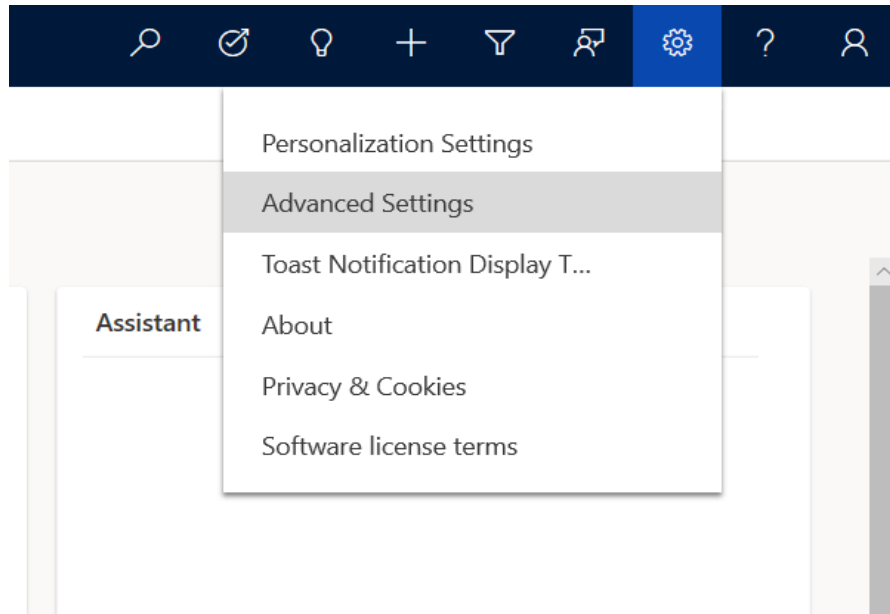


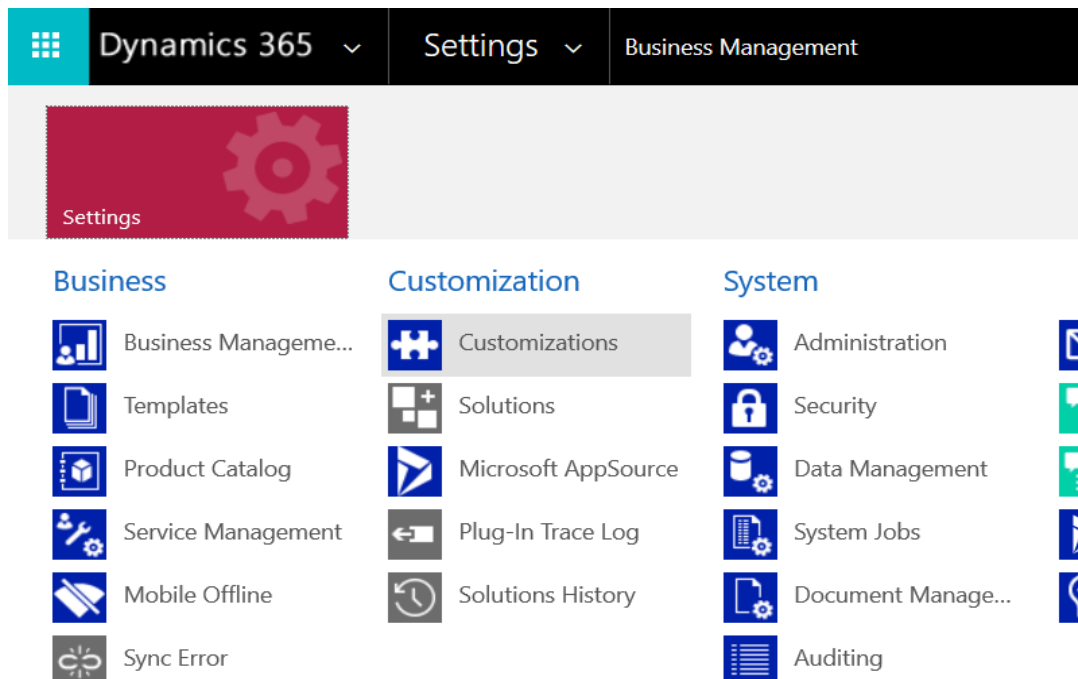
D365 - “Salutations”

