Customize the Help experience MS CRM 2015

Microsoft Dynamics CRM has a knowledge base application built in for online help. This help is hosted on the Customer Center, a central location where users can find articles, videos, eBooks, best practices, and tips regarding topical issues.

In addition to the built-in help, Microsoft Dynamics CRM offers customizable help and tooltips to provide contextual information to users filling in forms. You can replace default Help with the custom Help of your choice, at the global (organization) level or entity level. Custom Help makes the content exposed through the Help links more relevant to the user's day-to-day activities. With a single, global URL you can override the out-of-the-box Help links for all customizable entities. Per entity URLs override the out-of-the-box Help links on grids and forms for a specific customizable entity. You can include additional parameters in the URL, such as language code and entity name. These parameters allow a developer to add functionality to redirect the user to a page that's relevant to their language or the entity context within the application. The entity level custom Help settings are solution aware, therefore you can package them as a part of the solution and transport them between organizations or distribute them in solutions. Custom tooltips provide the ability to set the text that appears as a tooltip when the field is displayed in a form. Tooltips are also solution aware.

> Note
>
> **Customizable Help is not available in Microsoft Dynamics CRM for tablets.**

Example of a custom URL at a global level

You have a dynamic Help server to serve the Help content for the custom entities. Your solution almost entirely consists of the custom entities. You can specify the . aspx page that points to the Help server and pass the parameters in the URL. You can program the Help server to display the correct Help page based on the parameters passed.

Example of a custom URL at an entity level

You have a static set of Help webpages for the custom entities and customized out-of-the box (OOB) system entities. For example, you have added only two or three custom entities and heavily customized the opportunity entity. The rest of the OOB system entities remained unchanged. In this case, you can override the Help content for the custom entities and the **Opportunity** entity and use the default Help for the rest of the entities in your system.

As an administrator, you can use the settings to override default Help at the global level, in **Microsoft Dynamics CRM** > **Settings** > **Administration** > **System settings** > **General** tab, as shown here.

System Settings

Set system-level settings for Microsoft Dynamics CRM.

General	Calendar	Formats	Auditing	Email	Marketing	Customization	Outlook	Reporting	Goals	Sales	Service	Synchronization

☑ Enable country/region code prefixing   Country/Region Code Prefix +1

Set the telephony provider

Select provider for Click to call

⦿ Skype   ◯ Lync

Set whether users see CRM for tablets message

Users see app download message   ⦿ Yes   ◯ No

Set custom Help URL

Use custom Help for customizable entities   ⦿ Yes   ◯ No

Global Custom Help URL:

Append Parameters to URL   ⦿ Yes   ◯ No

To override the default Help for an entity, use the settings in **Microsoft Dynamics CRM** >
Settings > **Customization** > **Customize the system** > **Components** > **Entity** > **General** tab.
You must first enable custom Help at the global level.

General	Primary Field

☐ Automatically move records to the owner's default queue when a record is created or assigned.

Data Services

☑ Allow quick create
☑ Duplicate detection
☐ Auditing
⚠ This entity will not be audited until auditing is enabled for the organization.

Outlook & Mobile

☑ CRM for phones
☑ CRM for tablets
☐ Read-only in CRM for tablets
☑ Reading pane in CRM for Outlook
☑ Offline capability for CRM for Outlook

Help

☑ Use custom Help

Help URL:

⚠ To use this option, first set the option to use custom Help on the General tab in System Settings.

† - After you enable this option it cannot be disabled.

To append the parameters to a URL, set **Append Parameters to URL** in the **System settings** > **General** tab to **Yes**. Specify the parameters that will be attached to the URL:

- User Language Code: *userlcid*

- Entity Name: *entity*

- Entry Point: *hierarchy chart* or *form*

- Form Id: *formid*