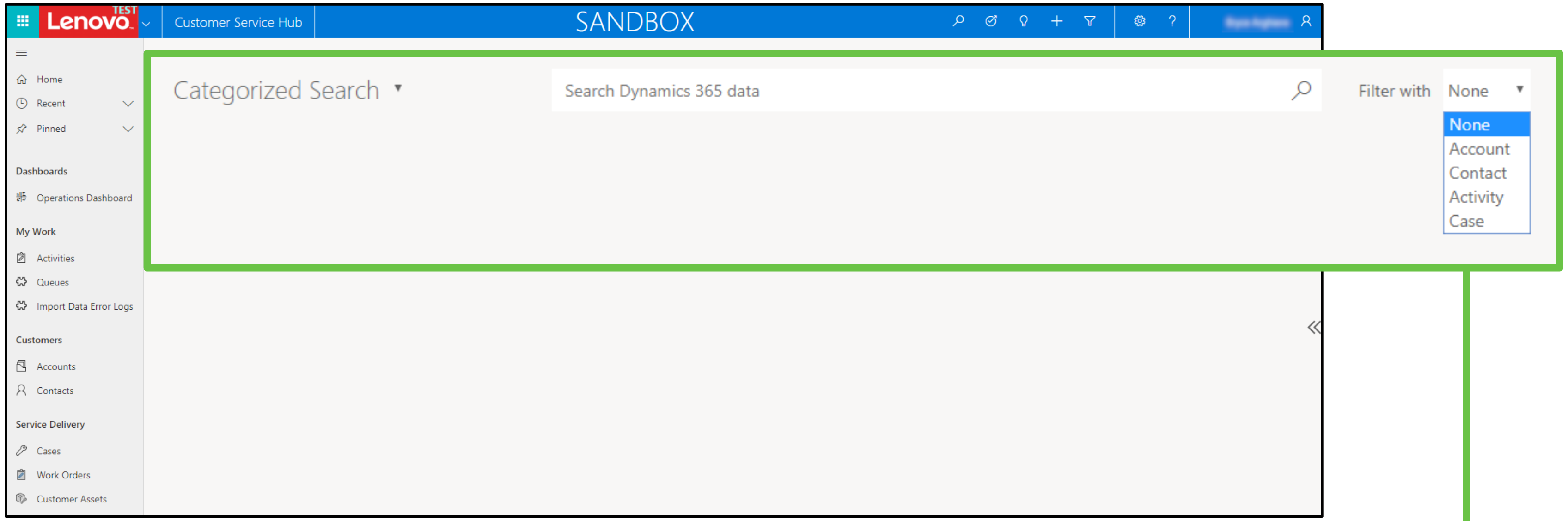
1. Search for and display a record | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

Use Global Search. → Find a record with the Records Search Bar. → Change a View.

- Located on the navigation bar and visible on all pages of the CRM.
- Allows you to search for records across multiple entities.
- Can be filtered to show only Accounts, Contacts, Activities, or Cases.
- "None" filter searches for all entities.



Global Search function on the navigation bar.



Global Search view with filters shown.

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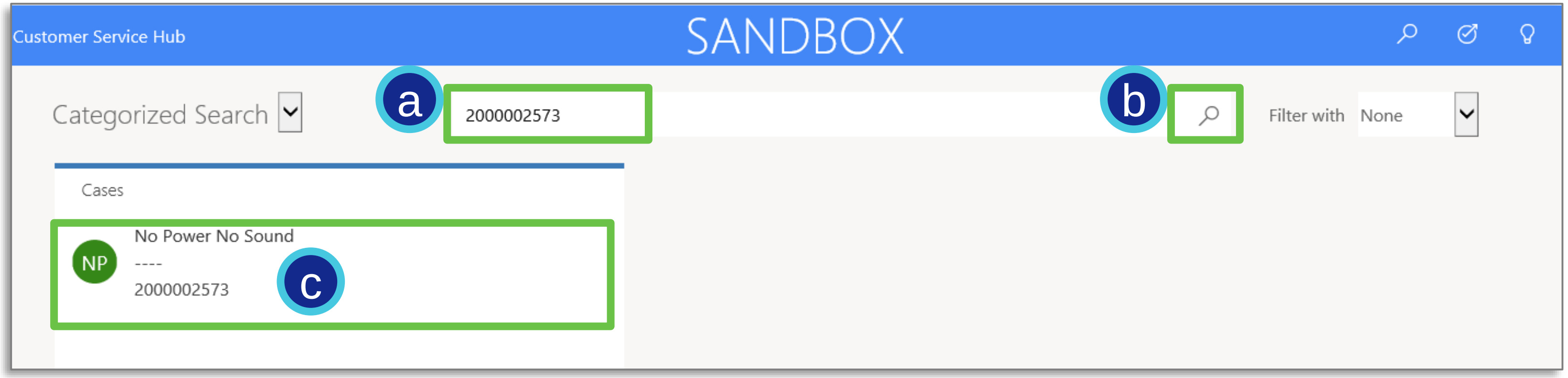
Global Search

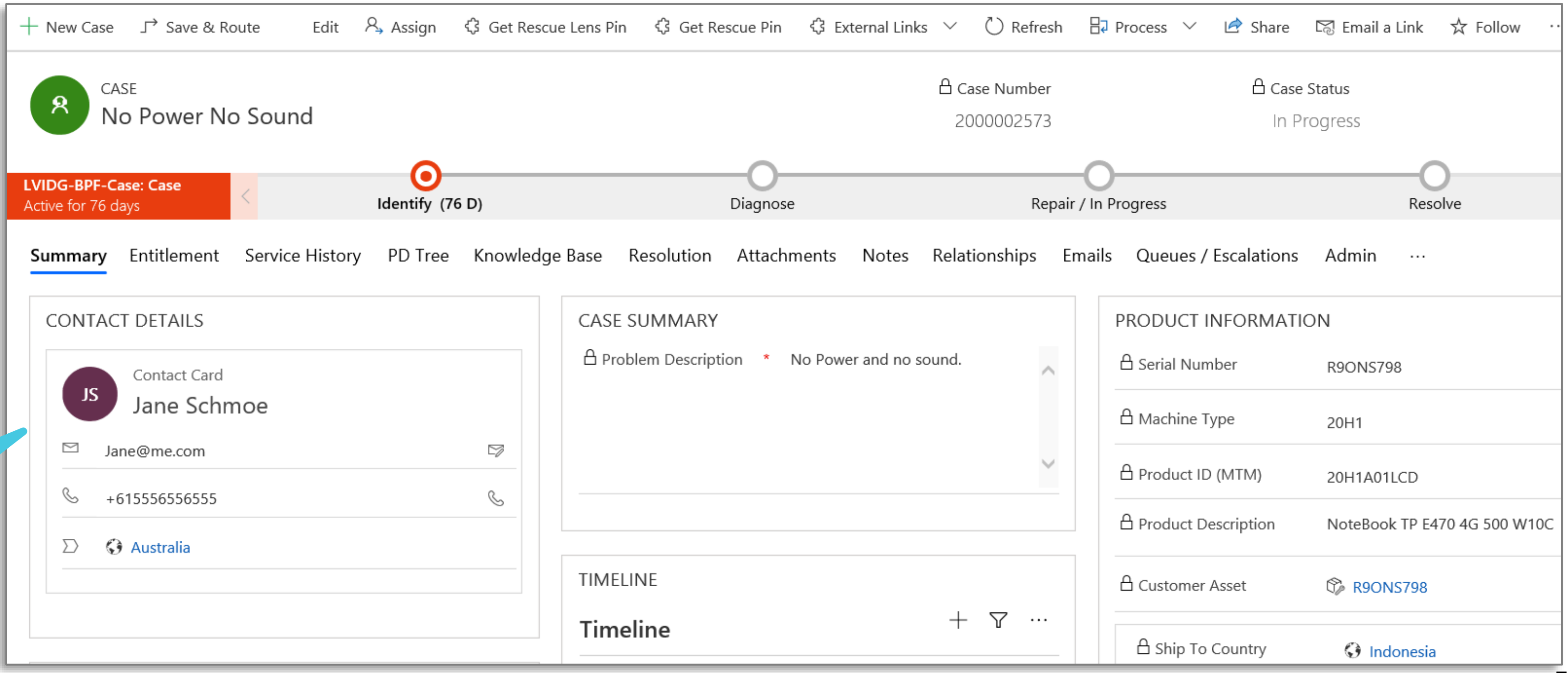
1. Search for and display a record. | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

Use Global Search. | Find a record with the Records Search Bar. | Change a View.

- Search for a Case:

  a. Type the case number in the Global Search field.
  b. Click the magnifying glass.
  c. Then click on the case number in the results.





The Case is displayed.

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Records Search

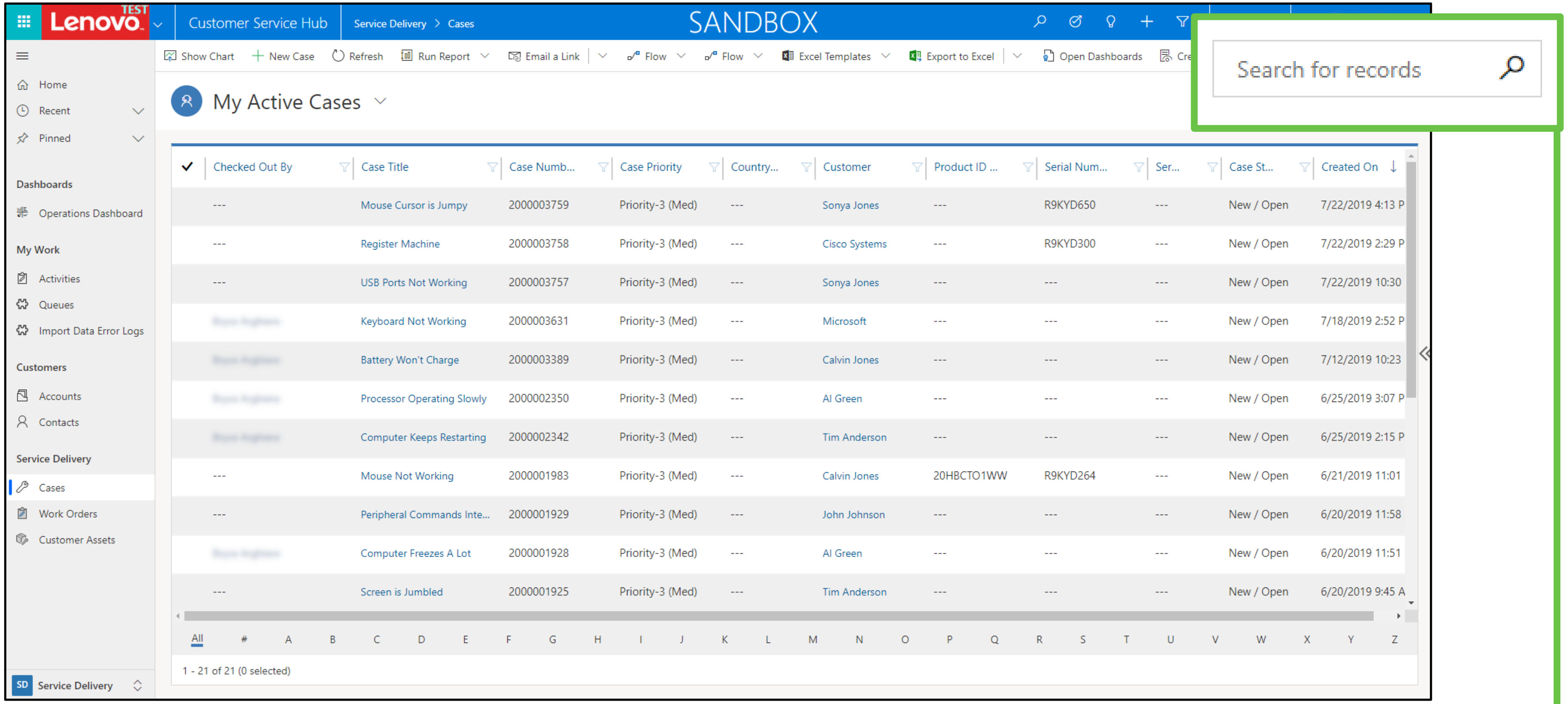
1. Search for and display a record.
2. Use a Timeline.
3. Display and edit a record's history.
4. Add an attachment to a record.
5. Merge two records.
6. Download to Excel

Use Global Search

Find a record with the Records Search Bar.

