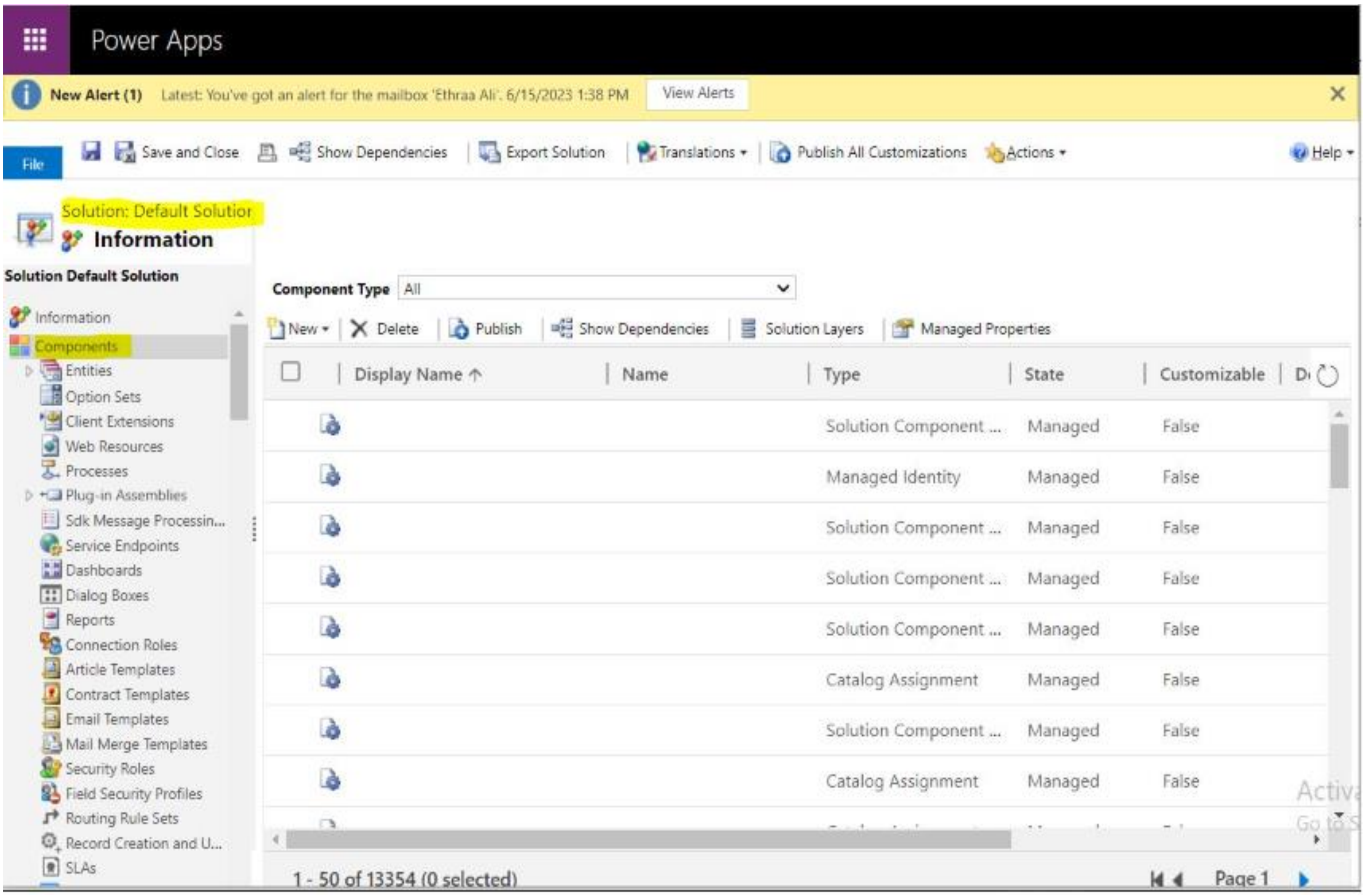
Dynamics CRM Environment Components



New Alert (1) Latest: You've got an alert for the mailbox 'Ethraa Ali'. 6/15/2023 1:38 PM

Solution: Default Solution

Information

Solution Default Solution

Component Type: All

Display Name	Name	Type	State	Customizable
		Solution Component ...	Managed	False
		Managed Identity	Managed	False
		Solution Component ...	Managed	False
		Solution Component ...	Managed	False
		Solution Component ...	Managed	False
		Catalog Assignment	Managed	False
		Solution Component ...	Managed	False
		Catalog Assignment	Managed	False

1 - 50 of 13354 (0 selected)

Page 1

Solution: is a container to transport apps and components from one organization to another or to apply a set of customizations to existing apps. A solution can contain one or more apps as well as other components such as site maps, entities, processes, web resources, option sets, and more.

