

Microsoft Dynamics CRM 2011 Walkthrough

*Part 2: Solution &
system management*

Jukka Niiranen

<http://niiranen.eu/crm>

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Walkthrough Part 1

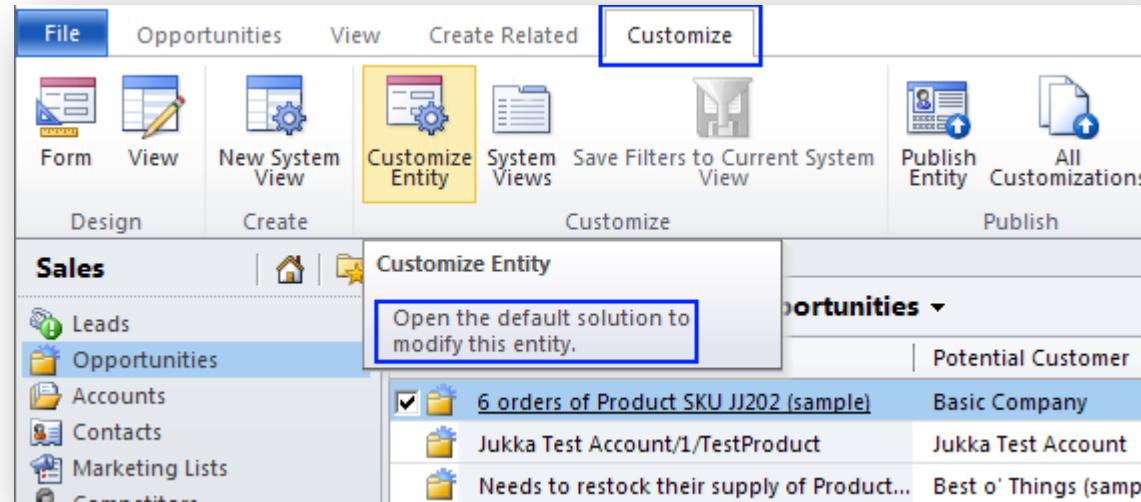
- End-user tools and UI enhancements
- Outlook client
- Form customization options
- Auditing
- Connections
- SharePoint integration
- Visualizations
- Goals

Walkthrough Part 2

- Customization menus
- UI customization options
- Solution management
- Web resources
- Processes (workflows)
- Custom activities
- Queue enhancements
- Multiple forms per entity
- Security features
- Cloud services
- Upgrading from CRM 4.0
- What's not there in 2011

Customization Menus

Ribbon access to Customizations



- Administrators now have direct access to entity, form and view customizations from the main window or detail form of a record
- Note: these shortcuts will always take you to the default solution, access to settings menu is needed for selecting which solution is to be customized

Hierarchical navigation

The screenshot shows the Microsoft Dynamics CRM 2011 customization screen for the Account entity. On the left, a hierarchical menu tree under 'Solution: Demo Solution' shows categories like Information, Components, Entities, Option Sets, Client Extensions, etc. The 'Entities' category is expanded, and 'Account' is selected, highlighted with a yellow background. The main right-hand pane displays the 'Information' tab for the Account entity. It includes fields for Display Name (Account), Plural Name (Accounts), Name (account), Description (Business that represents a customer or potential customer. The company that is billed in business transactions.), and areas that display this entity (Workplace, Sales, Marketing, Service, Settings, Resource Center). Below this is an 'Options for Entity' section with checkboxes for Note (includes attachments), Activities, Sending e-mail (If an e-mail field does not exist, one will be created), Queues, and Automatically move records to the owner's default queue when a record is created or assigned.

General Primary Field

Entity Definition

Display Name * Account Ownership * User or Team

Plural Name * Accounts Define as an activity entity.

Name * account Display in Activity Menus

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

Areas that display this entity

Workplace Sales Marketing Service
Settings Resource Center

Options for Entity

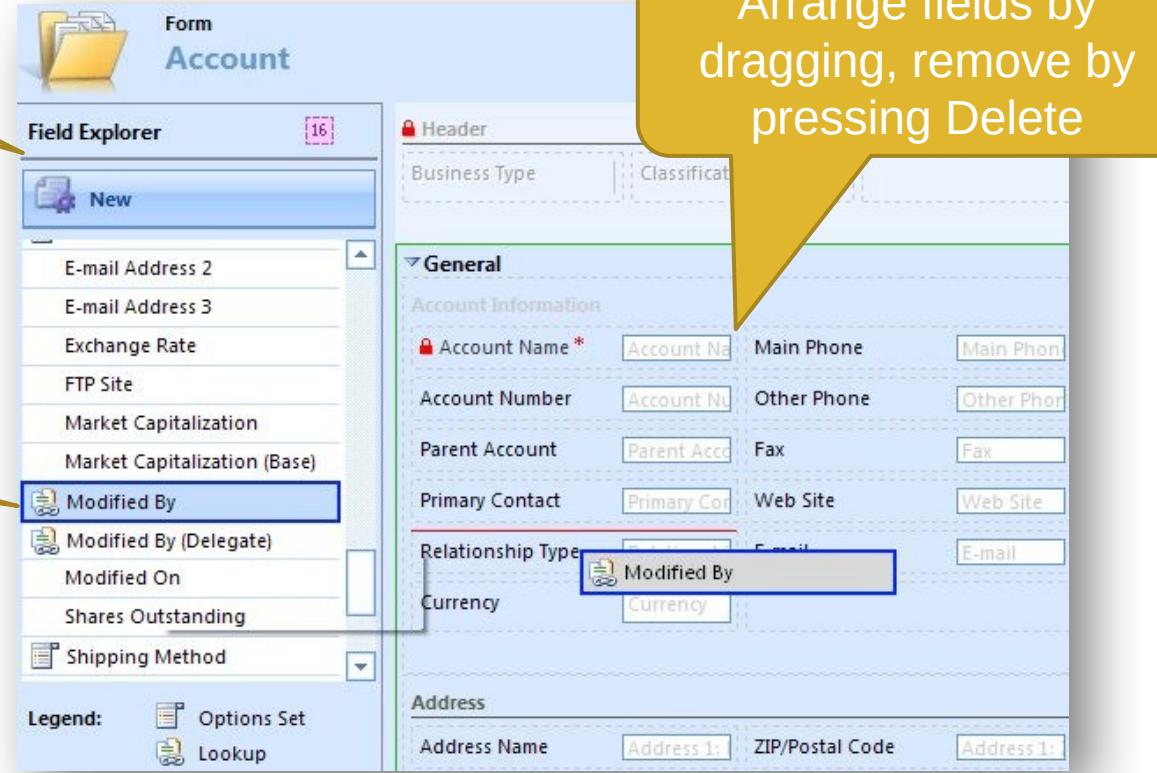
Select an option to enable the feature for this entity. After you enable these options, they can never be disabled.

Note (includes attachments)
 Activities
 Sending e-mail (If an e-mail field does not exist, one will be created)
 Queues
 Automatically move records to the owner's default queue when a record is created or assigned.

Drag & drop form editing

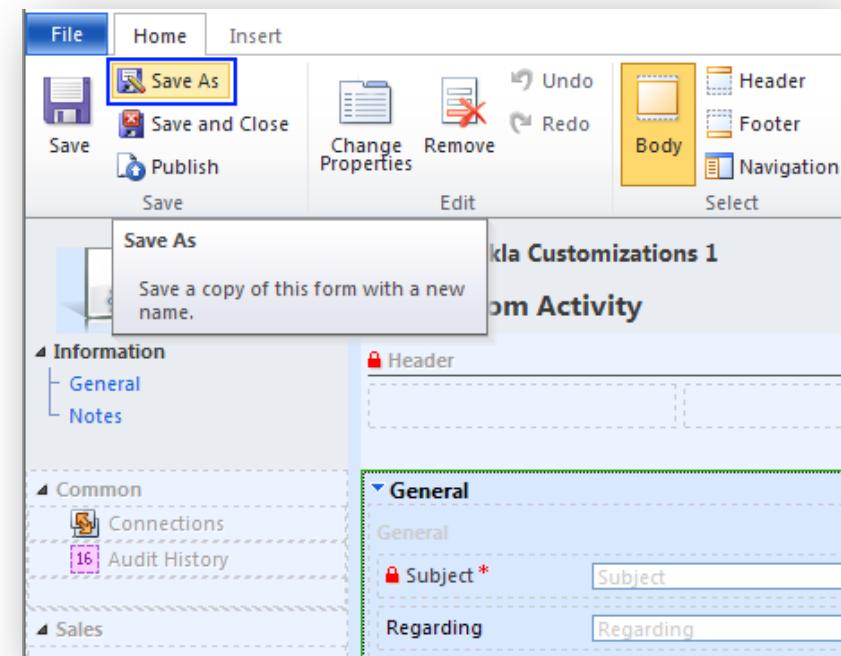
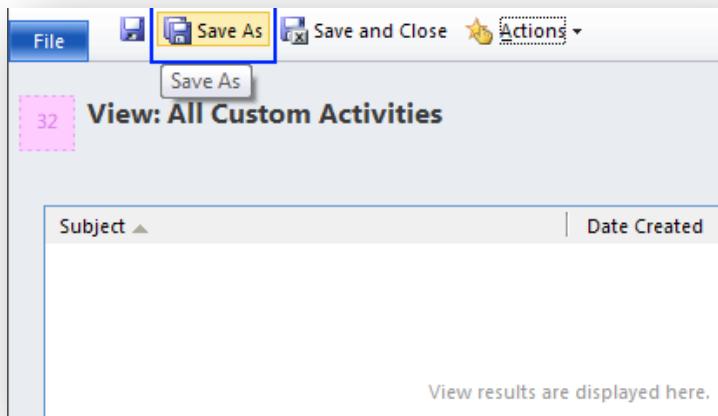
Field Explorer lists available fields and allows creation of new attributes

Drag fields directly to the form



Save As -options

- Available for views, forms, charts
- Quick way to replicate existing configurations when adding new views and forms



UI customization options

Ribbon customization

- Create custom sections and buttons to ribbons
- Default ribbon elements can be hidden or overwritten with custom elements
- No GUI editor, modifications done through XML:
 - Export the solution customizations
 - Edit the RibbonDiffXml
 - Create Web Resources for icons and scripts
 - Import solution
- Outlook 2003 and 2007 will display ribbon elements as menus, Outlook 2010 has full ribbon

Ribbon features

- Ribbon types available:
 - Entity ribbons: form, grid, subgrid
 - Web app specific: jewel ("File"), basic home tab
 - Others: dashboard, advanced find, form editor...
- Ribbon element display & enable criteria:
 - Client type, field value, form state, record privilege, grid selection count, custom rules for Javascript libraries
- Ribbon control actions:
 - Open a URL, pass parameters, call Javascript function
- Ribbon element size and scaling priority order

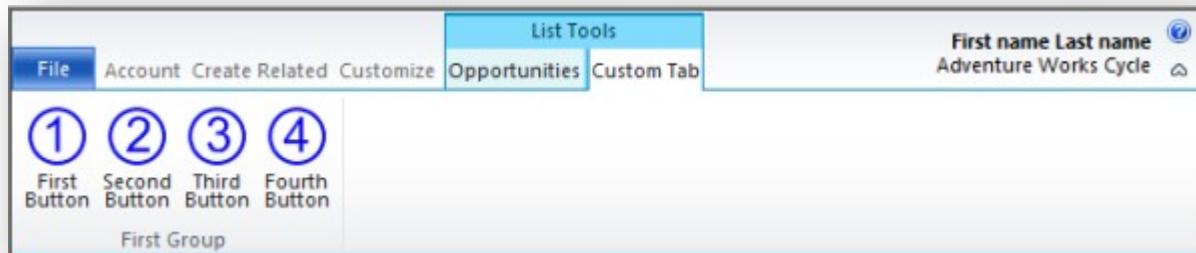
Examples of custom ribbon elements



Custom group and buttons in default layout



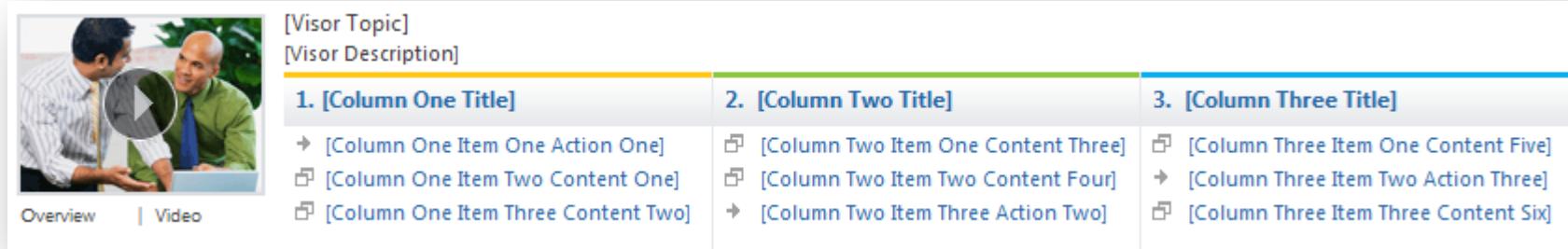
Custom group with popup button layout



Custom group in subgrid ribbon list tools

From Microsoft Dynamics CRM 2011 Beta SDK

Getting Started Pane



The screenshot shows the 'Visor Topic' and 'Visor Description' sections of the Getting Started Pane. It features three columns: Column One, Column Two, and Column Three. Each column has a title and a list of items. A video thumbnail with a play button is visible on the left.

