Contacts – Microsoft Dynamics 365 CRM

Lenovo Global Service Education

Initial version: August 2019
Latest Update: 11/20/2019 | version 1.0

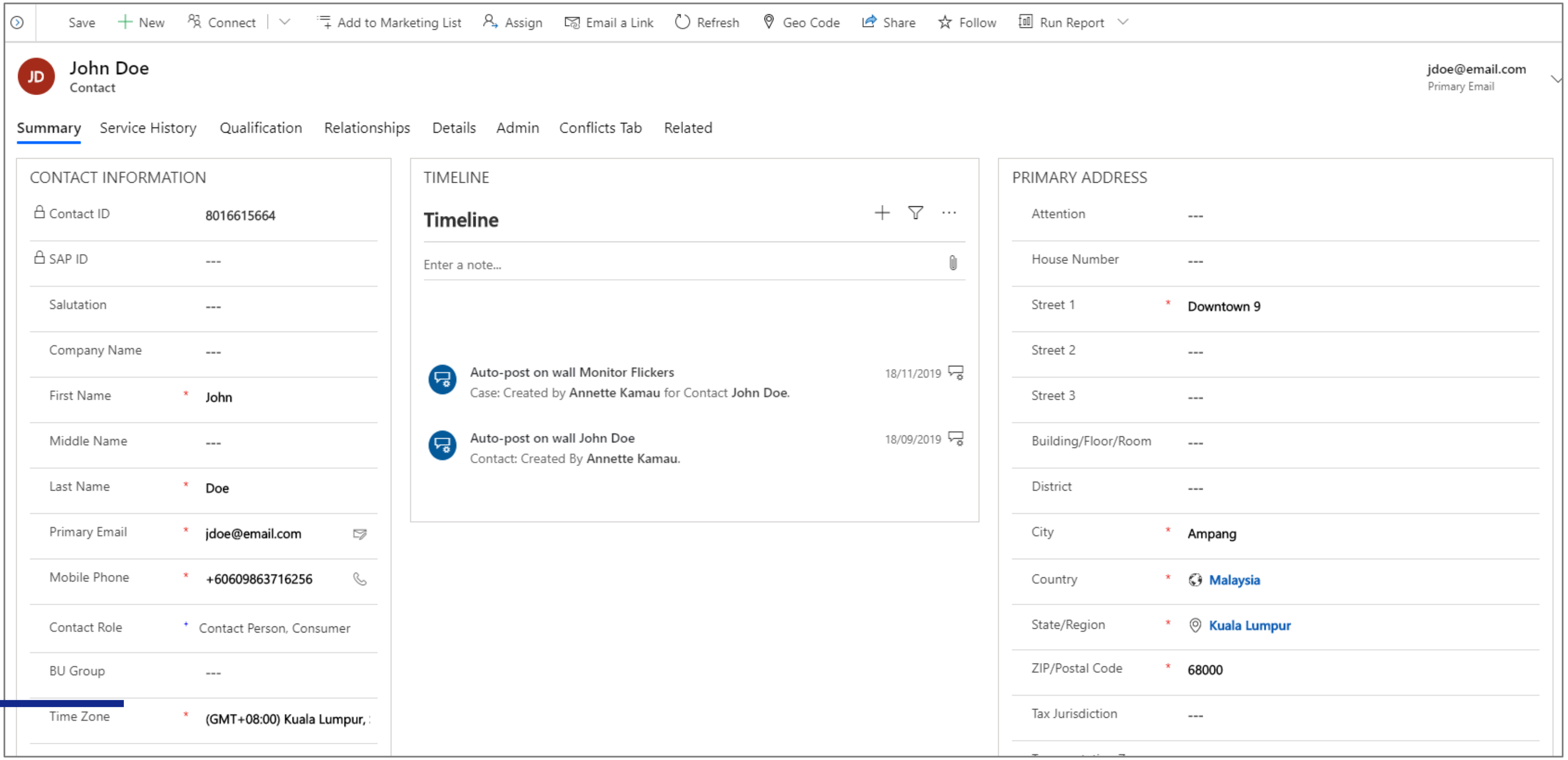
#Polaris #MSD #D365 #Dynamics #Contacts

Learning Outcomes

- Search for and edit a Contact.
- Create a Contact through Quick Create and the Contacts entity.
- Merge two Contacts.

Contacts

- An entity used for people, often those who represent a customer.
- Can be added as a child record to an Account.



Form for a Contact record.

Search for Contact

1. Search for and Edit a Contact. | 2. Create a Contact | 3. Merge two Contacts

Locate the Contact. | Edit the Contact. | Add a Relationship.

