MS Dynamics CRM 365

Customizing Forms

Lesson Objectives

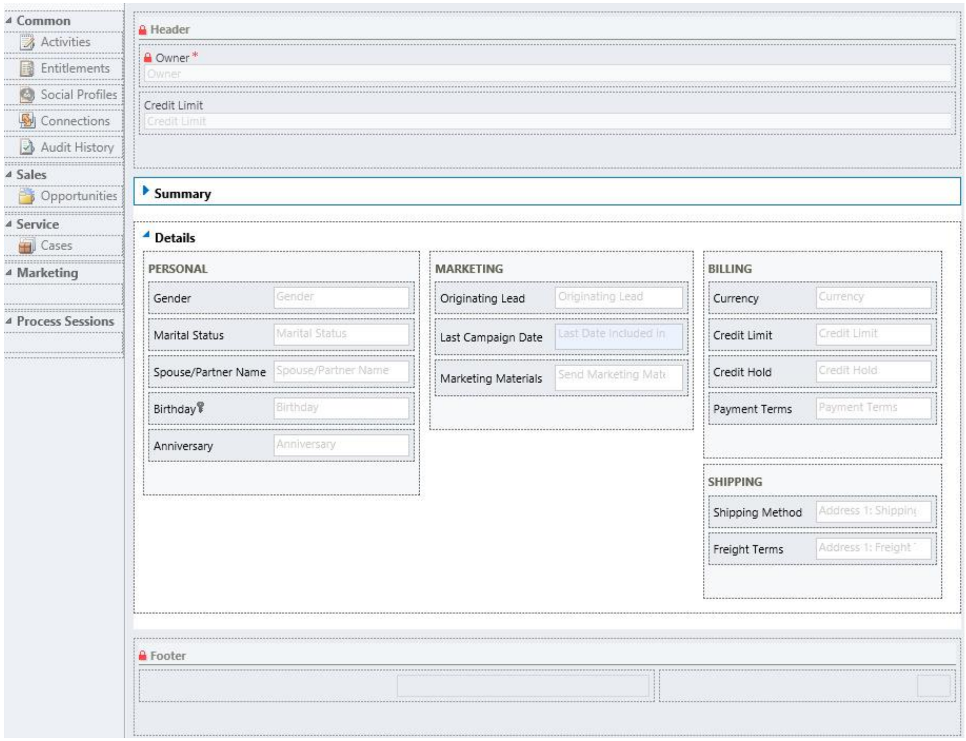
- Dynamics 365 Form Types
- How to Build Dynamics 365 Forms
- Specialized Form Components
- Using Access Teams and Sub-Grids for Record Sharing
- Working with Multiple Forms

Form Types

- Main
  - Used by browsers, Outlook and Dynamics 365 mobile clients
- Quick Create
  - Shortened version of forms for easy record creation
- Quick View
  - Simplified form to view parent record information

