

A story of blog content theft

How to fight the copy-paste bloggers in the
Microsoft Dynamics CRM community

Jukka Niiranen

Blogger at *Surviving CRM* (<http://niiranen.eu/crm/>)

Tweetaholic at @jukkan (<https://twitter.com/jukkan>)

Spotting the content theft & the opportunity

- ▶ I discovered a corporate blog that had stolen a post I wrote on my personal Surviving CRM blog
 - ▶ Original article:
<http://niiranen.eu/crm/2011/06/crm-2011-subgrids-aint-what-associated-views-used-to-be>
 - /
- ▶ Lucky for me they had done a pure copy & paste without editing any of the content
- ▶ This meant that also the images on their blog post were "hotlinked", meaning they were being loaded from my blog's web server
- ▶ I could have easily blocked the images from being shown anywhere outside my own website by modifying the .htaccess file
- ▶ I could have even replaced them with a static image saying "*to view this content, please visit Surviving CRM*"

Complaining on Twitter gives a tiny little pleasure, but it doesn't really address the problem

 **Jukka Niiranen**
@jukkan

Today's #MSDYNCRM blog theft award goes to: @DynamicsConsult. Support the original artist: bit.ly/mKjDRs
pic.twitter.com/nAo6SCKl

◀ Reply ⌂ Delete ★ Favorite


Surviving CRM
Working with Microsoft Dynamics CRM, day in day out.
About CRM On Google+ CRM Links CRM Blog Search feed Other sites worth visiting Custom search engine on CRM
Posted on 20th June 2011 by Jukka Niiranen in Features / Tips
activities, crm2011, customization, reports, subgrid, views
Bots in the days before we had Microsoft Dynamics CRM 2011 available... it was a common practice to customize to show entities related to the parent entity directly on the parent's form by utilizing an iFrame. Shifting information such as latest history items (nowadays called closed activities) quickly visible to any user viewing the form is often desired but not exactly supported. But it is.
Due to popular demand, methods have been added through the use of the Entity Form Redesign an out-of-the-box feature as accounts, contacts & leads.
Different navigation points, different views
It's important to note that subgrids don't use the entity associated view definition, which is applied when traditionally navigating to the view by using left side menu items on an entity form. Instead they always follow the standard UI logic of how Dynamics CRM presents records on the entity's form under normal circumstances. So the entity in question that is not associated views, as those are "special" views, 3 times out of 15 you'll want to keep the filter on, as showing non-related records on the entity's form would under normal circumstances defy the standard UI logic of how Dynamics CRM presents records in different windows.


Dynamics Consulting
MICROSOFT DYNAMICS CRM ADD-ONS DYNAMICS CRM 2011 HOSTING CRM & BPM
HOME BUSINESS DYNAMICSS PUBLICATIONS GARDEN BLOGS UNCLASSIFIED
activities, crm2011, customization, reports, subgrid, views
Bots in the days before we had Microsoft Dynamics CRM 2011 available... it was a common practice to customize to show entities related to the parent entity directly on the parent's form by utilizing an iFrame. Shifting information such as latest history items (nowadays called closed activities) quickly visible to any user viewing the form is often desired, as one key function of a CRM system is to share information about what interaction has taken place with the customer. Referencing the URL of the related view on the iFrame was not exactly supported, but it was a relatively safe customization to apply nonetheless.
Solution Test View Test Click to popular demand, Most Popular Article
Home Article Popular Article
For achieving this UI customization in CRM 2011 through the use of the forms entity forms redesign, the subgrids have now become an out-of-the-box feature as accounts, contacts and opportunities.
Click to popular demand, Most Popular Article
Different navigation points, different views
It's important to note that subgrids don't use the entity associated view definition, which is applied when traditionally navigating to the view by using left side menu items on an entity form. Instead they always follow the standard UI logic of how Dynamics CRM presents records on the entity's form under normal circumstances. So the entity in question that is not associated views, as those are "special" views, 3 times out of 15 you'll want to keep the filter on, as showing non-related records on the entity's form would under normal circumstances defy the standard UI logic of how Dynamics CRM presents records in different windows.