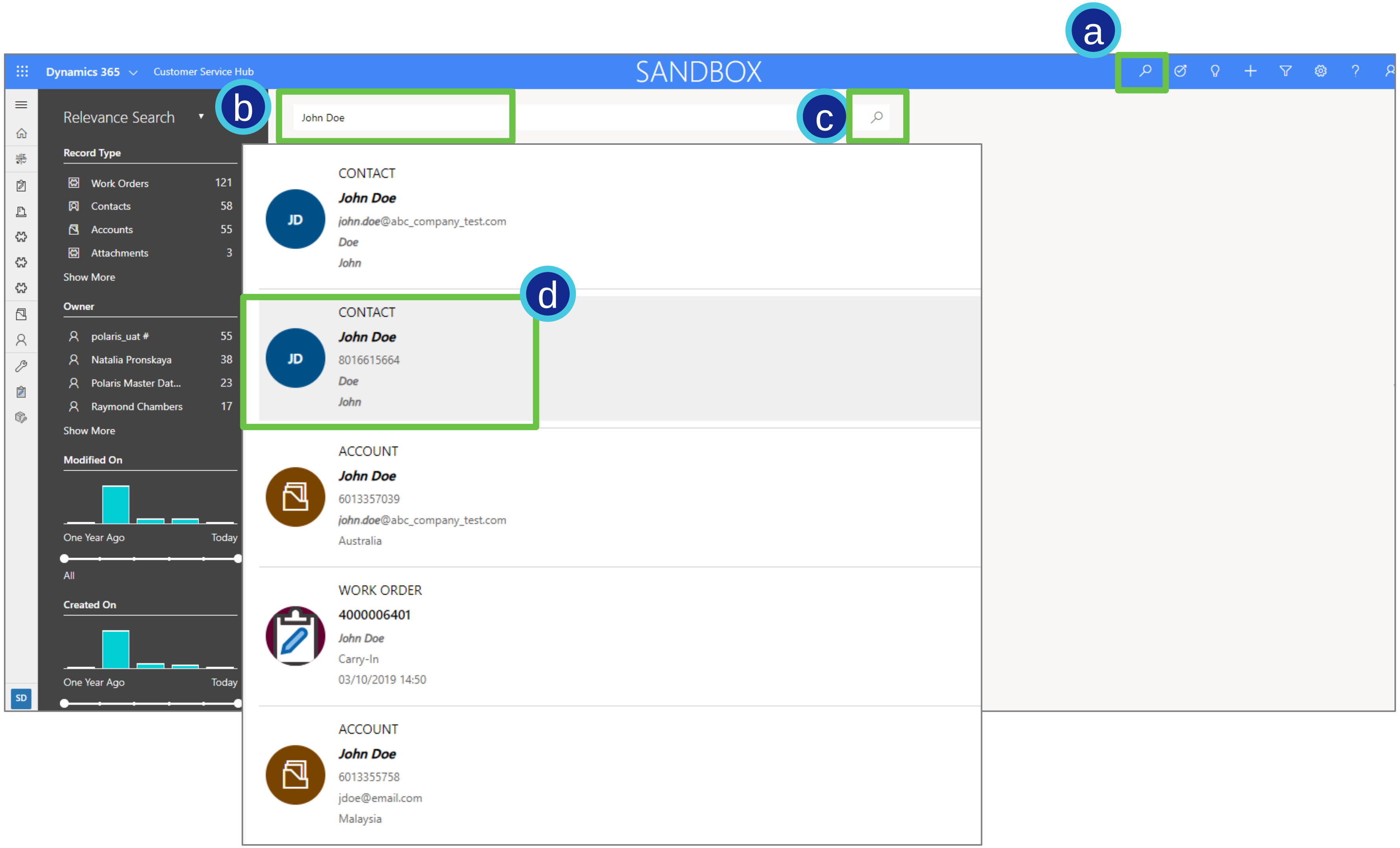
- There are two ways to search for a Contact.

1. Enter the Contact Name in the Global search.

  a. Click the Global search icon.

  b. Type the name of the contact in the search field.

  c. Click the magnifying glass.



The search results displayed include Contact and Account entities.

  d. Double-click on the Contact record.

Search for Contact

1. Search for and Edit a Contact.

[2. Create a Contact](#)