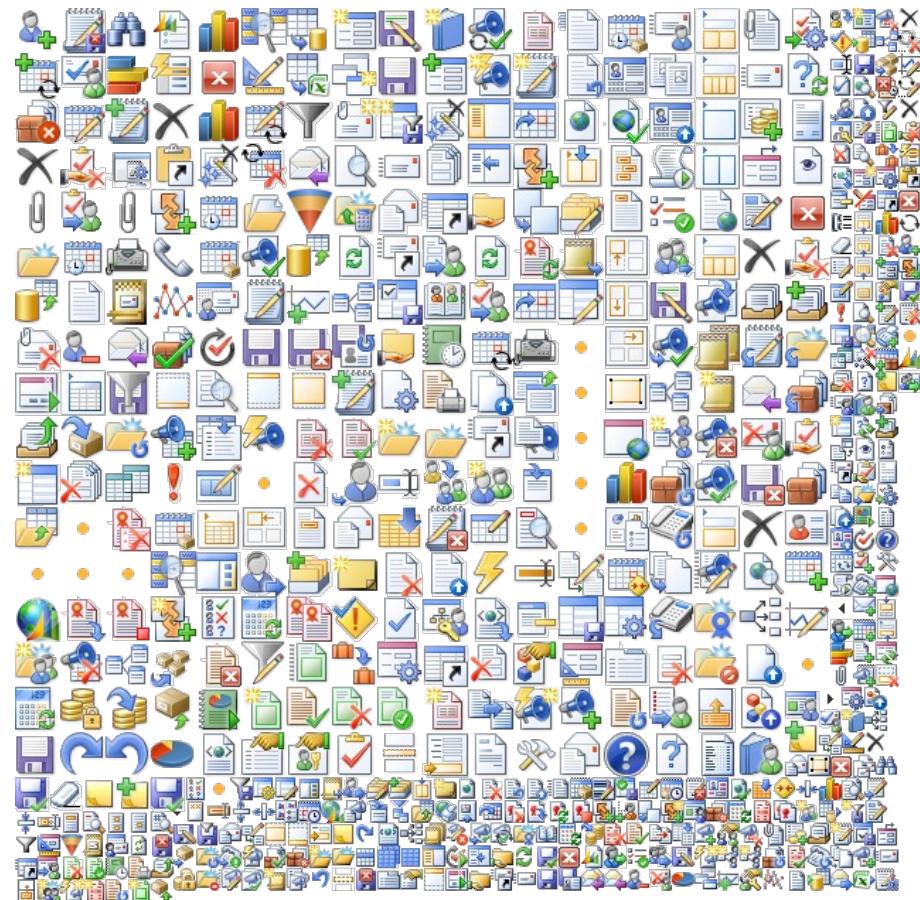
[Visor Topic]	[Visor Description]	
1. [Column One Title] → [Column One Item One Action One] □ [Column One Item Two Content One] □ [Column One Item Three Content Two]	2. [Column Two Title] □ [Column Two Item One Content Three] □ [Column Two Item Two Content Four] → [Column Two Item Three Action Two]	3. [Column Three Title] □ [Column Three Item One Content Five] → [Column Three Item Two Action Three] □ [Column Three Item Three Content Six]

Overview | Video

- Getting Started Pane is available for all entities that have viewable grids in CRM UI
- Allows presenting relevant instructions on the context of the entity being viewed
- Supports HTML and Silverlight content
- Users can show/hide the pane per entity or set global preferences through Options menu
- SDK contains HelpVisorTemplate that can be used as a customization starting point for own panes

Performance with CSS sprites

- CSS sprites reduce the HTTP calls to web server, thus improving performance in WAN environment
- One image file is used to render several icons by showing only a specific region of the main sprite
- Dynamics CRM 2011 utilizes sprites like ribbon.png to load and cache all default icons
- Note: Custom icons will have a higher payload and may affect page loading times



Solution Management

Not just customizations

- In CRM 4.0, customizations and other configuration items were managed independently from one another
- In CRM 2011, solutions are bundles of components that are used for delivering specific applications/functionalities
- Each CRM organization has one default solution, in addition to which it can have multiple different solutions from different publishers

Solution components

- Schema and metadata components
 - Entities, attributes, forms, views, charts, relationships, option sets
- User interface components
 - Web resources, ribbons, sitemap, dashboards
- Code components
 - Processes, dialogs, plug-ins, custom WF activities
 - Plug-in registration is also stored in the solution
- System configuration components
 - Templates, security roles, reports, settings
 - Users and teams not included, roles need to be manually configured after solution installation

Customizing solutions in CRM

The screenshot shows the Microsoft Dynamics CRM Solutions Manager interface. At the top, there's a toolbar with options like New, Import, Export, Publish All Customizations, and Get Solutions from Marketplace. Below the toolbar, a table lists solutions, with 'DemoSolution' selected. The main area shows the 'Information' tab for the 'Demo Solution'. On the left, a navigation pane lists components: Information, Components (which is selected), Entities, Option Sets, Client Extensions, Web Resources, Processes, Plug-in Assemblies, Sdk Message Processing..., Service Endpoints, Dashboards, Reports, Connection Roles, Article Templates, Contract Templates, E-mail Templates, Mail Merge Templates, Security Roles, and Field Security Profiles. In the center, a grid displays components with columns for Name, Type, and State. A yellow callout bubble points to the 'Add Existing...' button in the toolbar, with the text 'Add existing or new components to solution'.

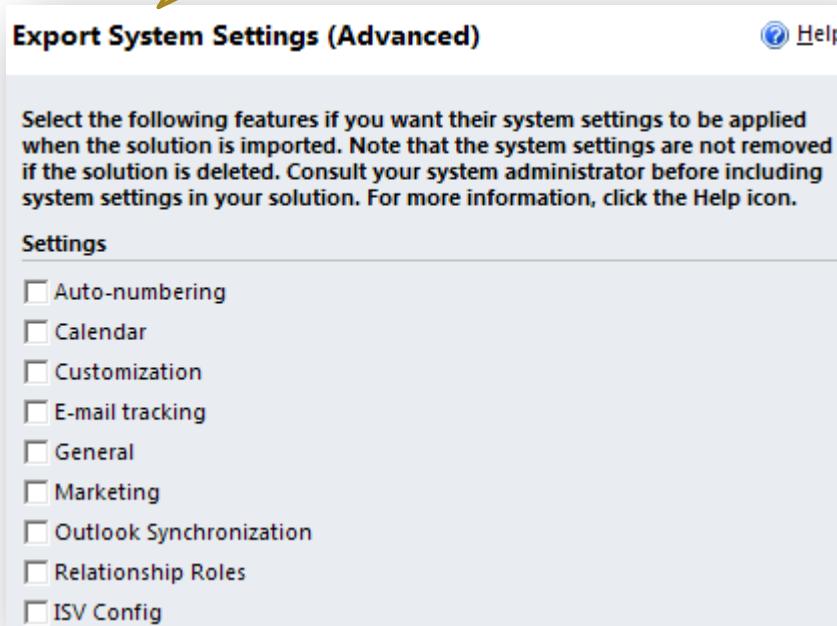
Name	Type	State
Account	Entity	Managed
Demo	Dashboard	Unmanaged
new_	Web Resource	Unmanaged
Pricelevel	Entity	Managed
test_BingMaps	Web Resource	Unmanaged
test_GoogleMaps	Web Resource	Unmanaged
testWebResource	Web Resource	Unmanaged

Unmanaged / managed solutions

- You can only create unmanaged solutions
- Upon export you can choose to make the solution either unmanaged or managed
- Managed solutions are locked from editing
- Managed solutions each have their own “layer”, which will control adding and removing solutions to/from a system
- Unmanaged solutions cannot be uninstalled
 - Only pointers to components, not separate containers
 - You can delete the solution, but components will not be deleted from the system

Exporting a solution

Including system settings
in the solution

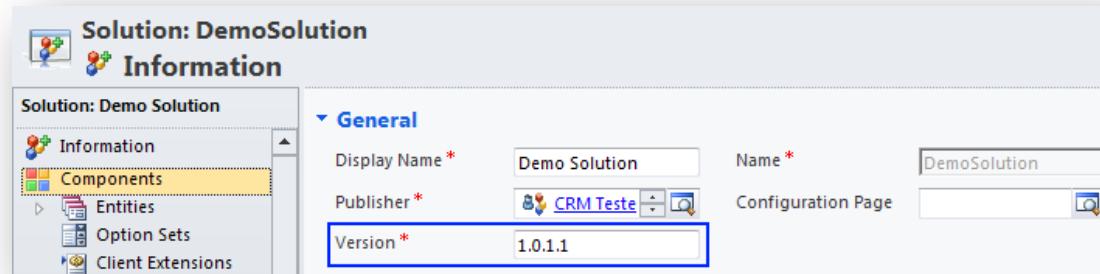


Export as unmanaged or
managed solution



Updating solutions

- Managed solutions in the system can be updated with new versions of the solution file provided by the publisher
- No version control or rollback support in the CRM platform itself, needs to be managed by publisher
- Solution version numbers are simply metadata set by the publisher



Managed properties

- By default, all custom solution components are customizable
- Managed properties can be enabled per component, which will enforce customization rights once the solution is exported as managed

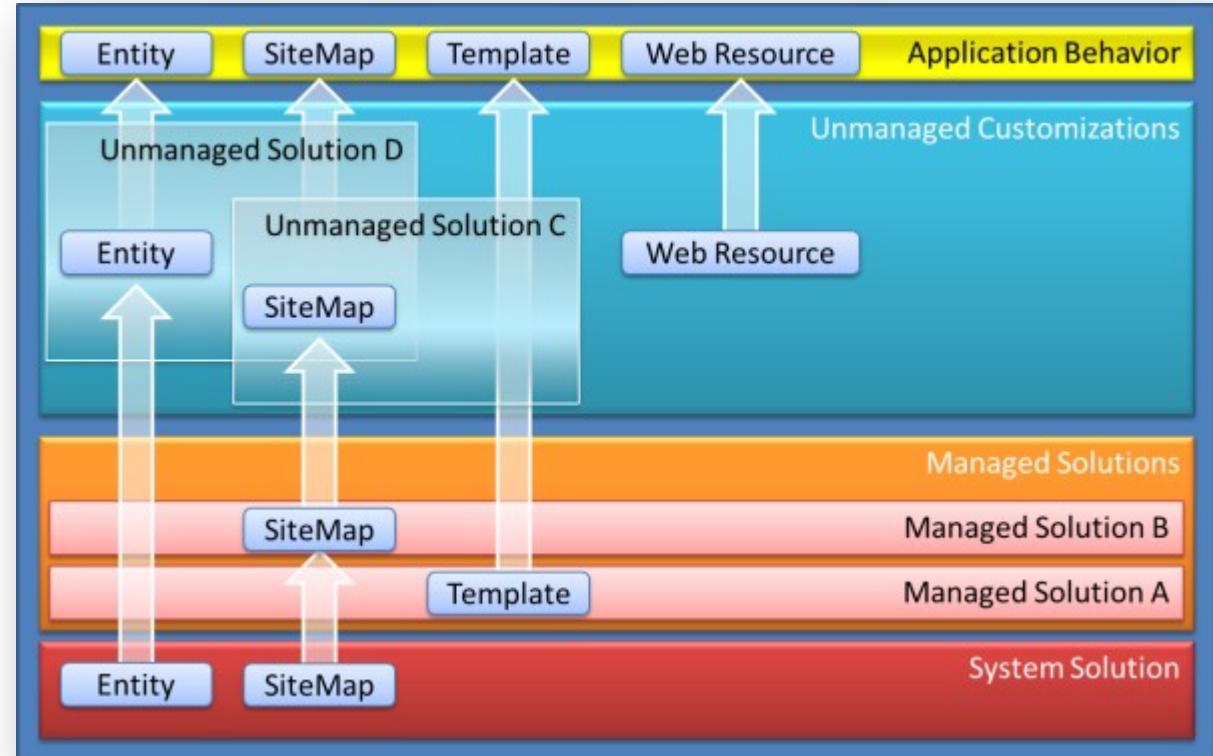
Managed Properties of Entity : Custom Activity
Set the Managed Properties of this component.

The following properties will take effect only after the component is exported and imported as part of a managed solution.