2 TWEETS 

Plotting the payback

- ▶ I decided to be a bit more cheeky with my approach and replace the images with tailor-made notifications for the blog in question
- ▶ I created new copies of the images and updated my own blog post to use those
- ▶ For the original images I added some text boxes into the images. These would be shown to any visitor to the offending blog as long as they were still delivered from my web server
- ▶ Naturally I also wanted to document the results into this slide deck (and my blog), in case the blog owner spots the modified images and removes the post

The first images were left as they were.
 This way anyone who's just browsing the content and not reading through it (like the blog owner) may not notice the trick

Dynamics Consulting

STARTSEITE MICROSOFT DYNAMICS CRM ADD-ONS DYNAMICS CRM 2011 HOSTING CRM & BPM

HOME BUSINESS > DOWNLOADS > PARENT CATEGORY > FEATURED HEALTH > UNCATEGORIZED

Recent Posts

Search

activities, crm2011, customization, reports, subgrid, views

01:12 Customization

Back in the days before we had Microsoft Dynamics CRM 2011 available, it was a commonplace customization to show entities related to the parent entity directly on the parent's form by utilizing an iFrame. Making information such as latest history items (nowadays called closed activities) quickly visible to any user opening the form is often justified, as one key functions of a CRM system is to share information about what interaction has taken place with the customer. Referencing the URL of the related view on the iFrame was not exactly supported, but it was a relatively safe customization to apply nonetheless.



Due to popular demand, Microsoft introduced an official method for achieving this UI customization in CRM 2011 through the use of the form sub-grid element. As a part of the entity forms redesign, the subgrids have now become an out-of-the-box feature on several default entities, such as accounts, contacts and opportunities.

Different navigation points, different views

It's important to note that subgrids don't use the entity associated view definition, which is applied when traditionally navigating to the view by using left side menu items on an entity form. Instead they allow you to separately choose a filter to "view only related records", in combination with any of the system views available for the entity in question (but not the associated views, as those are "special" views). 9 times out of 10 you'll want to keep the filter on, as showing non-related records on the entity's form would under normal circumstances defy the standard UI logic of how Dynamics CRM presents records in different windows.

OK, fair enough, so that's why the columns in a subgrid aren't updated after you edit the entity related view, like

SOCIAL PROFILES

Search

Popular Tags Blog Archives

DYNAMICS CONSULTING MÜNCHEN



Dynamics Consulting

Phone +49 89 414 375 00

DYNAMICS CONSULTING MÜNCHEN

Dynamics Consulting München

E Hertler

SEITEN

Startseite

Dynamics CRM 2011 Einführung München

Erweitertes CRM (xRM)

Dynamics CRM 2011 Schulungen München

Data Source
Specify the primary data source for this list or chart.
Records Only Related Records Entity Activities (Regarding)
Default View Open Activities Additional Options Display Seal Display Index
System Views All Activities Closed Activities My Activities My Team Members' Activities Open Activities Scheduled Activities

Recent Posts

Search

activities, crm2011, customization, reports, subgrid, views

01:12 Customization

Back in the days before we had Microsoft Dynamics CRM 2011 available, it was a commonplace customization to show entities related to the parent entity directly on the parent's form by utilizing an iFrame. Making information such as latest history items (nowadays called closed activities) quickly visible to any user opening the form is often justified, as one key functions of a CRM system is to share information about what interaction has taken place with the customer. Referencing the URL of the related view on the iFrame was not exactly supported, but it was a relatively safe customization to apply nonetheless.



Due to popular demand, Microsoft introduced an official method for achieving this UI customization in CRM 2011 through the use of the form sub-grid element. As a part of the entity forms redesign, the subgrids have now become an out-of-the-box feature on several default entities, such as accounts, contacts and opportunities.

Different navigation points, different views

It's important to note that subgrids don't use the entity associated view definition, which is applied when traditionally navigating to the view by using left side menu items on an entity form. Instead they allow you to separately choose a filter to "view only related records", in combination with any of the system views available for the entity in question (but not the associated views, as those are "special" views). 9 times out of 10 you'll want to keep the filter on, as showing non-related records on the entity's form would under normal circumstances defy the standard UI logic of how Dynamics CRM presents records in different windows.

OK, fair enough, so that's why the columns in a subgrid aren't updated after you edit the entity related view, like

SOCIAL PROFILES

Search

Popular Tags Blog Archives

DYNAMICS CONSULTING MÜNCHEN



Dynamics Consulting

Phone +49 89 414 375 00

DYNAMICS CONSULTING MÜNCHEN

Dynamics Consulting München

E Hertler

SEITEN

Startseite

Dynamics CRM 2011 Einführung München

Erweitertes CRM (xRM)

Dynamics CRM 2011 Schulungen München

Data Source
Specify the primary data source for this list or chart.
Records Only Related Records Entity Activities (Regarding)
Default View Open Activities Additional Options Display Seal Display Index
System Views All Activities Closed Activities My Activities My Team Members' Activities Open Activities Scheduled Activities

On the next images I added a friendly note telling the reader where the original article is from

Rolling up the records

Another thing that may surprise a seasoned Dynamics CRM consultant until he learns the tricks of the latest version is that the aforementioned feature has further implications specific to accounts and opportunities in particular. As we've come to know, these entities have special capabilities enabled in the activity views: the roll-up functionality. Instead of being restricted to only activities directly related to a record, we can actually see a bit further. Let's take a simple example of an account and it's open activity associated view:

Microsoft Dynamics CRM Add-Ons
http://dynamics-store.blogspot.de/

How to install Microsoft Dynamics CRM 2011 with the minimum required permissions
This article describes the minimum permissions that are required for a user to install Microsoft Dynamics CRM 4.0 this article can also be ...

