

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
- Body
 - Fields are read-only
- Body
 - Contains tabs, sections, fields, and other components
- Navigation
 - Allows navigation to related entities, and custom components

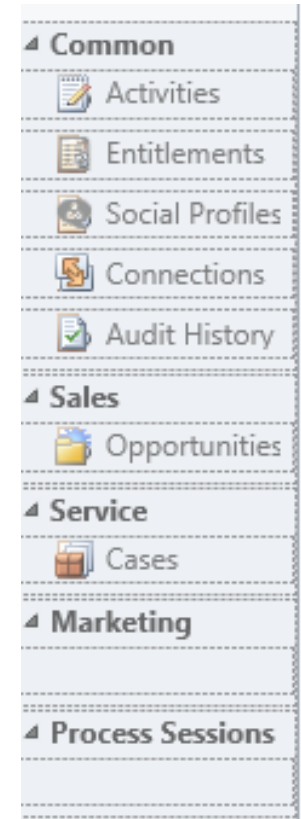
The screenshot displays a CRM form interface. On the left is a sidebar navigation menu with categories: Common (Activities, Entitlements, Social Profiles, Connections, Audit History), Sales (Opportunities), Service (Cases), Marketing, and Process Sessions. The main form area is divided into sections: Header (Owner, Credit Limit), Summary, Details (PERSONAL, MARKETING, BILLING, SHIPPING), and Footer. Each section contains various input fields, some of which are read-only.

| Section | Field Name | Field Value |
|-----------------|---------------------|-----------------------|
| Header | Owner | Owner |
| | Credit Limit | Credit Limit |
| Summary | | |
| | | |
| Details | PERSONAL | |
| | Gender | Gender |
| | Marital Status | Marital Status |
| | Spouse/Partner Name | Spouse/Partner Name |
| | Birthday | Birthday |
| | Anniversary | Anniversary |
| | MARKETING | |
| | Originating Lead | Originating Lead |
| | Last Campaign Date | Last Date Included In |
| | Marketing Materials | Send Marketing Mat |
| BILLING | | |
| Currency | Currency | |
| Credit Limit | Credit Limit | |
| Credit Hold | Credit Hold | |
| Payment Terms | Payment Terms | |
| SHIPPING | | |
| Shipping Method | Address 1: Shipping | |
| Freight Terms | Address 1: Freight | |
| Footer | | |
| | | |

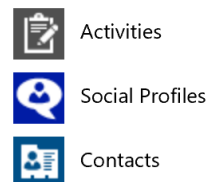


Related Entity Navigation

- 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



Common



Sales



Service





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

The screenshot shows the 'Field Explorer' panel. At the top, there is a 'Filter' section with a dropdown menu set to 'All Fields' and a checked checkbox labeled 'Only show unused fields'. Below this is a list of fields, each preceded by a document icon. The fields are: 'Address 1: Address Type', 'Address 1: City', 'Address 1: Country/Region', 'Address 1: County', 'Address 1: Fax', 'Address 1: Latitude', 'Address 1: Longitude', 'Address 1: Name', 'Address 1: Phone', 'Address 1: Post Office Box', and 'Address 1: Primary Contact Name'. At the bottom of the panel is a 'New Field' button.



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

The screenshot displays a user interface with three tabs: POSTS, ACTIVITIES, and NOTES. The ACTIVITIES tab is selected. Below the tabs, there is a filter dropdown set to 'All Entities' and two buttons: 'Add Phone Call' and 'Add Task'. A list of three activity items is shown, each with an icon, a title, and details. The first item, 'Planning Meeting', has a calendar icon and is marked as 'COMPLETE'. The second item, 'Woodgrove Bank', has a phone icon. The third item, 'Check on special incentive pricing with vendor', has a checkmark icon and is also marked as 'COMPLETE'. Each item includes a 'Modified by' field showing 'Derik Bormann' and the time 'Today'. Action icons for expand and collapse are visible to the right of each item.

| POSTS | ACTIVITIES | NOTES |
|--|---|----------|
| All Entities Add Phone Call Add Task ... | | |
| | Planning Meeting Due Date 12/20/2015 3:30 PM Modified by Derik Bormann Today | COMPLETE |
| | Woodgrove Bank Spoke with Mark. wants to know how much room Completed by Derik Bormann Today | |
| | Check on special incentive pricing with vendor Priority Normal Modified by Derik Bormann Today | COMPLETE |



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





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

CONTACTS + ☰

| Full Name ↑ | Email |
|-------------------------------|------------------|
| Jodi Anderson | jodi@example.com |
| Mike Smith | mike@example.com |

Name

Label *

CONTACTS

☒ Display label on the Form

Data Source

Specify the primary data source for this list or chart.