Can be customized	<input checked="" type="radio"/> True <input type="radio"/> False
Display name can be modified	<input checked="" type="radio"/> True <input type="radio"/> False
Can Change Additional Properties	<input checked="" type="radio"/> True <input type="radio"/> False
New forms can be created	<input checked="" type="radio"/> True <input type="radio"/> False
New charts can be created	<input checked="" type="radio"/> True <input type="radio"/> False
New views can be created	<input checked="" type="radio"/> True <input type="radio"/> False

Solution layering

- The active (default) solution is calculated from all the unmanaged and managed solutions applied to the system



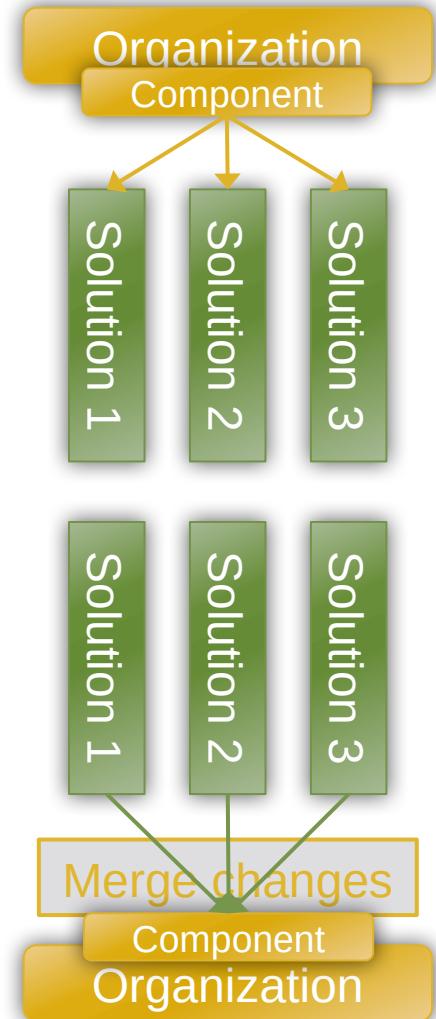
From Microsoft Dynamics CRM 2011 Beta SDK

Merging solution contents

- Solutions can and will very likely have dependencies to the same shared components
- The order of solution installations is important: **the last one wins**
- Conflicting form and SiteMap customizations can cause surprising results, which may require manual fixing after solution installation
- Option sets have value prefixes to reduce the chances of conflicts between solutions
- Ribbon customizations are defined by only stating the changed controls through RibbonDiffXml

Component export and import

- **Exporting** a solution component from an organization will contain **all the published changes**, as there is only one active component in the system at any given time (and not different versions)
- Upon **importing** solutions that update the same component, the **changes are merged** with the ones already published in the organization
- Therefore, each distinct solution that is interacting with the same components should be **developed inside a separate organization** of its own



Dependency tracking

The screenshot shows the Microsoft Dynamics CRM 2011 interface with a yellow banner at the top. The ribbon menu is visible, showing 'File', 'Show Dependencies' (which is highlighted with a yellow arrow), 'Publish', and 'Managed Properties'. The left navigation pane shows 'Solution: Demo Solution' and a list of components under 'Entities': Account, Option Sets, Client Extensions, Web Resources, Processes, Plug-in Assemblies, Sdk Message Proce..., Service Endpoints, Dashboards, Reports, Connection Roles, Article Templates, Contract Templates, E-mail Templates, Mail Merge Templat..., Security Roles, and Field Security Profil... (with 16 items). The 'Account' component is selected and highlighted with a yellow box.

Show dependencies per component

Missing Required Components

Solution components

The following components are missing from your solution. Import will fail if these components don't exist already in the target Microsoft Dynamics CRM organization. To add the missing components to your solution, cancel import, open the solution, and click the Add Required Components button.

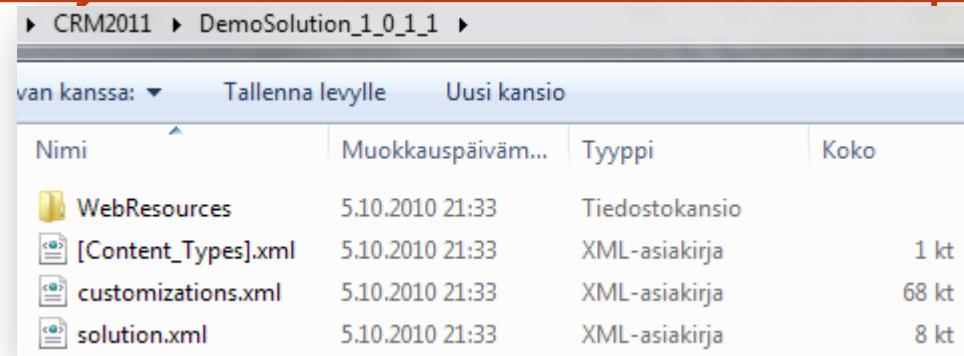
Display Name	Name/Id	Component Type	Parent Entity
Form	Form	System Form	Account
System Administrator	System Administrator	Security Role	
Scheduler	Scheduler	Security Role	
Lead Lookup View	Lead Lookup View	View	Lead
Open Opportunities	Open Opportunities	View	Opportunity
Top 10 Opportunities	Top 10 Opportunities	System Chart	Opportunity
Form	Form	System Form	Account
Active Services	Active Services	View	Service

Uninstall solutions

- Uninstalling an unmanaged solution will leave all the components in the system, only the solution record is removed
 - Unmanaged solutions are simply component groupings
- Uninstalling a managed solution will remove both components and data from the system
- See post from David Yack:
<http://crm.davidyack.com/journal/2010/9/20/exploring-crm-2011-solution-framework-update-scenarios.html>

Solution files

- ZIP files containing a set of XML files
- No encryption, content can be browsed by the customer also in managed solutions
- See blog post "Inside the solution XML file" by Gayan Perera for more information:
 - <http://weblogs.asp.net/gayanperera/archive/2010/09/14/peeking-into-the-dynamics-crm-2011-solution-export-file.aspx>



A screenshot of the Microsoft Dynamics CRM 2011 interface, specifically the 'Solution' screen. The title bar shows 'CRM2011 > DemoSolution_1_0_1_1 >'. Below the title bar is a toolbar with buttons for 'van kasssa', 'Tallenna levylle', and 'Uusi kansio'. The main area is a grid displaying the contents of the solution file. The columns are 'Nimi' (Name), 'Muokkauspäiväm...', 'Typpi' (Type), and 'Koko' (Size). The grid contains four items:

Nimi	Muokkauspäiväm...	Typpi	Koko
WebResources	5.10.2010 21:33	Tiedostokansio	
[Content_Types].xml	5.10.2010 21:33	XML-asiakirja	1 kt
customizations.xml	5.10.2010 21:33	XML-asiakirja	68 kt
solution.xml	5.10.2010 21:33	XML-asiakirja	8 kt

Solution layering strategies

- Evaluate the practical number of different solutions
 - More layers allow better modularity of solutions
 - ...but can make development and layer management tricky, due to number of files and organizations
- Separate CRM organization needed for publishing each individual solution layer
 - All exports are done from the unmanaged layer
- Only import managed solutions to your test environment to preserve the default (unmanaged) layer
- Automating build environments recommended to avoid mistakes of manual import process for multiple solution layers in multiple dev and test organizations

Team development strategies

- When multiple developers are customizing a single environment, MS suggest the following strategies for manage team development:
- **Single organization, one master solution**
 - Developers must work on separate components
- **Single organization, multiple developer solutions + one master solution**
 - Each developer has an unmanaged solution + reference to master solution components, no need to merge changes
- **One organization per developer**
 - Each developer has their own environment from which unmanaged solutions are imported into a master solution

From Microsoft Dynamics CRM 2011 Beta SDK

Web Resources

Contents and use cases

- Web resources represent files that would have traditionally been placed on the CRM web server
- Resource types supported:
 - Images: png, jpg, gif, ico
 - Website(app) components: html, css, javascript
 - Silverlight applications
- Enables portability of custom pages and applications by packaging the resources into the solution file
- Available also in Outlook client offline mode

Adding web resources

Solution: Demo Solution

Information
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing...
Service Endpoints
Dashboards
Reports
Connection Roles
Article Templates
Contract Templates
E-mail Templates
Mail Merge Templates
Security Roles
Field Security Profiles

Component Type Web Resource

New | Add Existing | Delete | Remove | Publish | Show Dependencies

More Actions ▾

Display Name ▾

Play Icon 32 (selected)
Test Web Resource

Select solution components -- WWW-...

https://teklacorporation.crm4.dynamics.com

Select solution components
Select one or more solution components

Component Type Web Resource

Display Name ▾

Filtered Lookup Test
JavaScript
Play Icon 16

General

Name * test_ TestWebResource
Display Name Test Web Resource
Description Just an HTML page.

Content

Type * Web Page (HTML)
Language
Upload File
URL
URL

Text Editor
Selaa...

Web Page (HTML)
Style Sheet (CSS)
Script (JScript)
Data (XML)
PNG format
JPG format
GIF format
Silverlight (XAP)
Style Sheet (XSL)
ICO format

Script libraries

- Javascript libraries allow the central management and re-use of scripts across different entities and forms
- Functions from the libraries can be associated with form and field events in form customization UI, while managing the code itself on the Web Resource hosting the library
- See blog post by Ayaz Ahmad:
 - <http://ayazahmad.wordpress.com/2010/09/25/javascript-libraries-in-microsoft-dynamics-crm-2011/>

Using Jscript libraries (1)

32

Solution: Customizations 1

Web Resource: Filtered Lookup Test

General

Name * new_FilteredLookupTest
Display Name Filtered Lookup Test
Description JScript library for testing purposes.

Content

Type * Script (JScript) Language
Upload File

URL

URL <https://teklacorporation.crm4.dynamics.com/>

function HandleOnChangeCustomerLookup()
{
 alert('On Change Called for Customer');
}

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

OK Cancel

Upload or cut&paste scripts into a new Web Resource

Using Jscript libraries (2)

Field Properties

Modify this field's properties.

Display Formatting Details Events

Event List

Form Libraries

Manage libraries that will be available in the form.

Add | **Remove** | **Up** | **Down** | **Edit**

Name

new_FilteredLookupTest

Display Name

Filtered Lookup Test

Description

JScript library for...

Event Handlers

Manage functions that will be called for form or field events.

Control Potential Customer

Event OnChange

Add | **Remove** | **Up** | **Down** | **Edit** | **Edit Library**

Library

new_FilteredLookupTest

Function

HandleOnChangeCustomerLookup

Enabled

True

In form or field properties,
add reference to the web
resource with the script
library

Attach functions from
the library to specific
form or field events

Handler Properties

Library **new_FilteredLookupTest**

Function * **HandleOnChangeCustomerLookup**

Enabled

Parameters

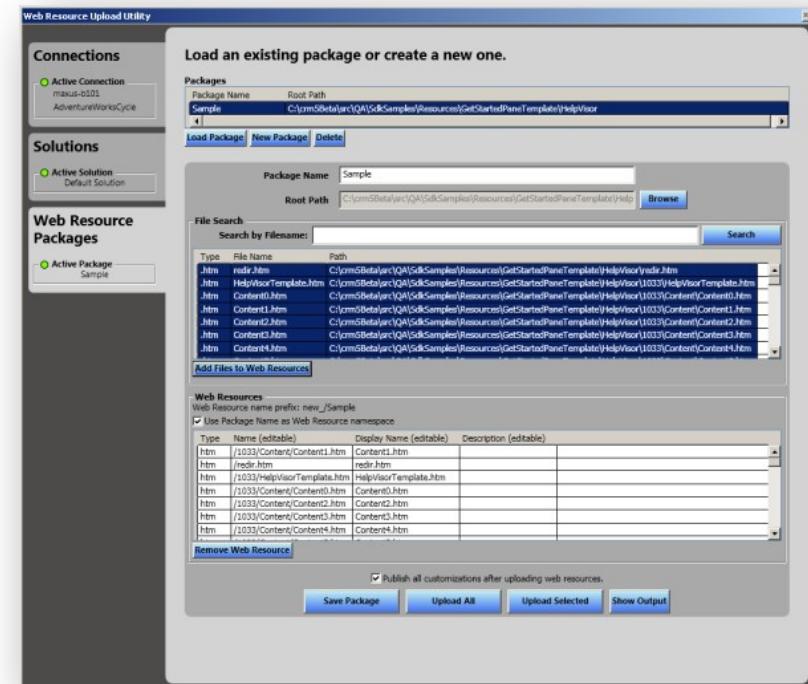
Pass execution context as first parameter

Comma separated list of parameters that will be passed to the function

Pass parameters
to functions

Managing web resources

- CRM 2011 SDK contains a WPF tool called Web Resource Utility
- Can be used for building Web Resource Packages to simplify management and uploading of individual files for CRM Web Resources



Processes

(previously known as Workflows)

From workflows to processes

- Workflow concept has been replaced with Process
- Processes are split into 2 categories:
 - Workflows
 - Dialogs
- Dialogs are basically **interactive workflows** that allow the user to enter input data while the workflow logic is being executed in the background
- Whereas workflows can be started by a trigger and executed asynchronously, dialogs must be started by the user and **executed synchronously**
- In short, dialogs are the "wizard engine" for workflows

Process Center

The screenshot shows the Microsoft Dynamics CRM 2011 Process Center interface. On the left, a navigation bar includes links for Settings, Business, System, Customization, and Process Center (which is selected and highlighted with a blue border). The main area displays a list of processes under 'My Processes' with columns for Process Name, Category, and Primary Entity. Below this is a 'Create Process' dialog box. The dialog has fields for 'Process name:' (set to 'Demo Dialog'), 'Entity:' (set to 'Account'), and 'Category:' (a dropdown menu showing 'Workflow' and 'Dialog', with 'Dialog' currently selected). A large yellow callout bubble points from the bottom-left towards the 'Category:' dropdown in the dialog.