Change a View.

- Located in the upper right corner of a entity view.
- Provides exact search functionality.



Records Search Bar on the My Active Cases View.

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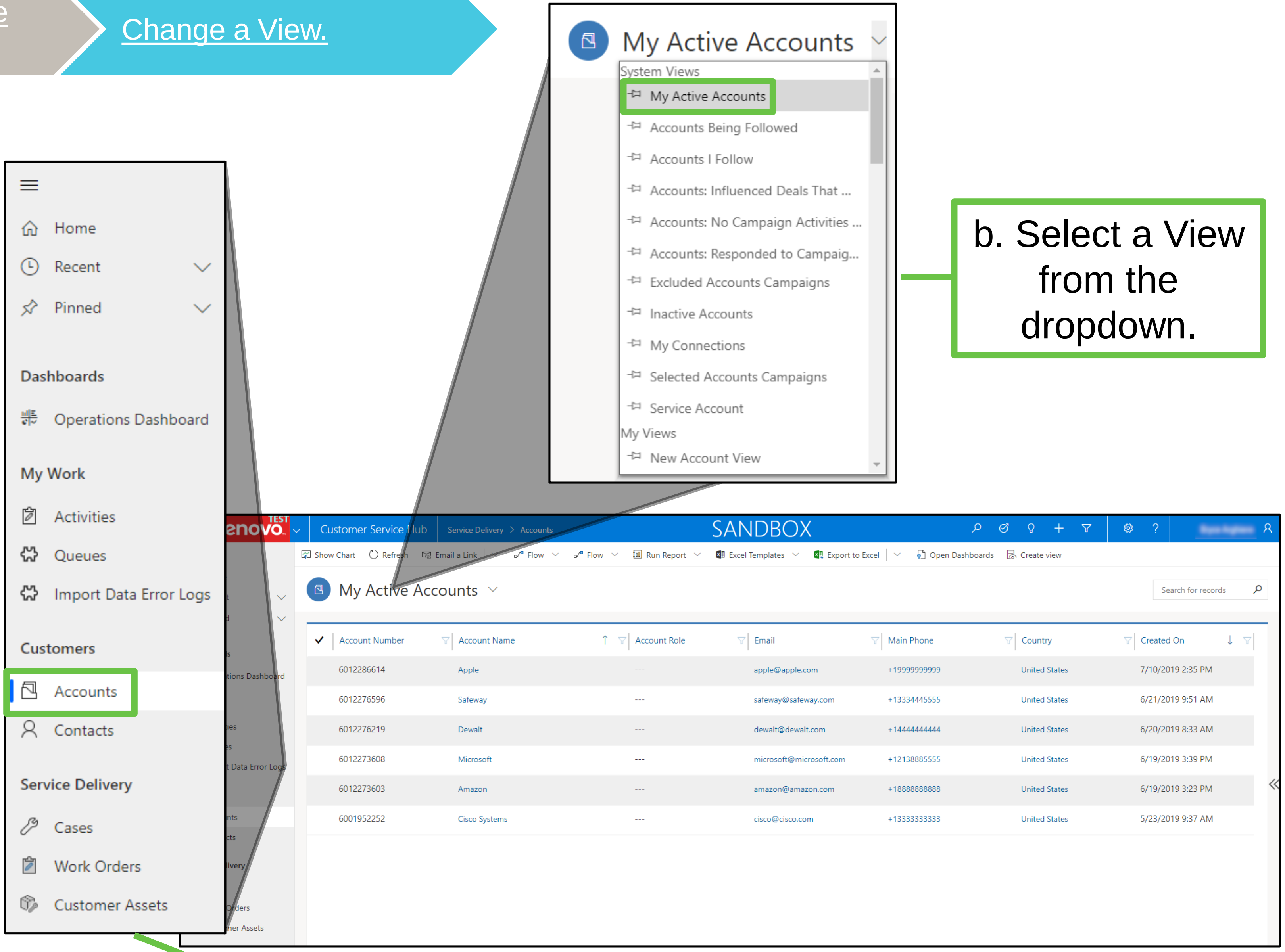
View

1. Search for and display a record. | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

Use Global Search. → Find a record with the Records Search Bar. → Change a View.

- A group of records from the same entity listed in a table.
- There are several Views for each entity. Each View shows a subset of records.
- Two types:
  - **System Views:** which are default system views.
  - **Personal Views:** that can be created by you and shared with others.



b. Select a View from the dropdown.

a. Click an entity on the navigation menu.

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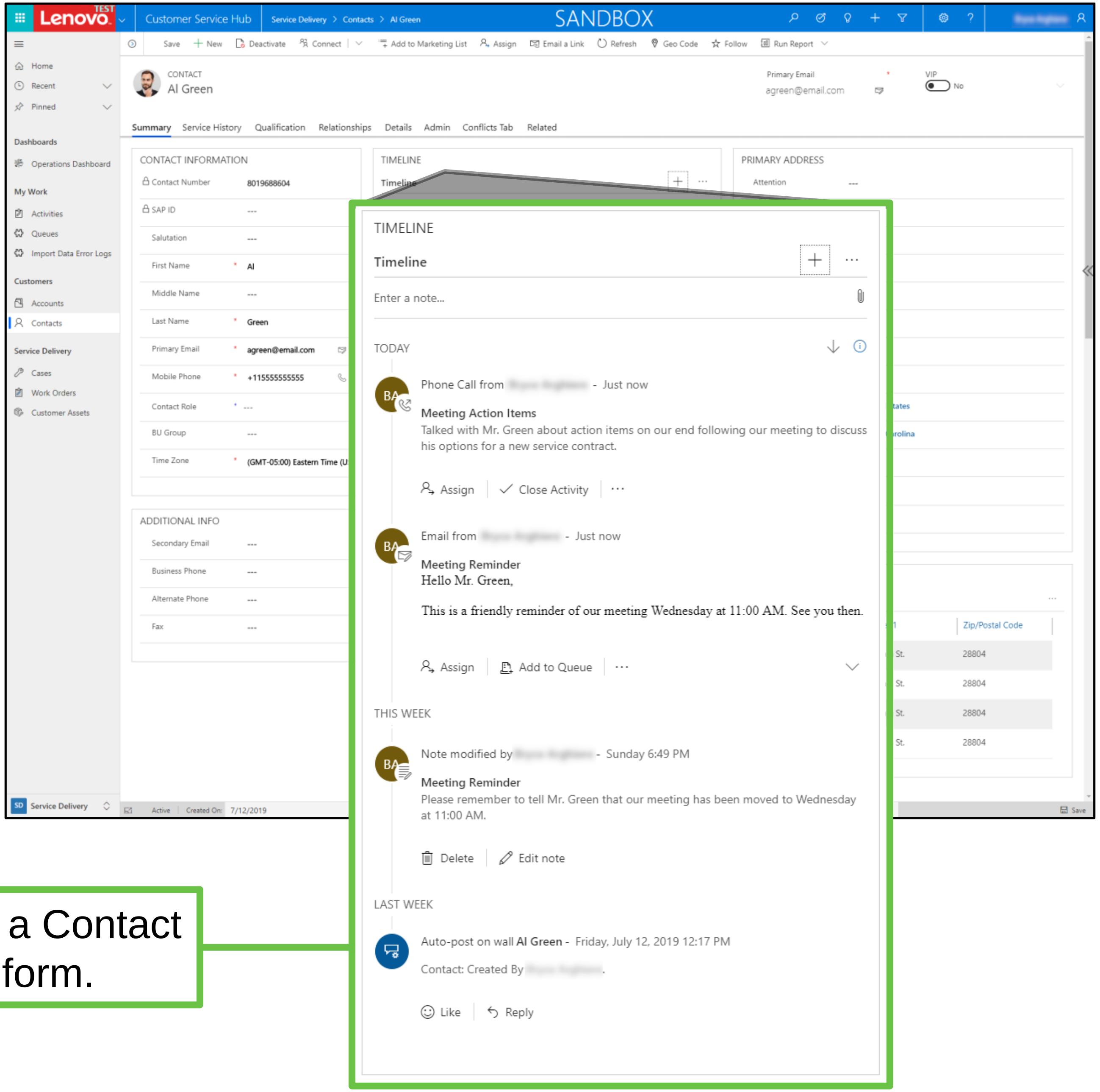
Read a Timeline

1. Search for and display a record. | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

Read a Timeline. | Add an Activity to a Timeline.

- A Timeline is a chronological log of communications, notes, and events related to a record.
- Found on the Summary tab of all Cases, Contacts, Work Orders, and Accounts.
- Can contain Notes, Posts and many Activity types:
  - Appointment
  - Email
  - Phone Call
  - Task
  - Chat History
  - SMS



Timeline on a Contact record form.

