**Module 6: Customizing Dynamics 365 Forms**

# Practice 6.1: Add Fields to Forms

#### Scenario

You need to continue the configuration of the Idea entity by adding some of the fields created previously to the form, and modify the layout to organize these logically. You also need to modify the Prototype form, and add some additional fields at the same time. The Prototype form also needs some changes to the layout to present the information as clearly as possible.

#### Lab Setup

Before doing this lab you need to have completed the all of the Previous Labs to this Point including Module 3 “Customizing Entities and Fields”, Module 4 “Additional Field Customizations”, and Module 5 “Relationships”.

##### Exercise Scenario

In this exercise you must format an existing tab and section on the Idea Information form, add two existing fields to the form and modify the layout of one of the fields.

The specific requirements are outline in the High level Steps. You must also add a new section to the Prototype Information form, create two new fields and add these to the new section. The two new fields must have the properties shown in the following table.

|  |  |
| --- | --- |
| Field Name | Properties |
| Planned Completion | Type: Date  Format: Date only |

#### **Task 1:** Customize the Idea and Feedback Forms and Add Existing Fields

##### High Level Steps

1. Open the Idea form called **Information** from **NPD and Feedback** solution.
2. Modify the **General** tab columns to 50% of the width for each, and modify the **General** section to have two columns.
3. Modify the **Name** field to span two columns, add the **Target Market Size** and **Description** fields to the **General** section and modify the **Description** field to span two columns and five rows.
4. Add a **Sub-grid** to the **Idea** form that will display related **Prototypes**.
5. Add the **Cost** and **Satisfaction Rating** field to the **Feedback** form.

##### Detailed Steps

1. Open the Idea form called **Information** from **NPD and Feedback** solution.
   1. If the **NPD and Feedback** Solution is not already open, click the Main button > **Settings** > **Solutions** and double-click the **NPD and Feedback** solution to open it.
   2. In the solution explorer, expand **Entities** then expand **Idea**.
   3. Under the Idea entity click **Forms**.
   4. Click **Forms**.
   5. Double-click the **Information** form with a Form Type of **Main**.
2. Modify the **General** tab columns to 50% of the width for each, and modify the **General** section to have two columns.
   1. Double-click the **General** tab or click to select it (blue box will appear around the entire tab) and click **Change Properties**.
   2. In the **Tab Properties** dialog box, click the **Formatting** tab.
   3. In the **Layout** section, under **Two Columns**, select the two column icon on the furthest to the left. Note that the column widths change to 50% each.
   4. Click **OK**.
   5. Double-click the **General** section.
   6. In the **Section Properties** dialog box, click the **Formatting** tab.
   7. In the **Layout** section, select **Two Columns**.
   8. Click **OK**.
3. Modify the **Name** field to span two columns, add the **Target Market Size** and **Description** fields to the **General** section and modify the **Description** field to span two columns and five rows.
   1. Double-click the **Name** field on the form.
   2. In the **Field Properties** dialog box, click the **Formatting** tab.
   3. In the Layout section, select **Two columns** to span both columns of the containing section. Note that the options for Three and Four columns are unavailable. Click **OK**.
   4. In the **Field Explorer** pane, in the **Filter** list, select **Custom Fields**.
   5. In Field Explorer pane Double click **Target Market Size** field. Drag it next to **Owner**.
   6. Double click the **Target Market Size** field.
   7. In the **Field Properties** dialog box, on the **Display** tab, change the **Label** to **Target Market** (delete the word “Size”). Click **OK**.
   8. In Field Explorer pane Double click **Detailed Description** field. Drag it under **Owner**.
   9. Double-click the **Description** field.
   10. In the **Field Properties** dialog box, click the **Formatting** tab.
   11. In the Layout section, select **Two columns**.
   12. In the **Row Layout** section, in **Number of Rows**, enter **5**.
   13. Click **OK**.
   14. Next you will now create a new Section on the General Tab called Idea Details.
   15. On the form editor ribbon, click **INSERT**
   16. Click the arrow below **Section** on the far left hand side of the ribbon
   17. Select **One Column**
   18. Locate the new section that was added to the form just below the **Detailed Description** field.
   19. Double-click the section to open the section properties.
   20. Change the **Name** to **Idea\_Details** *(Note: that the name cannot include spaces).*
   21. Change the **Label** to **Idea Details** *(The Label can include spaces).*
   22. Select the two checkboxes **Show the label of this section on the form** and **Show a line at the top of the section**
   23. Click **OK.**
   24. In the **Field Explorer**, click the **Target Market** field and drag it into the **Idea Details** section, just below the **Detailed Description** field.
4. Add a Sub-Grid to the Idea Entity to show related Prototypes.
   1. On the **Ribbon**, select **Insert**, click the arrow below **Section**, and select **One Column.**
   2. Double-click the new section to open the Properties.
   3. Enter **Prototypes** for the **Name** and **Label**.
   4. Check both the **Show the label of this section on the Form** and **Show a line at the top of the section** boxes.
   5. Click **OK**
   6. On the **Insert** ribbon, click the **Sub-Grid** button
   7. Enter **Prototypes** for the **Name**
   8. In the **Data Source** section, select **Prototypes (Originating Idea)** from the **Entity** Dropdown.
   9. Verify that **Only Related Records** is selected for Records
   10. Click **Set**
   11. On the ribbon, click the **Home** tab then click **Save**.
   12. Click **Publish**.
   13. Click **Save and Close**.
   14. Keep the Solution window open for the next task in this lab exercise.
5. Add the **Cost** and **Satisfaction Rating** fields to the Feedback Activity Entity
   1. In the **NPD and Feedback** solution, expand the **Feedback** entity.
   2. Click **Forms**.
   3. Double-Click the **Main Information** form to open it.
   4. In the **Field Explorer** pane, change the **Filter** to **Custom Fields**.
   5. Double-click the **Cost** field to add it just below the **Regarding** field.
   6. Double-click the **Satisfaction Rating** field to add it just below the **Cost** Field.
   7. Click **Save**
   8. Click **Publish**
   9. Click **Save and Close**