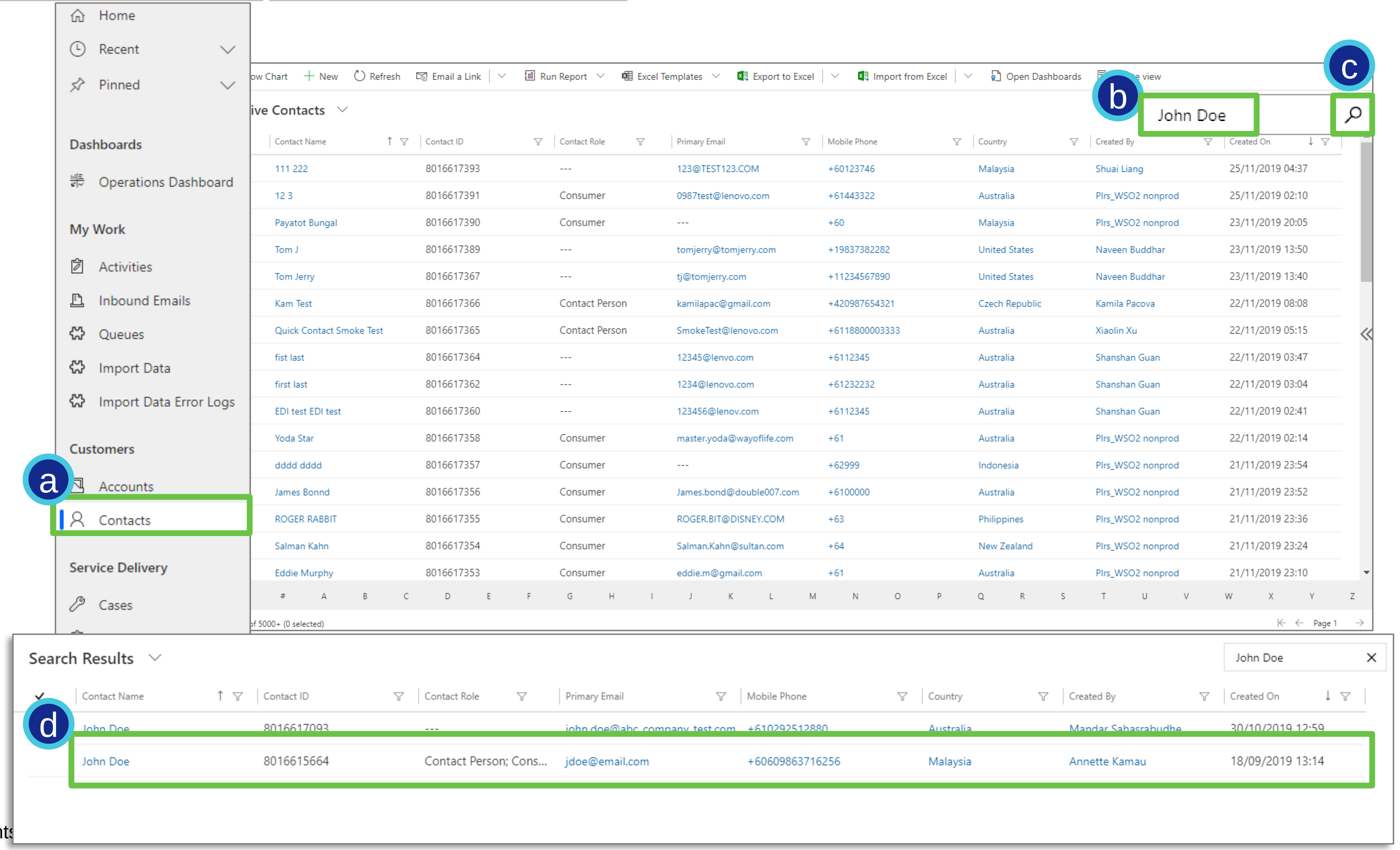
[3. Merge two Contacts](#)

[Locate the Contact.](#) [Edit the Contact.](#) [Add a Relationship.](#)

2. **Search through the Contacts entity.**
   a. Click the Contacts entity.
   b. Type the name of the contact in the search field.
   c. Click the magnifying glass.

The search results:

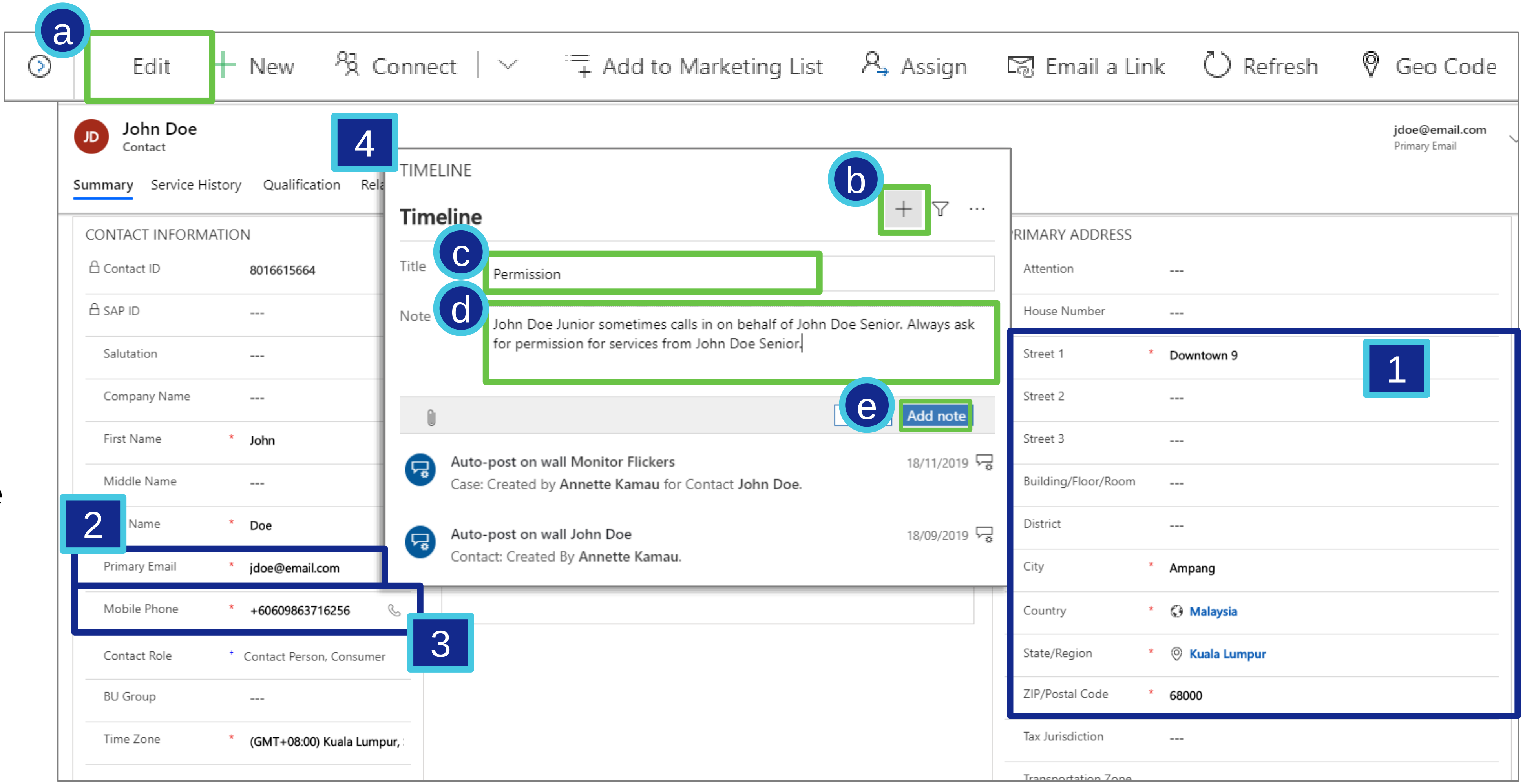
   d. Double-click on the Contact record.