Records

Only Related Records

▼

Entity

Contacts (Company Name)

▼

Default View

Active Contacts Subgrid View

▼

Edit

New

Additional Options

☐ Display Search Box

☐ Display Index i

View Selector

Off

▼

System Views

Active Contacts

Active Contacts Subgrid View

Contacts Being Followed

⬆

⬇



Editable Sub-Grids

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

CONTACTS + ☰

| ✓ | Full Name ↑ | Email |
|---|------------------------|-----------------------|
| ✓ | 🔒 Rene Valdes (sample) | someone_i@example.com |
| | Susan Burk (sample) | someone_l@example.com |

< >

Display Formatting Controls **Events**

| Control | Web | Phone | Tablet |
|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| Microsoft Dynamics 365 Read-o... | <input type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| Editable Grid | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

[Add Control...](#)

Editable Grid

| Property | Value |
|--------------------------------|------------------------------|
| Grid view | Active Contacts Subgrid View |
| Add Lookup | |
| Nested grid view | |
| Nested grid pare... | |
| Add Control... | |
| Nested grid view | |

OK Cancel





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)

General

Name * Entity * ▼

Description

Access Rights *

| | |
|-------------------------------------|-----------|
| <input type="checkbox"/> | Delete |
| <input checked="" type="checkbox"/> | Append |
| <input checked="" type="checkbox"/> | Append To |
| <input type="checkbox"/> | Assign |
| <input type="checkbox"/> | Share |
| <input checked="" type="checkbox"/> | Read |
| <input checked="" type="checkbox"/> | Write |



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

Data Source

Specify the primary data source for this list or chart.

| | | |
|---------------|--------------------------------|---|
| Records | All Record Types | ▼ |
| Entity | Users | ▼ |
| Default View | Associated Record Team Members | ▼ |
| Team Template | Account Collaboration | ▼ |



Form Preview

- Allows testing a form 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

ACCOUNTS

Woodgrove Bank

Relationships

- Derik Bormann (Owner)
- Entitlements
- Activities
- Social Profiles
- Cases
- Opportunities
- Costs

Summary

- Annual Revenue: ---
- No. of Employees: ---
- Owner: Derik Bormann

ACCOUNT INFORMATION

- Account Name: Woodgrove Bank
- Phone: 701-555-1234
- Fax: ---
- Website: <http://www.woodgrovetx.com>
- Parent Account: ---
- Ticker Symbol: ---

ADDRESS

- Address 1: Street 1: 1786 493rd Ave
- Address 1: Street 2: ---
- Address 1: Street 3: ---

Notes

No data available



Quick Create

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



Solution: Default Solution

Form: **Account**

- 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**

Tab

| Details | Description | Address |
|--|--|---|
| Account Name* <input type="text" value="Account Name"/> | Spacer <input type="text" value="Spacer"/> | Street 1 <input type="text" value="Address 1: Str"/> |
| Main Phone <input type="text" value="Main Phone"/> | Annual Revenue <input type="text" value="Annual Revenue"/> | Street 2 <input type="text" value="Address 1: Str"/> |
| Primary Contact <input type="text" value="Primary Contact"/> | No. of Employees <input type="text" value="No. of Employees"/> | City <input type="text" value="Address 1: City"/> |
| | Description <input type="text" value="Description"/> | ZIP/Postal Code <input type="text" value="Address 1: ZIP"/> |



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

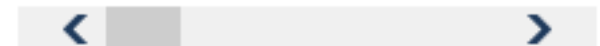
Company

 Woodgrove Bank

RECENT CASES



| Case Title | Case Nur |
|-----------------------------|------------|
| Broken Item | CAS-00001- |



RECENT OPPORTUNI...



| Topic | Status ↑ |
|--|----------|
| Interested in New Software | Open |





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

Assign Security Roles: Account

Select the security roles for which this form will be displayed.

☐ Display to everyone


☒ Display only to these selected security roles

| ✓ | Name | Business Unit |
|---|------------------------|-------------------------|
| | Marketing Professional | |
| ✓ | Sales Manager | preview |
| ✓ | Salesperson | preview |
| | Schedule Manager | preview |
| | Scheduler | preview |
| | System Administrator | preview |
| | System Customizer | preview |

1 - 16 of 16 (2 selected)

Fallback

☒ Enabled for fallback

 This form will be displayed to users who have no forms explicitly assigned.

OK Cancel



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.



People matter, results count.

This message contains information that may be privileged or confidential and is the property of the Capgemini Group.
Copyright © 2017 Capgemini. All rights reserved.

Rightshore® is a trademark belonging to Capgemini.

About Capgemini

With more than 190,000 people, Capgemini is present in over 40 countries and celebrates its 50th Anniversary year in 2017. A global leader in consulting, technology and outsourcing services, the Group reported 2016 global revenues of EUR 12.5 billion. Together with its clients, Capgemini creates and delivers business, technology and digital solutions that fit their needs, enabling them to achieve innovation and competitiveness. A deeply multicultural organization, Capgemini has developed its own way of working, [the Collaborative Business Experience™](#), and draws on [Rightshore®](#), its worldwide delivery model.

Learn more about us at

www.capgemini.com

This message is intended only for the person to whom it is addressed. If you are not the intended recipient, you are not authorized to read, print, retain, copy, disseminate, distribute, or use this message or any part thereof. If you receive this message in error, please notify the sender immediately and delete all copies of this message.