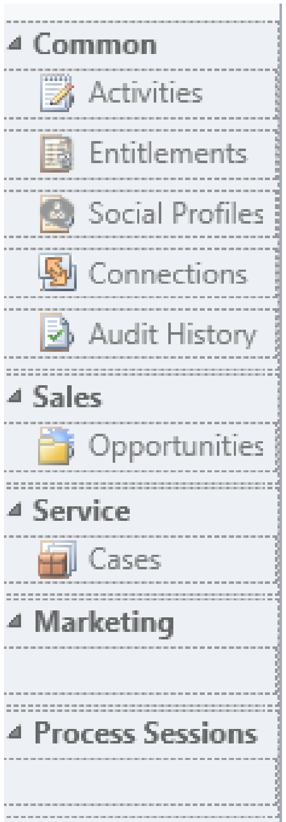
Structure of a Form

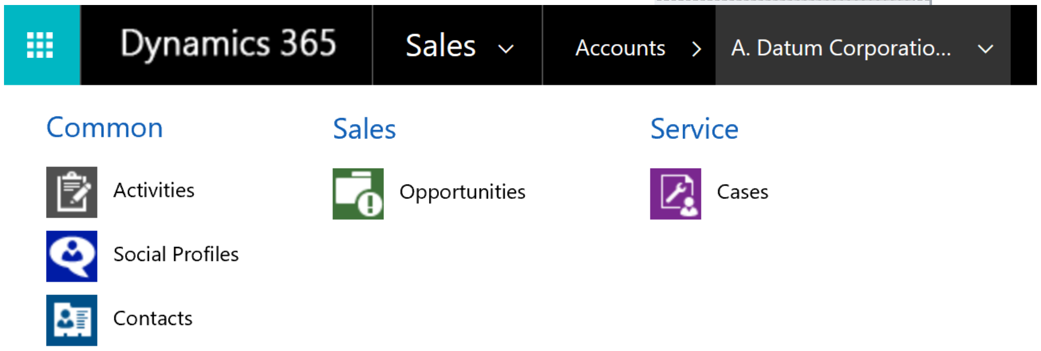
- Header
  - Data in the fields can be modified
- Footer
  - Fields are read-only
- Body
  - Contains tabs, sections, fields, and other components
- Navigation
  - Allows navigation to related entities, and custom components



Related Entity Navigation

- Navigation shown on the left in Form Editor
- Displayed in Navigation Bar from left to right
- Add links from Relationships are available
  - All 1:N and N:N relationships are available
- Drag to change order and grouping
- Group can be renamed but no new groups can be created
  - Empty groups are not displayed



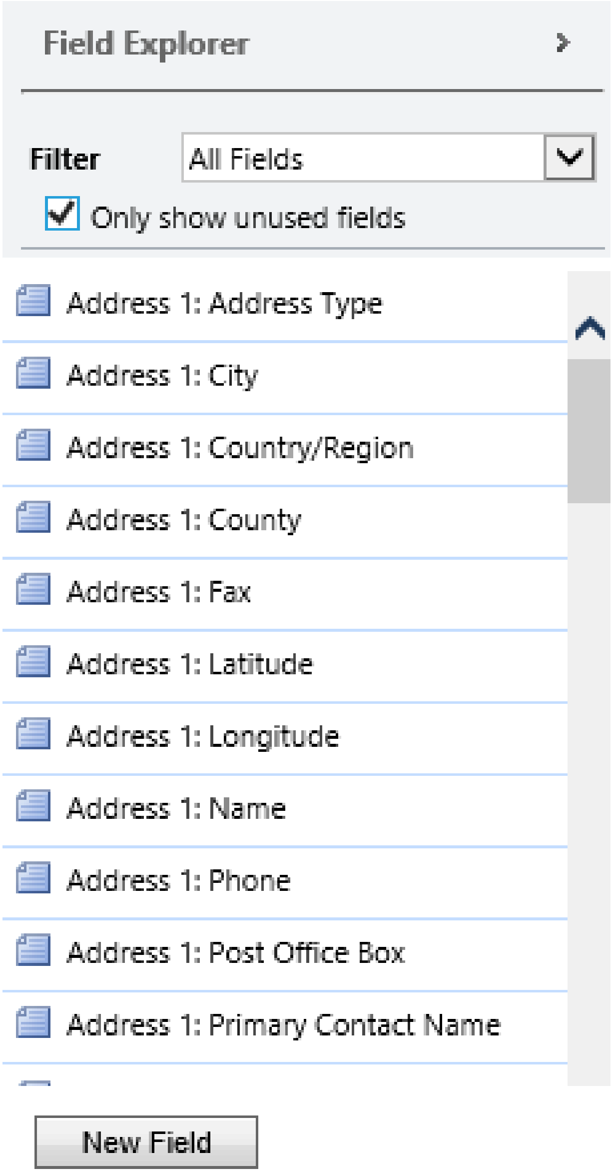


Tabs, Sections, and Fields

- Tabs
  - Can have one to three columns
  - Each tab column contains sections
    - Must have at least one section (Added by default)
- Sections
  - Have between one to four columns
  - Contain fields, sub-grid (lists or charts), notes control, iframes, web resources, Bing maps, and spacers
- Tabs and sections are added through the insert ribbon

Add Field to a Form

- Field Explorer
  - Filter for All/Custom Fields; Only show unused fields
  - Drag fields from the field explorer to form
  - Double-click a field in the Field Explorer to add to the currently selected section
  - Create fields directly by clicking New Field button
- Drag fields to a new position on the form
- Double-click a field to change properties
  - Field label, number of columns to span, events