Default Solution: it is a special solution that contains all components in the system. The default solution is useful for discovering all of the components and configurations in your system.

Entities: are used to model and manage business data in Dynamics 365. For example, entities such as account, campaign, and incident (case) can be used to track and support sales, marketing, and service activities. An entity has a set of attributes and each attribute represents a data item of a particular type. For example, the account entity has Name, Address, and OwnerId attributes. Conceptually, an entity is like a database table, and the entity attributes correspond to the table columns. Creating an entity record (or, simply a record) is like adding a row in a database table.

Option Sets: You can define an option set to use a set of options defined within itself (locally) from the entity or it can use a set of options defined elsewhere (globally) which can be used by other option set fields. Global option sets are useful when you have a standard set of categories that can apply to more than one entity.

The site map designer: lets you define the area, subarea, or group titles in the languages supported by the environment. A default site map is available. You can edit this site map or configure site maps for new apps by using the site map designer. The site map designer is integrated with the app designer.

Web Resources: represent files that can be used to extend the Dynamics 365 (on-premises) web application such as html files, JavaScript, and CSS, and several image formats. You can use web resources in form customizations, the site map, or the application ribbon because they can be referenced by using URL syntax.

Reports: a collection of charts and visuals, built with Report Wizard. Reports use FetchXML queries to retrieve data from the different entities.

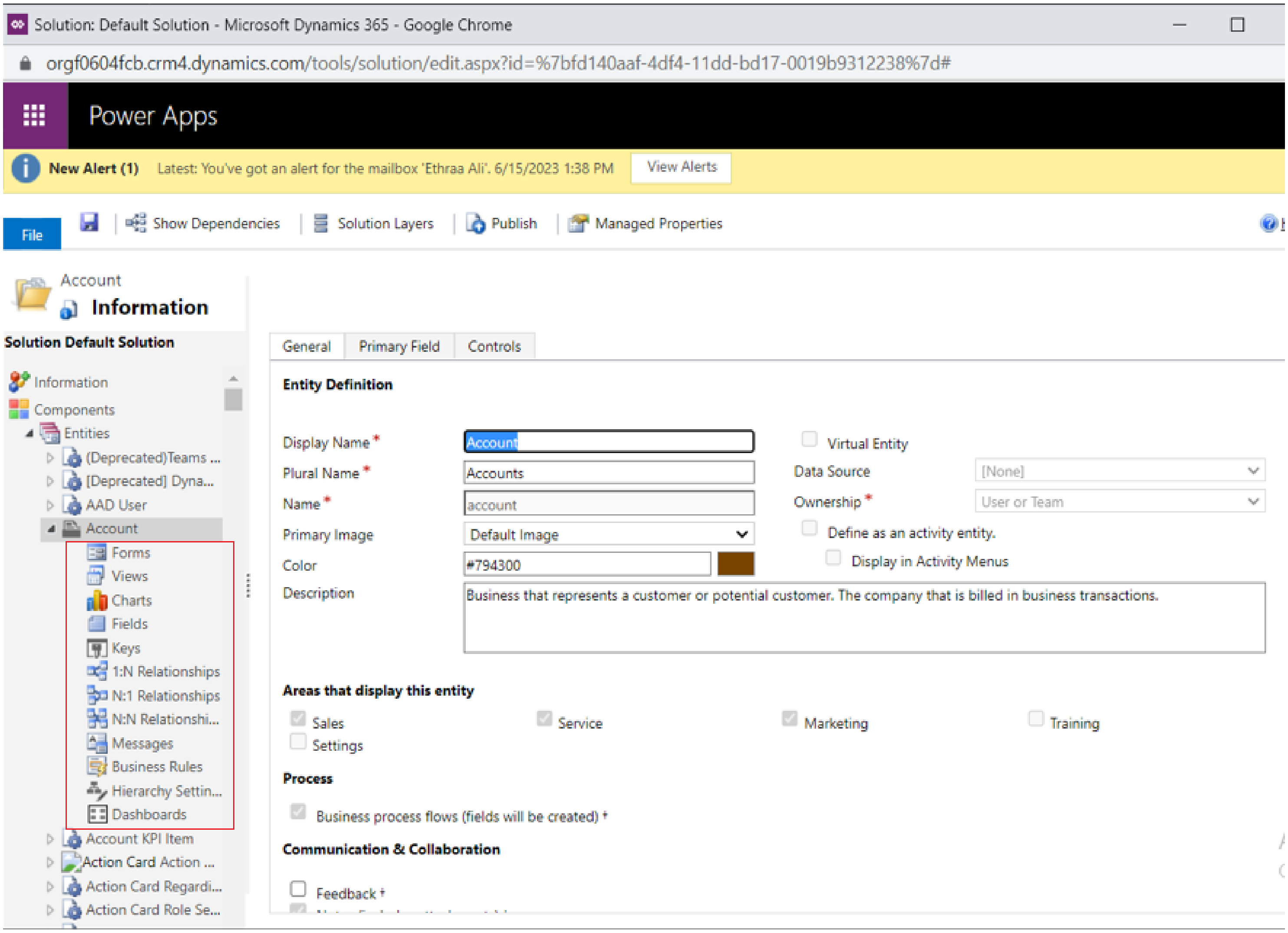
Dashboards: a collections of charts relating to different tables. There are two types of dashboards, user dashboards and system dashboards. An app user can create a dashboard visible only to them in the app areas where they have privileges.
An admin or customizer creates or customizes system dashboards that, when published, are visible to all app users. A user can choose to set their user dashboard as their default dashboard and override the system dashboard.