Processes: My Processes

Process Name	Category	Primary Entity
AccountTestDialog	Dialog	Account
Bankrupt customer	Dialog	Account
Bankruptcy task to HQ accounting	Workflow	Account
Lead source test	Workflow	

Process: New -- WWW-valintaikkuna

https://tekla.corporation.crm4.dynamics.com/sfa/workflow/workflowTemplate

Create Process

Create a new process definition or a process based on an existing template. There are two categories of processes you can create, dialogs and workflows.

Process name: * Demo Dialog Entity: Account

Type: Workflow Category: Dialog

No process template records are available in t

Dialog

Dialog and Workflow have similar presentation in the CRM UI under Process menus

Also the Process Designer UI is common to both Workflows and Dialogs

Dialog page components

The screenshot shows a 'Sample Dialog' window in Internet Explorer. The window title is 'Sample Dialog'. Inside, there's a main content area with a message 'Welcome to Contoso Systems Case Management System!' and a question 'Is this a new case or an existing case?'. Below the question are two radio buttons: 'Existing' (selected) and 'New'. To the right of the question is a 'Tip' section with the text 'Select whether a new or existing case.' At the bottom of the dialog, there are buttons for 'Help', 'Summary', 'Next', 'Cancel', and 'Done'. A status bar at the bottom indicates 'Local intranet | Protected Mode: Off' and shows zoom controls.

Prompt and Response with Response Type = 'None'

Prompt and Response with Response Type = 'Radio Button'

The current Prompt and Response is highlighted.

The Tip section displays the tip text for the current Prompt and Response.

Tip

Page

From Microsoft Dynamics CRM 2011 Beta SDK

Dialog process conditions

Input Arguments

Variables

Steps

Compulsory first screen

Page: Input details

- Processing a bankrupt customer account:
Prompt and Response: [View properties](#)
Prompt: Please enter details on the bankruptcy of the customer account Account:Account Name. Your answer will be recorded to the account archives.
- Notifying HQ accounting team
Prompt and Response: [View properties](#)
Prompt: Does the account have valid service subscriptions?
Response: Yes
Response: No

Optional second screen

Check value from question 2

If Notifying HQ accounting team-Response Value equals [1], then:

Page: Prompt for additional details

- Instructions to HQ accounting
Prompt and Response: [View properties](#)
Prompt: Please provide additional instructions to HQ accounting on subscription termination details:

Update account record

- Update account description with the details given by user
Update: Account [View properties](#)

Create task for HQ accounting

Check if HQ accounting should be notified

If Notifying HQ accounting team-Response Value equals [1], then:

- Create task, wait for completion, deactivate account
Start child workflow: Account [Bankruptcy task to HQ accounting](#)

Continue the process asynchronously in a child workflow

Dialog prompt options

General

Statement Label *

Prompt Details

Prompt Text *

Tip Text

Response Details

Response Type

Log Response Yes No

Data Type

Default Value

Provide Values Define Values Query CRM data

Response Values
Selection 1
Selection 2
Selection 3

Value *

Label *

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Dialog

Primary Entity Account

Related Entities

- Created By (Delegate) (User)
- Created By (User)
- Currency (Currency)
- Master ID (Account)
- Modified By (Delegate) (User)
- Modified By (User)
- Originating Lead (Lead)
- Owner (Owner)
- Owning Business Unit (Business)
- Owning Team (Team)
- Owning User (User)
- Parent Account (Account)
- Preferred Facility/Equipment (Facility)
- Preferred Service (Service)
- Preferred User (User)
- Price List (Price List)
- Primary Contact (Contact)
- Territory (Territory)

Local Values

Dialog

Process

Insert hyperlinks to instructions

Collect response data as picklist, nvarchar or ntext

Type in list of values or query CRM data

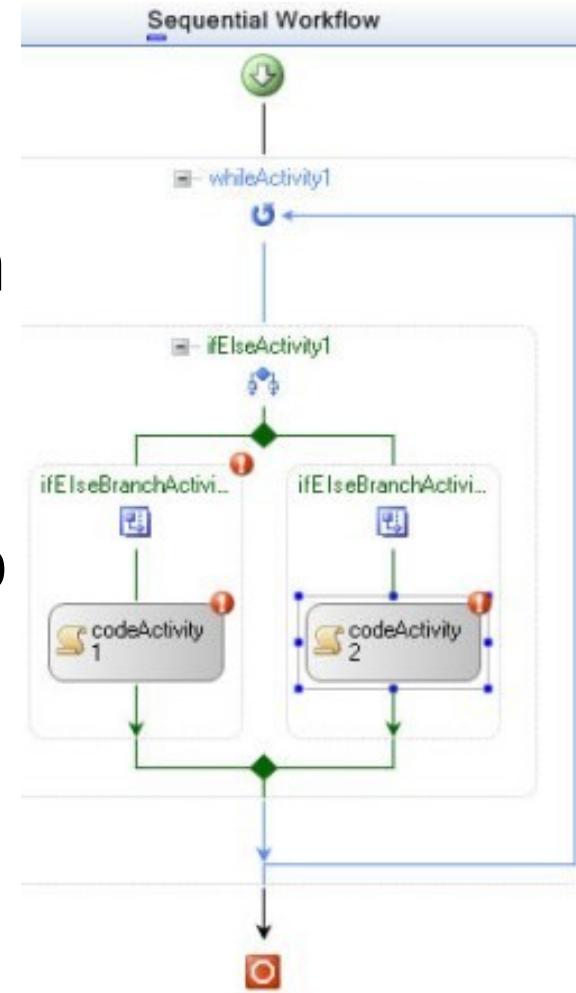
Insert dynamic values to text

Examples of Dialog use cases

- Replace the built-in dialog windows such as "convert lead" or "close opportunity" with custom logic, also replace the ribbon buttons with references to custom Dialogs
- Guide the user in new record creation process by showing instructions in prompts
- Force the input of several required variables and descriptions when updating a field that is disabled on the entity form

Processes for developers

- .NET Framework 4.0 workflows
- Create custom workflow activities
- Fully declarative XAML modeling in WF 4 (workflows & activities)
- Single XAML file
- Modifications through Visual Studio 2010 Workflow Designer
- Not supported for CRM Online



Process administration

System Job: Contacts

Information

General Details

Related

General

Name	Contacts	Type	Matchcode Upd
Regarding		Created On	24.10.2010 11:15
Job Owner *	SYSTEM	Completed On	24.10.2010 11:15
Retry Count	0		

A SQL Server error occurred. Try this action again. If the problem continues, check the Microsoft Dynamics CRM Community for solutions or contact your organization's Microsoft Dynamics CRM Administrator. Finally, you can contact Microsoft Support.

Details

Message

```
<OrganizationServiceFault xmlns:i="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://schemas.microsoft.com/xrm/2011/Contracts">
<ErrorCode>-2147204784</ErrorCode>
<ErrorDetails
  xmlns:d2p1="http://schemas.datacontract.org/2004/07">
<Message></Message>
<Timestamp>2010-10-24T16:45:54.7431537Z</Timestamp>
<InnerFault>
<ErrorCode>-2147204784</ErrorCode>
```

System job error details visible in UI

Process: Queue Item notification

Information

Common

Information

Working on solution: Default Solution

General Administration Notes

Owner * First Last

Description

This is a demo workflow on Queue Items, to pass on worker information.

Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Completed system job deletion can be set per workflow, to manage AsyncOperationBase table size

Upgrade from CRM 4.0

- Running workflow instances will be upgraded to .NET 4 during server/organization upgrade
- Custom workflow activities written for CRM 4.0 in .NET 3 are wrapped into .NET 4 interop activity

Notes on processes

- Processes can be called through URL in a custom ribbon button
- Combined with the new queues and custom activities in CRM 2011, processes and dialogs provide "a better work management story" for visualizing business process automation in CRM UI

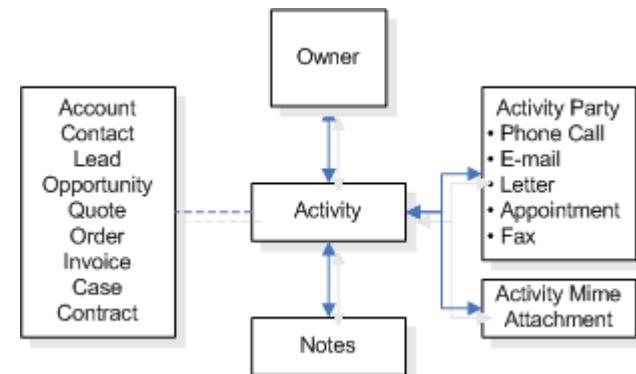
Dialog limitations

- Dialog prompts do not support many native CRM form attribute types:
 - Bit, date, lookup...
- Fields cannot be set as mandatory
- Dialogs cannot be paused/resumed
- Option sets cannot be queried in a Dialog
- Custom UI's cannot be embedded into Dialog pages (iframe/Silverlight/etc.)

Custom Activities

Features

- Possible use cases:
 - Extending messaging types (IM, SMS etc.)
 - Work orders or other process specific activities
- Support for all the different activity participant types available in out-of-the-box entity types
 - Customer, To, From, Cc, Required, Optional, Resource etc.
- Display child record activities in account/opportunity roll-up views



From Microsoft Dynamics CRM 2011 Beta SDK

Creating a custom activity

General Primary Field

Entity Definition

Display Name *	Custom Activity	Ownership *	User or Team
Plural Name *	Custom Activities	<input checked="" type="checkbox"/> Define as an activity entity.	
Name *	new_customactivity	<input checked="" type="checkbox"/> Display in Activity Menus	
Description	Testing out the creation of a custom activity entity.		

Define entity type as activity upon creation and set visibility

Custom Activity Fields

Solution: Default Solution

View: All

	Name	Display Name	Type
<input type="checkbox"/>	bcc	BCC	partylist
<input type="checkbox"/>	cc	CC	partylist
<input type="checkbox"/>	createdby	Created By	Lookup
<input type="checkbox"/>	createdon	Date Created	Date and Time
<input type="checkbox"/>	createdonbehalfby	Created By (Del...)	Lookup
<input checked="" type="checkbox"/>	customers	Customers	partylist
<input type="checkbox"/>	description	Description	Multiple Lines o...
<input type="checkbox"/>	exchangerate	Exchange Rate	Decimal Number
<input type="checkbox"/>	from	From	partylist
<input type="checkbox"/>	importsequencenumber	Import Sequenc...	Whole Number
<input type="checkbox"/>	instancetypecode	Recurring Insta...	Option Set
<input type="checkbox"/>	isbilled	Is Billed	Two Options
<input type="checkbox"/>	isregularactivity	Is Regular Activity	Two Options
<input type="checkbox"/>	isworkflowcreated	Is Workflow Cre...	Two Options
<input type="checkbox"/>	modifiedby	Modified By	Lookup
<input type="checkbox"/>	modifiedon	Last Updated	Date and Time
<input type="checkbox"/>	modifiedonbehalfby	Modified By (De...)	Lookup
<input type="checkbox"/>	optionalattendees	Optional Atten...	partylist
<input type="checkbox"/>	organizer	Organizer	partylist
<input type="checkbox"/>	overriddencreatedon	Record Created ...	Date and Time
<input type="checkbox"/>	ownerid	Owner	Owner
<input type="checkbox"/>	owningbusinessunit	Owning Busine...	Lookup
<input type="checkbox"/>	owningteam	Owning Team	Lookup
<input type="checkbox"/>	owninguser	Owning User	Lookup
<input type="checkbox"/>	partners	Outsource Ven...	partylist
<input type="checkbox"/>	prioritycode	Priority	Option Set
<input type="checkbox"/>	regardingobjectid	Regarding	Lookup
<input type="checkbox"/>	requiredattendees	Required Atten...	partylist

Partylist attributes will be created for each custom entity by default

Example of a custom activity

Convert activity to other records

Send activity to queue

Manage activity parties

Custom Activity
Custom activity for an account

Custom Field (FLS) Date Created: 23.10.2010 18:02 Created By: [Jukka Niiranen](#)

General

Subject*: Custom activity for an account
Regarding: [Another Test Account](#)
To: [Jukka Niiranen](#)
Priority: Normal Owner*: [First Last](#)
Start Date: 23.10.2010 Due Date: 30.10.2010
Description: Yes we can

Notes

Add a new note...
Title: Note created on 23.10.2010 18:03 by Jukka Niiranen
23.10.2010 16:03 by Jukka Niiranen Edited 23.10.2010 16:03 by Jukka Niiranen
Note this

Activity Status: Open Last Updated: 23.10.2010 18:02 Modified By: [Jukka Niiranen](#)

Managing custom activities

The screenshot shows the Microsoft Dynamics CRM 2011 interface for managing activities. At the top, there's a ribbon bar with tabs: File, Account, Create Related, and Customize. Below the ribbon are several icons for different activity types: Attach File, Add Note, Task, E-mail, Phone Call, Letter, Fax, Recurring Appointment, Service Activity, and Other Activities. A callout bubble points to the "Other Activities" icon with the text "Create related activities".

The main area displays an account record for "Another Test Account". On the left, there's a navigation pane with sections: Information (General, Details, Administration, Notes), Activities (Open Activities), and a list of recent activities.

The "Activities: Open Activities" section has filters for Due (All) and Type (All). It lists various activities, each with a subject, regarding contact information, and status. A callout bubble points to this section with the text "View open activities".