#### **Task 2:** Customize the Prototype Form and Add New Fields

##### High Level Steps

1. Open the **Prototype** form called **Information**.
2. Add two new fields to the Prototype entity.
3. Create a new one column section called **Planning**.
4. Add the Planned Completion, Currency and Budget fields to the form.
5. Configure the Originating Idea field to be read-only.
6. Add the Owner field to the form header.
7. Add the Modified By and Modified On fields to the form footer.
8. Test your changes to both entities by creating some **Prototypes** from an existing **Idea** and creating some **Feedbacks** from a **Prototype**.

##### Detailed Steps

1. Open the **Prototype** form called **Information**.
   1. In the **NPD and Feedback** solution (this should still be open from the previous task) expand the **Prototype** entity.
   2. Click **Forms**.
   3. Double-click the **Information** form with a Form Type of **Main**.
2. Add the **Originating Idea**, **Master Prototype**, **Total Cost**, and **Total Feedback** fields to the General Section.
   1. In the **Field Explorer** pane, change the **Filter** to **Custom Fields**.
   2. Select **Originating Idea**, and drag it below the **Owner** field.
   3. Select **Master Prototype**, and drag it below the **Originating Idea** field.
   4. Select the **Total Feedbacks** field, and drag it below the **Master Prototype** field.
   5. Select the **Total Cost** field, and drag it below the **Total Feedback** Fields.
   6. In the **Field Explorer** pane, change the **Filter** back to **All Fields**.
3. Add a new field called Planned Completion to the Prototype entity.
   1. In the Field Explorer pane, click the **New** **Field** button at the bottom.
   2. In the **New for Prototype** form in **Display Name**, enter **Planned Completion**.
   3. In the **Data Type** list, select **Date and Time**.
   4. In the **Format** list, select **Date Only** (this is the default value).
   5. On the toolbar, click the **Save and Close** button.
4. Create a new one column section called **Planning**.
   1. On the ribbon, click the **Insert** tab, then click the arrow below **Section**, then Select **One Column**.
   2. Double-click the new section on the form.
   3. In the **Section Properties** dialog box, in the **Name** and **Label** fields, enter **Planning**.
   4. Select the two checkboxes **Show the label of this section on the form** and **Show a line at the top of the section**.
   5. Click **OK**.
5. Add the Planned Completion, Currency and Budget fields to the form.
   1. In the **Field Explorer**, select the **Planned Completion** field and drag it into the **Planning** section. ***Note:*** *if the Planned Completion field is now showing in the Field Explorer list, you may need to Save and close the form and reopen it.*
   2. Drag the **Currency** field below the **Planned Completion** field
   3. Drag the **Budget** field below the **Currency** field.
6. Configure the Originating Idea field to be read-only.
   1. Double-click the **Originating Idea** field.
   2. In the **Field Properties** dialog box, check the box next to **Field is read-only**.
   3. Click **OK**.
7. Add the Owner field to the form header.
   1. On the ribbon, click the **Home** tab.
   2. In the **Select** group, click the **Header** button.
   3. In the **Field Explorer**, select the **Owner** field and drag it to the leftmost position in the **Header**.
   4. In the Select group, click the Body button.
   5. Select the Owner field located just below the Name field