Tab, Section, and Field Properties

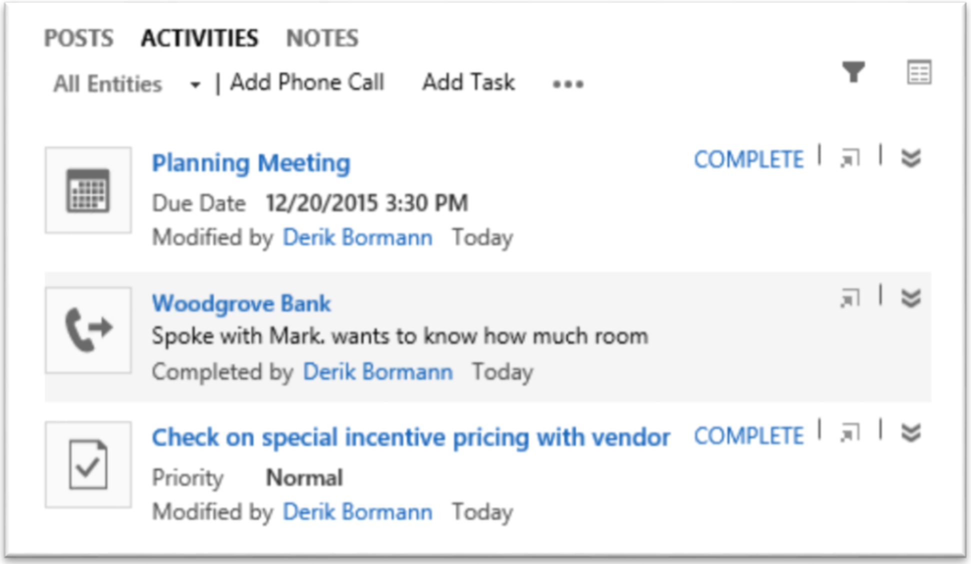
- All tabs, sections, fields, and form components have properties
- Tabs
  - Allow changing names, visibility and formatting
  - Can change number of columns and size
- Sections
  - Allow changing names, visibility, and formatting
  - Can change number of columns and size
- Fields
  - Allow changing names, visibility, formatting and business rules
  - Available properties can vary depending on the field data type

Specialized Form Components

- Special components can be added to enhance functionality
- Additional components can include:
  - Notes Control
  - We Resources and Iframes
  - Bing Maps
  - Spacers
  - Timers
  - ACI Controls

Notes Control

- Display Notes, Activities and Activity Feed Posts
  - Depends on entity configuration
  - Activities shown in short form, can be expanded / opened for more detail
  - New records can be created inline in the control
- Can only be added once to a form



External Resources

- Web Resources
  - Includes HTML, JavaScript and image files
- IFrames
  - Displays web page. URL can be modified dynamically based on record values using JavaScript
- Bing Maps
  - Only available for system entities which use “address” record (including Account, Contact, Lead)
  - On-premises customers require an API key