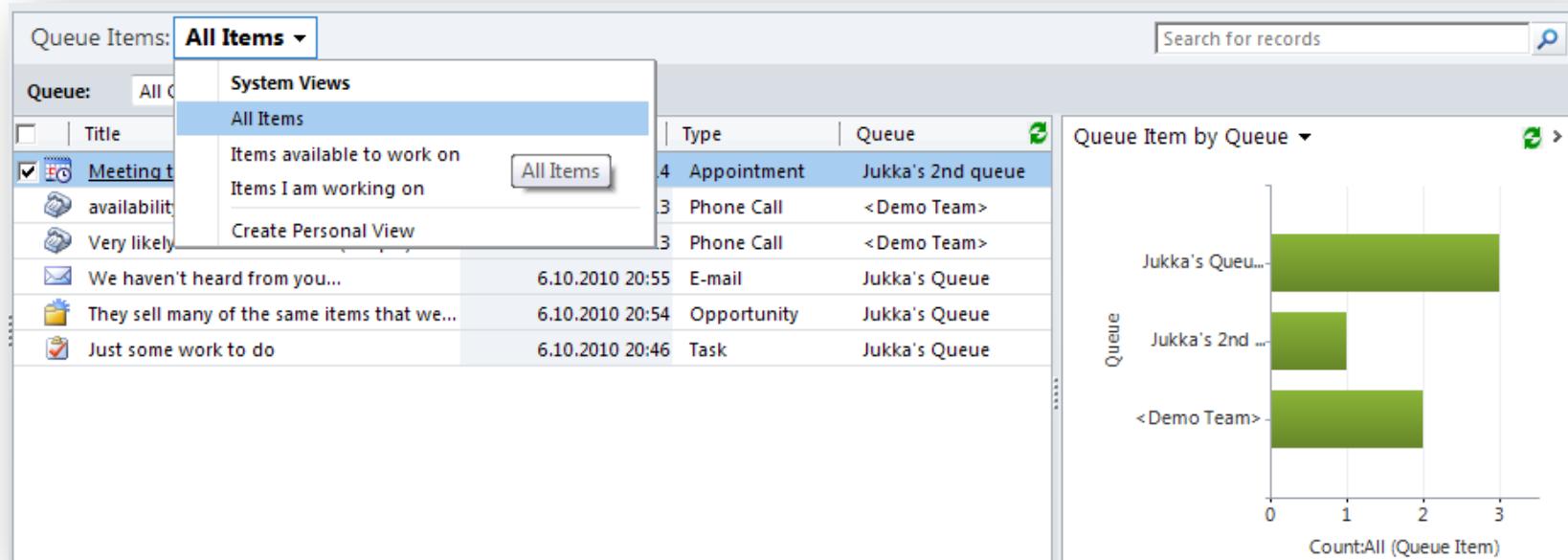
A detailed view of the activity list shows the following data:

Subject	Regarding	Type	Status	Normal
Access to power negotiated (sample)	Jukka Test Account	Phone Call	Open	Normal
Agree to above in Sponsor letter (sample)	Jukka Test Account	Task	Open	Normal
Another activity for an Order	Jukka Test Account	Appointment	Open	Normal
Another custom activity, for an Opportunity	Jukka Test Account	Service Activity	Open	Normal
Asked for business (sample)	Jukka Test Account	Campaign Response	Open	Normal
availability of Product catalogs (sample)	Jukka Test Account	Campaign Activity	Open	Normal
Call and say hi	Jukka Test Account	Recurring Appointment	Open	Normal
Cancel all subscriptions for Another Test Account	Another Test Account	Custom Activity	Open	Normal
Check sales literature for recent price list (sample)	Another Test Account	Custom Activity	Open	Normal
Custom activity for an account	Another Test Account	Custom Activity	Open	Normal

Queue enhancements

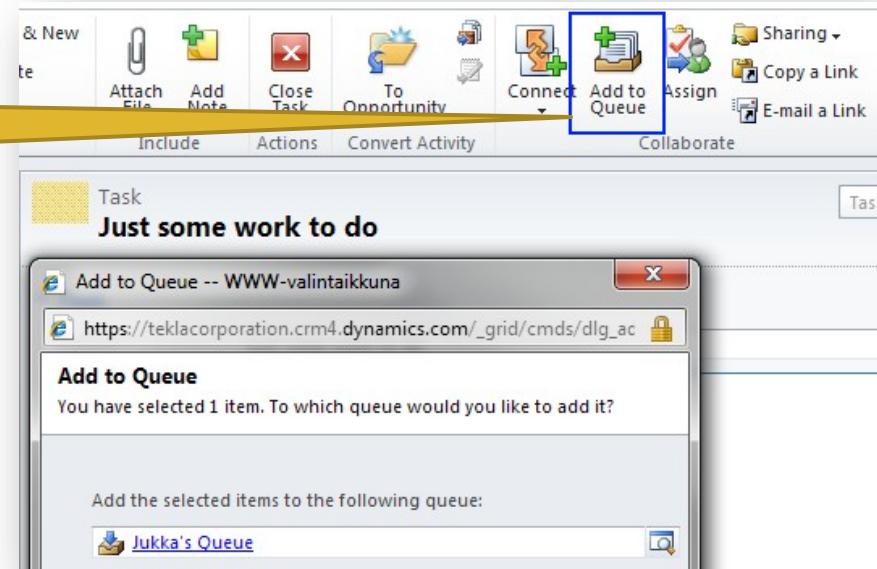
Queues in CRM 2011

- All customizable entities can be enabled for queues
- By default, queues are automatically generated for users, teams and business units
 - All of these can also be used for managing user rights

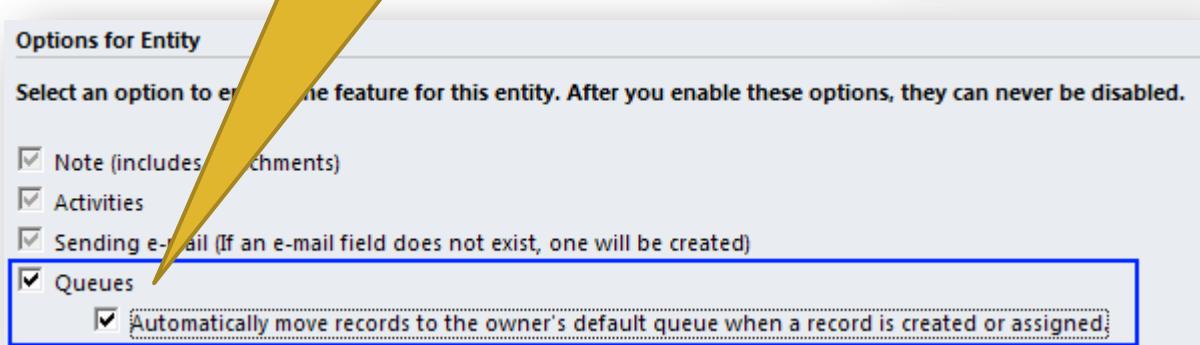


Adding record to queue

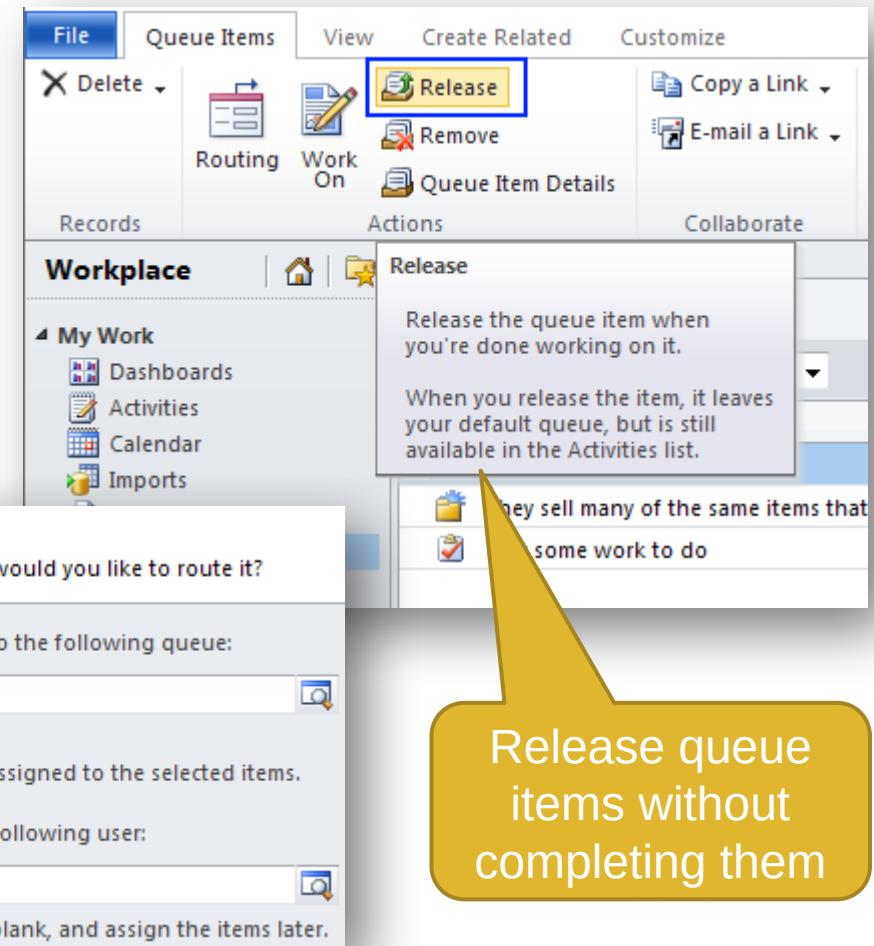
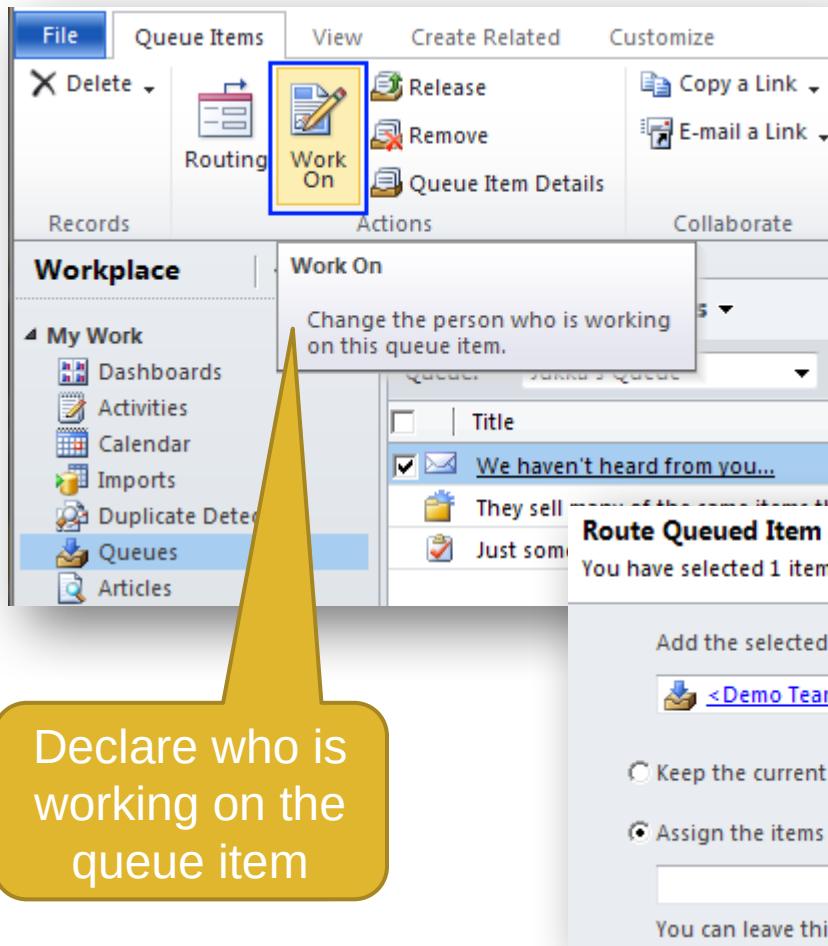
Manually add records to queue



Set all created & assigned records to appear in owner's queue automatically



Actions on queue items



Queue item entity

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The top navigation bar includes File, Queue Item (selected), and Customize. The Queue Item tab has several actions: Save, Save & Close, Copy a Link, E-mail a Link, Run Workflow, and Start Dialog. The main area is titled 'Queue Item' and contains the message 'We haven't heard from you...'. The 'Information' section has a 'General' tab selected. On the left, there's a 'Related' section with 'Common' (Audit History) and 'Processes' (Workflows, Dialog Sessions). The 'General' tab displays fields for Queue (Jukka's Queue), Worked By (empty), Entered Queue (6.10.2010, 20:55), and Modified On (6.10.2010, 20:55).