   6. Press Delete (Note: you are not able to delete the Owner field until you place in the Header as it is a Required field and must be present on the form)
8. Add the Modified By and Modified On fields to the form footer.
   1. Scroll down to the bottom of the form and double-click the **Footer** area.
   2. In the **Field Explorer**, click the **Modified By** field and drag it to the leftmost position in the footer.
   3. In the **Field Explorer**, click the **Modified On** field and drag it to the middle position in the **Footer**.
   4. On the ribbon, click **Save**, and then click **Publish**.
   5. Click **Save and Close**.
   6. To ensure that all the customizations you have made to this point are available, click the **Publish all Customizations** button.
   7. Leave the Solution window open for later labs.
9. Test your changes to both entities by creating a **Prototype** from an existing **Idea**.
   1. Switch back to your CRM Trial Organization.
   2. Press **F5** to refresh your browser and verify that all of your customizations are loaded into the application.
   3. Click the **Main** button and Navigate to **Sales** > **Ideas**.
   4. On the Active Ideas screen, click the **New** button
   5. In the **Name** field, enter **New Helmet for Kids**.
   6. In the **Detailed Description** field enter, **This new helmet will be lighter and stronger**.
   7. In the **Target Market** field, enter **100**
   8. Save the Idea. *(Notice the Prototypes Sub-Grid is now Active.)*
   9. Click on the **New** button to add a New Prototype
   10. In the **Name** field, enter **Child-125A**
   11. In the **Planned Completion** field, select a date in the future
   12. In the **Budget** field, enter 10,000. *(Notice the Key to indicate Field Security on this field).*
   13. Click **Save**
   14. In **the Activities Pane**, click **Activities**.
   15. Click the **Add More Activities Button** (…)
   16. Select **Feedback**
   17. In the **Subject** field, **Enter Buckle Sticks**
   18. In the **Cost** field, Enter **$200.00**
   19. Click **Save and Close**
   20. Back on the **Prototype**, hover over the **Total Feedbacks Rollup field** and click the **Refresh** button. *(It should now display 1)*
   21. Do the same thing for the **Total Cost** field. *(Should now display 200)*.
10. Test the Prototype Hierarchy
    1. On the Navigation Bar, click the **Main** button, and select **Sales** > **Ideas**
    2. Open the **New Helmet for Kids** Idea
    3. In the **Prototypes Sub-Grid**, click the **New** Button
    4. Enter **Child 125B** in the **Name** field
    5. In the **Master Prototype** field, click the Lookup icon and **Select Child 125A**
    6. Click **Save and Close**.
    7. On the Navigation Bar, click the **Main** button, and select **Marketing** > **Prototypes**.
    8. Notice that Child 125A and 125B both have a Hierarchy Icon next to their names.
    9. Click the **Hierarchy Icon** to view the Hierarchy.

# Practice 6.2: Create a Role-Based Form

#### Scenario

Ben Burton, Marketing Manager at Adventure Works Cycles has asked for some changes to be made to the Competitor form to support the new product development (NPD) process. Users managing NPD need to see information about related Ideas on Competitor records, but this is not useful to everyone. You have decided to create a second form for the NPD users to meet their requirements without affecting other departments.

#### Lab Setup

Before doing this lab you need to have completed the all of the Previous Labs to this Point including Module 3 “Customizing Entities and Fields”, Module 4 “Additional Field Customizations”, and Module 5 “Relationships”.