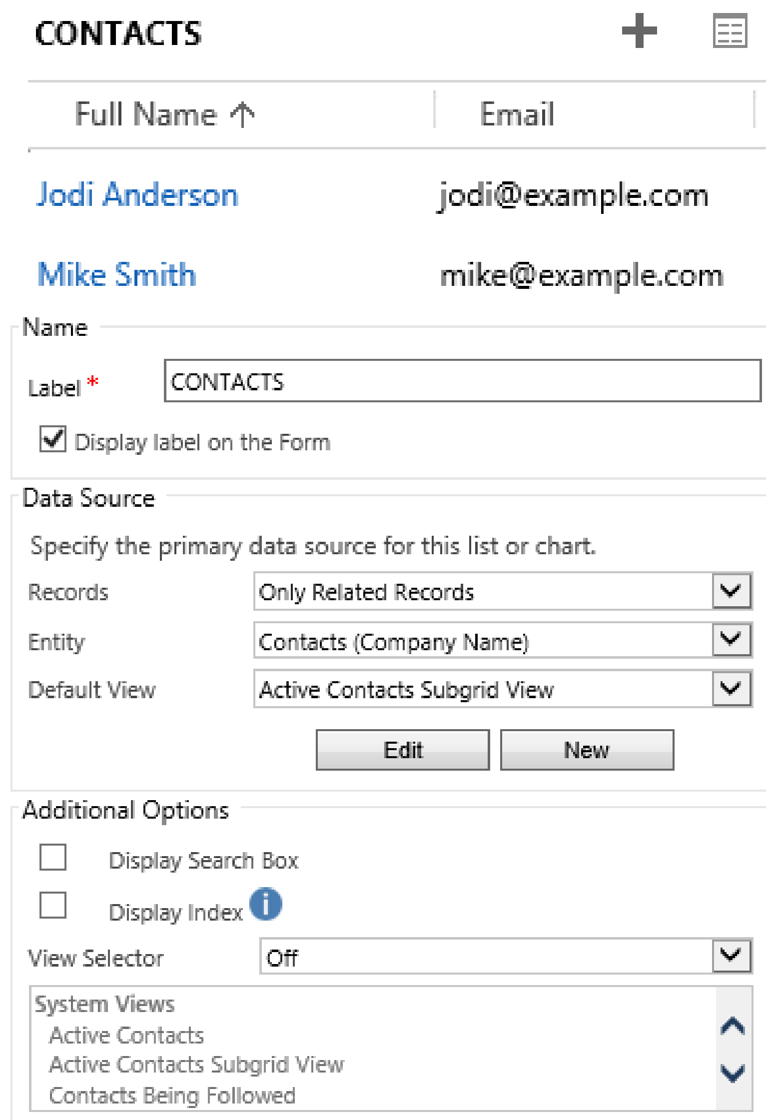
Additional Components

- Spacers
  - Appear as blank spaces on the form
- Timer
  - Timer controls used in conjunction with Service Level Agreements
- Knowledge Base Search
  - Allow searching of knowledge base from records
- Social Insights
  - Display social information from Microsoft Social Engagement