Second Step: Create and insert a new field in Dynamics 365

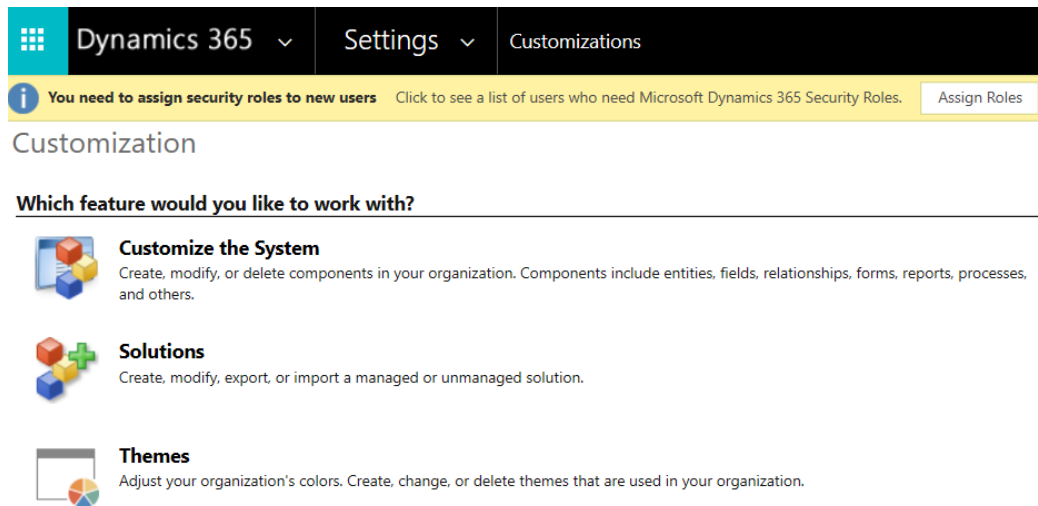
1. Login in your Dynamics 365
2. go to Advanced Settings, you can find it in the right side of your screen.



3. Dynamics 365 will open a new window. Go to Settings menu and select Customization



4. Select Customize the System






Dynamics 365 ▾ **Settings** ▾ **Customizations**

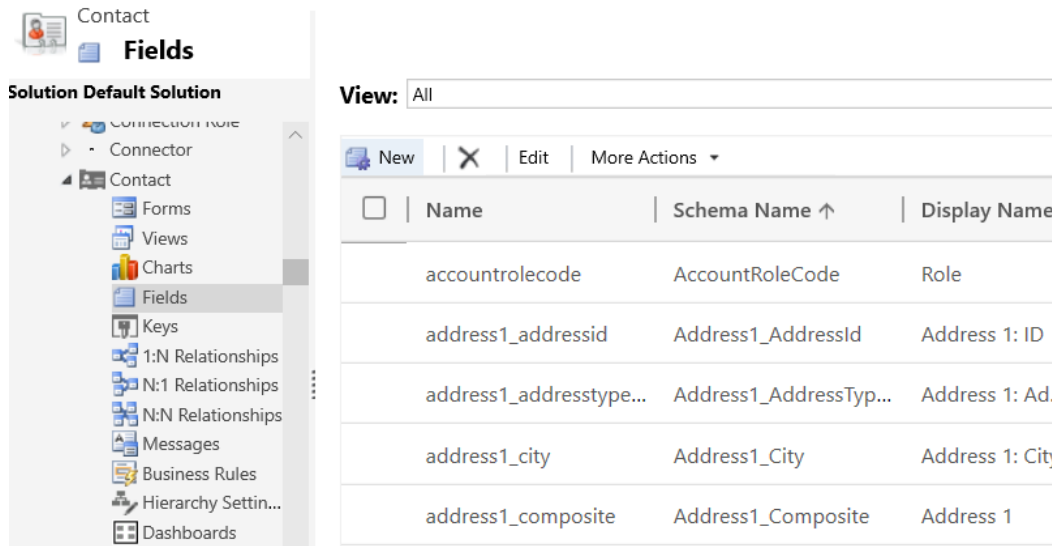
You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics 365 Security Roles. [Assign Roles](#)

Customization

Which feature would you like to work with?