CRM 2011 - ADFS 2.0 Federating with ADFS 1.1
CRM 2011 - ADFS 2.0 Federating with ADFS 1.1 So by now you've heard about CRM 2011 AND that it supports Claims Based Authentication...

TMG 2010 or ISA or ans Kind of Reverse Proxy and Dynamics CRM 2011 - Client Side Caching Issue caused by Vary:
TMG 2010 or ISA or ans Kind of Reverse Proxy and Dynamics CRM 2011 - Client Side Caching Issue caused by Vary: * I read a lot of stuff rega...

It's that "Include Related Regarding Records" selection above the grid which allows us to view activities not only related to the account itself but also the ones regarding a contact of the account and an opportunity related to it. Pretty neat, as it's often the people working at an account that we associate communication and activities to, such as emails and appointments.

Now, let's take advantage of the new CRM 2011 functionalities and look at the activity subgrid that's conveniently available in the out-of-the-box configuration of an account form:

Microsoft Dynamics CRM Add-Ons
http://dynamics-store.blogspot.de/

How to do an Publishing of Dynamics Crm 2011 through ISA 2006 or FAG
This post is going to answer questions regarding ISA 2006 FAG and CRM 2011 Claims and IFD. For this post we chose to let ISA handle the S...

Understanding IIS & Kerberos Kernel Mode
A new post about kerberos.. indeed some technico stuff nobody seems to understand but is very important for security. A new feature in Windows...

Kerberos and Delegation Tips
Kerberos and Delegation Tips Have you ever seen the following error " NT AUTHORITY/ANONYMOUS LOGON " or " Login failed for user '(null)' ...

Dynamics CRM 4.0 Internet Facing Deployment Step By Step with FAG
Whiz or novice I'm somewhat in shame to tell you that I was unable to configure MS CRM Internet facing deployment for the last few months si...

Huh? Where did my activities go? They're still there, but this particular navigation path will not allow you to view them, since you're on a subgrid and, as we previously concluded, subgrids can't show the entity associated view. This means there's no way for you to apply the "Including Related Regarding Records" functionality over here.

I'll be the first to admit I've fallen for this trap in customer demos more than once. The menu anchor for accessing the Notes & Activities subgrid is just too tempting to click, when what you really intended to do was to view the fully featured activity associated view and access a complete list of the related activities. If the difference between view columns was a minor inconvenience, then this is downright misleading to many users I'm sure.

The quick solution for this would be to just remove the activity subgrids from the account and opportunity entity forms where the results can be contradicting, thus forcing the user to navigate through the old fashioned menu into the related activities view. Another option would be to conform the old CRM 4.0 click and just embed

Rolling up the records

Another thing that may surprise a seasoned Dynamics CRM consultant until he learns the tricks of the latest version is that the aforementioned feature has further implications specific to accounts and opportunities in particular. As we've come to know, these entities have special capabilities enabled in the activity views: the roll-up functionality. Instead of being restricted to only activities directly related to a record, we can actually see a bit further. Let's take a simple example of an account and it's open activity associated view:

Microsoft Dynamics CRM Add-Ons
http://dynamics-store.blogspot.de/

How to install Microsoft Dynamics CRM 2011 with the minimum required permissions
This article describes the minimum permissions that are required for a user to install Microsoft Dynamics CRM 4.0 this article can also be ...

CRM 2011 - ADFS 2.0 Federating with ADFS 1.1
CRM 2011 - ADFS 2.0 Federating with ADFS 1.1 So by now you've heard about CRM 2011 AND that it supports Claims Based Authentication...

TMG 2010 or ISA or ans Kind of Reverse Proxy and Dynamics CRM 2011 - Client Side Caching Issue caused by Vary:
TMG 2010 or ISA or ans Kind of Reverse Proxy and Dynamics CRM 2011 - Client Side Caching Issue caused by Vary: * I read a lot of stuff rega...

It's that "Include Related Regarding Records" selection above the grid which allows us to view activities not only related to the account itself but also the ones regarding a contact of the account and an opportunity related to it. Pretty neat, as it's often the people working at an account that we associate communication and activities to, such as emails and appointments.