Lab

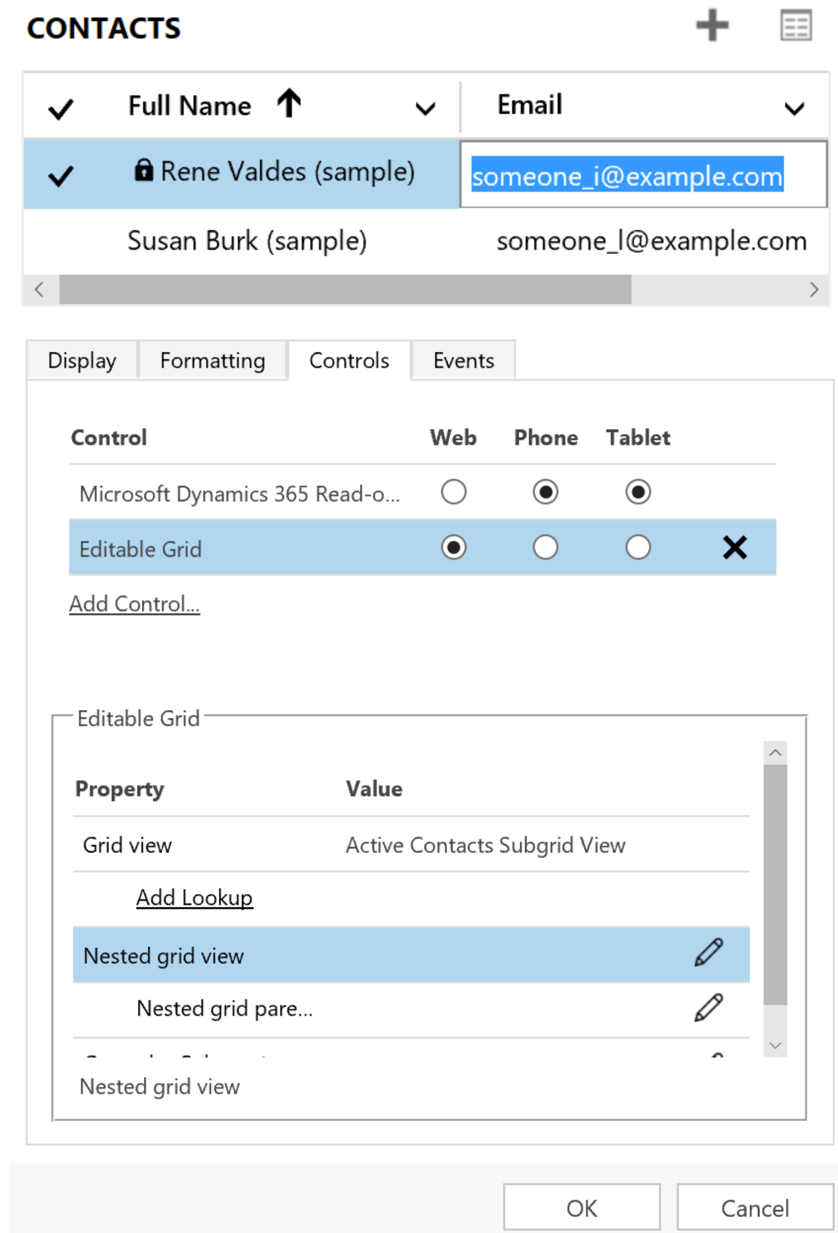
Sub-Grids

- Display data from other records on a form
- Usually related records, but can be unrelated
- Select a view to filter records displayed
- Show data as a list or as a chart, but not both
- User can click to open the content of the sub-grid in a new window that has all the usual features of a view and chart pane together



Editable Sub-Grids

- Sub Grids can be set to editable
- Can be configured for Web, Phone, or Tablet



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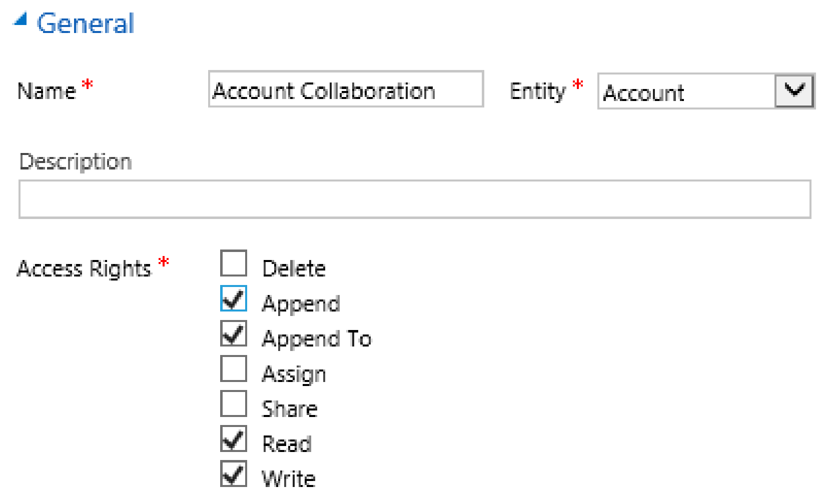
Access Teams

- Users add other users to an Access Team using a sub-grid, to grant them access to record
  - Rights defined in Access Team Template
  - Team is created when first user is added
  - Record is shared with the Access Team, not the individual users



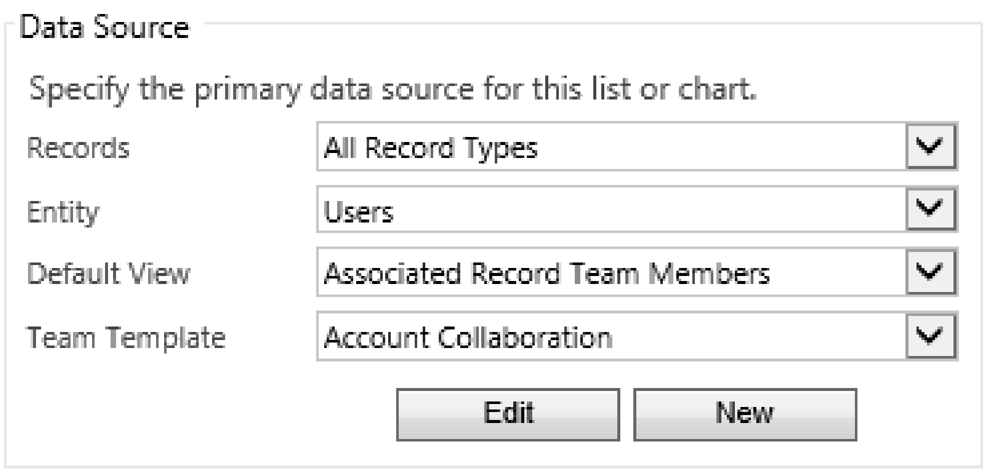
- Simple to view, add and remove users
  - Because the Access Team is a “normal” Team record, this can be used in queries (unlike sharing)