Edit the Contact

- On the Summary page, the Contact's biographical details can be edited:

1. Address
2. Primary Email
3. Mobile Phone
4. Timeline
   a. Click Edit
   b. Click the + to the right of Timeline
   c. Type a Title
   d. Type the Notes in the free text field.



Edit the Contact

1. Search for and Edit a Contact

2. Create a Contact

3. Merge two Contacts

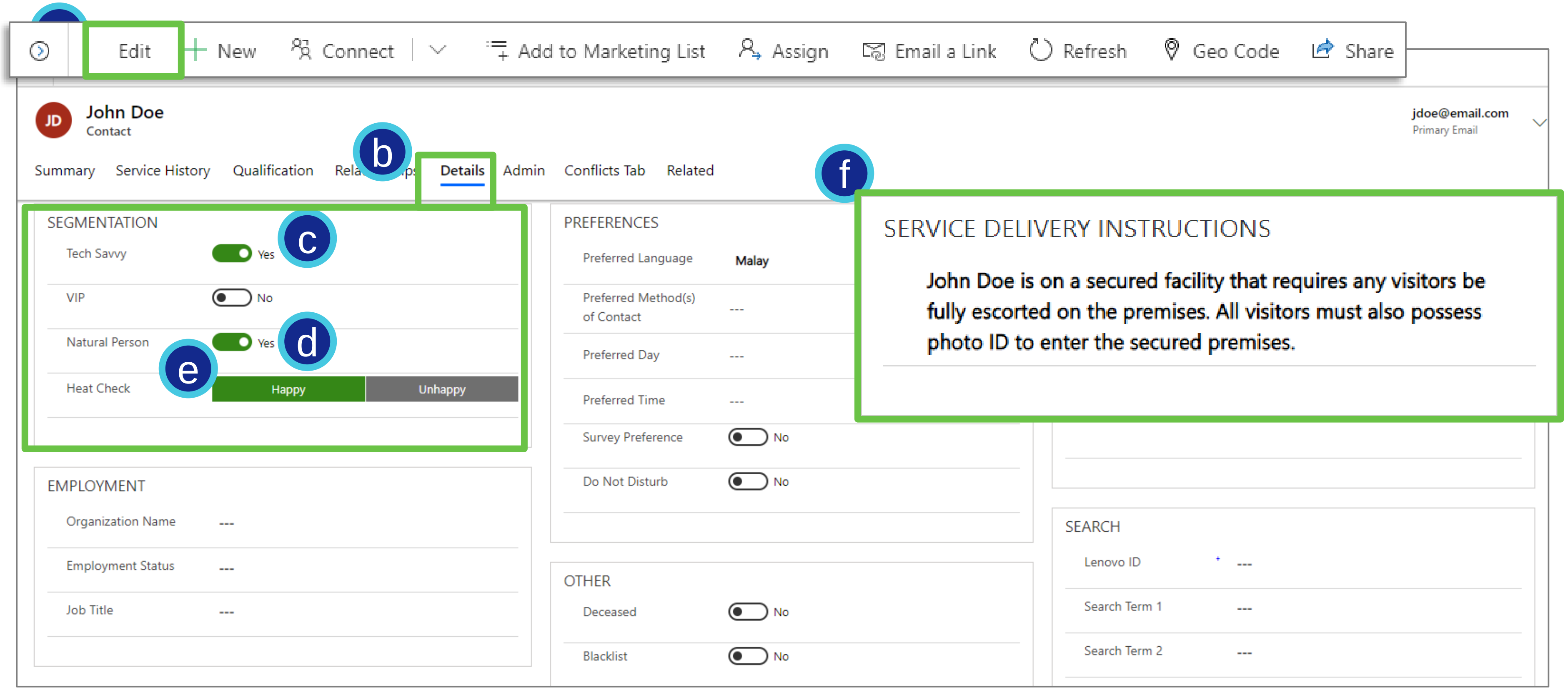
Locate the Contact

Edit the Contact.

Add a Relationship.

- Edit the Contact.
  a. Click Edit on the command bar above the form.
  b. Click the Details tab.

- In the Segmentation section, the following fields can be updated:
  c. Tech Savvy - yes.
  d. Natural Person - yes.
  e. Heat Check – Happy.
  f. Service Delivery Instructions – add a note.



