ADX Portal:-

**Create menu**

**Portal => Web Link Sets => Primary Navigation =>**

{ Links => Add(+) }

* { Name, Publish State , Page , Display Order }

**Create a Page**

**Portal => Web Page => New =>**

* { Name, Website, Parent Page, Partial URL, Page Template, Publish State , Web Form/Entity List/Entity Form }

**Create a Entity Form**

**Portal => Entity Form => New =>**

* { Name, Entity Name, Form Name, **Mode(insert/Edit/ReadOnly)** , Website }

**Create a Entity List**

**Portal => Entity List => New =>**

* { Name, Entity Name, Website, View(Advanced Find/…) , Page Size,

Web Page for Details View , Search }

////////////////////////////////////////////////////////////////////////////////////////////////////////

**Create Web Role**

**CRM**

# **Plug-ins vs. Workflows in Microsoft Dynamics CRM**

**Workflows**

* want to achieve simple tasks faster, such as **sending an e-mail or creating / updating assigning records**. These actions can be set up very quickly with a workflow without any need of writing code.

**plug-ins**

* you need to manipulate data before is saved.
* you need to make validations before submitting the operation.
* you want to be able to cancel an operation based on your validations.
* immediate response to the user is needed.

Synchronous vs. Asynchronous Plug-ins

1. **Synchronous** Triggering event will wait until the plug-in finishes the execution.

For example, if we have synchronous plug-in that triggers on the creation of account and user creates account record in CRM, the form will hang at save until the plugin has finished.

1. **Asynchronous** plug-ins are executed by asynchronous service. Asynchronous plug-ins allow triggering event to finish before plug-in code runs. Therefore these can never be used to prevent an action, validate data entry, or provide any error messages back to the user.

# New Features in Microsoft Dynamics CRM 2016

**Document Generation**

**Updated Case Form**

**“Next Generation” Search:**