

DYNAMICA TAGGING USER GUIDE

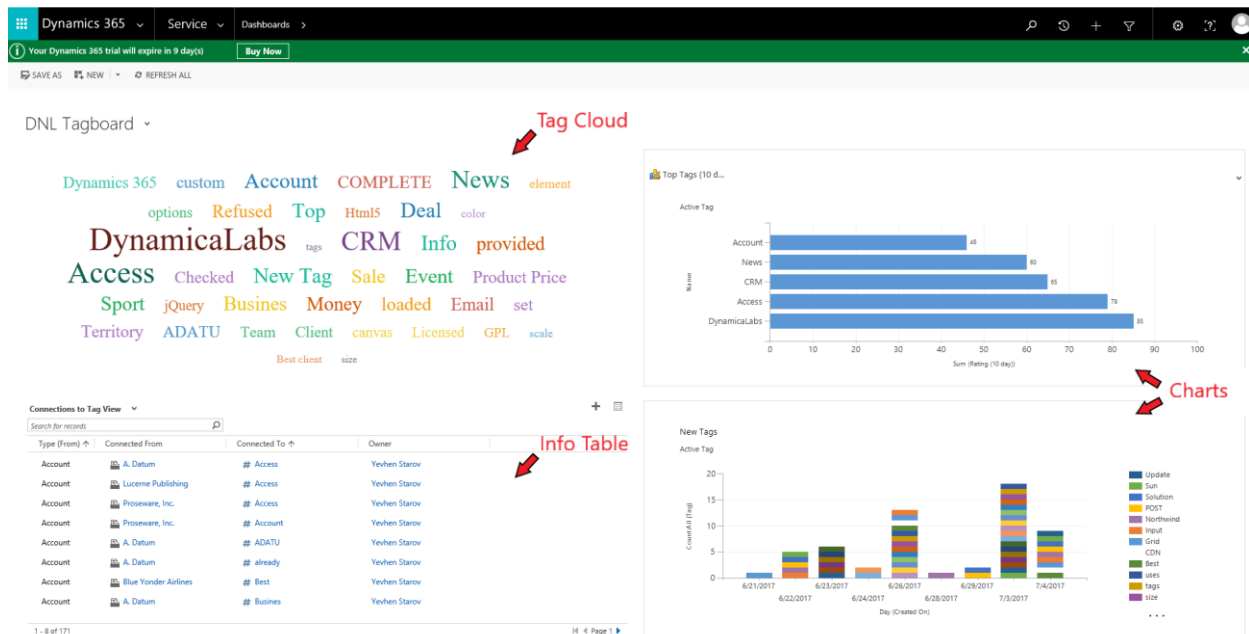
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Components

Dashboard – Dynamica Tagboard

Includes 2 charts with statistics on the use of tags, an information table and a tag cloud.



Tag Input Section

The screenshot shows the 'Tag Input Section' in Dynamics 365. It features a contact profile for 'Darrell Bromley' with fields for Full Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, Preferred Method of Contact, Address, Facebook, Twitter, and Klout Score. To the right of the profile is a 'TAGS' section with a search bar and a list of tags. A red arrow points to the 'TAGS' section. Below the profile is a 'POSTS' section with a list of posts. To the right of the posts is a 'RECENT CASES' section with a table of cases. Below the cases is a 'RECENT OPPORTUNITIES' section with a table of opportunities.

Field	Value
Full Name	Darrell Bromley
Job Title	
Account Name	
Email	
Business Phone	
Mobile Phone	
Preferred Method of Contact	Any
Address	
Facebook	
Twitter	
Klout Score	

Case Title	Case Number	Priority	Orig
No Case records found.			

Topic	Status	Actual Close Date	Actual Revenue
No Opportunity records found.			

Tag Entity

The screenshot shows the 'Tag Entity' in Dynamics 365. It features a 'General' tab for the 'Dynamicalabs' tag. The tag has a name 'Dynamicalabs' and a rating of 85. The rating is broken down by period: Rating (10 day) is 85, Rating (month) is 208, and Rating (year) is 473.

