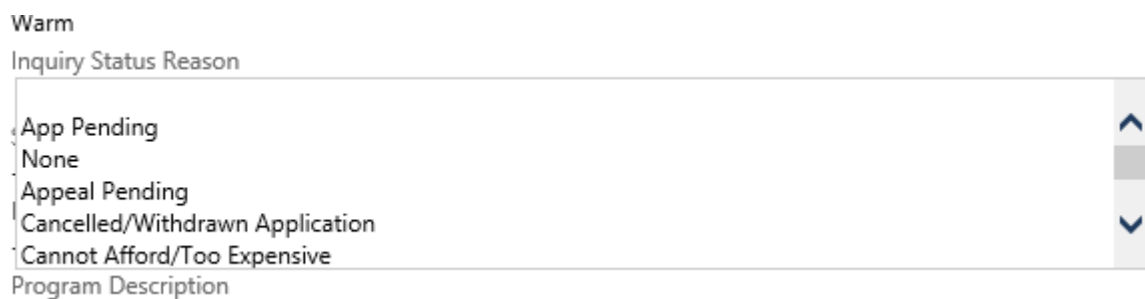


Understanding Global Option Sets in Dynamics CRM

Global option sets are extremely useful for developing in Dynamics CRM according to best practices in system architecture. In this blog we'll cover what is an option set and how to create an option set.

What is a Global Option Set?

Often referred to as “dropdown” or a “pick-list” option sets are a field type that can be created within Dynamics CRM. An option set is a list of defined options that can be selected by a user to capture specific information, unlike a text field where the data can be “organic” or manually entered.



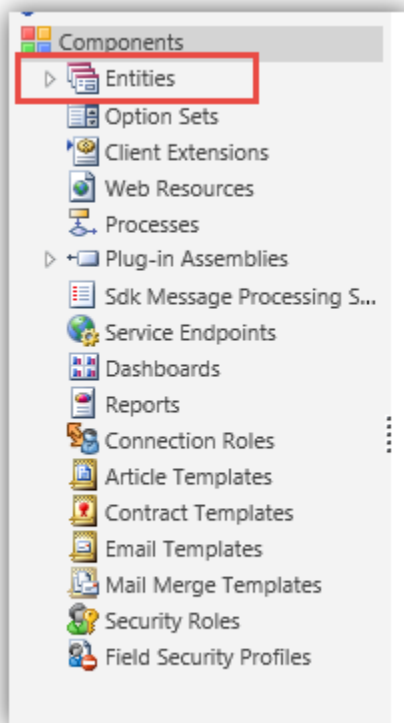
A “global” option set is functionally exactly the same as an option set, but after a global option set is created it can be reused in any entity as well as in any option set type field.

Creating a Global Option Set

Under Settings – Customizations – Customize the Solution – select the Option Sets Tab.

Select “Option Sets” from the left.

Selecting this will show a view of all the global option sets that have been created within the solution.



Click “New” in the top left corner to create a new option set.

Option Set

New

Schema

Display Name *

Name *

Description

Options

Label *

Value *

Description

Fill out the following fields

Display Name: This is a field that must be populated. This display name is what appears to the user when adding the option set to a field. Note: Make sure to give option sets an identifiable display name to make it easier to find. The Name field is automatically populated after the “Display Name” contains data. This is the schema name of the option set.

Selecting the “+” (plus sign) will add an “Item” option.


After clicking the “plus sign” the label will be “Item” rename this to the appropriate option name. Continue clicking “plus sign” until all the options needed are created. The Value field is automatically populated after selecting the “plus sign”.

After all appropriate fields, options, labels are populated save and close the form and a global option set is created.

How to Add a Global Option Set to a Form

This option set is not on any form yet. This option set must be added to the form.

Schema

Display Name *	<input type="text"/>	Field Requirement *	Optional <input type="button" value="v"/>
Name *	<input type="text" value="po_"/>	Searchable	Yes <input type="button" value="v"/>
Field Security	<input type="radio"/> Enable <input checked="" type="radio"/> Disable		
Auditing *	<input checked="" type="radio"/> Enable <input type="radio"/> Disable		
	 This field will not be audited until you enable auditing on the entity.		
Description	<div></div>		

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

Type

Type *	<input type="text" value="Option Set"/> <input type="button" value="v"/>	
Use Existing Option Set	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Option Set *	<input type="text" value=""/> <input type="button" value="v"/>	<input type="button" value="Edit"/> <input type="button" value="New"/>
Default Value	<input type="text" value="Unassigned Value"/> <input type="button" value="v"/>	

When creating a new field on a CRM form, set the type to “Option Set” will prompt a “Use Existing Option Set” yes or no question. Selecting “Yes” will allow the use of global option sets. Select the option set that was created to use within that field.