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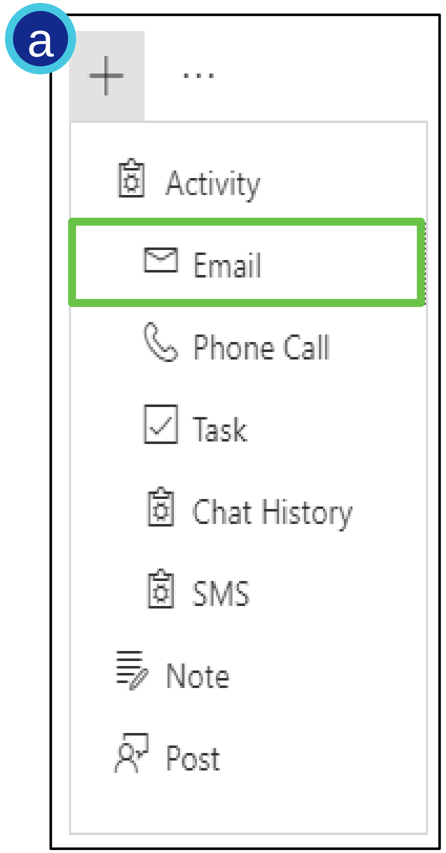
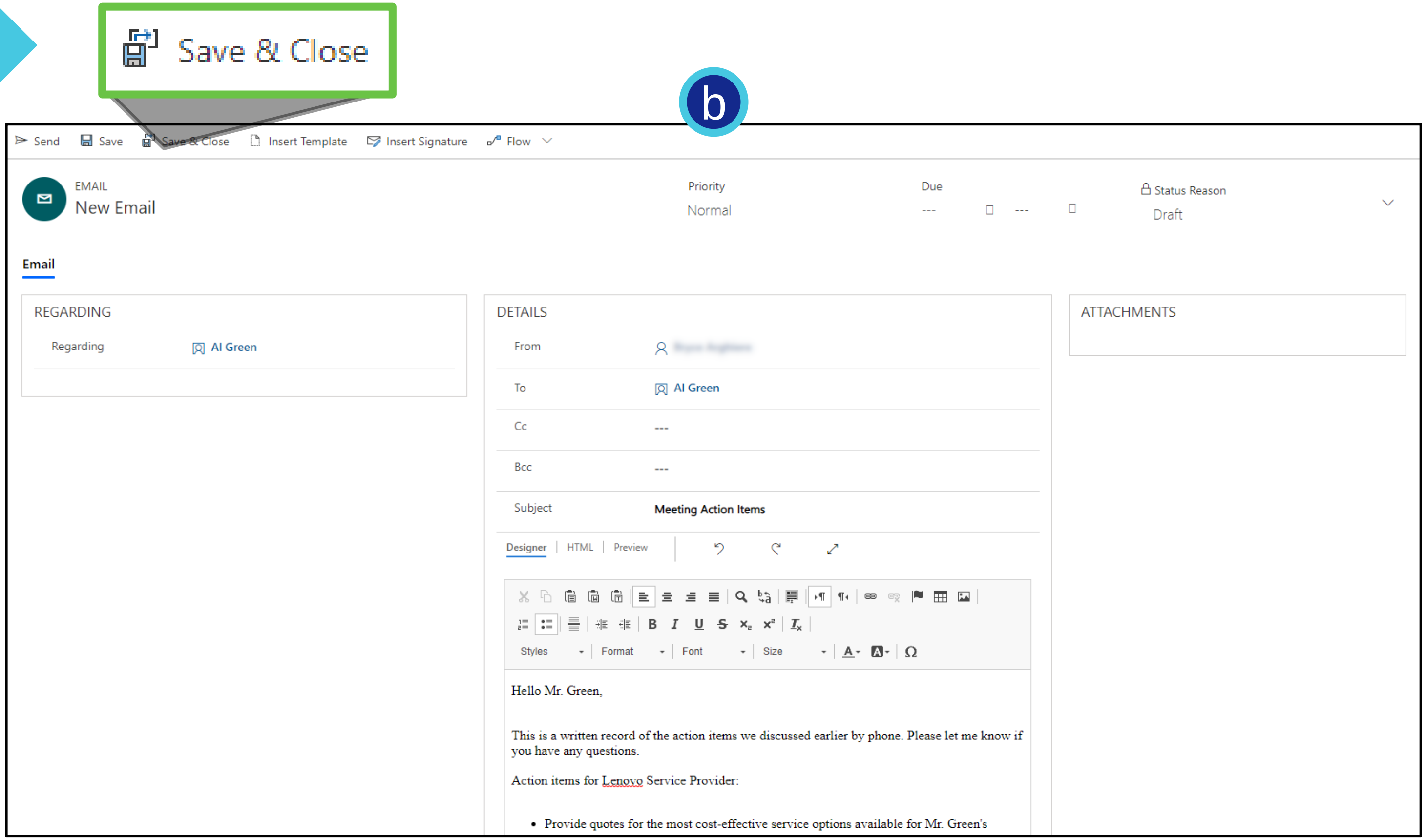
Add an Activity

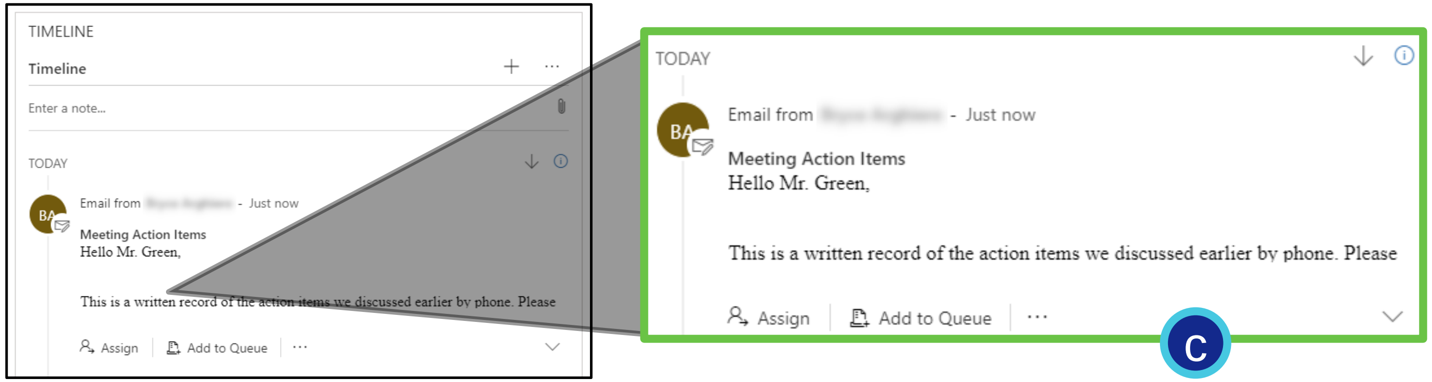
a. Click the + symbol at the top of the Timeline and select an Activity from the popup menu.



b. Complete the form for the Activity. Click Save & Close.



c. The Activity will appear on the Timeline.



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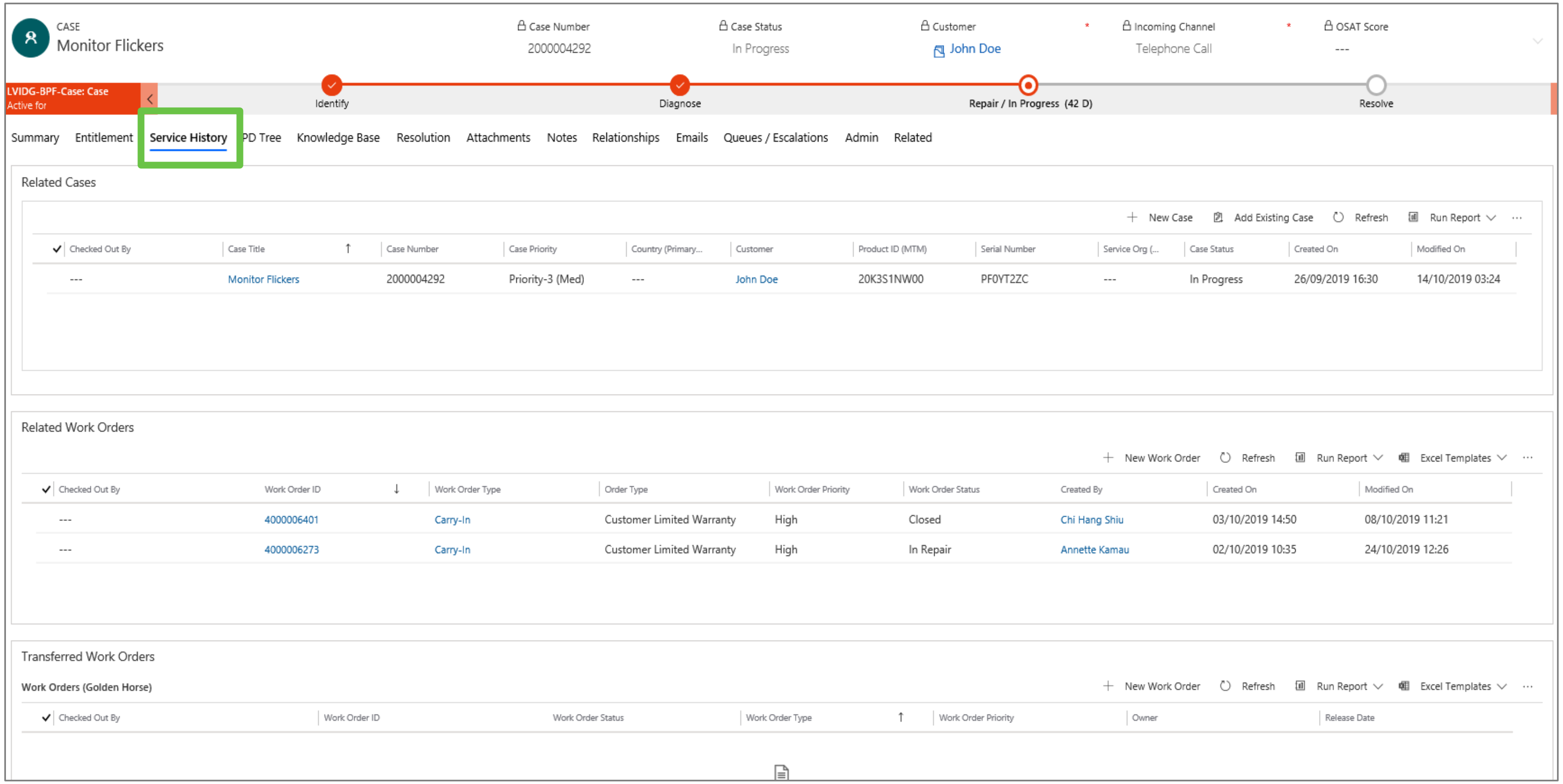
Service History

1. Search for and display a record. | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

Display and edit a record's service history.Slide 10 | Check a record's status and timestamp data. | Display a list of changes to a record.

- Allows you to display and create records related to the one you are viewing.
- Entities shown in the Service History Tab vary depending on which entity the record belongs to.
- Available for Accounts, Cases, Contacts, and Customer Assets.