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Add a Relationship

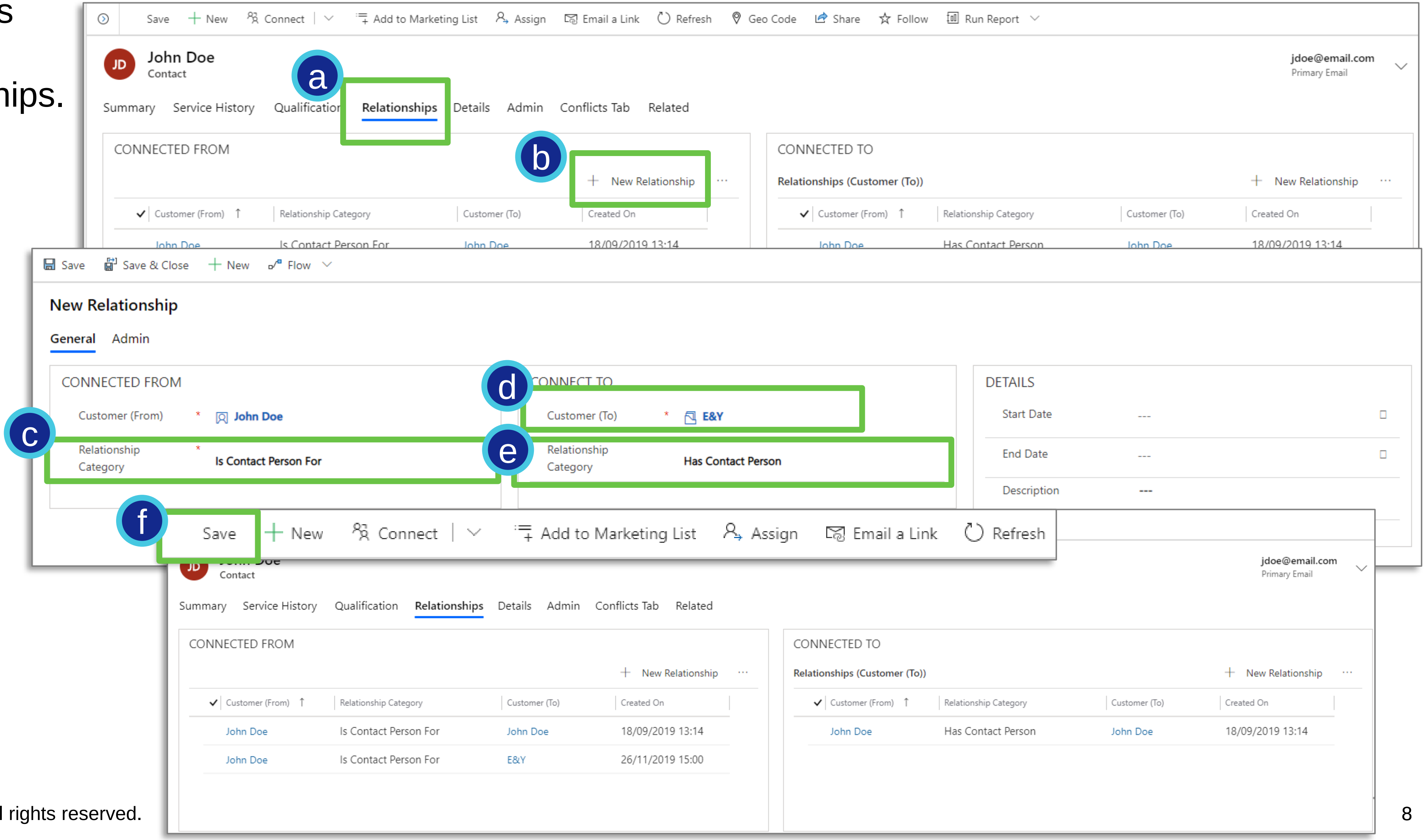
1. Search for and Edit a Contact | [2. Create a Contact]() | [3. Merge two Contacts]()

[Locate the Contact.]() > [Edit the Contact.]() > [Add a Relationship.]()

a. Click the Relationships tab.
b. Click +New Relationships.

In the New Relationship window:

c. For Relationship Category choose: Is the Contact Person for.
d. In the Customer field: type E&Y and choose it.
e. For Relationship Category: choose Has Contact Person.
f. Click Save.