Exercise Scenario

In this exercise you will create and test a new NPD version of the Competitor form.

*Task 1: Create a Role-Based Form*

High Level Steps

* + - 1. Open the **NPD and Feedback** solution.
      2. Create a copy of the existing **Information** form for the **Competitor** entity.
      3. Add a sub-grid showing **Ideas** on the new **NPD** form.
      4. Assign the new form to the **SalesPerson** Security Role.
      5. Set the form order.

Detailed Steps

Open the **NPD and Feedback** solution.

If Necessary switch to the **NPD and Feedback** by clicking the **Main** button and thennavigate to **Settings** > **Solutions** and double-click the **NPD and Feedback** solution to open it.

In the solution explorer expand **Entities**.

Add the Competitor entity to your Solution

If the Competitor entity does not exist in your **NPD and Feedback** Solution, in solution explorer navigate to **Entities**.

Click the **Add Existing** button.

Locate and select the **Competitor** entity.

Click **Add All Assets** to include everything in your solution.

If you are prompted to add missing components, select **No, do not include** and click **OK**

*If you already had the* ***Competitor*** *entity but are missing items, click the* ***Add Subcomponents****, and Select all the* ***Forms****,* ***Fields****, and* ***Relationships****.*

Create a copy of the existing Information form for the Competitor entity.

Expand the **Competitor** entity.

Click **Forms**.

Double-click the **Competitor** form that has a **Form Type** of **Main**.

On the ribbon, click **Save As**.

In the **Save As** dialog box, change the **Name** to read **NPD**.

In the **Save As** dialog box, change Description to “A form for the NPD team.”

Click **OK** and wait for the form to save and reload.

Add a sub-grid showing Ideas on the new NPD form.

In the **NPD** form designer, on the ribbon, click the **Insert** tab.

In the **1 Tab** group, click **One Column**.

With the tab still selected, on the **Home** ribbon in the **Edit** group, click **Change Properties** (or you can double-click the tab).

In the **Tab Properties** dialog box, in **Name** and **Label** enter **Ideas**.

Click **OK**.

On the **Insert** ribbon, in the **Control** group, click **Sub-grid**.

In the **Set Properties** dialog box, in **Name**, enter **Ideas**.

In the **Entity** list, select **Ideas**. Note the label is filled in based on this selection, but you can choose to overwrite it.

Click **Set**.

On the ribbon click the **Home** tab.

Click **Save**.

Click **Publish**.

Click **Save and Close**.

Assign the new form to the Salesperson Security Role.

Click to select the **NPD** form.

On the action bar above the list of forms, click **Enable Security Roles**.

Select the **Salesperson** role.

Click **OK**.

Set the form order.

On the toolbar, click **Form Order**, then click **Main Form Set**.

Move the **NPD** form to the top of the list by selecting the form and clicking the up arrow above the list.

Click **OK**.

Test your work by opening a Competitor.

Click the Main button in the CRM Navigation Bar and navigate to **Sales**, and **Competitors**.

On the **All Competitors** list, click the **New** button.

Just above New Competitor, you will see the word COMPETITOR with an arrow next to it.

Click the Arrow and switch to the NPD from.

*Since you are logged in as a System Administrator, you will see all forms and can switch between them. Users who have access to both forms will see the same thing. Users with only access to a specific from will only see the form they have access towith no option to switch.*

# Practice 6.3: Create and Configure an Access Team Template

*Task 1: Create and Configure an Access Team Template*

High Level Steps

Enable Access Teams for the Prototype entity.

Create an Access Team Template named Project Team for the Prototype entity.

Add a sub-grid to the Prototype Information form for Project Team members.

Grant Ben Burton Access to a Prototype by using the new Sub-Grid.

Detailed Steps

Enable Access Teams for the Prototype entity.

If Necessary navigate to the **NPD and Feedback** Solution by clicking the **Main** button, selecting **Settings** > **Solutions** and double-click the **NPD and Feedback** Solution to open it.

In the solution explorer, expand **Entities.**

Click **Prototype**.

In the Prototype properties, in the **Communication & Collaboration** section, select the check box to enable **Access Teams**.

On the toolbar, click **Save**, and then click **Publish**.

Leave the Solution window open for use later in this lab.