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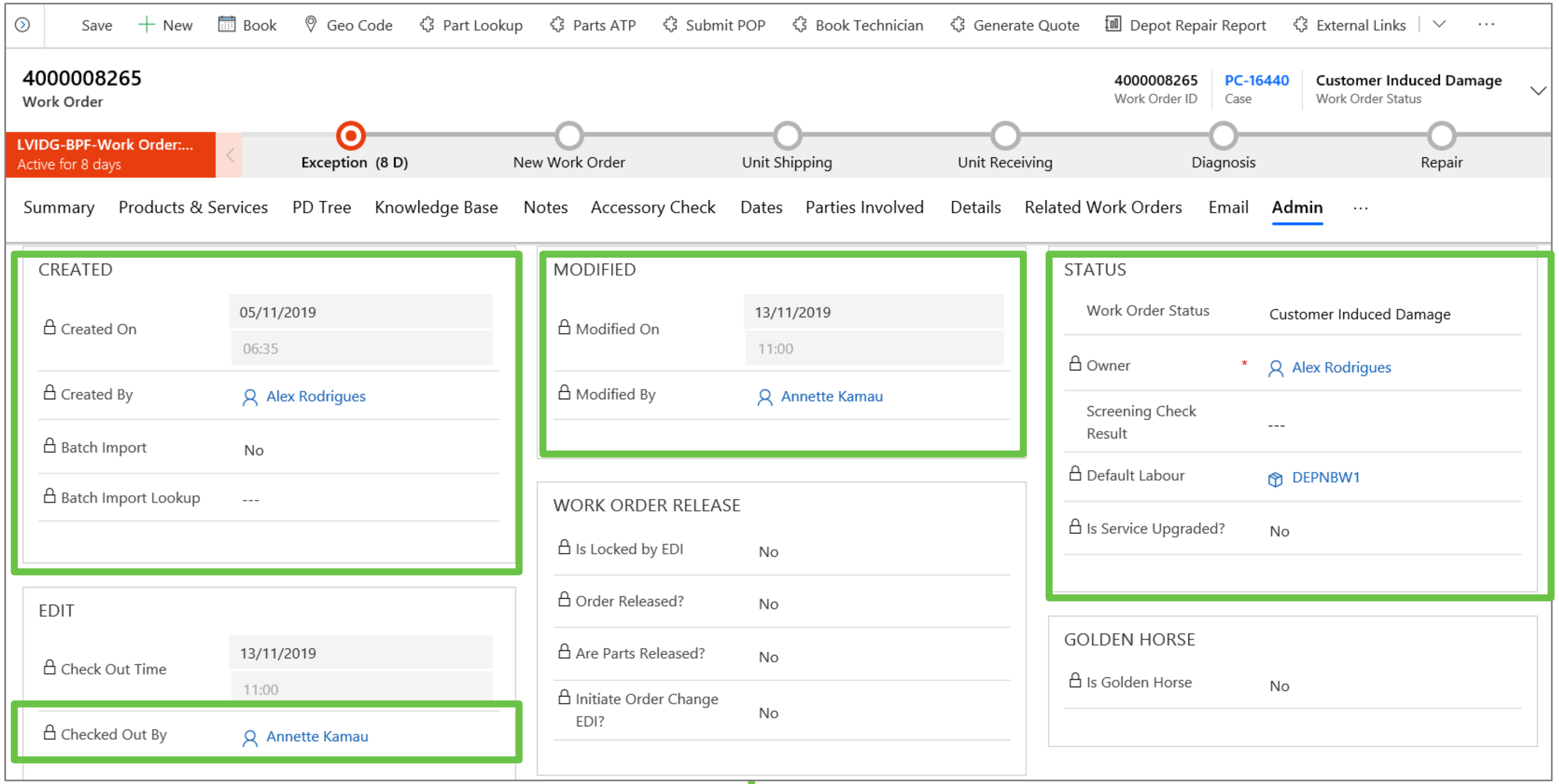
Admin Tab

1. Search for and display a record. | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

Display and edit a record's service history. | Check a record's status and timestamp data. | Display a list of all changes to a record.

- Shows if a record is currently checked out (for editing) and who has checked it out.
- Shows a record's status and timestamp information.
- Available for:
  - Accounts
  - Cases
  - Contacts
  - Customer Assets
  - Work Orders



Admin Tab on Work Order record.

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Audit History

1. Search for and display a record.

2. Use a Timeline.

3. Display and edit a record's history.

4. Add an attachment to a record.

5. Merge two records.

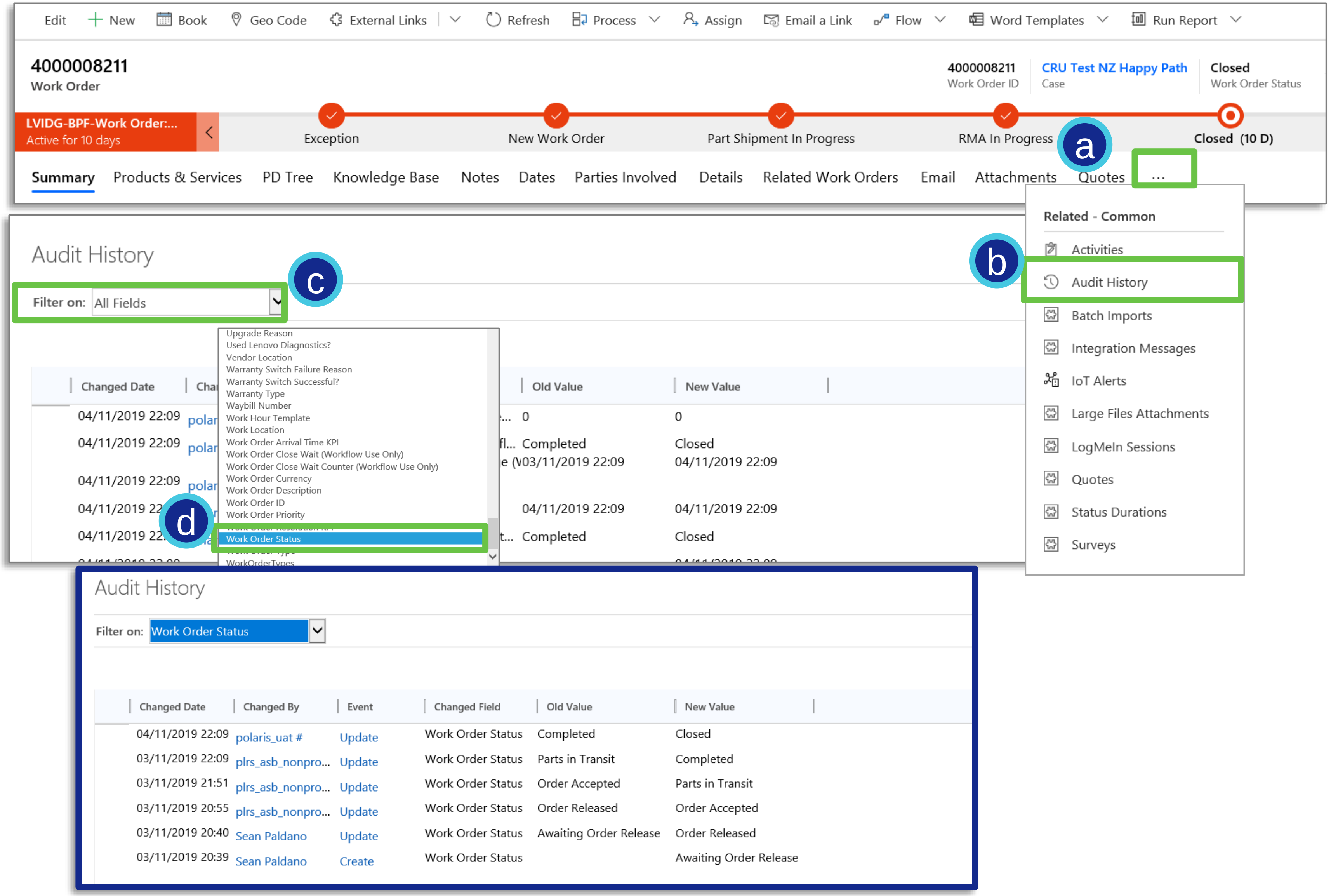
6. Download to Excel

Display and edit a record's service history.

Check a record's status and timestamp data.

Display a list of changes to a record.

- Shows a history of the changes made to a record's fields.
- Can be filtered to show only changes made to specified fields.
- Available for all entities.
- Accessed by clicking the three periods to the right of the tab titles.



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Attachments Tab

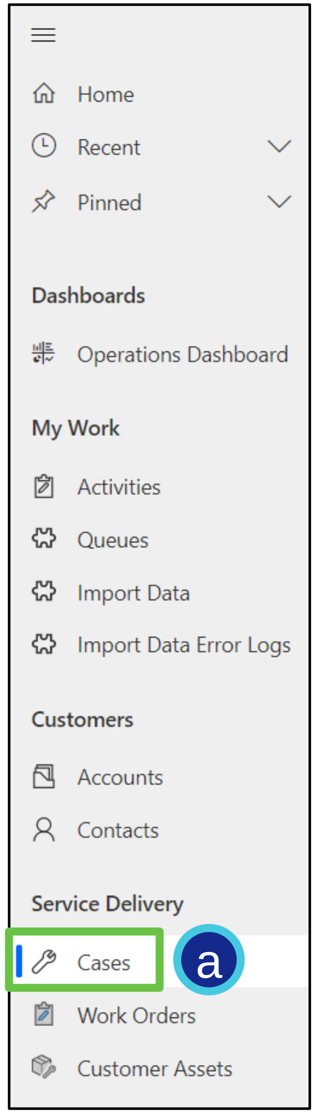
1. Search for and display a record. | 2. Use a Timeline. | 3. Display and edit a record's history. | 4. Add an attachment to a record. | 5. Merge two records. | 6. Download to Excel

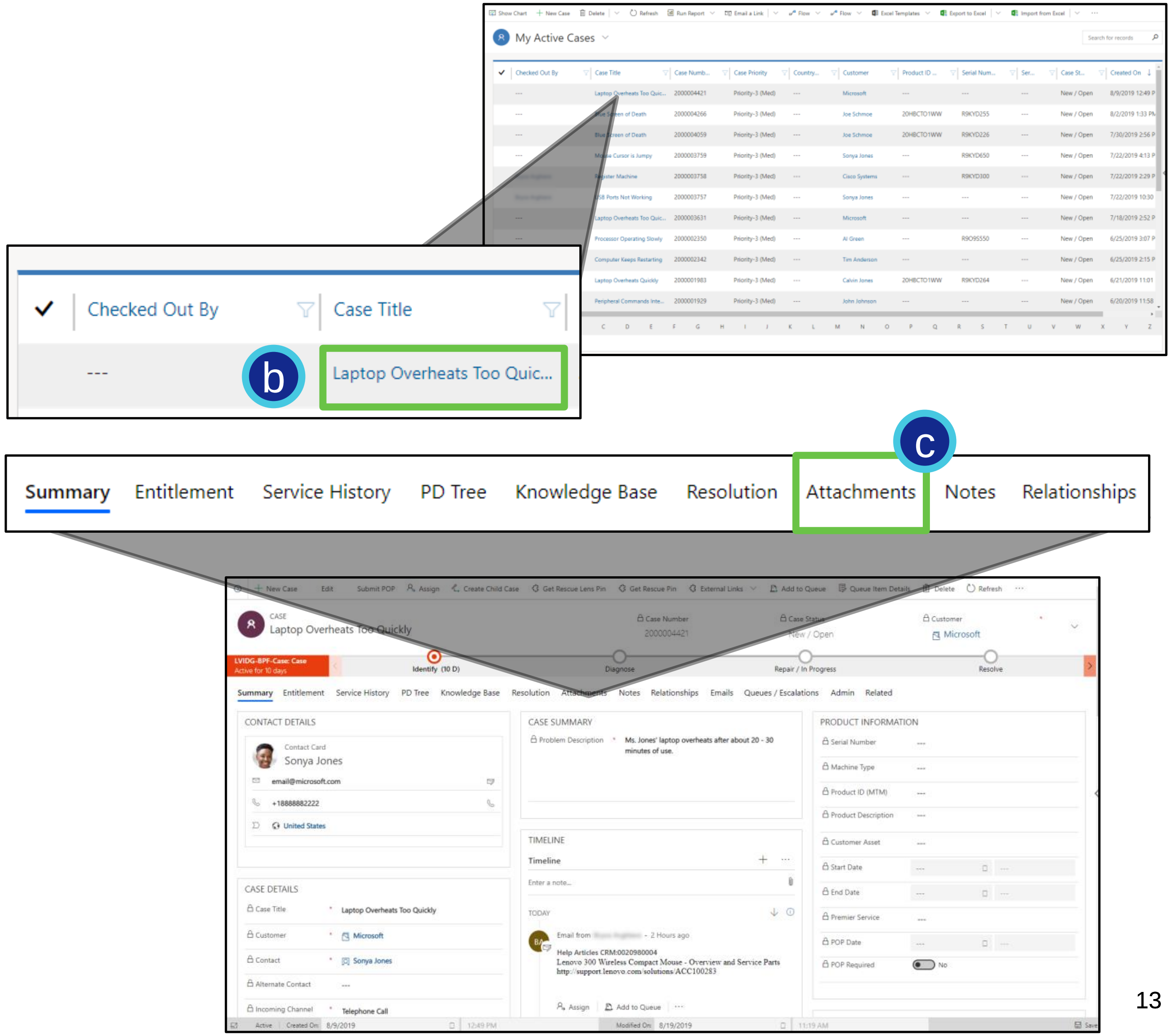
Go to the Attachments Tab on a record. | Upload a small file to a record. | Upload a large file to a record. | Download a file from a record. | Delete a file from a record.