Access Team Members

- When a User is added to an Access Team:
  - The users who adds a new Access Team member to record must have share privileges to the record
  - The user who adds a new Access Team member must have for this record all the access rights that are defined in the Access Team Template
  - The user who is added to the Access Team must have at least User level access to all the privileges that the Access Team Template has

Configure Access Teams

- Enable the entity for Access teams
- Create an Access Team Template that defines the access rights to be granted to members of the Access Team that uses this template
- On a form for the entity, add a sub-grid for Users who are members of the Access Team for a record. The sub-grid is associated with a specific Access Team Template

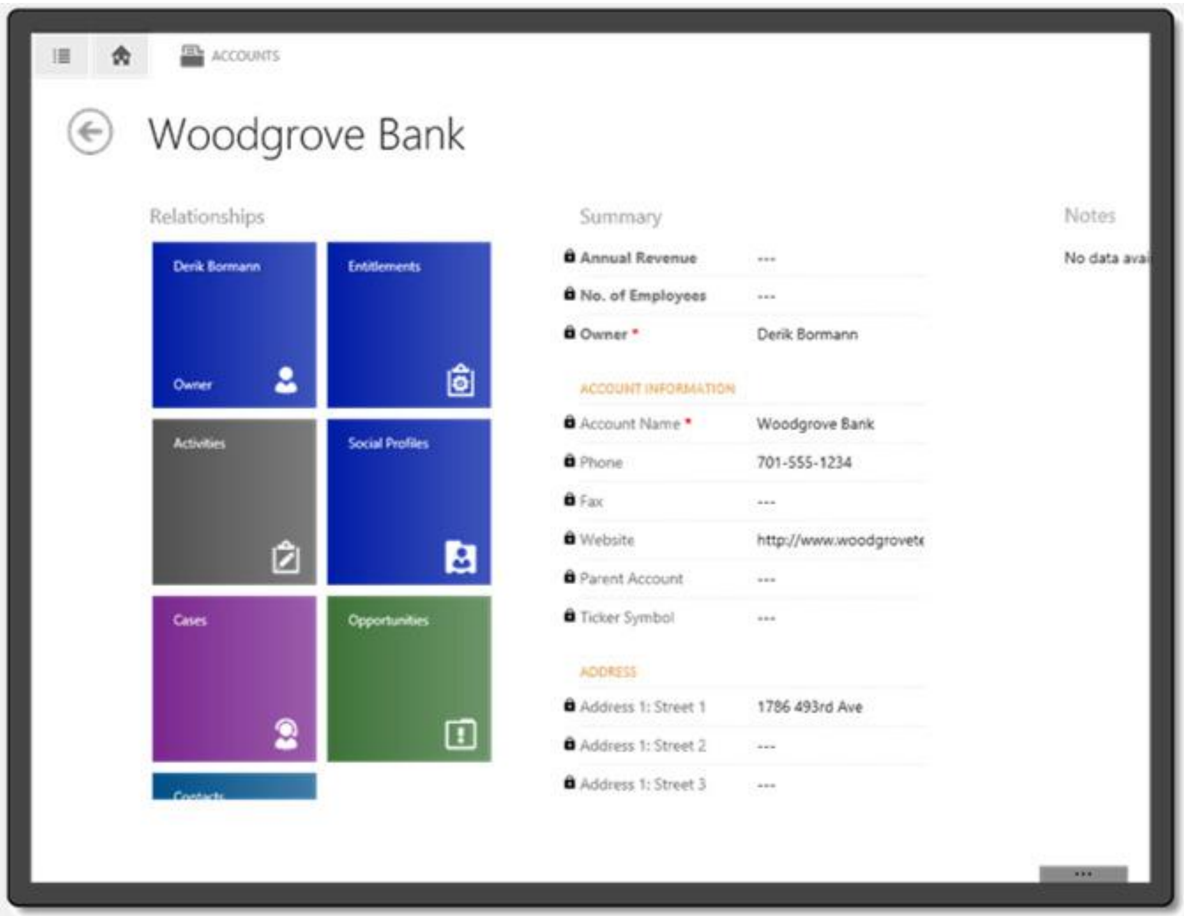


Form Preview

- Allows testing a from before publishing customizations
  - Includes Business Rules and Client Scripts