Workflows can be triggered
based on queue item
creation / update

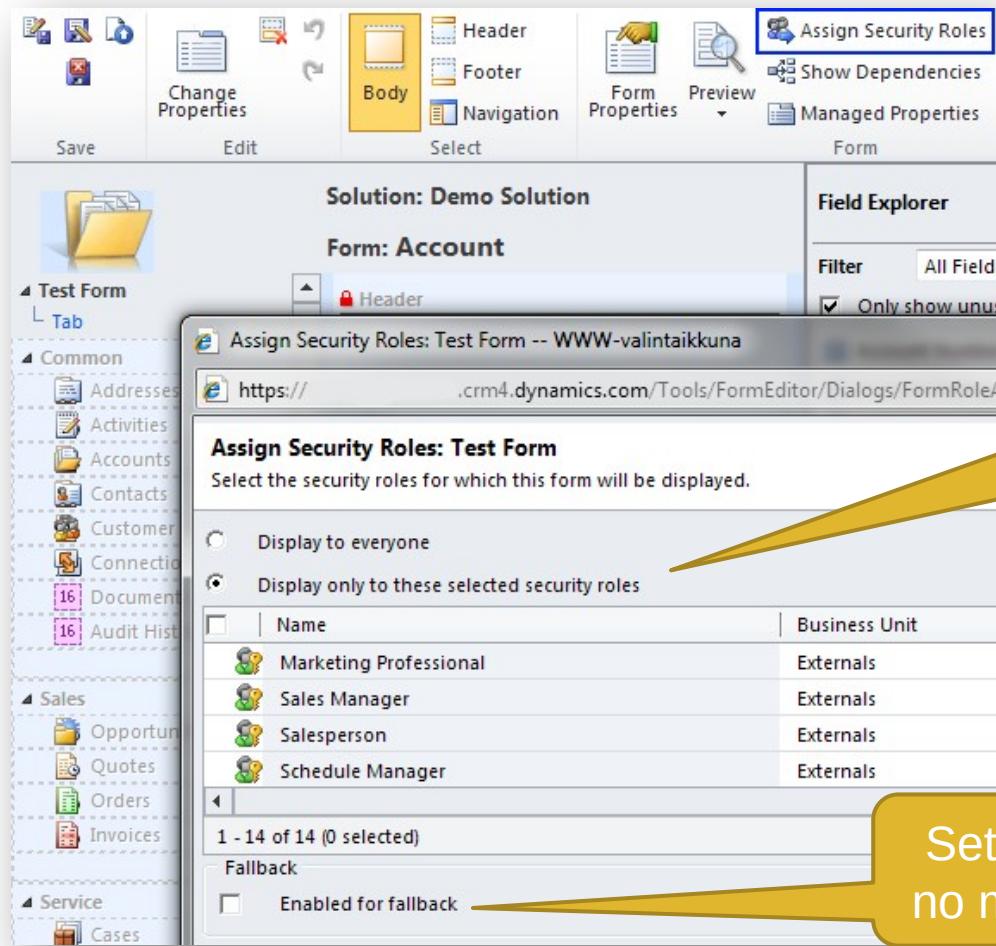
Check that someone is working on the item
Wait until Queue Item:Worked By contains data, then:
Create a task with worker info
Create: Task View properties

Multiple forms per entity

Role based forms

- Entities can now have more than one form
- Existing forms can be copied to create variations
- The form presented to a user is determined by the security roles assigned to available forms
- No support for "rule based forms", i.e. showing a form based on entity variable data
 - Show/hide scripts still needed to achieve the functionality

Managing form security roles



Determine security roles that are allowed to view the form

Set fallback form when no matching roles found

Managing form order

Define form display priority order when roles allow viewing multiple forms

Solution: Demo Solution

View: All Forms

Name	Form Type	State	Customizable	Parent Form
Test Form	Main	Unmanaged	True	
Information	Main	Managed	True	
Information	Mobile	Managed	True	

New X [16] Assign Security Roles [16] Form Order More Actions

Form Order -- WWW-valintaikkuna

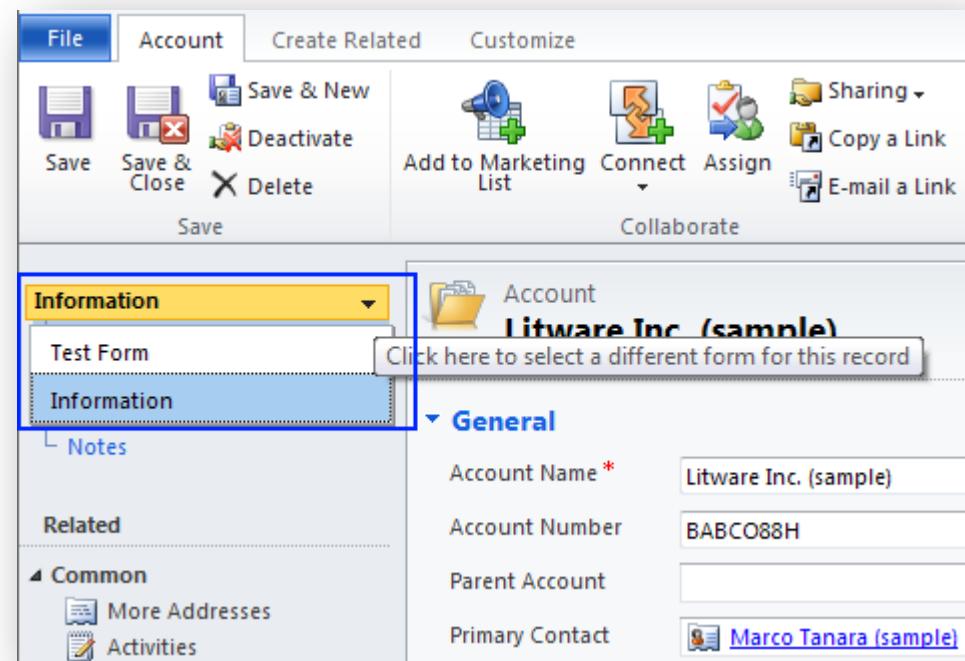
Form Order

Specify the order in which you would like the form set to be displayed. Depending on the user's role, only some of these forms will be visible.

Information	Test Form
-------------	-----------

Form selector

- When a user has the security roles that allow viewing more than one form, a form selector will be shown
- Form can be changed with onLoad script
 - Note: will cause the form to load again (and the onLoad event...)

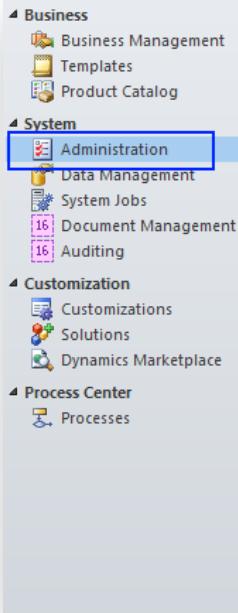


Security features

Field Level Security

- In addition to entities and forms, data visibility in CRM 2011 can be controlled also per field
- Applies to all components (reports, filtered views), data is never sent to client without access rights
- Field Security is not available for standard fields, such as contact address & name

Enabling field security



This block contains two screenshots. The top one is a list of Field Security Profiles, with 'Custom security profile' selected. The bottom one is a detailed view of the 'Custom security profile' profile, specifically the 'Users' tab where 'Jukka Niiranen' is listed as a user associated with the profile.

Create a Field Security Profile and assign it to users or teams

Enable Field Security in entity customizations

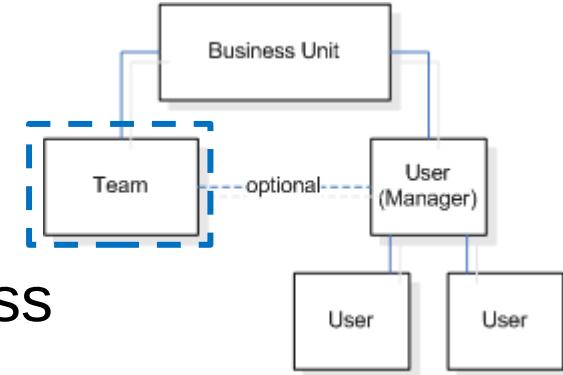
This screenshot shows the 'Schema' section of an entity customization. It includes fields for Display Name, Name, and a 'Field Security' section. In the 'Field Security' section, the 'Enable' radio button is selected.

This block contains two screenshots. The top one is the 'Field Permissions' screen for the 'new_customfield' field, showing it is assigned to 'Common' and 'Members' (Teams and Users). The bottom one is the 'Edit Field Security' dialog for the 'new_customfield' field, where the 'Read' permission is checked.

Set access rights per profile

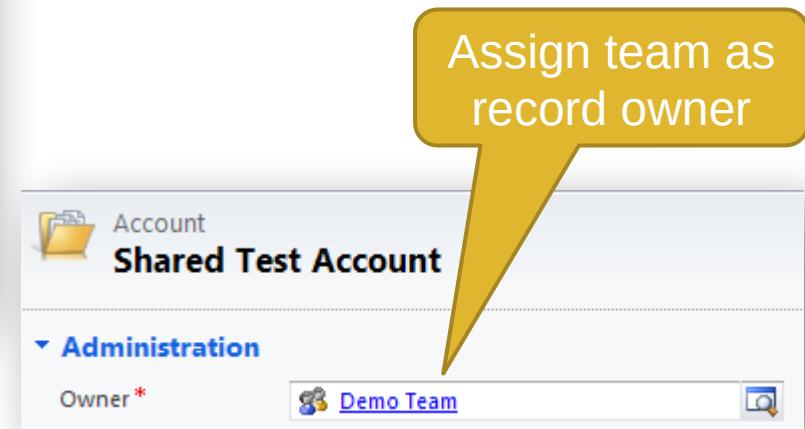
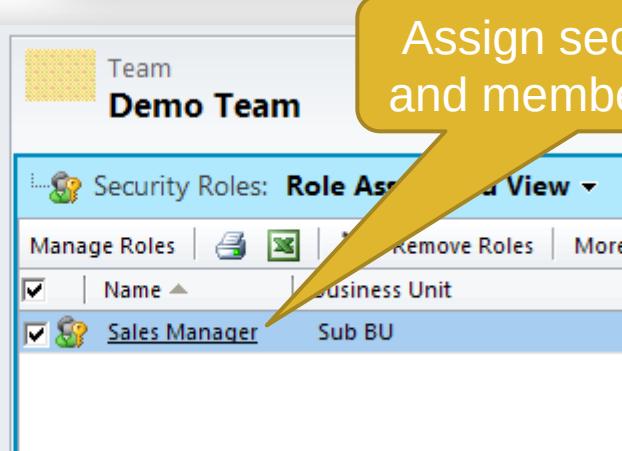
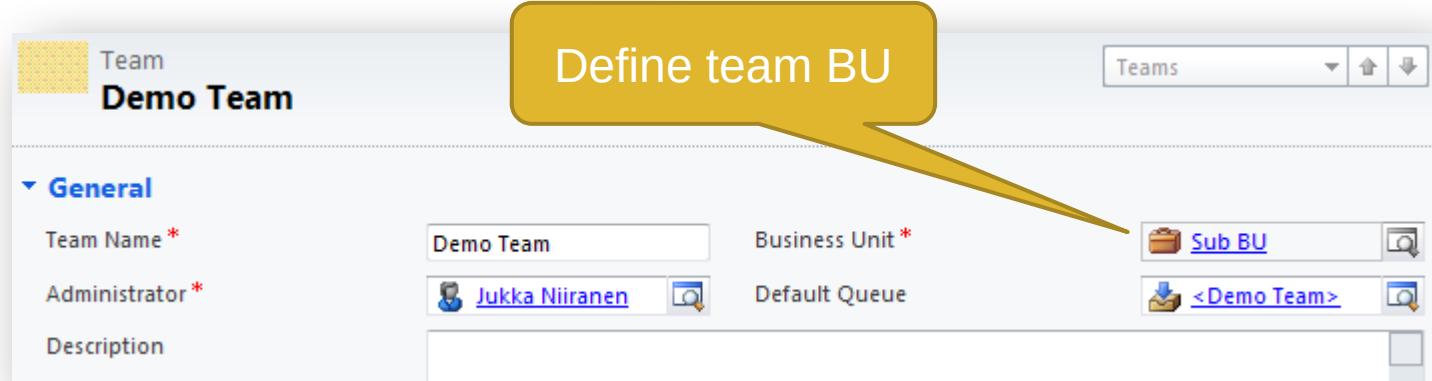
Team ownership

- New features:
 - Assign security roles to an entire team
 - Teams can own records
 - There is a default team for each business unit. All users in a business unit are members of this team
 - Access checks are **additive**. You can access entities based on the roles assigned to the user plus the roles assigned to the team a user is a member of. This allows a user to have privileges outside their business unit
 - Teams can be deleted



From Microsoft Dynamics CRM 2011 Beta SDK

Assigning records to teams



CRM Online enhancements

Code on the server

- Plug-in deployment to CRM Online allowed with isolated mode (sandbox)
 - Cannot access files, event log, network, etc.
- Custom workflow activities are not supported
- Plug-ins can consist of only a single assembly .dll
- Plug-in statistics available for monitoring the behavior of individual plug-ins in a hosted environment
 - Execution count, failure count, crash count

Custom applications

- Web Resources in solutions cannot execute code
- No support for .aspx pages, MS suggested solution is to host these pages on Azure
- Custom UI's could be built with HTML/jQuery or Silverlight, to allow packaging and distribution inside the solution file

Custom reports

- Custom SSRS reports can be uploaded to CRM Online
- However, no direct access is allowed to database views = no SQL data sources can be used
- FetchXML will be the primary method for building custom reports for CRM Online
- Runtime component available for SSRS, Fetch Authoring Extension for VS
- See post on MS CRM Team Blog for details:
 - <http://blogs.msdn.com/b/crm/archive/2010/10/19/getting-started-with-custom-reports-in-the-cloud.aspx>

Dynamics Marketplace

Marketplace features

- Integrated into the Settings menu in CRM
- Built on the existing Microsoft Pinpoint site
- Listings for add-on applications, professional services, hosting services
- CRM 2011 is not a requirement, thus available also for add-on applications that are not delivered as solution packages
- Initially no eCommerce functionality available for purchase and payment transactions

Marketplace in CRM

Settings | Home | Favorites

Dynamics Marketplace

Popular Newest

ADVANTAGE RMI Corpora

Apparel and Sunrise Tech

Asset Mana StarDyne Te

BRIX 2009 Aurigo Software Technologies Inc

Microsoft Dynamics Marketplace Beta

I'm looking for: Applications | Professional Services | Companies

Browse by Category - or - Search Applications... E-mail Hosting and M Go

You are browsing for E-mail Hosting and Management

Category: Communication, Mobile, E-mail > E-mail Hosting and Management

Establish a strong foundation for e-mail hosting and management. Better organize your e-mails and improve e-mail filtering practices for more efficient communications.