- The Attachments Tab is available on all Cases and Work Orders.

- Go to the Attachments Tab on a Case:

  a. Click Cases on the navigation menu.
  b. Find your Case in one of the Cases Views and click the Case Title. This will open the Summary Tab of the Case's form.
  c. Click the Attachments Tab.





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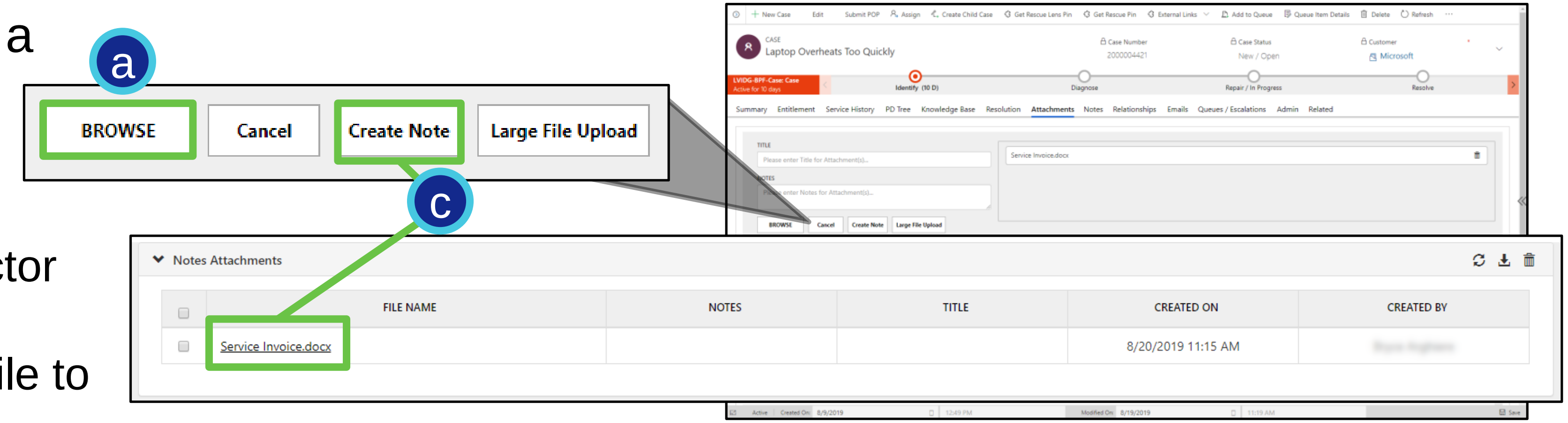
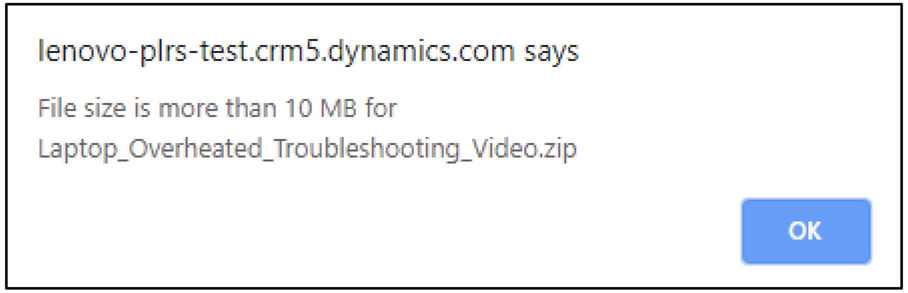
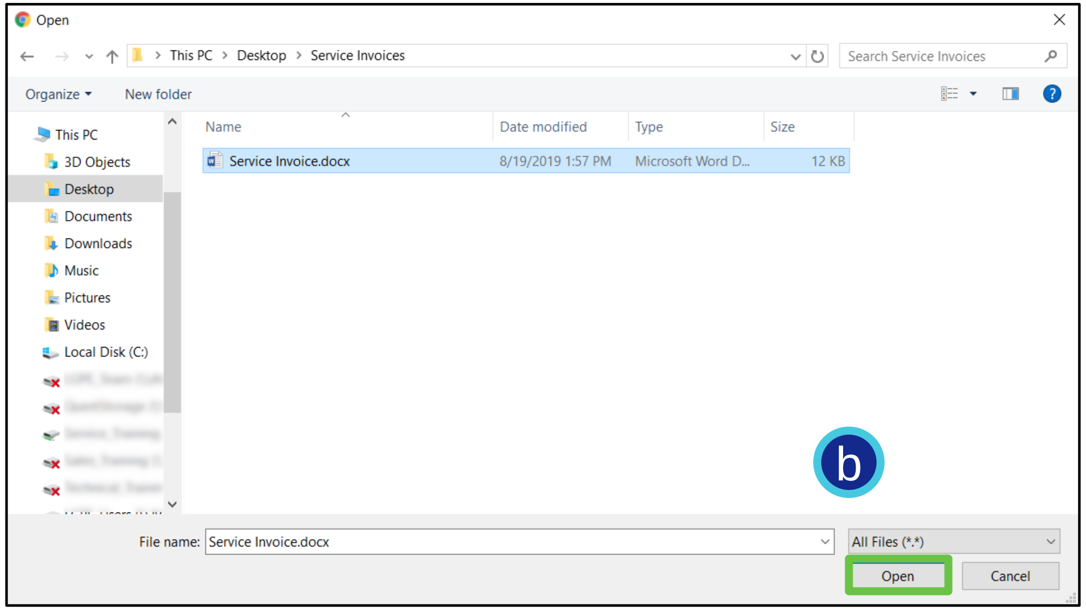
- Upload a small file (≤ 10 MB) to a Case or Work Order record:

  a. Click Browse.
  b. Select the file from the file selector window. Click Open.
  c. Click Create Note to move the file to the Notes Attachments section.



- **Note:** If the file is larger than 10 MB, a message will appear telling you it is too large. Use the Large File Upload button (see next slide).





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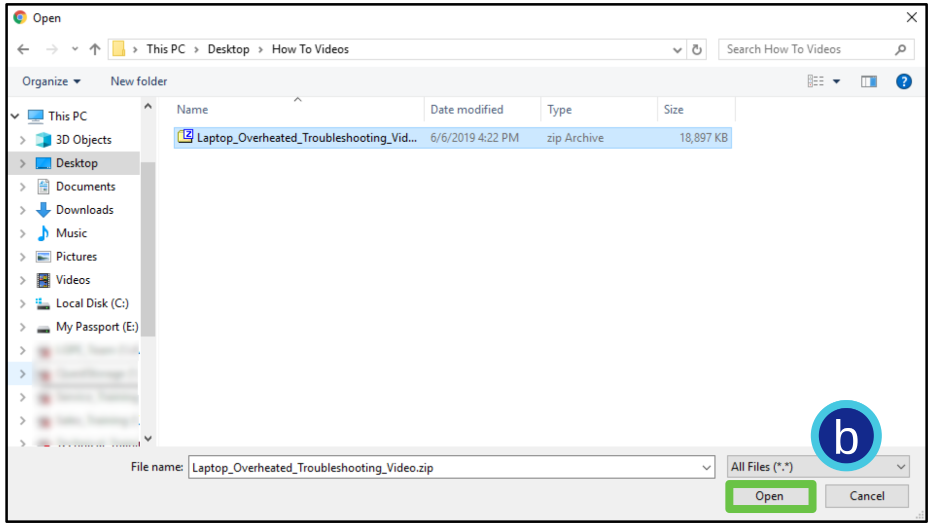
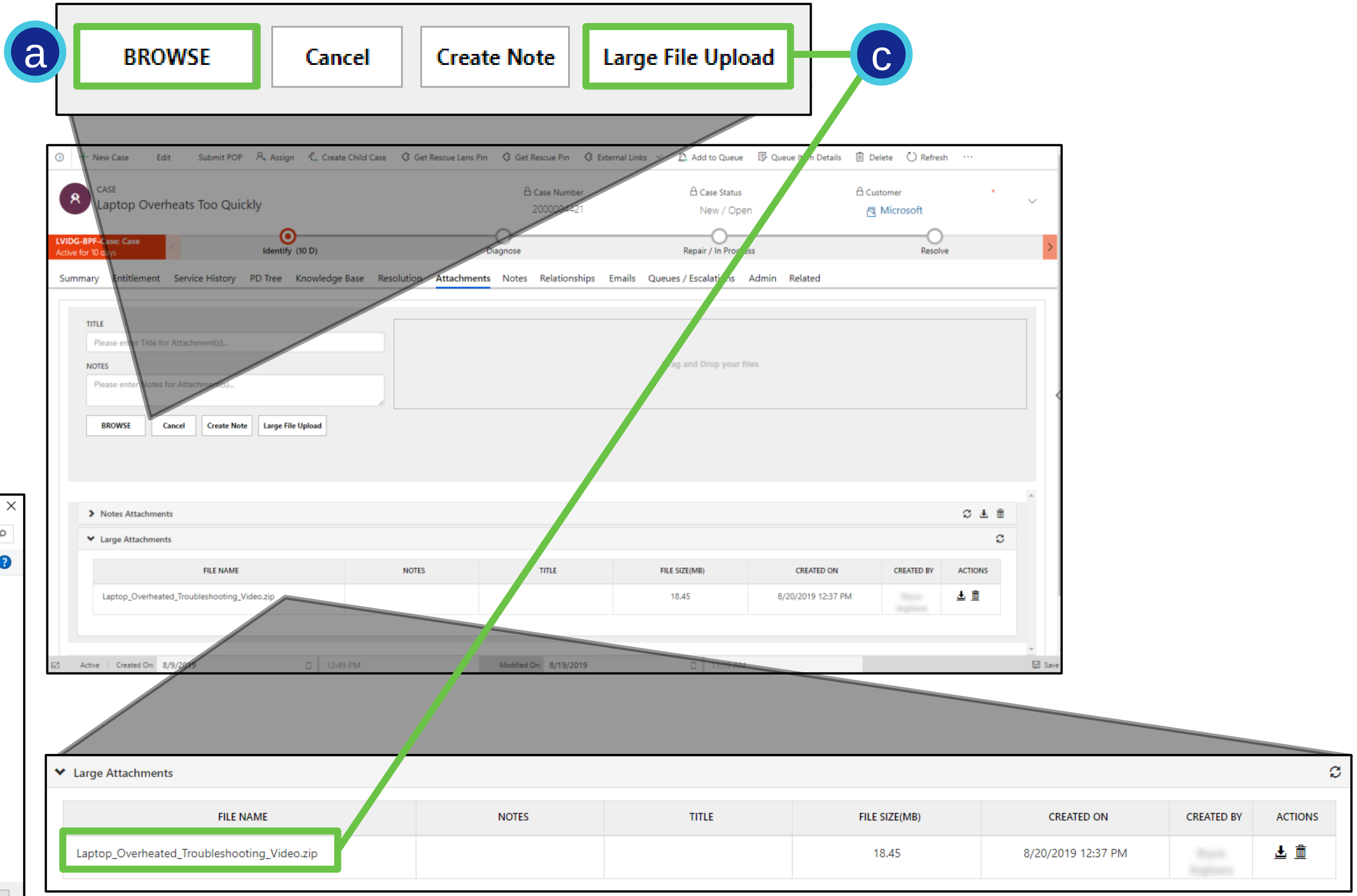
- Upload a large file (> 10 MB) to a record:

  a. Click Browse.
  b. Select the file from the file selector window. Click Open.
  c. Click Large File Upload to move the file to the Large Attachments section.