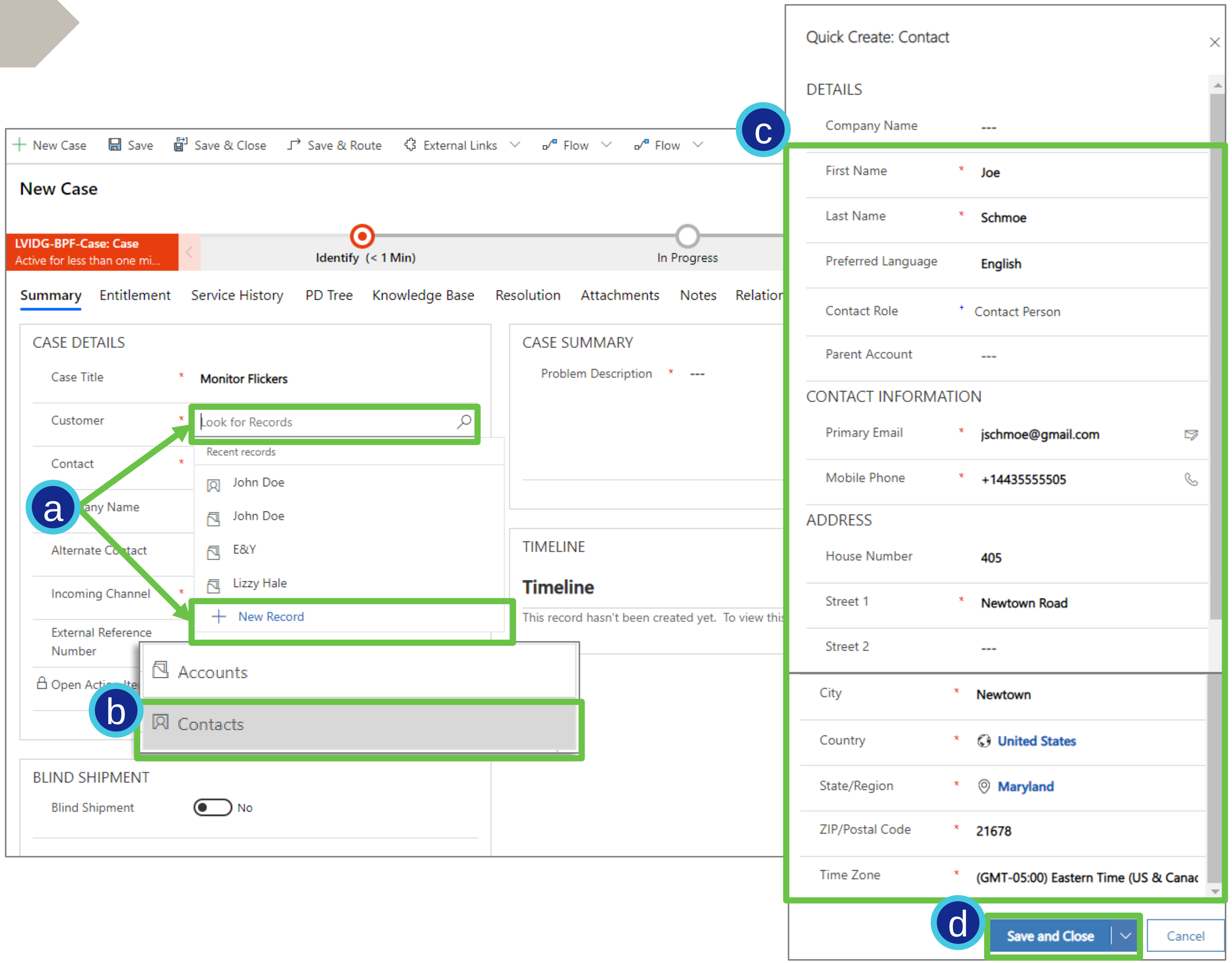


Create a Contact using Quick Create

[1. Search for and Edit a Contact.] [2. Create a Contact] [3. Merge two Contacts]

Use Quick Create. > Contacts Entity.

- Use Quick Create to create a Contact.
  a. Click in the Customer field, and choose +New Record.
  b. Choose Contact
  c. Complete all required fields on the form:
     - First Name
     - Last Name
     - Primary Email
     - Mobile Phone
     - Street 1
     - City (type and choose)
     - Country (type and choose)
     - Zip/Postal Code
     - Time Zone
  d. Click Save and Close.