Now, let's take advantage of the new CRM 2011 functionalities and look at the activity subgrid that's conveniently available in the out-of-the-box configuration of an account form:

Microsoft Dynamics CRM Add-Ons
http://dynamics-store.blogspot.de/

How to do an Publishing of Dynamics Crm 2011 through ISA 2006 or FAG
This post is going to answer questions regarding ISA 2006 FAG and CRM 2011 Claims and IFD. For this post we chose to let ISA handle the S...

Understanding IIS & Kerberos Kernel Mode
A new post about kerberos.. indeed some technico stuff nobody seems to understand but is very important for security. A new feature in Windows...

Kerberos and Delegation Tips
Kerberos and Delegation Tips Have you ever seen the following error " NT AUTHORITY/ANONYMOUS LOGON " or " Login failed for user '(null)' ...

Dynamics CRM 4.0 Internet Facing Deployment Step By Step with FAG
Whiz or novice I'm somewhat in shame to tell you that I was unable to configure MS CRM Internet facing deployment for the last few months si...

Huh? Where did my activities go? They're still there, but this particular navigation path will not allow you to view them, since you're on a subgrid and, as we previously concluded, subgrids can't show the entity associated view. This means there's no way for you to apply the "Including Related Regarding Records" functionality over here.

I'll be the first to admit I've fallen for this trap in customer demos more than once. The menu anchor for accessing the Notes & Activities subgrid is just too tempting to click, when what you really intended to do was to view the fully featured activity associated view and access a complete list of the related activities. If the difference between view columns was a minor inconvenience, then this is downright misleading to many users I'm sure.

The quick solution for this would be to just remove the activity subgrids from the account and opportunity entity forms where the results can be contradicting, thus forcing the user to navigate through the old fashioned menu into the related activities view. Another option would be to conform the old CRM 4.0 click and just embed

Microsoft Dynamics CRM Add-Ons
http://dynamics-store.blogspot.de/

Form Scripting with Microsoft Dynamics CRM 2011
Form Scripting with Microsoft Dynamics CRM 2011 The ability to insert Javascript into Client-side Events was one of the most common ways of...

Dynamics CRM 4.0 Internet Facing Deployment Step By Step with FAG
Whiz or novice I'm somewhat in shame to tell you that I was unable to configure MS CRM Internet facing deployment for the last few months si...

Form Scripting with Microsoft Dynamics CRM 2011
Form Scripting with Microsoft Dynamics CRM 2011 The ability to insert Javascript into Client-side Events was one of the most common ways of...

As we move along, I point out that the "author" of this blog couldn't actually write a post like this him/herself

Activity roll-up across an account hierarchy

Let's kick it up a notch further and look at a more complex scenario. It's not uncommon to have accounts that have a hierarchical relationship with one another. Typically these are either subsidiaries or branch offices of the parent account, which need to be treated as separate entities, even though they may form a single customer relationship when it comes to business activities. Below is an example of a hierarchy where there are three different levels of accounts, with each of them being a candidate for activities. And let's not forget, accounts act as the parent record for contacts and opportunities, opportunities act as parents to quotes, orders and so on.



In this example we have four activities (the orange boxes) that have been added to various levels of the customer data hierarchy. Ultimately we'd of course like to be able to get a 360 view of the customer, regardless of which particular data object the user has associated the activity with. Let's start by opening the Sub-account and navigating to the associated activities view, since we already have established that you can't trust the sub-grids to view all data. On this window we get the full view of all four activities:

The screenshot shows the 'Activities: Open Activity Associated View' for a Sub-account. The grid displays four activities:

Activity Type	Subject	Owner	Last Modified
E-mail	Sub-account opportunity	John Doe	2011-07-17 10:00:00
Phone Call	Sub-account Contact	Jane Smith	2011-07-17 10:00:00
Task	Sub-account opportunity	John Doe	2011-07-17 10:00:00

Great! Let's try the opportunity record next:

The screenshot shows the 'Opportunity: Open Activity Associated View' for a Sub-account opportunity. The grid displays four activities:

Activity Type	Subject	Owner	Last Modified
E-mail	Sub-account opportunity	John Doe	2011-07-17 10:00:00
Phone Call	Sub-account Contact	Jane Smith	2011-07-17 10:00:00
Task	Sub-account opportunity	John Doe	2011-07-17 10:00:00

A sales process is a standardized series of activities that occur during a sales cycle. A...

Configuring Hosted/IFD with Microsoft Dynamics CRM 2011 (Hosted Microsoft Dynamics CRM 2011)
Configuring Hosted/IFD (Internet Facing Deployment) with Microsoft Dynamics CRM 2011 (Hosted Microsoft Dynamics CRM 2011) As many of our ear...