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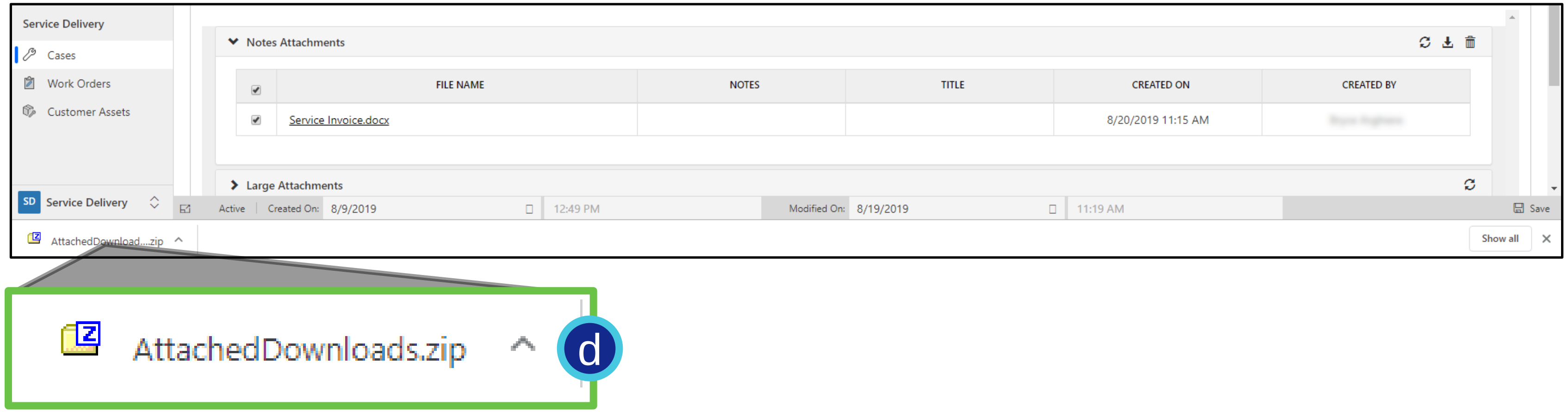
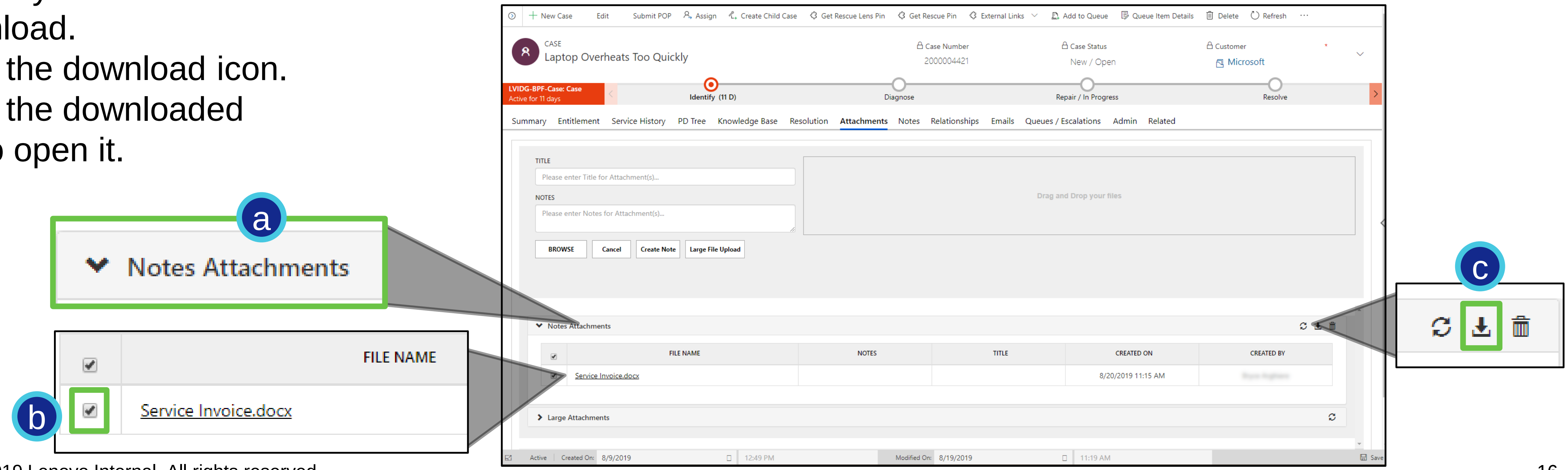
- Download a file:

  a. Click either the Notes Attachments or the Large Attachments section to expand it.
  b. Check the box next to the file you wish to download.
  c. Click the download icon.
  d. Click the downloaded file to open it.





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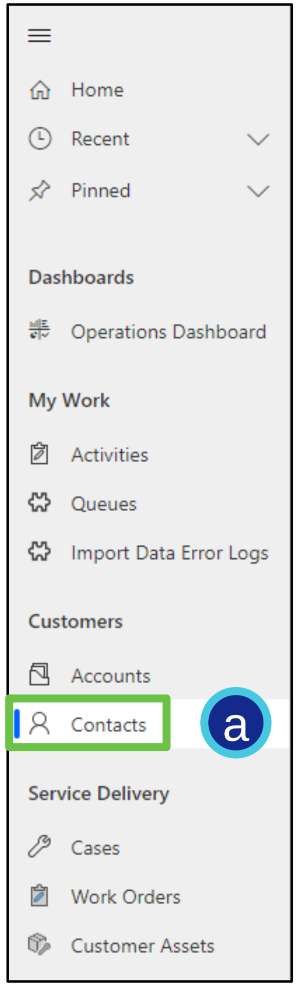
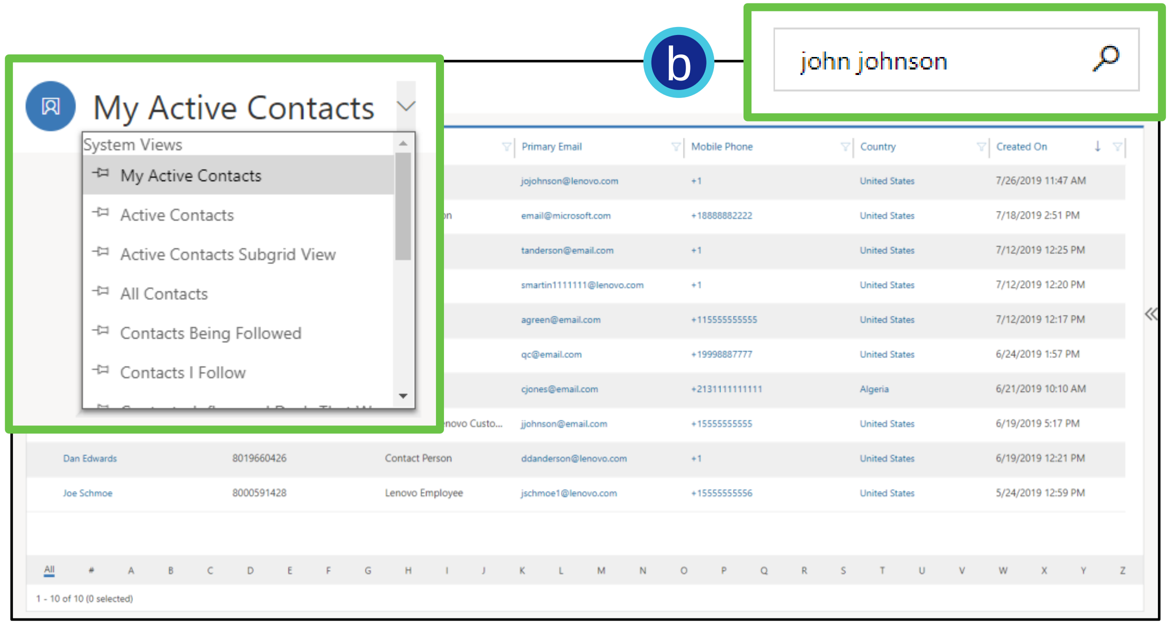
- To merge two Contacts or Cases records, begin by finding and selecting the two records:

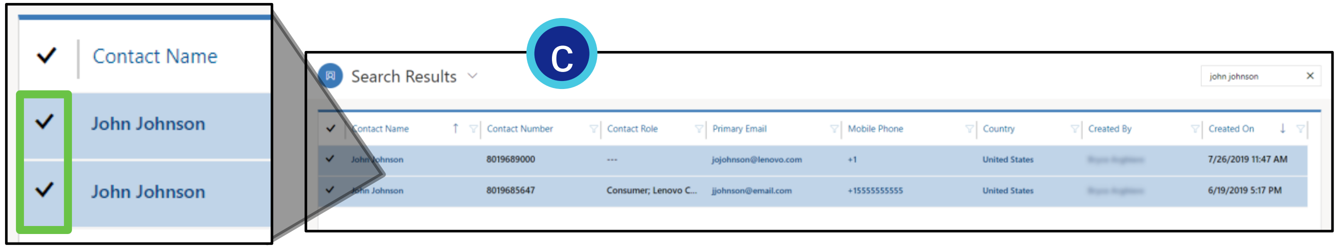
  a. Use the navigation menu to open the default view for the entity.

  b. Use the Views dropdown menu or the Records Search Bar to find the records.

  c. Select each record by clicking next to it in the far left column of the table.