Apps Found: 4 Sort by Best Match

Email Marketing for Microsoft Dynamics CRM ★★★★☆(1)
Online Application & On-premises Application by: CoreMotives
Price: For Purchase
Send bulk email marketing from within Microsoft CRM and immediately know who is clicking and viewing your web pages. - Easily create professional-looking emails in minutes - Track clicks, bounces, unsubscribes, web visits - Save money by having all sends & responses... [Read more](#)

Product/Platform: Windows Azure Platform

Categories: Marketing Communications, Web Analytics, Usability Testing, E-mail Hosting and Management

ConnectED (0 Reviews)
Online Application by: SRC Technology Solutions
Price: For Purchase
ConnectED helps your organization to improve collaboration and drive real-world results by adopting a Customer Relationship Management (CRM) approach to the business of Industry Attraction and Business Retention / Expansion. The solution set was initially designed for the... [Read more](#)

Categories: Customer Service, CRM, Intranets, Extranets, Portals, Document Management, ... (more)

0/5

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Marketplace listing contents

**RATED
4.0**

★★★★★
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[General Information](#)

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Email Marketing for Microsoft Dynamics CRM

by CoreMotives

APP TYPE:	Online Application, On-premises Application
CATEGORY:	Marketing Communications, Web Analytics, Usability Testing, E-mail Hosting and Management
WORKS WITH:	Microsoft Dynamics CRM, Microsoft Dynamics Live CRM
INDUSTRY FOCUS:	General - Applicable to All
PRODUCT/PLATFORM:	Windows Azure Platform

[App Overview](#) [Reviews](#) [Company](#)

Email Marketing for Microsoft Dynamics CRM has an overall rating of ★★★★☆ from 1 customer.

[Submit A Review](#)

The views and opinions submitted and expressed here are not those of Microsoft.

Sort by: [Newest First](#) [Oldest First](#) [Highest Rated](#) [Lowest Rated](#)

Highly integrated tool for smart email campagins and beyond

4.0 OVERALL RATING ★★★★☆

REVIEWED BY: Jukka_CRM REVIEWED ON: 7/27/2010

PROS

The Email Marketing module from CoreMotives really fits well into the CRM user experience, due to the fact that it has been designed to work inside Dynamics CRM, unlike some other competing products where the CRM integration has later on been added as a feature. Flexible pricing without user or server licenses helps drive wider adoption beyond just the marketing department.

CONS

The retrofit to CRM version 3.0 created some usability issues

PRICE:	★★★★★
DEPLOYMENT TIME:	★★★★★
NEEDS MET:	★★★★★
COMPATIBILITY:	★★★★★
PERFORMANCE:	★★★★★

Listing requirements

- Two separate categories for applications:
 - Certified for Microsoft Dynamics (CfMD)
 - Community-rated solution
- Requirements for certified applications
 - Application must pass the CfMD software tests
 - 10 customer references
 - MS Gold Certified Partner status
 - Sure Step certification exam
 - Escrow service must be used for storing IP assets such as source code and documentation

Azure

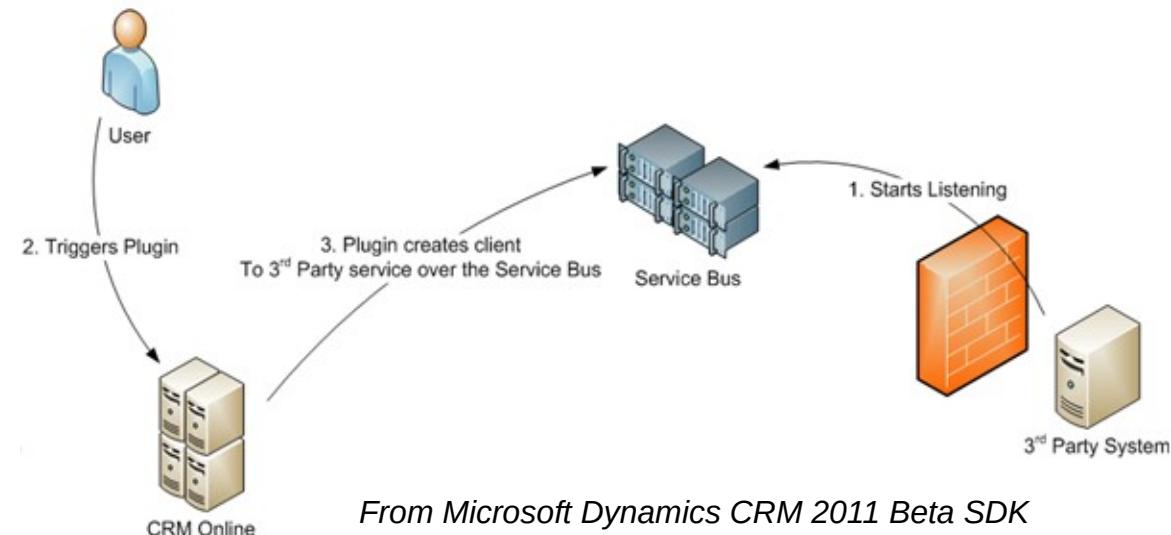
AppFabric

- Service Bus for messaging between applications
 - Bridges on-premises and cloud applications
 - Exposes applications through corporate firewalls
- Access Control Service for authentication
 - Windows Identity Foundation (WIF) integration
 - Supports OAuth, OpenID, Windows Live ID, Google, Facebook...
 - On-premises requires purchase of a private certificate, Online certificate available from MS



Integration through Service Bus

- CRM 2011 Online event execution pipeline has been exposed to AppFabric Service Bus
- Allows posting data processed in CRM events to Service Bus through a CRM plug-in
- Can be used for integration scenarios where CRM Online must exchange data with on-premises applications



Upgrading

System requirements

- Server
 - Only 64-bit SQL and IIS servers are supported
 - Windows Server 2008, SQL Server 2008
 - Exchange 2003, 2007, 2010, Online (optional)
 - SharePoint 2007, 2010 (optional)
- Client
 - Office 2003 (SP3), 2007, 2010
 - Internet Explorer 7, 8 (Beta does not yet support IE9)
 - 32-bit or 64-bit

Upgrade paths

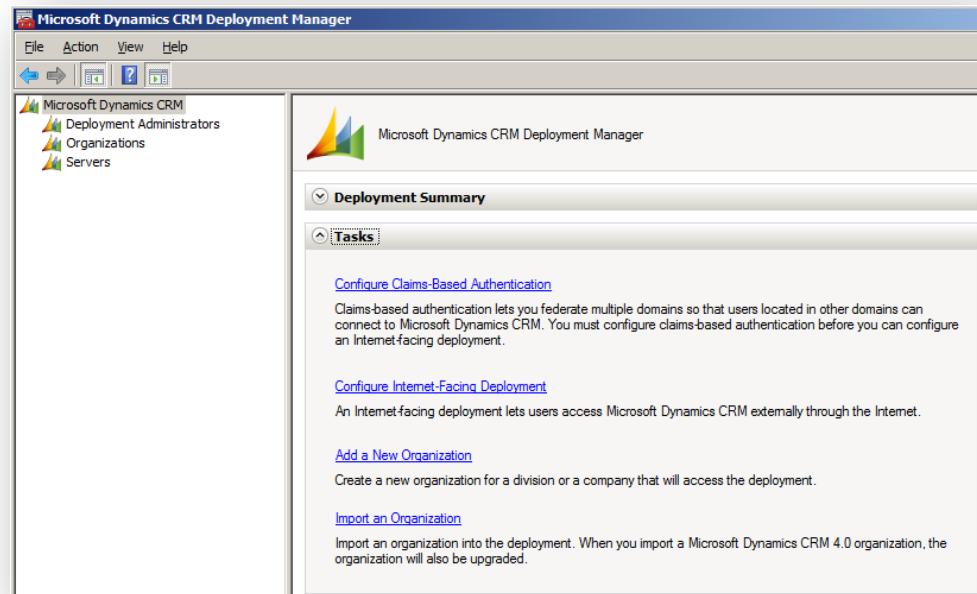
- Migration
 - Recommended option, allows import per organization
 - Old CRM4 instance can remain operational during upgrade
 - Separate SQL Server instances required
- Connect to existing
 - Install new CRM server, upgrade existing SQL database
- In-place
 - Most simple process, but old server environment must meet 2011 requirements
- CRM 3.0 environments must first be upgraded to CRM 4.0 (can use trial version)

Client upgrade

- CRM 4.0 Outlook clients (UR7+) are compatible with CRM 2011 server
- CRM 2011 clients are NOT compatible with CRM 4.0 server
- New client cannot be pre-deployed, client upgrades to be performed after server upgrade
- CRM 4.0 Offline client changes can be updated to CRM 2011 server, but Go Offline is not available for CRM 4.0 clients after server upgrade

CRM 4.0 / 2011 customizations

- You can't directly import CRM 4.0 customizations into CRM 2011 system
- However, you can import a CRM 4.0 organization through the Deployment Manager



Accelerators

- New versions of the accelerators will be released, as stated by Microsoft
- However, unlikely to be available at CRM 2011 RTM/RTW
 - Latest estimate: 6 months after CRM 2011 RTW
- Upgrading an existing CRM 4.0 instance to CRM 2011 with the accelerator components installed may work, but there's no guarantee on functionality

Virtual machines for CRM 2011

- Everything is x64 now (IIS, SQL) = no more MS Virtual PC or MS Virtual Server images
- Hyper-V is an option if you're running Windows Server 2008 on your PC
- If not, go for Oracle (Sun) VirtualBox
- Creating a virtual machine with VirtualBox:
 - <http://crmscape.blogspot.com/2010/09/creating-ms-crm-2011-vm-part-1-of-2.html>

Code compatibility

Web service

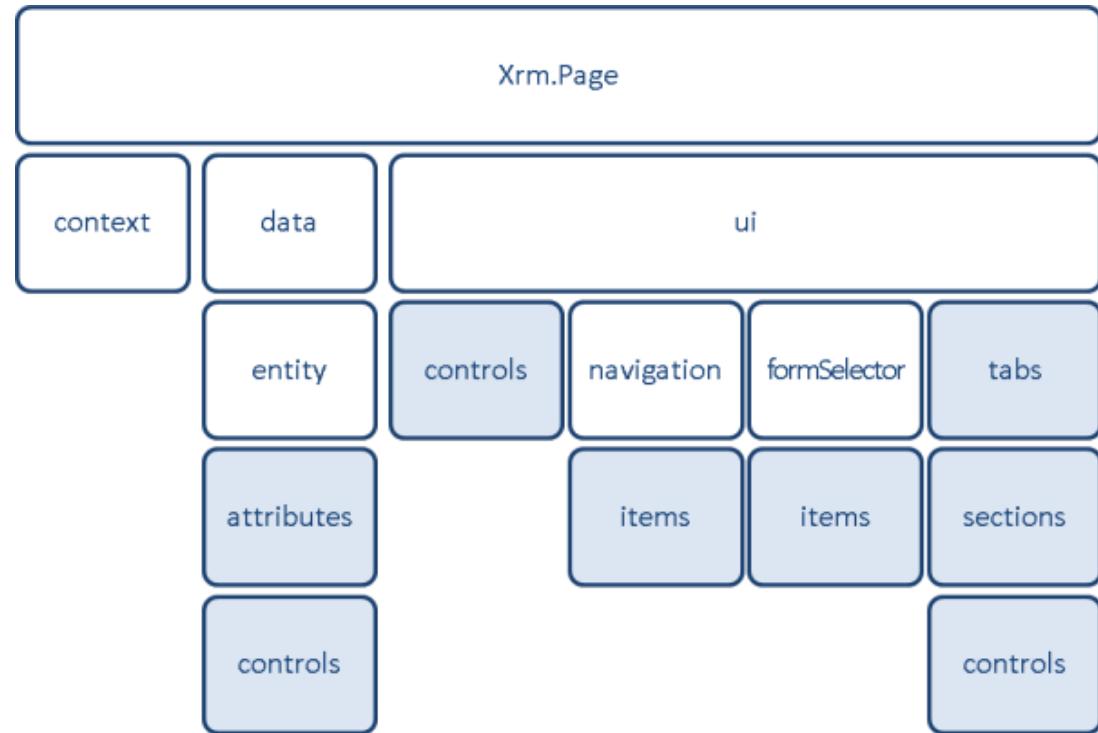
- CRM 4.0 web service endpoint (2007) is supported, CRM 3.0 (2006) is not available
- Web service authentication through WCF