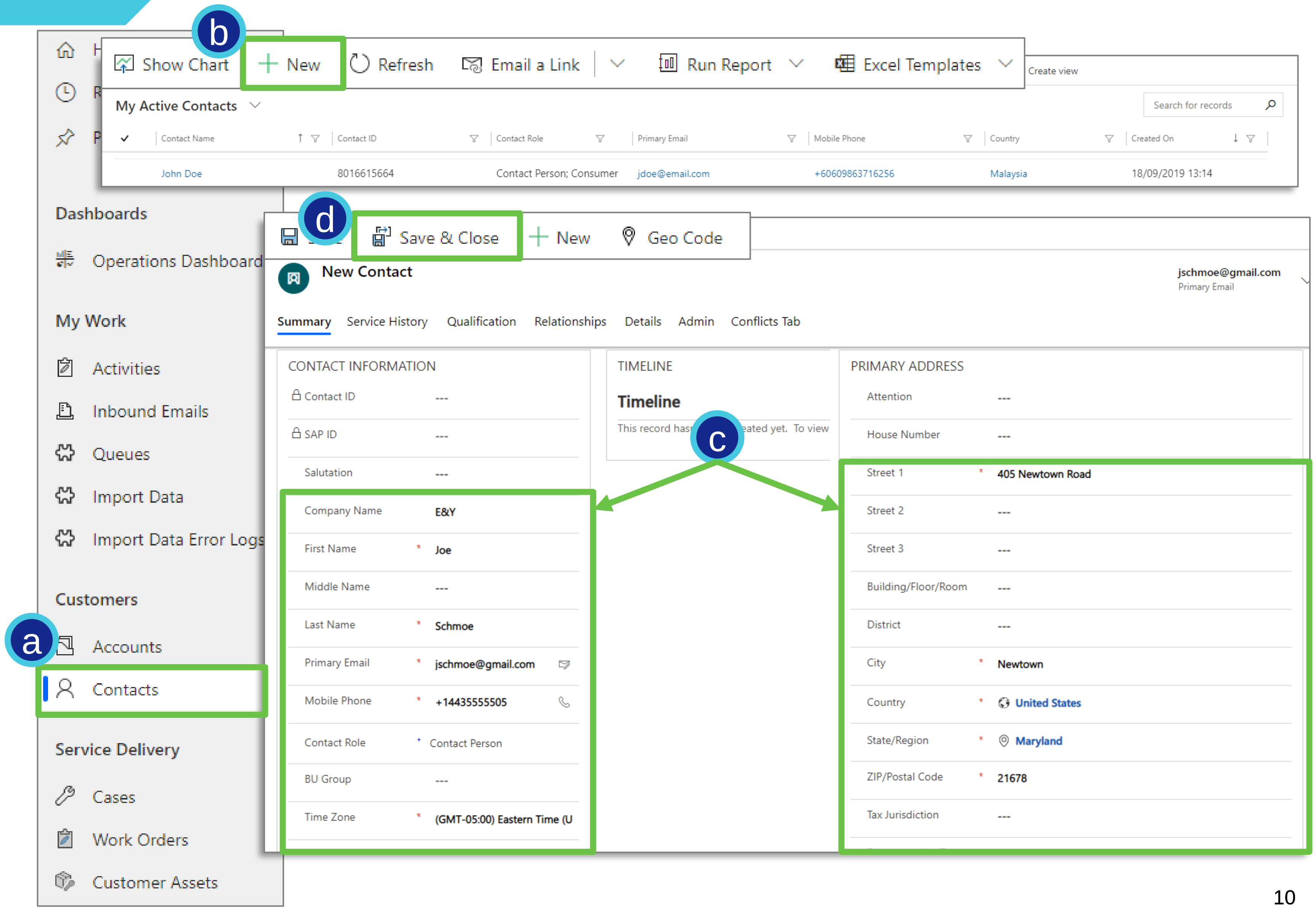


Create a Contact Using Contacts Entity

1. Search for and Edit a Contact. | 2. Create a Contact | 3. Merge two Contacts

Use Quick Create. | Contacts Entity.

- Create a Contact through the Contacts entity.
  a. Click on the contact entity.
  b. Click on +New
  c. Complete all required fields on the New Contact form:
     - First Name
     - Last Name
     - Primary Email
     - Mobile Phone
     - Street 1
     - City (type and choose)
     - Country (type and choose)
     - Zip/Postal Code
     - Time Zone
  d. Click Save and Close.



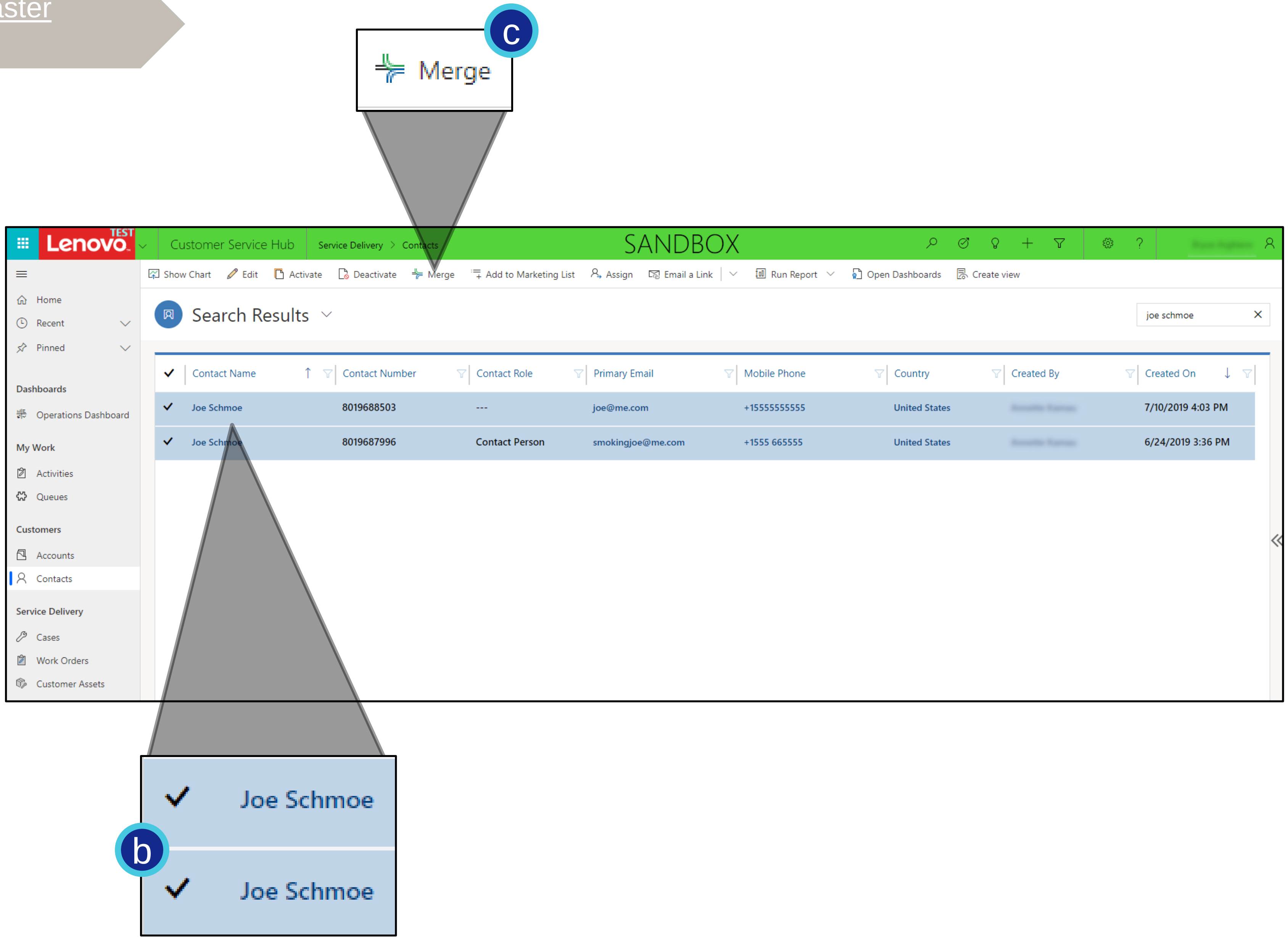
Select Contacts to Merge

Select Contacts to merge. [Create the master record.]