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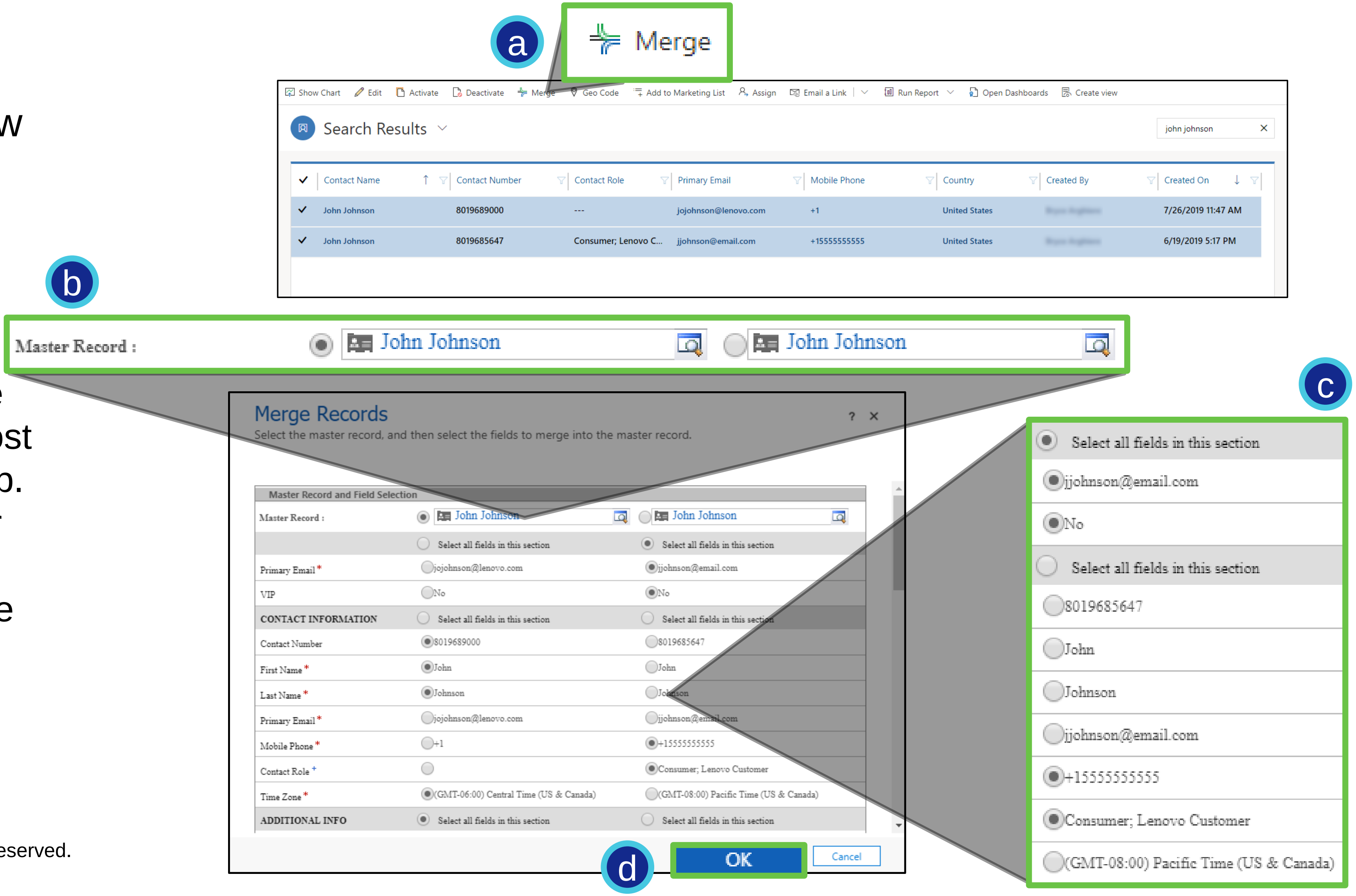
- To create the master record from two records you have selected, follow these steps:

  a. Click Merge on the command bar.
  b. Select the master record. This should be the record with the most fields you want to keep.
  c. Select fields to use for each section.
  d. Click OK when you are finished.



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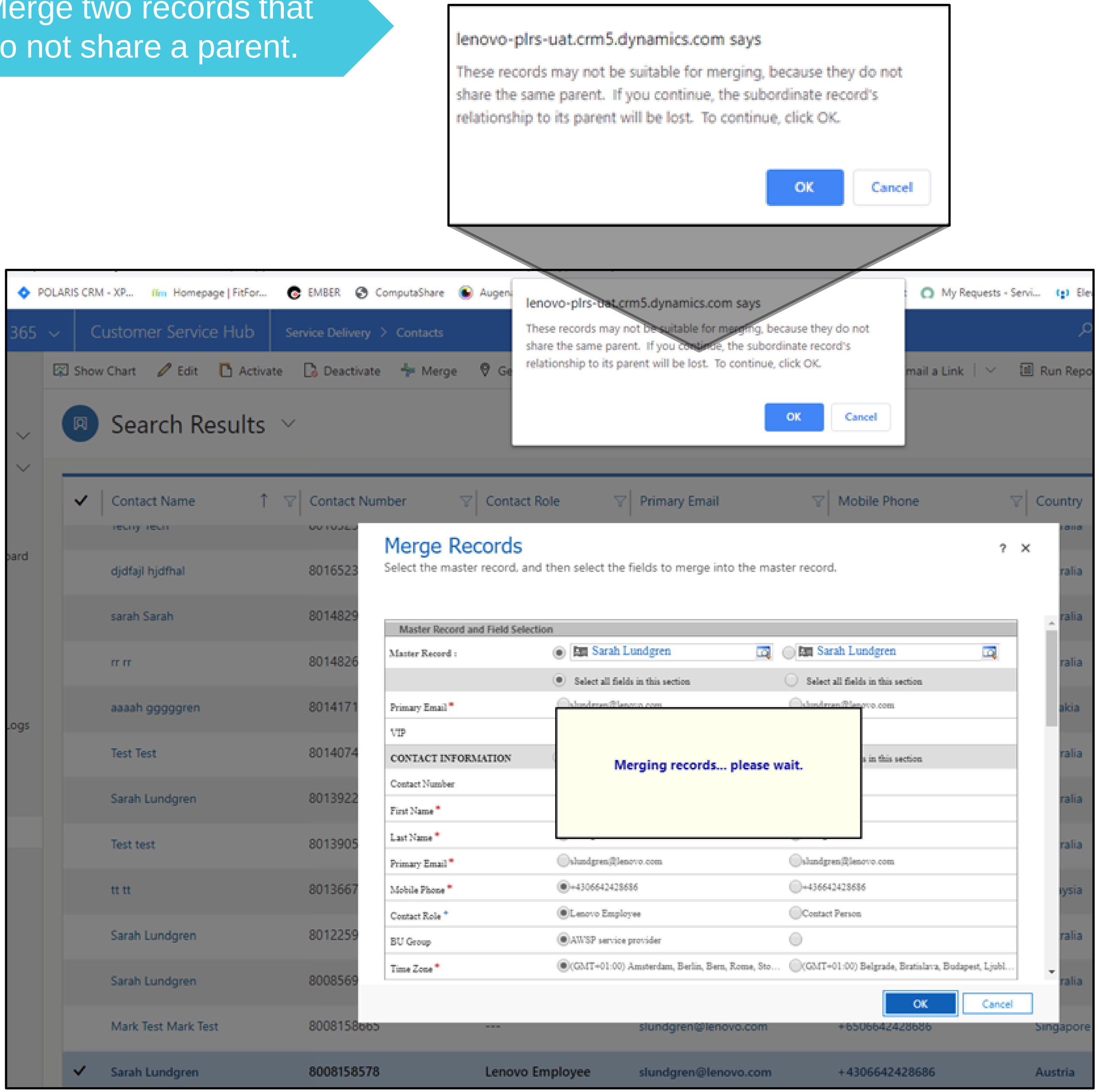
Merge Records

Merge two records that do not share a parent.

- If you merge two records that do not share a parent record, the subordinate record will no longer be linked to its parent record.

- An alert window will warn you of this before the records are merged.



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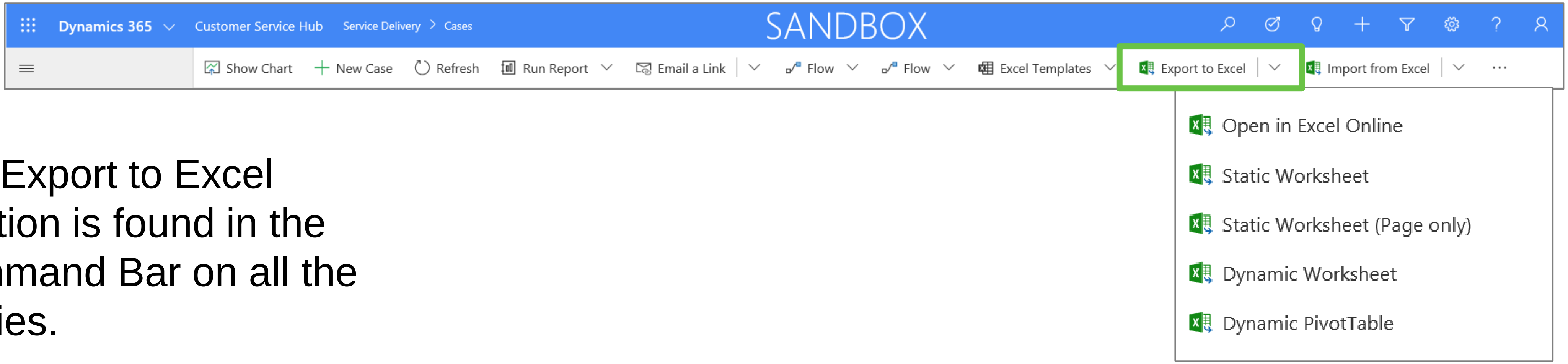
Merge Records

1. Search for and display a record.
2. Use a Timeline.
3. Display and edit a record's history.
4. Add an attachment to a record.
5. Merge Two Records
6. Download to Excel.

Export to Excel.

Case Download to Excel.



- The Export to Excel function is found in the Command Bar on all the entities.
- It allows the download of information into an excel spreadsheet in several formats.

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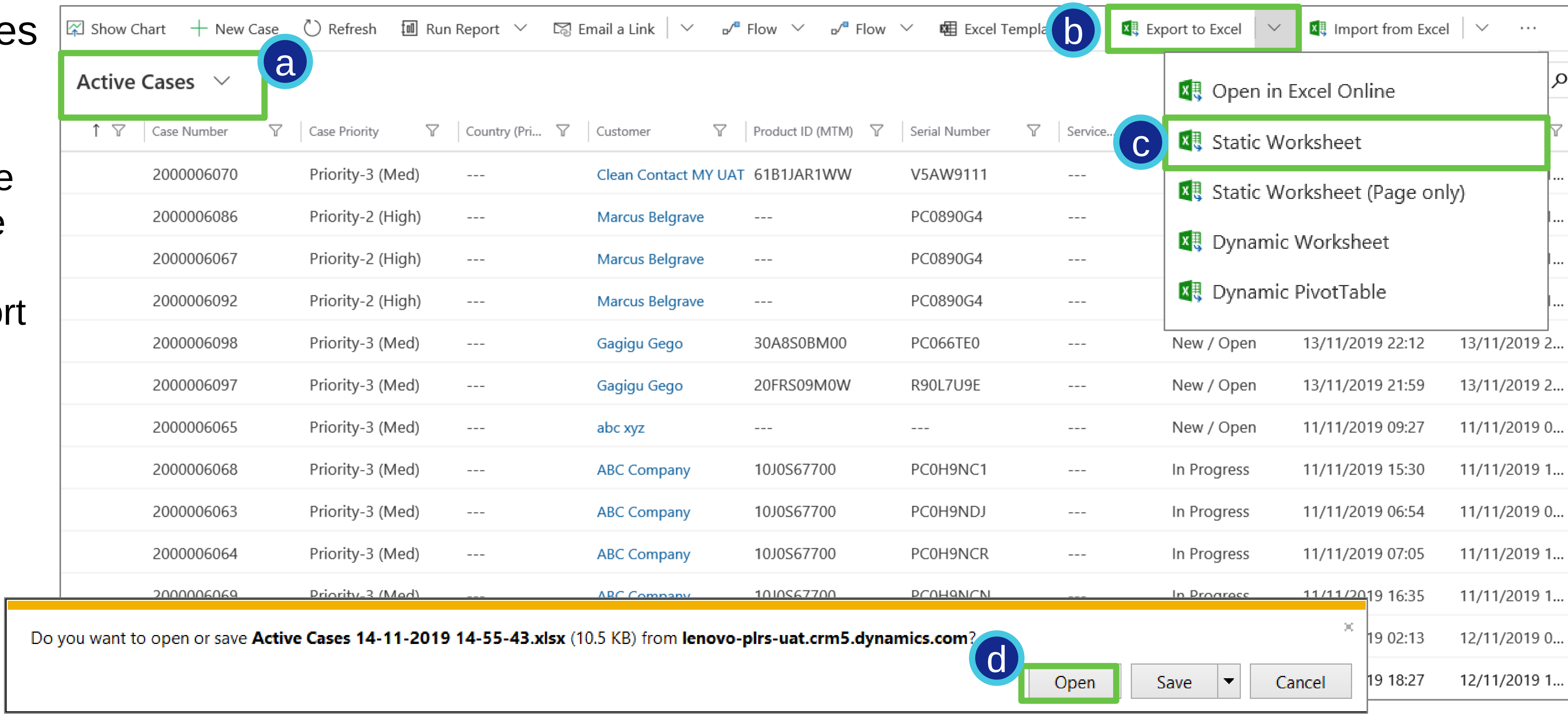
Merge Records