Create an Access Team Template named Project Team for the Prototype entity.

Switch back to your CRM organization, click the Main button and, navigate to **Settings** > **Security**.

Click **Access Team Templates** at the lower left.

On the toolbar, click **New**.

In **Name**, enter **Project Team**.

In **Entity**, select **Prototype**.

In **Access Rights**, select the check boxes for **Read** and **Write**.

On the ribbon, click **Save and Close**.

Add a sub-grid to the Prototype Information form for Project Team members.

Switch to the **NPD and Feedback** Solution.

In the solution explorer, expand the **Prototype** entity.

Click **Forms**.

Double-click the **Information** form that has a **Form Type** of **Main**.

In the form editor, select the **Planning** section.

On the **Insert** ribbon, click **Section**, and then click **One Column** to insert a new section.

In the **Insert** ribbon, in the **Control** group, click **Sub-Grid**.

In the **Set Properties** dialog box, in **Name**, enter **ProjectTeam** (no spaces).

In **Label**, enter **Project Team**.

Select the check box Display label on the Form.

In the **Data Source** section, in **Records**, select **All Record Types**. **Note**: *the users who are added to the Access Team do not have a direct relationship with the record, so* ***Only Related Records*** *will not work.*

In **Entity**, select **Users**.

In Default View, select **Associated Record Team Members**. The Team Template property is now displayed.

In **Team Template**, select **Project Team** (the name of the Access Team Template you created).

In the lower right, click **Set**.

On the **Home** ribbon, click **Save,** and then click **Publish**.

Click **Save and Close**.

Grant a user access to the record using the new Sub-Grid.

Switch back to your CRM Organization.

Click the Main Button and navigate to **Marketing** > **Prototypes**.

Open the **Child 125a** Prototype record *(Or any prototype record.)*

Notice the **Project Team** Sub-Grid.

Click the **New** button.

Click the **lookup Icon.**

Select **Ben Burton** *(or any user in your deployment)*.

Ben will now have **Read** and **Write** Privileges to the Record.

You could sign in as Ben and test access if so desired.

# **Module 7: Business Rules**

# Practice 7.1: Create a Business Rule

*Scenario*

After a Prototype record is created, users must not be able to move it to a different idea than the one it originated from, to make sure that the reported outcomes of Ideas are accurate. To achieve this requirement, you configured the Originating Idea field on the Prototype form to be read-only. This works if a user creates the Prototype record from an Idea because it inherits the Idea lookup value through field mapping. However, when a Prototype is created from anywhere else, the record cannot be saved because the field is required *and* read-only (locked).

Ben Burton, the Marketing Manager, has asked you to create a Business Rule so that users can create a Prototype and link it to an Idea, or the other way round. You must configure a Business Rule that will test if the Originating Idea field does not contain data, and unlock it when this condition is true.

*Lab Setup*

Before you perform this lab, you must complete the Add Fields to Forms lab in the Customizing Forms module, and added the Originating Idea lookup to the Prototype form as described in that lab.

High Level Steps

* + - 1. Create a Business Rule for the Prototype entity in the NPD and Feedback Solution.
      2. Configure the **Business Rule** as described in the lab scenario.
      3. Test the **Business Rule** by creating a **Prototype** record.

Detailed Steps

Create a Business Rule for the Prototype entity in the NPD and Feedback Solution.

Switch to the **NPD and Feedback** Solution.

In the solution explorer, expand **Entities**.

Expand **Prototype**.

Click **Business Rules**.

On the menu bar, click **New**.

Configure the Business Rule as described in the lab scenario.

Enter **Originating Idea unlocked when empty** as the rule name.

In the upper right side corner, verify that the **Scope** is set to **All Forms**.

Select the **Condition** in the editor, in properties enter **unlock when Empty**.

Under the rule set the **Source** to **Entity**

In **Field**, select **Originating Idea**.

In the Operator list, select **Does not contain data**.

Click the **Apply** to save the changes to the condition.

Click **Components**

Drag the **Lock / Unlock** action after the **Unlock when Empty** condition.

Verify the Properties tab is selected, and set the Display Name to Unlock

In **Field**, select **Originating Idea**.

In **Status**, select **Unlock**.

Click the **Apply** to save the changes to the action.