- Two Modes Available:
  - Desktop Client
    - Create Form
    - Update Form
    - Read-Only Form

- Mobile Client
  - Tablet
  - Phone

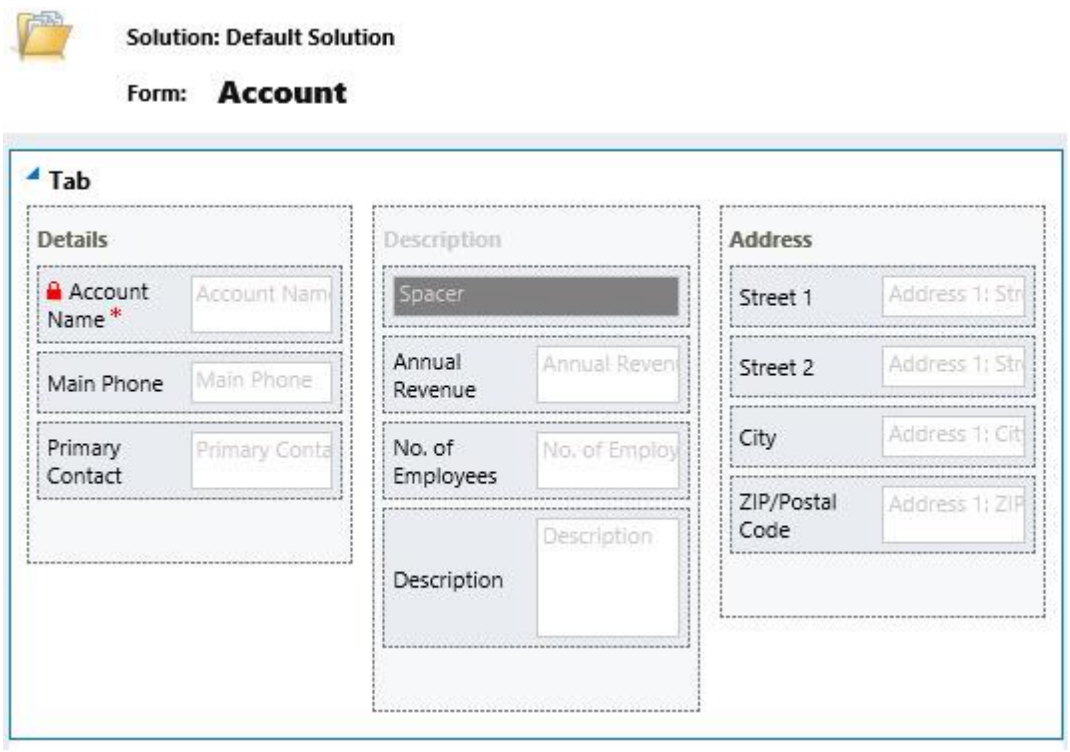


Quick Create

- Short version of form for easy record creation
- One tab, three columns, one section in each
- Field and spacers only

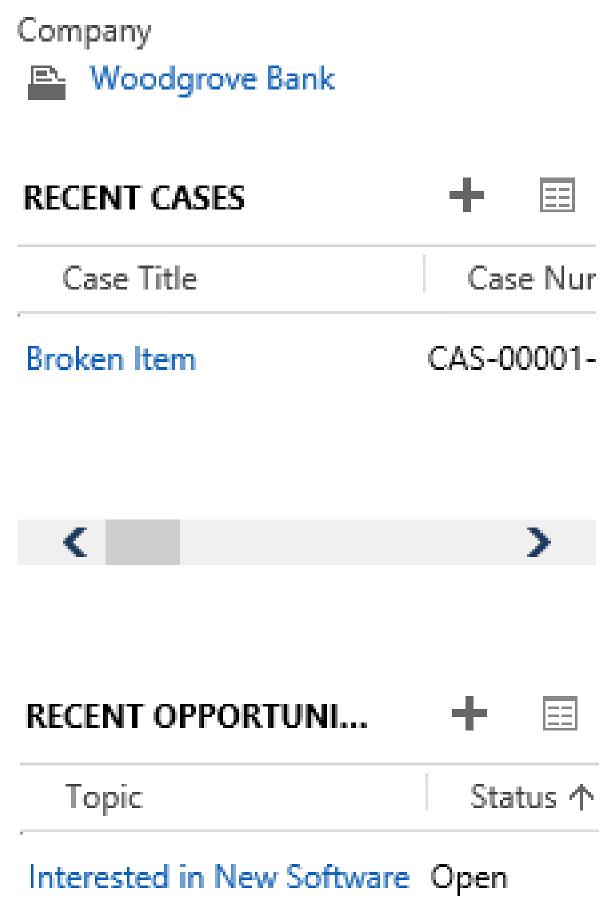
- Entity must be enabled for Quick Create