-  **Customize the System**
Create, modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.
-  **Solutions**
Create, modify, export, or import a managed or unmanaged solution.
-  **Themes**
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.

5. A new window Power Apps will open, in Power Apps select: Components >> Entities >> Contact >> Field



Contact

Fields

Solution Default Solution

- Connector
- Contact
 - Forms
 - Views
 - Charts
 - Fields**
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships
 - Messages
 - Business Rules
 - Hierarchy Settin...
 - Dashboards

View: All

New | **Edit** | **More Actions** ▾

<input type="checkbox"/>	Name	Schema Name ↑	Display Name
<input type="checkbox"/>	accountrolecode	AccountRoleCode	Role
<input type="checkbox"/>	address1_addressid	Address1_AddressId	Address 1: ID
<input type="checkbox"/>	address1_adresstype...	Address1_AddressTyp...	Address 1: Ad...
<input type="checkbox"/>	address1_city	Address1_City	Address 1: City
<input type="checkbox"/>	address1_composite	Address1_Composite	Address 1

6. Click on New

7. A new window will be open, in this window you can fill up with the information of your new Field.

Power Apps

File Save and Close Help

Field **New for Contact** Working on solution: Default Solution

Common
Information
Business Rules

General

Schema

Display Name * Field Requirement * Optional

Name * new_ Searchable Yes

Field Security ☐ Enable ☒ Disable

⚠ Enabling field security? [What you need to know](#)

Auditing * ☒ Enable ☐ Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience ☐ Sortable in interactive experience dashboard ☐

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type * Single Line of Text

Field Type * Simple

Format * Text

Maximum Length * 100

IME Mode * auto

8. Write a display name for your new field. The name will be write automatic. You can also select a data type and field type.
9. Click on: Save and Close
10. Click on: Publish All Customization
11. To insert your new field go to a contact, and click on: Form

Dynamics 365 Settings Business Management

Recent Views

Recent Records

- Sales Activity Dashboard
- Benno Kurmann
- Sales Activity Social Dashboard

Dynamics 365 Settings Business Management Benno Kurmann

You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS

CONTACT Benno Kurmann

Summary

CONTACT INFORMATION POSTS ASSISTANT ACTIVITIES

Full Name * Benno Kurmann

12. Find your new field in the field list and drop the new field in the contact form.

The screenshot shows the Power Apps form designer interface. The top bar includes the 'Power Apps' logo and a ribbon with tabs for 'FILE', 'HOME', and 'INSERT'. The 'HOME' tab is active, showing various icons for saving, editing, and previewing. A yellow banner at the top states: 'Form headers now default to high density to display more data. Use the new form designer to edit header density. [Learn more](#)'. On the left, a navigation pane shows the 'Contact' form with sections like 'Summary', 'Details', 'Scheduling', and 'Files'. The main canvas displays the 'Contact' form with a 'Header' section containing an 'Owner' field and a 'Summary' section containing a 'CONTACT INFORMATION' group. A red arrow points from the 'Formal Salutation' field in the 'Field Explorer' pane to the 'Formal Salutation' field in the 'CONTACT INFORMATION' group on the canvas. The 'Field Explorer' pane on the right shows a list of fields: 'Formal Salutation', 'GDPR Optout', and 'Not at Company Flag'. The 'Formal Salutation' field is highlighted with a red box.

This is a close-up screenshot of the Power Apps form designer interface. The 'Formal Salutation' field is now added to the 'CONTACT INFORMATION' group in the 'Summary' section of the 'Contact' form. The field is highlighted with a red box. The 'Field Explorer' pane on the right shows the same list of fields: 'Formal Salutation', 'GDPR Optout', and 'Not at Company Flag'. The 'Formal Salutation' field is still highlighted with a red box. The 'CONTACT INFORMATION' group on the canvas contains the following fields: 'Formal Salutation', 'Full Name', 'Job Title', 'Account Name', and 'Email'. The 'Formal Salutation' field is the first field in the group.