- Export Active Cases view to excel.

  a. Choose the Active Cases view in the Cases entity.
  b. Click on the Export to Excel chevron.
  c. Click on Static Worksheet.
  d. Click the Open button.



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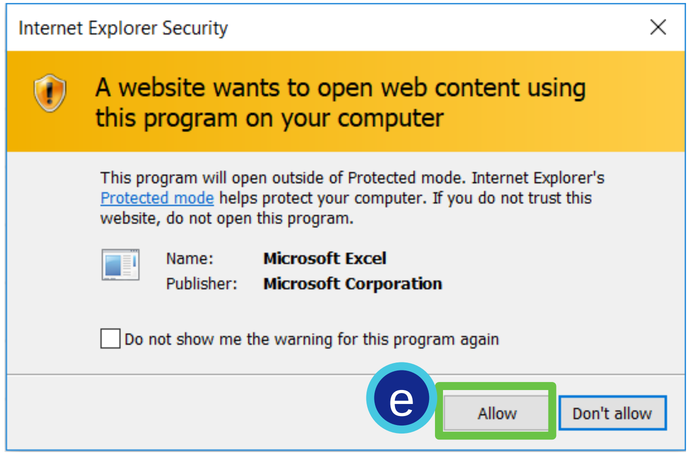
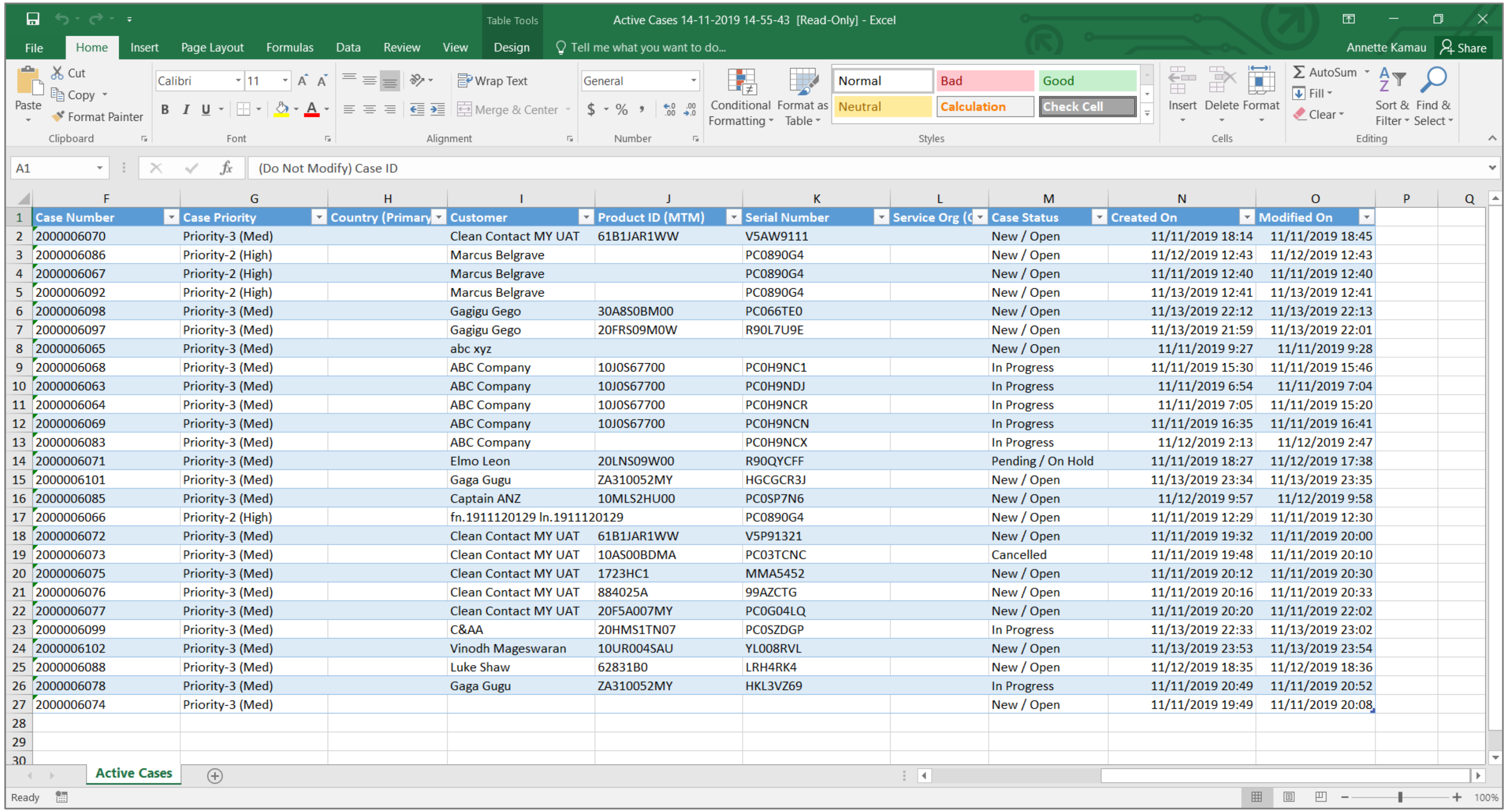
- Continued...

  e. Click the Allow button.

  The spreadsheet opens in Excel and can be filtered further.





Case Number	Case Priority	Country (Primary	Customer	Product ID (MTM)	Serial Number	Service Org (	Case Status	Created On	Modified On
2000006070	Priority-3 (Med)		Clean Contact MY UAT	61B1JAR1WW	V5AW9111		New / Open	11/11/2019 18:14	11/11/2019 18:45
2000006086	Priority-2 (High)		Marcus Belgrave		PC0890G4		New / Open	11/12/2019 12:43	11/12/2019 12:43
2000006067	Priority-2 (High)		Marcus Belgrave		PC0890G4		New / Open	11/11/2019 12:40	11/11/2019 12:40
2000006092	Priority-2 (High)		Marcus Belgrave		PC0890G4		New / Open	11/13/2019 12:41	11/13/2019 12:41
2000006098	Priority-3 (Med)		Gagigu Gego	30A8S0BM00	PC066TE0		New / Open	11/13/2019 22:12	11/13/2019 22:13
2000006097	Priority-3 (Med)		Gagigu Gego	20FRS09M0W	R90L7U9E		New / Open	11/13/2019 21:59	11/13/2019 22:01
2000006065	Priority-3 (Med)		abc xyz				New / Open	11/11/2019 9:27	11/11/2019 9:28
2000006068	Priority-3 (Med)		ABC Company	10J0S67700	PC0H9NC1		In Progress	11/11/2019 15:30	11/11/2019 15:46
2000006063	Priority-3 (Med)		ABC Company	10J0S67700	PC0H9NDJ		In Progress	11/11/2019 6:54	11/11/2019 7:04
2000006064	Priority-3 (Med)		ABC Company	10J0S67700	PC0H9NCR		In Progress	11/11/2019 7:05	11/11/2019 15:20
2000006069	Priority-3 (Med)		ABC Company	10J0S67700	PC0H9NCN		In Progress	11/11/2019 16:35	11/11/2019 16:41
2000006083	Priority-3 (Med)		ABC Company		PC0H9NCX		In Progress	11/12/2019 2:13	11/12/2019 2:47
2000006071	Priority-3 (Med)		Elmo Leon	20LNS09W00	R90QYCFF		Pending / On Hold	11/11/2019 18:27	11/12/2019 17:38
2000006101	Priority-3 (Med)		Gaga Gugu	ZA310052MY	HGCGCR3J		New / Open	11/13/2019 23:34	11/13/2019 23:35
2000006085	Priority-3 (Med)		Captain ANZ	10MLS2HU00	PC0SP7N6		New / Open	11/12/2019 9:57	11/12/2019 9:58
2000006066	Priority-2 (High)		fn.1911120129 ln.1911120129		PC0890G4		New / Open	11/11/2019 12:29	11/11/2019 12:30
2000006072	Priority-3 (Med)		Clean Contact MY UAT	61B1JAR1WW	V5P91321		New / Open	11/11/2019 19:32	11/11/2019 20:00
2000006073	Priority-3 (Med)		Clean Contact MY UAT	10AS00BDMA	PC03TCNC		Cancelled	11/11/2019 19:48	11/11/2019 20:10
2000006075	Priority-3 (Med)		Clean Contact MY UAT	1723HC1	MMA5452		New / Open	11/11/2019 20:12	11/11/2019 20:30
2000006076	Priority-3 (Med)		Clean Contact MY UAT	884025A	99AZCTG		New / Open	11/11/2019 20:16	11/11/2019 20:33
2000006077	Priority-3 (Med)		Clean Contact MY UAT	20F5A007MY	PC0G04LQ		New / Open	11/11/2019 20:20	11/11/2019 22:02
2000006099	Priority-3 (Med)		C&AA	20HMS1TN07	PC0SZDGP		In Progress	11/13/2019 22:33	11/13/2019 23:02
2000006102	Priority-3 (Med)		Vinodh Mageswaran	10UR004SAU	YL008RVL		New / Open	11/13/2019 23:53	11/13/2019 23:54
2000006088	Priority-3 (Med)		Luke Shaw	62831B0	LRH4RK4		New / Open	11/12/2019 18:35	11/12/2019 18:36
2000006078	Priority-3 (Med)		Gaga Gugu	ZA310052MY	HKL3VZ69		In Progress	11/11/2019 20:49	11/11/2019 20:52
2000006074	Priority-3 (Med)						New / Open	11/11/2019 19:49	11/11/2019 20:08

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thanks.

Change Log

Version	Update Date	Update by	Remark
V2.0	12/11/2019	Annette Kamau	Updated with new system updates after UAT

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