Click **Components**

Drag the **Lock / Unlock** action below the **Unlock when Empty** condition.

In Properties enter, Lock Field

In **Field**, select **Originating Idea**.

In **Status**, select **Lock**.

Click **Apply** to save the changes to the action.

At the top left of the window, on the command bar, click **Save**.

On the command bar, click **Activate**,

In the **Process Activate Confirmation** dialog box, click **Activate** to confirm.

Close the Business Rule.

Test the **Business Rule** by creating a **Prototype** record.

Switch to your main CRM application.

Click the Main button, and navigate to **Marketing** > **Prototypes**.

On the command bar, click **New**.

In **Name**, enter **New Bike Lock**.

Notice the **Originating Idea** field is unlocked.

In the **Originating Idea** field, click the lookup icon and then select an existing **Idea** record.

Notice a padlock appears next to the **Originating Idea** field

Click it again and verify that it does not respond because it is now locked.

On the command bar, click **Save**.

Notice that thefield continues to display a padlock icon since it is still locked.

### **Module 8: Views and Visualizations**

# Practice 8.1: Modify the Quick Find View

Adventure Works Cycles staff frequently use the Quick Find feature in Microsoft Dynamics 365. Some users need to search for Contacts based on the city in which they are located. Because the **City** field is not configured as a *find column* by default you must modify the Quick Find view by adding the Address 1: City field as a find column.

*Exercise Scenario*

In this exercise you must modify the **Quick Find Active Contacts** view to enable the **Address 1: City** field as a find column in order to allow users to search for Contacts based on the city in which they are located.

*Task 1: Customize the Prototype Active Prototypes View.*

High Level Steps

1. Open the Active Prototypes view in the **NPD and Feedback Solution**.
2. Remove the Created On Column and Resize the Name Column.
3. Add the **Originating Idea**, **Planned Completion**, and **Owner** fields from the **Prototype** entity..
4. Add the **Target Market** field from the Idea entity.
5. Move the **Planned Completion** field directly after the **Name** field.

Detailed Steps

Open the Quick Find Active Contacts view in the NPD and Feedback Solution.

Switch to your **NPD and Feedback.** Otherwise click the Main button, and navigate to **Settings** > **Solutions** and double-click the **NPD and Feedback** Solution to open it.

In the solution explorer, expand **Entities**.

Expand the **Prototype** entity.

Click **Views**.

In the list of views, double-click **Active Prototypes**.

Remove the **Created On** Column and Resize the **Name** Column.

In the Column Headings click the **Created On** column.

In the **Common Tasks** pane at the right side of the view designer, click **Remove**.

Click the **Name** column.

In the **Common Tasks** pane at the right side of the view designer, click **Change Properties**.

Select 200px, and click **OK**.

Add the **Originating Idea**, **Planned Completion**, and **Owner** fields from the **Prototype** entity.

In the **Common Tasks** pane at the right side of the view designer, click **Add Columns**.

In the **Add Columns** dialog, select **Originating Idea**, **Planned Completion**, and the **Owner** fields.

Click **OK**

Add the **Target Market** field from the Idea entity.

In the **Common Tasks** pane at the right side of the view designer, click **Add Columns**.

Click the **Record Type** selector box, and choose **Originating Idea (Idea)**

Select the check box next **Target Market Size**.

Click **OK**

Move the **Planned Completion** field directly after the **Name** field.

Click to select the **Planned Completion** field

Using the arrows in the **Common Tasks** pane, move it after the **Name** column.

Click **Save and Close**.

In the solution explorer, click the **Prototype** entity node.

On the toolbar, click **Publish**.

# Practice 8.2: Create a Custom View

*Scenario*

Adventure Works Cycles requires two custom views to be created in their Microsoft Dynamics 365 installation. The details of the views are as follows:

A new public view for the Prototype entity is required. The view must be named **All Prototypes for My Ideas**. To create the view, you must copy the **Active Prototypes** view, add a filter to the view, and add the **Modified On** and **Originating Idea** fields as columns.

You must also create a new view for the Feedback entity. The view should be named **Service Feedback Last 3 Months** and be filtered to show feedback for resolved cases that were modified in the last three months. The view must display columns for the **Satisfaction Rating**, **Owner**, **Modified On** date of the Case, and the **Owner** of the Case.