DYNAMICS CRM 2011 NEWS

Apple Google Microsoft
[Apple tuottaa päänsärkyä Dow Jonesille](#)
Kuupalehti
Apple-fani ottivat kuvia iPhone 5-julkistukseen ympäristössä San Franciscossa. Pörsitähti Apple saattaa päästää maailman tunnetuimpia osakeindeksihin lukeutuvan Dow Jones Industrial Averageen, kertoo FT. Applen kurssin nousu aiheuttaa ongelmaa.
[Lukiat Apple Maps -mokista: Inari on virys](#)
Helsingin Sanomat
Apple odotetusti puolustaa uutta ohjelmaansa. "Parannamme palvelua koko ajan". Apple Maps on pilviyhäinen sovellus. Mita enemmän sitä käytetään, sitä paremmaksi se tulee", Applen tiedottaja Tracy Mullersano. Ohjelma seuraa käyttäjien palautetta ja ...

[Koulutusohjelma "Apple-henkeä" suomalaisiin](#)
Tietovirkko
Kontion mukaan uuden koulutusohjelman tuloksena yrityksissä voitaisiin ottaa nopealla tahtilla käytön valmitta ja testata uudelle innovaatiojohtamisen työkaluja, joilla on mahdollista luoda myönteistä "Apple-henkeä" suomalaisiin yrityksiin. Verkoston ...

[Guardian: Apple nörtyvä ja palaa Googleen](#)
Kuupalehti
Jutussa väitetään myös, ettei Applen päättös luopua Googlesta "olut ainakaan Googlesta kinni". Applen ratkaisua on ihmetytetty aikaisemminkin ja siinä yhteydessa on esimerkiksi väitetty, että Google olisi antanut Applille kaikkia oikeuksia karttoihin.

tarjoaa Google™

Powered by Blogger.

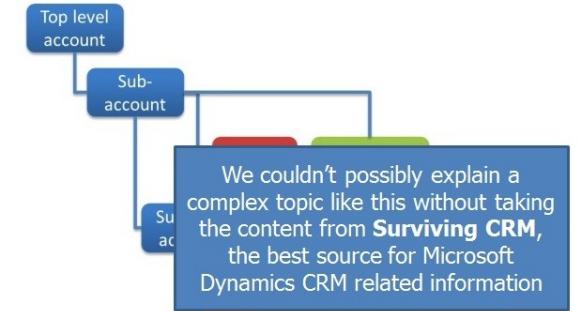
LABELS1

Client Tracing (1)

Cloud News (2)

Activity roll-up across an account hierarchy

Let's kick it up a notch further and look at a more complex scenario. It's not uncommon to have accounts that have a hierarchical relationship with one another. Typically these are either subsidiaries or branch offices of the parent account, which need to be treated as separate entities, even though they may form a single customer relationship when it comes to business activities. Below is an example of a hierarchy where there are three different levels of accounts, with each of them being a candidate for activities. And let's not forget, accounts act as the parent record for contacts and opportunities, opportunities act as parents to quotes, orders and so on.



In this example we have four activities (the orange boxes) that have been added to various levels of the customer data hierarchy. Ultimately we'd of course like to be able to get a 360 view of the customer, regardless of which particular data object the user has associated the activity with. Let's start by opening the Sub-account and navigating to the associated activities view, since we already have established that you can't trust the sub-grids to view all data. On this window we get the full view of all four activities:

The screenshot shows the 'Activities: Open Activity Associated View' for a Sub-account. The grid displays four activities:

Activity Type	Subject	Owner	Last Modified
E-mail	Sub-account opportunity	John Doe	2011-07-17 10:00:00
Phone Call	Sub-account Contact	Jane Smith	2011-07-17 10:00:00
Task	Sub-account opportunity	John Doe	2011-07-17 10:00:00

Great! Let's try the opportunity record next:

The screenshot shows the 'Opportunity: Open Activity Associated View' for a Sub-account opportunity. The grid displays four activities:

Activity Type	Subject	Owner	Last Modified
E-mail	Sub-account opportunity	John Doe	2011-07-17 10:00:00
Phone Call	Sub-account Contact	Jane Smith	2011-07-17 10:00:00
Task	Sub-account opportunity	John Doe	2011-07-17 10:00:00

We just copy & paste the content

A sales process is a standardized series of activities that occur during a sales cycle. A...

Configuring Hosted/IFD with Microsoft Dynamics CRM 2011 (Hosted Microsoft Dynamics CRM 2011)
Configuring Hosted/IFD (Internet Facing Deployment) with Microsoft Dynamics CRM 2011 (Hosted Microsoft Dynamics CRM 2011) As many of our ear...