- Accessed from global **Create** button on navigation bar, or from lookup, sub-grid or associated view buttons for **New record**



Quick View

- Used to display details from a parent record
- Select Quick View form to use, associated with a lookup field on specific child entity form
  - Select Quick View form for each parent entity for a multi-entity lookup such as Customer and Regarding
- View consists of one tab with one column
  - Can contain one or more one-column sections containing fields, sub-grids, and/or spacers
- Data displayed in Quick View form is read-only but links are active and can be clicked



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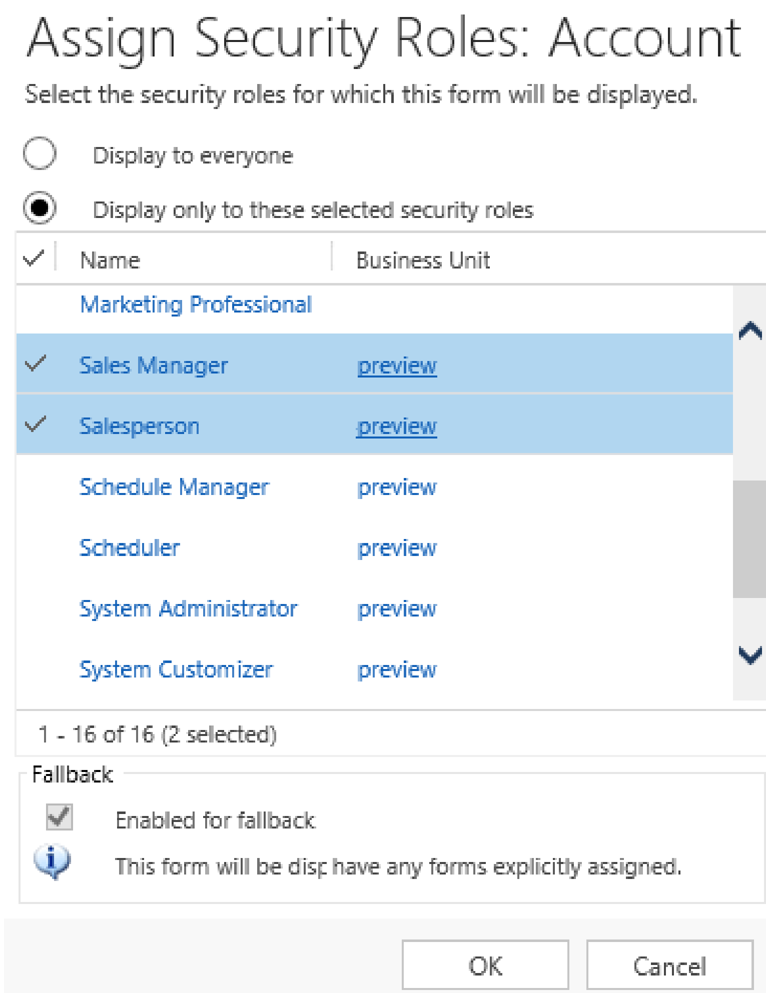
Manage Multiple Forms

- Enable Security Roles to control access to forms
  - You might use roles that have no privileges, separate from the ones that are used to grant user access
  - Deactivate a form to remove access from all
- Form Order determines form a user receives
  - User receives the first form in the form order that the user has access to through Security Roles
  - “Enable for fallback” to specify a form for users who have no roles that grant access to a specific form



Module Review

- Dynamics 365 Provides several different items that can be included on a form to customize the look and feel
- Each component added to a form has different properties that can be modified to control its look and behavior
- Adding Sub-grids to forms provide any way to view related data and use Access Teams
- Although they are presented differently on mobile clients, the same form is used for mobile clients.

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