*Lab Setup*

Before you perform this lab, you must complete the Create Custom Entities lab and the Create a Custom Activity Entity lab in the **Customizing Entities** module, and create the Prototype and Feedback entities as described in those labs.

*Exercise Scenario*

In this exercise you must create the **All Prototypes for My Ideas** view and the **Service Feedback Last 3 Months** view following the requirements specified in the lab scenario.

*Task 1: Create a Custom View for the Prototype Entity*

High Level Steps

1. Open the list of **Prototype** views in the **NPD and Feedback** solution.
2. Create a copy of the Active Prototypes view and name it All Prototypes for My Ideas.
3. Update the filter criteria of the new view.
4. Add the **Modified On** and **Originating Idea** columns to the view.
5. Publish the entity and test the view.

Detailed Steps

1. Open the list of **Prototype** views in the **NPD and Feedback** solution.
   1. Switch to your **NPD and Feedback.** Otherwise click the Main button, and navigate to **Settings** > **Solutions** and double-click the **NPD and Feedback** Solution to open it.
   2. In the solution explorer, expand **Entities**.
   3. Expand the **Prototype** entity.
   4. Click **Views**.
2. Create a copy of the Active Prototypes view and name it All Prototypes for My Ideas.
   1. Double-click the **Active Prototypes** view.
   2. When the view is open, click **Save As**.
   3. Change the Name to **All Prototypes for My Ideas** and then click **OK**.
   4. Update the filter criteria of the new view.
   5. In the **Common Tasks** pane on the right side of the view designer, click **Edit Filter Criteria**.
   6. In the **Select** control, click the drop-down and select **Originating Idea** from the **Related** section in the lower part of the list.
   7. Underneath **Originating Idea**, in the **Select** control, select the **Owner** field.
   8. Make sure that the condition list to the right of **Owner** contains **Equals current user**.
   9. At the lower right corner of the **Edit Filter Criteria** dialog box, Click **OK**.
3. Remove the Owner, Target Market Size and Planned Completion Fields.
   1. Select the Owner column.
   2. In the **Common Tasks** area, click **Remove**, and **OK** to Confirm.
   3. Select Target Market Size column.
   4. In the **Common Tasks** area, click **Remove,** and **OK** to Confirm.
   5. Select the Planned Completion column.
   6. In the **Common Tasks** area, click **Remove,** and **OK** to Confirm.
4. Add the **Created On** and **Modified On** columns to the view.
   1. In the Common Tasks pane, click Add Columns.
   2. In the **Add Columns** dialog box, select the check boxes next to **Created On** and **Modified On**, and then click **OK**.
   3. Verify **Originating Idea** column is to the left of the **Name** column.
   4. Select the **Originating Idea** column, and then in the **Common Tasks** pane, click **Change Properties**.
   5. In the **Change Column Properties** dialog box, select **200px** and click **OK**.
   6. Select the **Modified On** column.
   7. Verify that **Modified On** is just to the right of **Created On.**
   8. If not, In the **Common Tasks** area, click the right arrow until the **Modified On** column is to the right of the **Created On** column.
   9. Click **Save and Close**.
   10. In the solution explorer, click the **Prototype** entity.
   11. On the toolbar, click **Publish**.
   12. Leave the Solution window open for use in later labs.

Task 2: Create a Custom View for the Feedback Entity

High Level Steps

1. In the **NPD and Feedback** Solution, create a view for the **Feedback** entity named **Service Feedback Last 3 Months**.
2. Modify the filter criteria as described in the lab scenario.
3. Add columns to the view as described in the lab scenario.
4. Resize the new columns and configure sorting for the view.
5. Publish and test the view.