DYNAMICS CRM 2011 NEWS

Apple Google Microsoft
[Apple tuottaa päänsärkyä Dow Jonesille](#)
Kuupalehti
Apple-fani ottivat kuvia iPhone 5-julkistukseen ympäristössä San Franciscossa. Pörsitähti Apple saattaa päästää maailman tunnetuimpia osakeindeksihin lukeutuvan Dow Jones Industrial Averageen, kertoo FT. Applen kurssin nousu aiheuttaa ongelmaa.
[Lukiat Apple Maps -mokista: Inari on virys](#)
Helsingin Sanomat
Apple odotetusti puolustaa uutta ohjelmaansa. "Parannamme palvelua koko ajan". Apple Maps on pilviyhäinen sovellus. Mita enemmän sitä käytetään, sitä paremmaksi se tulee", Applen tiedottaja Tracy Mullersano. Ohjelma seuraa käyttäjien palautetta ja ...

[Koulutusohjelma "Apple-henkeä" suomalaisiin](#)
Tietovirkko
Kontion mukaan uuden koulutusohjelman tuloksena yrityksissä voitaisiin ottaa nopealla tahtilla käytön valmitta ja testata uudelle innovaatiojohtamisen työkaluja, joilla on mahdollista luoda myönteistä "Apple-henkeä" suomalaisiin yrityksiin. Verkoston ...

[Guardian: Apple nörtyvä ja palaa Googleen](#)
Kuupalehti
Jutussa väitetään myös, ettei Applen päättös luopua Googlesta "olut ainakaan Googlesta kinni". Applen ratkaisua on ihmetytetty aikaisemminkin ja siinä yhteydessa on esimerkiksi väitetty, että Google olisi antanut Applille kaikkia oikeuksia karttoihin.

tarjoaa Google™

Powered by Blogger.

LABELS1

Client Tracing (1)

Since this is a blog for a company, next I questioned what their business ethics are like if they resort to such content theft in their online marketing

Information
General
Line Items
Notes & Activities
Quotes
Preferences

Related
Activities

Opportunity
Sub-account opportunity
Potential Customer: Sub-account
Est. Revenue: 10 000,00 \$
Est. Close Date: 17.7.2011

Activities: Open Activity Associated View
Filter on: Next 30 days
Include: Related 'Regarding' Records
Subject: Activity Type: Regarding
Email regarding Sub-account Order
Task regarding sub-account's opportunity

Information
General
Details
Contacts
Notes & Activities
Preferences

Related
Common
More Addresses
Activities

Account
Top level account
Activities: Open Activity Associated View
Filter on: All
Include: Related 'Regarding' Records
Subject: Activity Type: Regarding
Task regarding the sub-account directly

Wait – why is it so empty here at the top? I can see what's going on at the very bottom level of the hierarchy, the Sub-sub-account's task, but why is there nothing from the middle tier? The reason for this is that none of the records visible in the Sub-account's activity view were actually set as *regarding* that particular account record. The special filter in the activity view was able to pick them up based on a parental relationship to the account (I'm assuming). However, that filter doesn't roll up into the account hierarchy structure in general, which means the Top level account can only see activities from its own contacts, opportunities and then any of the account records beneath it. Had the Sub-sub-account's task been related to a contact down in the hierarchy, even that one wouldn't be visible up at the top.

As a final demonstration of the power of associated views over sub-grids, let's see what things would have looked like on the middle tier for the Sub-account, had I accidentally clicked on the Notes & Activities anchor instead:

Information
General
Details
Contacts
Notes & Activities
Preferences

Related
Common
More Addresses
Activities

Account
Sub-account
Notes & Activities
Activities: Open Activities
Subject: Regarding: Activity Type: Priority
No Activity records are available in this view.

Powered by Blogger.

LABELS1

- Client Tracing (1)
- Cloud News (2)
- CRM 2011 (1)
- CRM 2011 - Windows 7 Phone (2)
- CRM 2011 Advanced Administration (1)
- CRM 2011 and Scribe (3)
- CRM 2011 and Sharepoint 2010 (3)
- CRM 2011 Books (1)
- CRM 2011 Client Deployment (4)
- CRM 2011 CTI (1)
- CRM 2011 Customization (2)
- CRM 2011 Data Integration (1)
- CRM 2011 Deployment (2)
- CRM 2011 Download News (2)
- CRM 2011 Features (3)
- CRM 2011 Infrastructure (3)
- CRM 2011 Integration (1)
- CRM 2011 JavaScript (2)
- CRM 2011 Licensing (1)
- CRM 2011 Mail Merge (3)
- CRM 2011 News (6)
- CRM 2011 Offline Client (3)
- CRM 2011 Online (2)
- CRM 2011 Online Client Troubleshooting (6)
- CRM 2011 Organisation Import (1)
- CRM 2011 Performance (1)
- CRM 2011 SDK (1)
- CRM 2011 Setup (2)

Information
General
Line Items
Notes & Activities
Quotes
Preferences

Related
Activities

Opportunity
Sub-account opportunity
Potential Customer: Sub-account
Est. Revenue: 10 000,00 \$
Est. Close Date: 17.7.2011

Activities: Open Activity Associated View
Filter on: Next 30 days
Include: Related 'Regarding' Records
Subject: Activity Type: Regarding
Email regarding Sub-account Order
Task regarding sub-account's opportunity

Works the way it should, I see the activities from the opportunity as well as the related order record. Now, let's go up to the very top of the hierarchy and open the Top level account record.