- You may want to merge a Contact if it has a duplicate record in the CRM.

- Complete three steps to begin merging two Contacts:

  a. Use the Contacts View to find the Contacts you want to merge.
  b. Click the left end of the row for each Contact to select it.
  c. Click the merge button on the command bar. This opens the Merge Records window.

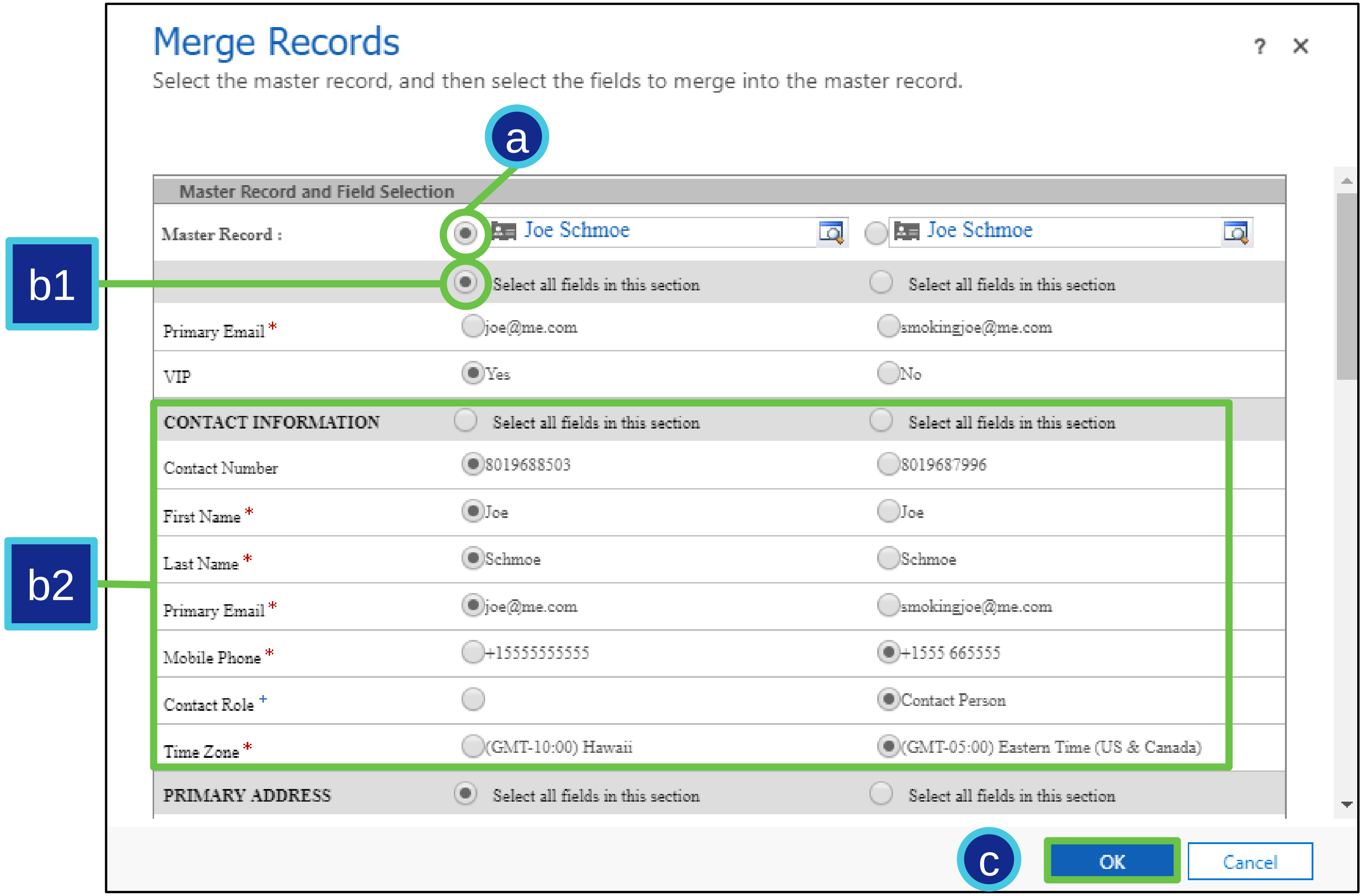


a. Select one of the two records you are merging to be the master record. The master record is the record that will be kept.

b. For each section on the master record, you have two options:

   1. Select all fields from either of the original records (adopts every field from a section of the selected record).
   2. Choose a combination of fields from each original record.

c. Click OK.



Note: The master record will inherit all of the subordinate record's child records. The subordinate record will be deactivated.

thanks.

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Change Log

Version	Update Date	Update by	Remark
V2	11/20/2019	Annette Kamau	