Field	Value
Name	Dynamicalabs
Rating (10 day)	85
Rating (month)	208
Rating (year)	473

- **Field Name** – name of Tag
- **Rating** – number of use this Tag on different periods (read-only)

Usage

After installation

After successful installation, Tagging Extension ready to use:

After installation, you will see a new dashboard and new forms with tags section on such entities: Account, Case, Contact, Contract, Email, Fax, Invoice, Lead, Letter, Marketing List, Opportunity, Order, Phone Call and Quote. Forms include a new section with web resource for adding new tags and displaying existing ones.

Dynamics 365 Service Cases > Test > SANDBOX

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

SAVE & ROUTE NEW CREATE CHILD CASE RESOLVE CASE CANCEL CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN DO NOT DECREMENT ENT...

CASE Case Case with Tags

Identify (Active for 1 minute) Research Resolve

Find Customer Google #1 click to enter

Find Case Test

Summary

CASE DETAILS

Case Title Test

ID CAS-00000-W3G3H5

POSTS ACTIVITIES KB RECORDS NOTES

All Add Phone Call Add Task

Using tags on custom entities

If you want to customize another entity to use tags, complete simple instruction below:

1. Open the Form of the Entity which you want to customize.
 - Go to the tab: Dynamics 365 → Settings → Customization and choose to **Customize the System**. Then choose entity, click **Forms** and open any Main Form.

File Publish All Customizations Help

Account Forms

Solution Default Solution

Information Components Entities

Account Forms Views Charts Fields Keys 1:N Relationships N:1 Relationships N:N Relationships Messages Business Rules Hierarchy Settings Dashboards

Account Project Pri... Activity Actual Actual Data Export (...) Address Agreement Agreement Bookin... Agreement Bookin... Agreement Bookin...

Status: Existing

System Forms Active Forms

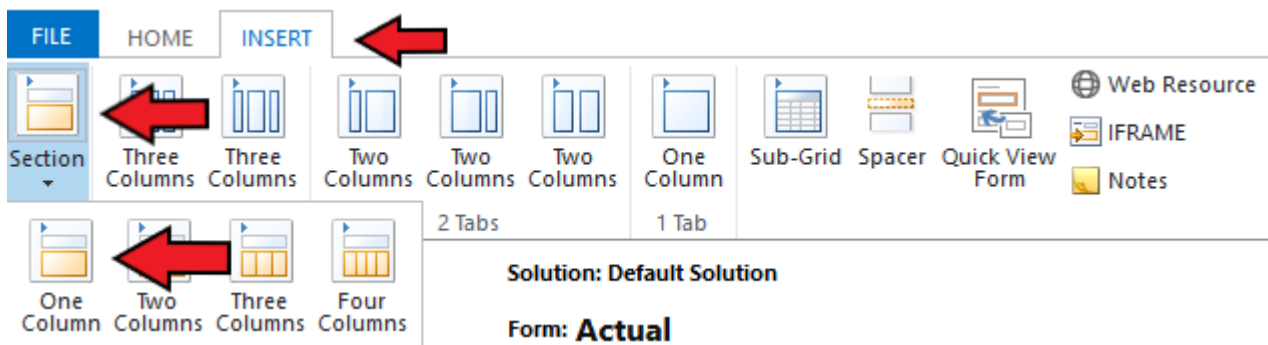
New Delete Enable Security Roles Form Order Activate Deactivate More Actions

Name	Form State	Form Type	State	Customizable	Version	Description
Account Card form	Active	Card	Managed	True	8.0.0.0	Default A
Account - MoCa	Active	Main	Managed	True	6.1.0.0	This form
Information	Active	Main	Managed	True	1.0	A form fo
Account	Active	Main	Managed	True	5.0.0.0	Updated
Account for Interactive experience	Active	Main - Interactiv...	Managed	True	8.0.0.0	Default Ir
Information	Active	Mobile - Express	Managed	True	5.0.0.0	This is the
Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Default q
Account Summary Card	Active	Quick View Form	Managed	True	3.1.0.3	
Account Hierarchy Tile Form	Active	Quick View Form	Managed	True	7.0.0.0	This is the
Social Profiles	Active	Quick View Form	Managed	True	6.1.0.0	A form th
Account Reference Panel	Active	Quick View Form	Managed	True	8.0.0.0	A form th
Recent Cases and Entitlements	Active	Quick View Form	Managed	True	8.0.0.0	A form th
account card	Active	Quick View Form	Managed	True	5.0.0.0	A form th