Information
General
Details
Contacts
Notes & Activities
Preferences

Related
Common
More Addresses
Activities

Account
Top level account
Activities: Open Activity Associated View
Filter on: All
Include: Related 'Regarding' Records
Subject: Activity Type: Regarding
Task regarding the sub-account directly

Wait – why is it so empty here at the top? I can see what's going on at the very bottom level of the hierarchy, the Sub-sub-account's task, but why is there nothing from the middle tier? The reason for this is that none of the records visible in the Sub-account's activity view were actually set as *regarding* that particular account record. The special filter in the activity view was able to pick them up based on a parental relationship to the account (I'm assuming). However, that filter doesn't roll up into the account hierarchy structure in general, which means the Top level account can only see activities from its own contacts, opportunities and then any of the account records beneath it. Had the Sub-sub-account's task been related to a contact down in the hierarchy, even that one wouldn't be visible up at the top.

As a final demonstration of the power of associated views over sub-grids, let's see what things would have looked like on the middle tier for the Sub-account, had I accidentally clicked on the Notes & Activities anchor instead:

Information
General
Details
Contacts
Notes & Activities
Preferences

Related
Common
More Addresses
Activities

Account
Sub-account
Notes & Activities
Activities: Open Activities
Subject: Regarding: Activity Type: Priority

Powered by Blogger.

LABELS1

- Client Tracing (1)
- Cloud News (2)
- CRM 2011 (1)
- CRM 2011 - Windows 7 Phone (2)
- CRM 2011 Advanced Administration (1)
- CRM 2011 and Scribe (3)
- CRM 2011 and Sharepoint 2010 (3)
- CRM 2011 Books (1)
- CRM 2011 Client Deployment (4)
- CRM 2011 CTI (1)
- CRM 2011 Customization (2)
- CRM 2011 Data Integration (1)
- CRM 2011 Deployment (2)
- CRM 2011 Download News (2)
- CRM 2011 Features (3)
- CRM 2011 Infrastructure (3)
- CRM 2011 Integration (1)
- CRM 2011 JavaScript (2)
- CRM 2011 Licensing (1)
- CRM 2011 Mail Merge (3)
- CRM 2011 News (6)
- CRM 2011 Offline Client (3)
- CRM 2011 Online (2)
- CRM 2011 Online Client Troubleshooting (6)
- CRM 2011 Organisation Import (1)
- CRM 2011 Performance (1)
- CRM 2011 SDK (1)
- CRM 2011 Setup (2)

On the last picture we advice the potential customer to always check the backgrounds of CRM consultants that they wish to hire, to protect themselves from fraudulent players

Reports to the rescue

The relational data model of a CRM system doesn't always manage to make the underlying information structure fully visible to the casual user who is browsing the records instead of managing them. In order to eliminate the complexity of relationships and hierarchies between various entities and truly roll up data to provide that 360 view, it's advisable to reserve an adequate share of your CRM implementation and development budget for creating summary reports that present exactly the information that the users are expecting to get out of the system.

Even with the standard reports that come with Microsoft Dynamics CRM, you can already get a more accurate overview of the activities in a hierarchical account structure. The Account Summary Report, which can be run against any account record, will allow you to view information from sub-accounts as well as related records. You just need to remember to change the default filters to "include":

The screenshot shows the 'Account Summary For: Top level account' report. At the top, there are four dropdown filters: 'Group By' set to 'None', 'Date' set to 'Last 7 Days', 'Sub-Accounts' set to 'Include' (which is highlighted with a red border), and 'Notes' set to 'Exclude'. Below the filters, the report title is 'Account Summary For: Top level account'. Underneath, a section titled 'None: None' lists various activity types. A large table follows, showing activity details like subject, regarding, status, and date. The table includes rows for Sub-account opportunity, Phone call for sub-account's contact, Task regarding sub-account's opportunity, Task regarding the sub-sub-account directly, Sub-account opportunity, Email regarding Sub-account Order, and another Sub-account opportunity. The status column shows values like In Progress, Open, and New.

Looks great and also prints out nicely onto PDF's that can be shared with users who are not yet familiar with accessing Dynamics CRM directly. You could of course email them a link to the report, but that URL doesn't preserve any filter selection applied.