Plug-in: is custom business logic (code), they are handlers for events fired by Dynamics 365. You can register a plug-in to a known set of events to have your code run when the event occurs.

Security role: defines how different users, such as salespeople, access different types of records. To control access to data, you can modify existing security roles, create new security roles, or change which security roles are assigned to each user. Each user can have multiple security roles.

Security role privileges are cumulative: having more than one security role gives a user every privilege available in every role.

Each security role consists of record-level privileges and task-based privileges.



Solution: Default Solution - Microsoft Dynamics 365 - Google Chrome

orgf0604fcb.crm4.dynamics.com/tools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d#

Power Apps

New Alert (1) Latest: You've got an alert for the mailbox 'Ethraa Ali'. 6/15/2023 1:38 PM View Alerts

Account
Information

Solution Default Solution

- Information
- Components
  - Entities
    - (Deprecated)Teams ...
    - [Deprecated] Dyna...
    - AAD User
    - Account
      - Forms
      - Views
      - Charts
      - Fields
      - Keys
      - 1:N Relationships
      - N:1 Relationships
      - N:N Relationshi...
      - Messages
      - Business Rules
      - Hierarchy Settin...
      - Dashboards
    - Account KPI Item
    - Action Card Action ...
    - Action Card Regardi...
    - Action Card Role Se...

Entity Definition

Display Name * Account

Plural Name * Accounts

Name * account

Primary Image Default Image

Color #794300

Description Business that represents a customer or potential customer. The company that is billed in business transactions.

□ Virtual Entity

Data Source [None]

Ownership * User or Team

□ Define as an activity entity.

□ Display in Activity Menus

Areas that display this entity

☑ Sales ☑ Service ☑ Marketing □ Training

□ Settings

Process

☑ Business process flows (fields will be created) †

Communication & Collaboration

□ Feedback †

Form: provide the user interface that people use to interact with the data they need to do their work. It's important that the forms people use are designed to allow them to find or enter the information they need efficiently.

View: a list of records for a specific entity is displayed in the application. A view defines:

- The columns to display
- How wide each column should be
- How the list of records should be sorted by default
- What default filters should be applied to restrict which records will appear in the list

Chart: obtains the data from the view that is selected for a record type and visualize through pie, bar …. Shape. A chart is automatically updated every time that you change the view in the list of records.

Field: the individual data items that can be used to store data in an entity. Fields are sometimes called attributes by developers. You can use the customization tools in the solution explorer to edit system fields that allow customization, or to create, edit, or delete custom fields.

Key: you can use the alternate key to assure an efficient and accurate way of integrating data from external systems. It’s especially important in cases when an external system doesn’t store the record IDs (GUIDs) that uniquely identify records. The alternate keys are not GUIDs and you can use them to uniquely identify records. You must give an alternate key a unique name. You can use one or more entity fields to define the key. For example, to identify an account record with an alternate key, you can use the account name and the account number.

Relationships: define how records can be related to each other in the database. At the simplest level, adding a lookup field to an entity creates a new 1:N (one-to-many) relationship between the two entities and lets you put that lookup field in a form. With the lookup field, users can associate multiple “child” records of that entity to a single “parent” entity record.