MS Dynamics CRM 365

Additional Field Customizations

Capgemini

Lesson Objectives

- Creating Fields to Meet Client Needs

- Using Calculated and Rollup Fields

- Working with Local and Global Options Sets

- Using Alternate Keys to Facilitate Data Integration

- Dynamic 365 Field Level Security

- State and Status Reason Transitions

Using Fields to Meet Client Needs

- Often times customers will require specific types of fields to provide specific functionality

- Potential Needs:

  - Ability to perform calculations

  - Aggregate data from related records

  - Prevent specific users from viewing or modifying specific data

  - Share lists across entities

Calculated Fields

- Let you automate manual calculations

  - Calculations use fields from the current or related entities

  - Expression support available on the current and related parent entities

  - Conditions can be added to support branching

- Examples:

  - Weighted Revenue

  - Cost of Labor

  - Net Worth

SAVE   SAVE AND CLOSE

CALCULATED FIELD

Set Amount to Finance

⊿ IF...THEN

    ⊿ CONDITION (OPTIONAL)

       + Add condition

    ⊿ ACTION

       Set **Amount to Finance** to **Credit Limit * .80**

Defined Calculated Fields

- Change field type from simple to calculated

  - Click edit – it will create the field

  - Once created you cannot change field type

- Can only be defined during field creation

  - Existing fields cannot be converted to calculated

- Calculation expressions can be modified at any time

Rollup Fields

- Aggregate value of records related to specific record

  - Ex. Total est. revenue of opportunities for a specific account

- Available Functions:

  - Sum

  - Count

  - Min

  - Max

  - Avg

ROLLUP FIELD

Open Opp Value

◢ **SOURCE ENTITY**

Source: **Account**

Use Hierarchy: **NO**

◢ **RELATED ENTITY**

Related: **Opportunities (Potential Customer)**

◢ FILTERS (OPTIONAL)

If **Status Reason** equals **"In Progress"**

✚ Add condition

◢ **AGGREGATION**

SUM of **Est. Revenue**

Dynamics 365 Option Sets

- Store values as integers

- Displays text labels associated with the values

- Customize options and labels

- Two types: Local and Global

  - Local Option Set Only available for a single field on single entity

  - Global Option Set can be used with more than one field on more than one entity

  Consider advantages of each type before creating a new field

Local Option Sets and Field Mapping

- Option Set fields are mapped between entities based on the underlying integer values

- Make sure option sets have equivalent labels

Event Type			Booking Type
Product Demo	1	1	Product Demo
Market Research	2	2	Product Launch
Product Launch	3	3	Market Research
Trade Show	4	?	???

Modifying Option Sets

- New Labels Used for new and existing records

- Deleted options leave old records unchanged – the records still store the old value

  - Old records will be updated to the current default value when the record is opened

  - Use advanced find before deleting an option and update records to a new value, or clear the old one

  - With many options or lists which might change frequently, consider a lookup to a custom entity

Alternate Keys

- Alternate Keys provide an efficient and accurate way of integrating external data into Dynamics 365

- Can be used to uniquely identify the Dynamics 365 records

  - Important when external System doesn't store the Dynamics 365 IDs

- Key creation

  - Must have a unique name

  - Can use one or more entity fields to define the key

Key Definition

Display Name * `GP Account ID`   Name * `new_` `GPAccountID`

Available Attributes

Email (emailaddress1)
Email Address 2 (emailaddress2)
Email Address 3 (emailaddress3)
Fax (fax)
FTP Site (ftpsiteurl)
Main Phone (telephone1)
No. of Employees (numberofemployees)
Other Phone (telephone2)
Primary Satori ID (primarysatoriid)
Primary Twitter ID (primarytwitterid)
Shares Outstanding (sharesoutstanding)

[Add >]
[< Remove]

Selected Attributes

Account Name (name)
Account Number (accountnumber)

[OK]

Field Security

- Field security applies to all access methods

  - Including: views, charts, audit logs, data import, SDK

- Available for system and custom fields

  Field Security ⦿ Enable ◯ Disable

  ⚠ Enabling field security? What you need to know

- All access is removed until you grant permissions to it

  ◢ **Details**

  - Create field security profiles for users or teams

    PERSONAL

- System Administration profile

  | Gender | Gender |

  - Profile with all permissions to all fields

    | Marital Status | Marital Status |

  - Includes all users who have the system admin security role

    | Spouse/Partner Name | Spouse/Partner |

    | Birthday🔑 | Birthday |

    | Anniversary | Anniversary |

Field Security Profiles

- **All secured fields are listed**

  - Add users and/or Teams

- **Select fields and grant permissions to them**

  - Read, Update, Create

- **Permissions are independent of each other**

  - For example, user could have Update, but not Read

Field Security and Security Roles

- Security applies at the following levels:

  - **Entity:** Managed through security roles

  - **Record:** Enabled by sharing specific records

  - **Field:** Controlled by using field security profiles

- Field Security combined with Security Profiles

  - Least restrictive Field Security profile applies

  - Least restrictive Security Role applies

  - Most restrictive of the two models wins

    - For example, a user who has update access to a record and read permissions to a secure field can only read the field

Lab

Status and Status Reason

- Status is the main "state" of a record

  - Most entities have two states: Active and Inactive

  - Some system entities have more than two, and/or use different names for these states

  - Cannot be customized

- Status Reason provides detail

  - Each status reason is associated with one state

  - Default status reasons for custom entities are active and inactive (You can rename these)

  - You can change labels and add more options

Status Reason Transitions

- On the case and custom entities, status transitions can be defined to add additional level of filtering that defines a specific list of status reasons that can be chosen for specific status reason

- Each reason option for an active status must allow at least one path to an inactive status

Waiting for Details

Canceled	Service Escalated	Presearching	In Progress
	Canceled	In Progress	On Hold
	Merged	On Hold	Solved
	Solved	Merged	Canceled
	Info Green	Canceled	
		Solved	
		Escalate	

Module Review

- By using calculated fields, you can perform calculations and populate data from other fields

- Rollup fields provide a convenient way to aggregate data from related records

- Alternate keys can be a key component where integrating Dynamics 365 with external applications

- Field level security can be applied to system or custom fields and in applied regardless of how the data is accessed

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