If you know your way around working with Visual Studio and BIDS, then creating a custom report that displays all the activities and embedding it on a form iFrame should be perfectly possible. Just don't ask me about how to construct the query needed for pulling the activity data from all the different entities (let alone if you're on CRM Online and need to use Fetch XML instead of SQL), since I'm not an expert on the topic. However, if you have any examples of such, please feel free to drop a comment below on how you've simplified activity data presentation for the CRM end user in your solutions.

Reports to the rescue

The relational data model of a CRM system doesn't always manage to make the underlying information structure fully visible to the casual user who is browsing the records instead of managing them. In order to eliminate the complexity of relationships and hierarchies between various entities and truly roll up data to provide that 360 view, it's advisable to reserve an adequate share of your CRM implementation and development budget for creating summary reports that present exactly the information that the users are expecting to get out of the system.

Even with the standard reports that come with Microsoft Dynamics CRM, you can already get a more accurate overview of the activities in a hierarchical account structure. The Account Summary Report, which can be run against any account record, will allow you to view information from sub-accounts as well as related records. You just need to remember to change the default filters to "include":

The screenshot shows the 'Account Summary For: Top level account' report. The filter settings are identical to the previous screenshot: 'Group By' set to 'None', 'Date' set to 'Last 7 Days', 'Sub-Accounts' set to 'Include' (highlighted with a red border), and 'Notes' set to 'Exclude'. The report title is 'Account Summary For: Top level account'. Below, a section titled 'None: None' lists activities. A large table follows, showing activity details. The table includes rows for Sub-account opportunity, Phone call for sub-account's contact, Task regarding sub-account's opportunity, Task regarding the sub-sub-account directly, Sub-account opportunity, Email regarding Sub-account Order, and another Sub-account opportunity. The status column shows values like In Progress, Open, and New.

So, as a conclusion, when you're looking for Dynamics CRM professionals to help you implement & develop your CRM system, do some background checks first. It's all too easy to steal content from others and build up a web presence to lure in potential customers. Online content is easy to generate, building a reputation requires hard work. Some of us choose to skip that "hard work" part.

I wish I could say "we're sorry about this", but I'll leave that to the actual persons behind the site to apologize for their mistakes.

Looks great and also prints out nicely onto PDF's that can be shared with users who are not yet familiar with accessing Dynamics CRM directly. You could of course email them a link to the report, but that URL doesn't preserve any filter selection applied.

If you know your way around working with Visual Studio and BIDS, then creating a custom report that displays all the activities and embedding it on a form iFrame should be perfectly possible. Just don't ask me about how to construct the query needed for pulling the activity data from all the different entities (let alone if you're on CRM Online and need to use Fetch XML instead of SQL), since I'm not an expert on the topic. However, if you have any examples of such, please feel free to drop a comment below on how you've simplified activity data presentation for the CRM end user in your solutions.

CRM 2011 Tools (2)
CRM 2011 Trainings (1)
CRM 2011 Troubleshooting (5)
CRM 2011 und Exchange (1)
CRM 2011 und IFD - ADFS 2.0 (8)
CRM 2011 Update Rollup Issues (1)
CRM 2011 Update Rollups (5)
CRM 2011 UR Issues (1)
CRM 2022 Books (1)
CRM 4 Client Troubleshooting (3)
CRM 4.0 (1)
CRM 4.0 - CRM 2011 Migration (3)
CRM 4.0 AsyncService (2)
CRM 4.0 Client Troubleshooting (1)
CRM 4.0 Rollups (2)
CRM 4.0 Troubleshooting (2)
CRM Themen (2)
Customization (5)
Customization Design; Picklists; Lookup Filtering (1)
Dynamics CRM 2011 Consulting Beratung (4)
Dynamics CRM 2011 Hosting (1)
Dynamics CRM 4.0 IFD und FAG (1)
Dynamics CRM News (1)
Exchange 2010 Hosting (2)
IIS 7 und CRM 2011 (1)
Import / Export Tools (1)
Installation (2)
JavaScript und CRM 2011 (8)
JavaScript und CRM 4.0 (1)

Conclusions

- ▶ Content theft is all too commonplace on the web today and it's very difficult to protect yourself from becoming a victim of it
- ▶ Many copy-paste bloggers will remove the stolen blog posts if you contact them, but this means they can just continue with their practice and none of the readers will know about it
- ▶ If you'd link to the stolen content from your original blog article, you might just end up giving them a higher search engine ranking as a result (that's what they are ultimately looking for with their practice)
- ▶ As a blogger, you need to be creative in using different means to draw attention to the content thieves
- ▶ As blog readers, we should all be alert in spotting content theft and notifying the original bloggers as well as the copy-pasters about it