Plug-ins

- Sandbox (isolation mode) not available for CRM 4.0 plug-ins
- CRM 3.0 plug-ins (callouts) are not supported

crmForm object is deprecated

- Xrm.Page object is the new namespace
- crmForm backward compatibility but with limited features



From Microsoft Dynamics CRM 2011 Beta SDK

Form scripts

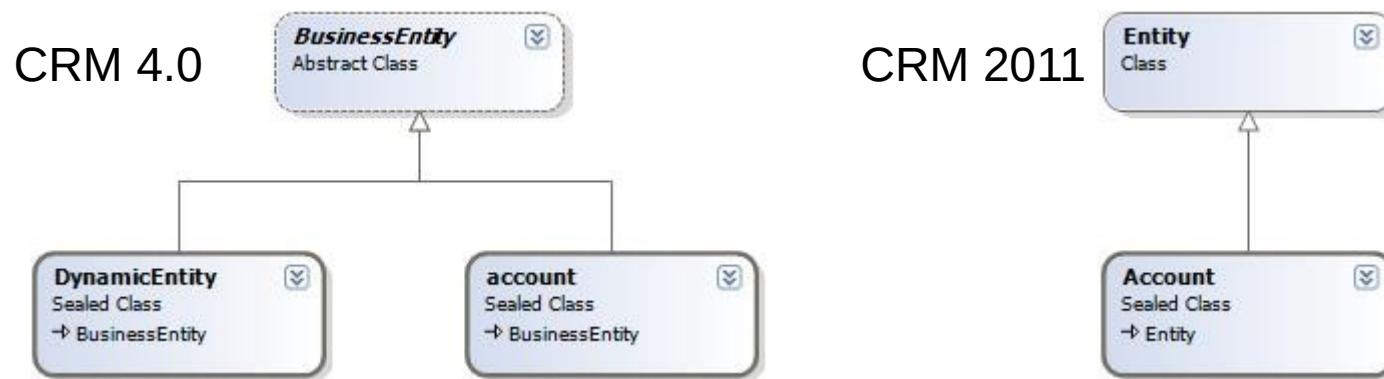
- Changes in the Client API scripting model and namespaces
 - Old: var AccName = crmForm.all.name.DataValue
 - New: var AccName =
Xrm.Page.getAttribute("name").getValue()
- Javascript converter for CRM 4.0 scripts:
<http://crm2011scriptconvert.codeplex.com/>
- During the upgrade from 4.0, old form scripts will be converted into .js Web Resources

ISV folder is deprecated

- Calling the 2011 Web services from the <crmwebroot>\ISV folder is no longer supported
- Custom ASPX pages in the ISV folder work after CRM 2011 if they meet the criteria listed in SDK

No more Dynamic Entity

- Dynamic Entity has been replaced with the base class Entity



From Microsoft Dynamics CRM 2011 Beta SDK

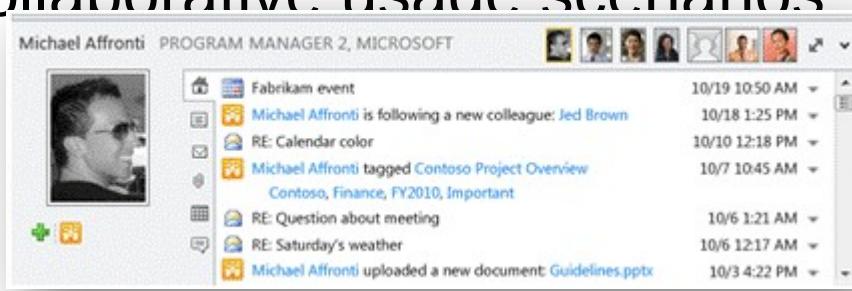
What's not there

Search improvements

- No Outlook / Windows Search type of “global search” functionality for searching across different entities
- No “Google style” full text search for using multiple search terms in same search field
- Indexing CRM data with SharePoint through BDC (2007) / BCS (2010) can be used to overcome the search functionality limitations

Activity streams

- Microblogging á la Yammer or Salesforce.com Chatter is not a Dynamics CRM feature
- SharePoint 2010 activity streams are the closest match in Microsoft's portfolio, integration with CRM data and events could possibly bring more “Enterprise 2.0” flavor to Dynamics CRM in collaborative usage scenarios



A screenshot of the Vibe by Sonoma Partners application window. The title bar says "Vibe by Sonoma Partners v0.9.0.6". The main area is titled "My Feed" and shows a search bar with "blackhawks". Below the search bar are several filter options: "Content" (set to "blackhawks"), "Author" (empty), "Mentions Feed" (empty), "On Or After" (set to "Select 15"), and "On Or Before" (set to "Select 15"). The feed itself contains five entries from different users: pmajer, rtoenies, pmajer again, pmajer again, and ameyers. Each entry includes a small profile picture, the user's name, the date and time of the post, a brief message, and a link. At the bottom right of the feed area, it says "4 Responses". At the very bottom of the window, it says "Powered by Microsoft Dynamics CRM Developed by Sonoma Partners".

Example of microblogging add-on for Dynamics CRM:
[Vibe by Sonoma Partners](#)

Social media integration

- Social CRM is a huge trend, but Microsoft has not included out-of-the-box connectivity to any social networks in Dynamics CRM 2011
- Outlook Social Connector does integrate with CRM Outlook client reading panes, but the data is purely inside the Outlook client, not trackable to the CRM database
- Updated Accelerators expected, will offer some level of social media integration
 - Current CRM 4.0 Accelerator was not updated after Twitter switched to OAuth in August...

Customer fields

- You can't create a Customer field that would act in the same way as the fields on default entities like opportunities etc.
- However, creating a new custom activity entity automatically adds such a field
- Currently there is no supported way for limiting the existing customer fields' entity types or setting defaults on the OOB entities
 - 4.0 scripts not compatible in 2011

Auto-numbering

- Custom solutions still needed for providing numbering on most entities, such as accounts
- Open source solutions may emerge quickly, as this is such a common requirement & readily available in competing CRM products
- BTW: no calculated fields in CRM 2011 either

Set Auto-Numbering
Specify prefixes for these entities. Select suffix length for the eligible entities.

Contracts	Cases	Articles	Quotes	Orders	Invoices	Campaigns
Prefix * <input type="text" value="CNR"/>						
Number <input type="text" value="1000"/>						
Suffix Length <input type="text" value="6"/>						
Preview	CNR-01000-AS7FX3					

Mobile client enhancements

- As of CRM 2011 Beta, the Mobile Express client appears to have the exact same functionality as before
- Windows Phone 7 integration with CRM Online is expected to be announced, other platforms may need to rely on ISV client applications

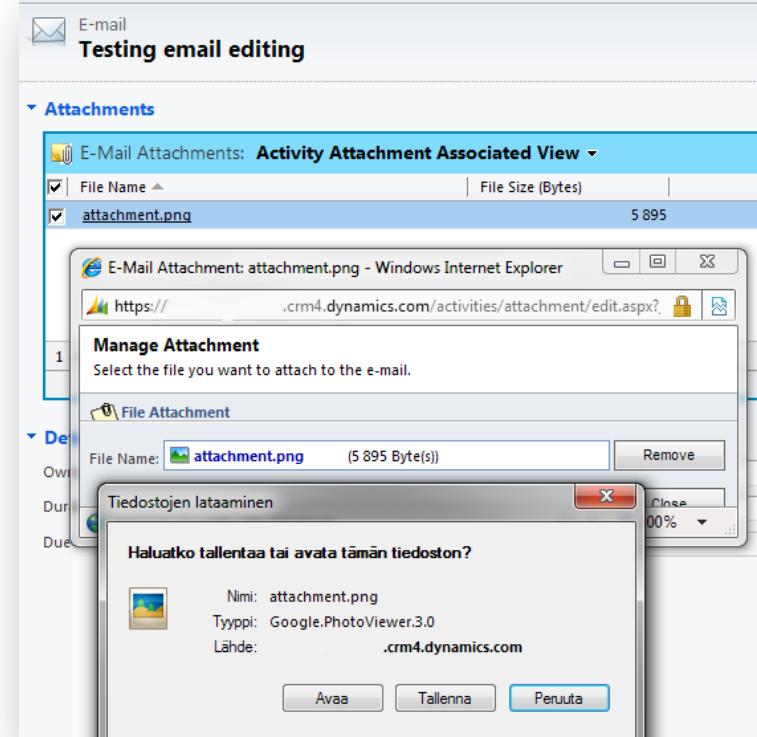


This screenshot shows the 'My Active Accounts' list page. It has a header with 'Corporation' and 'Sign Out'. Below that is a search bar with 'My Active Accounts' dropdown, 'Go' button, and 'Search' button. The main area is titled 'My Active Accounts' and lists accounts with columns for 'Account Name' and 'Main Phone'. The list includes 'A Store new name', 'Advanced Components (sample)', 'Affordable Equipment (sample2)', 'Another Test Account', 'Basic Company', 'Best o' Things (sample)', 'Blue Company (sample)', 'Designer Goods (sample)', and 'Elemental Goods (sample)'. At the bottom, there are buttons for 'Page 1 >' and 'New'.

This screenshot shows a contact creation form. The header says 'Corporation' and 'Sign Out'. The title is 'Contacts > Person, Test'. The form has fields for 'Last Name*' (Person), 'First Name+' (Test), 'Job Title', 'Role' (with a dropdown menu showing 'Decision Maker', 'Employee', and 'Influencer'), 'E-mail', 'Fax', and 'Address 1: Street 1'. There are 'Save' and 'Cancel' buttons at the top right.

Email editor enhancements

- As of CRM 2011 Beta, email editing experience in the web client remains the same as CRM 4.0
- No spell checker, user signatures, multiple attachment selection, attachment preview



Hyperlinks in workflow emails

- Feature for including hyperlinks to regarding records in workflow email body text was dropped from CRM 2011
- Custom workflow activities need to be developed for achieving the hyperlinking feature in workflows
 - However, CRM Online will not support custom workflow activities
- Other workarounds known previously, like storing GUID's into entity attributes, can still be utilized

Follow-up activities

- As a result of the deprecation of form assistant, there is no longer a built-in functionality for creating a follow-up activity
- Custom solution could be built with the new Process Dialogs
- However, since Dialogs don't support many field types (such as datetime), implementing identical functionality may be difficult

Thanks for viewing!

Working with Microsoft Dynamics CRM, day in day out



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Outlook 2007 with Dynamics CRM 2011: will it blend?

2 comments

Posted on 16th September 2010 by Jukka Niiranen in Features

CRM 2011, Office, Outlook, UI

Perhaps the most visible improvement in Microsoft Dynamics CRM 2011 for the end user is the completely revamped Outlook client. Instead of merely wrapping the CRM web client UI inside the Outlook frame with stripped navigation and giving you the all important tracking buttons, the new Outlook client promises additional usability features over the web client. In the demos we've seen, things certainly do look pretty with Outlook 2010, but one question remains: will it blend with the previous versions of Outlook?

Here's a reminder of what Dynamics CRM 2011 Outlook client delivers with Outlook 2010:

The screenshot shows the Microsoft Dynamics CRM 2011 Outlook client interface. The ribbon menu is visible at the top with tabs like Opportunities, View, Create Related, Customize, etc. Below the ribbon is a toolbar with icons for Settings, Reverse Sort, Add Column, Expand/Collapse, and Arrangement. The main area displays a list of opportunities. A filter bar at the top of the list allows searching by topic, potential customer, edit close date, edit revenue, and probability. The list includes items such as '18 Touring bike & thin summer', '25 Mountain bikes and at least 5 road bikes. Some inter...', '25 Road Bikes next quarter', '39 Bike orders - probably road and touring.', '24 road bike road', '4 Lower level touring bikes', '44 High end road bikes', '5 Road-250 bikes: Needs a discount to get him on board.', '5 Touring Bikes - medium and lower level', and '50 mountain bikes'. Each item has a small thumbnail image, a title, and a detailed description below it.

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About this site

I'm a Microsoft Dynamics CRM specialist from Finland, having worked with the system since 2005. Occasionally when I have a thing to say about the topic, I may post it on my CRM blog, [tweet it](#), save it to [CRM links](#) or bookmark it on [Delicious](#).



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Microsoft BPOS waiting for Exchange 2010 update over a year now, whereas CRM 2011 should launch Online before on-premises.

Hmm... #MSDYNCRM

from Eteläinen, Helsinki

10 Oct



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Video of MS CRM 2011 Online reporting features: <http://t.co/ZzoJ5mN> Includes FetchXML export to VS, embedding RDLs to dashboards #MSDYNCRM

9 Oct



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Finally! Dynamics CRM 2011 now displays the total number of records in the view ("1-50 of 99") #MSDYNCRM #CRM2011 <http://yfrog.com/6z7oup>

6 Oct



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Date fields not supported in Dynamics CRM 2011 process dialogs: <http://bit.ly/crM9cl> - Well, there goes my use cases then #MSDYNCRM #CRM2011

5 Oct