Detailed Steps

1. In the **NPD and Feedback** Solution, create a view for the **Feedback** entity named **Service Feedback Last 3 Months**.
   1. If necessary, switch to the **NPD and Feedback** Solution.
   2. In the solution explorer, expand the **Entities** node.
   3. In the list of entities, expand **Feedback**.
   4. Click **Views**.
   5. On the menu bar above the list of views, click **New**.
   6. In Name, enter **Service Feedback Last 3 Months** and click **OK**.
2. Modify the filter criteria as described in the lab scenario.
   1. In the Common Tasks pane, click Edit Filter Criteria.
   2. In the **Edit Filter Criteria** dialog box, click the **Select** control, and then in the **Related** section of the list select **Regarding (Case)**.
   3. Underneath **Regarding (Case)**, in the **Select** control, select the **Status** field.
   4. Next to the **Enter Value: Status** field, click the ellipsis button.
   5. Double-click **Resolved** in the **Available Values** list to add **Resolved** to the **Selected Values** list, and then click **OK**
   6. Underneath **Regarding (Case)**, in the **Select** control, select **Modified On.**
   7. In the condition list (that currently contains **On**), select **Last X Months**.
   8. In the **Choose Date** control, type **3**.
   9. At the lower right corner of the **Edit Filter Criteria** dialog box, Click **OK**.
3. Add columns to the view as described in the lab scenario.
   1. In the Common Tasks pane, click Add Columns.
   2. In the **Add Columns** dialog box, select the check boxes next to **Date Created** and **Satisfaction Rating**, and then click **OK**.
   3. In the Common Tasks pane, click Add Columns.
   4. In the **Add Columns** dialog box, in the **Record Type** list, select **Regarding (Case)**.
   5. Select the check boxes next to **Modified On** and **Owner**, and then click **OK**.
4. Resize the new columns and configure sorting for the view.
   1. Double-click the **Owner (Regarding)** column.
   2. In the **Change Column Properties** dialog box, select **125px**, and then click **OK**.
   3. In the Common Tasks pane, click Configure Sorting.
   4. In the **Configure Sort Order** dialog box, in the **Sort By** list, select **Date Created**.
   5. Underneath **Date Created**, select **Descending Order** so that the newest records will be displayed at the top.
   6. Click **OK**.
   7. On the toolbar, click **Save and Close**.
5. Publish and test the Views.
   1. In the solution, click the **Publish All Customizations** button.
   2. Leave the Solution window open for use in later labs.
   3. Switch back to your main CRM application.
   4. Click the **Main** button and navigate to **Service** > **Activities**.
   5. Click the view selector (this shows My Activities because this is the label of the current view).
   6. In the view selection list, click **Feedback**, then in the submenu select **Service Feedback Last 3 Months**. The new view will be displayed, showing test records created in earlier labs.
   7. Click the Main button and navigate to **Marketing** > **Prototypes**
   8. Using the view selector Select the **All Prototypes for My Ideas** this will show all prototypes for any Ideas that you are the Owner of.

# Practice 8.5: Create and Apply a Dynamics 365 Theme

Adventure Works Cycles, would like to modify the colors in their Dynamics 365 environment to reflect their company colors which primarily Red and Gray. They are only concerned with the Navigation elements at the top of the screen.

*Exercise Scenario*

In this exercise you copy the existing Default Dynamics 365 theme and modify it to fit based on Adventure Works Color Pallet.

The want to use the Following:

* Set the Navigation Bar color to a Red using the color code #e34444
* Set the Navigation Bar Shelf color to a very Light gray using the color code #e2e2e2
* Set the Heading used in the Navigation bar to a Dark gray using the color code #6e6e6e

Task 1: Custom Dynamics 365’s Theme

High Level Steps

1. Create a Clone of the existing default Theme, called ADV Works Theme
2. Change the Navigation Bar Color, Navigation Bar Shelf Color, and Header Color to the colors outlines above.
3. Publish the Theme.

Detailed Steps

1. Create a Clone of the existing default Theme, called ADV Works Theme
   1. In your main application click the **Main** button and navigate to **Settings** > **Customizations**.
   2. Select **Themes**.
   3. Select the **Default Theme**.
   4. Click **Clone.**
2. Change the **Navigation Bar Color**, **Navigation Bar Shelf Color**, and **Header Color** to the colors outlines above.
   1. Double-click the **Copy of Default Theme** to open it.
   2. In the **Theme Name**, enter **ADV Works Theme**.
   3. In the **Navigation Bar Color** field, enter **#34444** *(Preview will change to red)*
   4. In the **Navigation Bar Shelf Color**, enter **#e2e2e2** *(Preview will change slightly)*
   5. In the **Heading Color**, enter **#6e6e6e** *(Preview will change to a Dark Gray)*
   6. Click **Publish Theme**.