1 - 13 of 13 (0 selected)

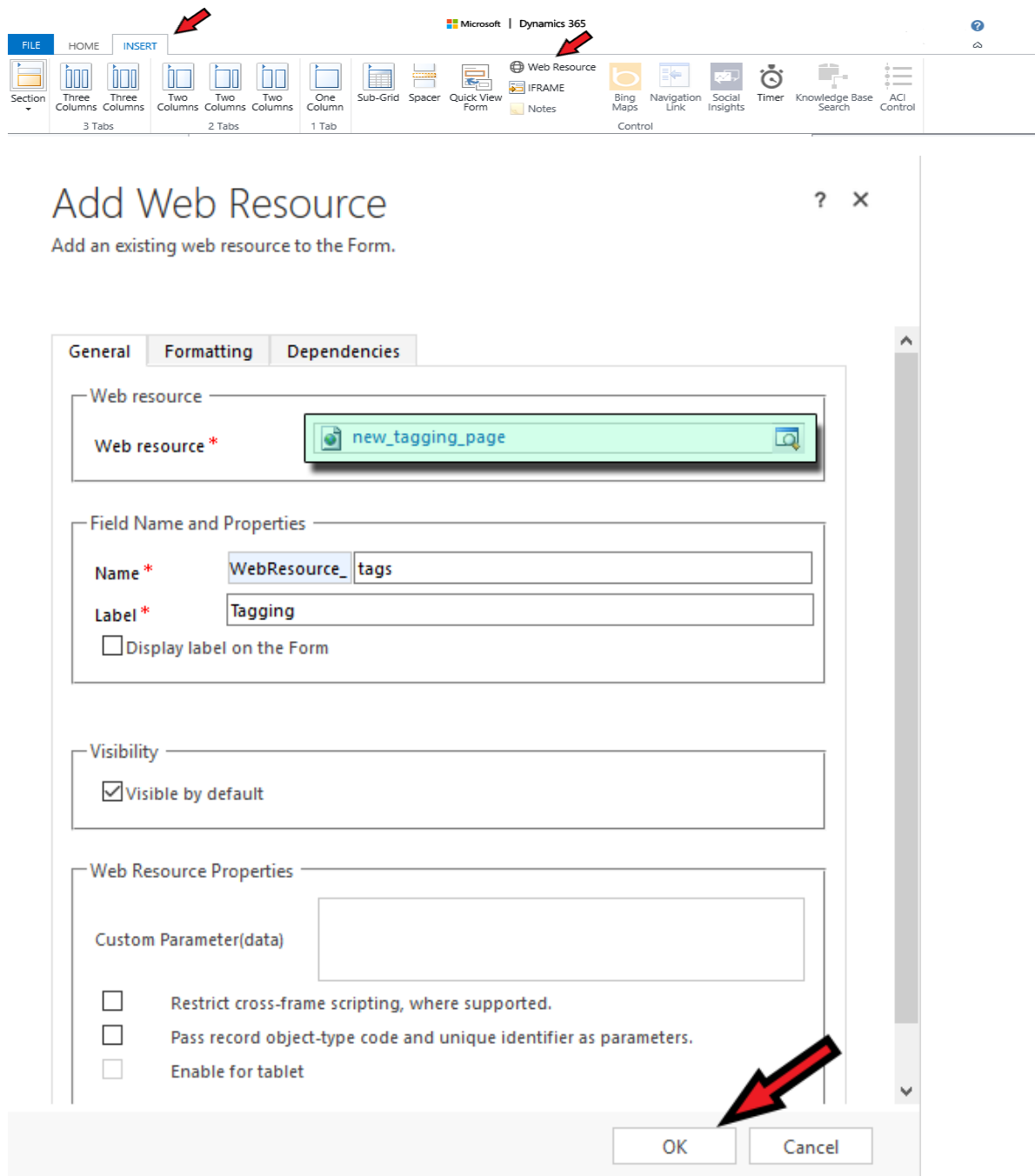
2. Add new section to the Form

- To do this, go to the tab **Insert** and click **Section** and choose **one column**:

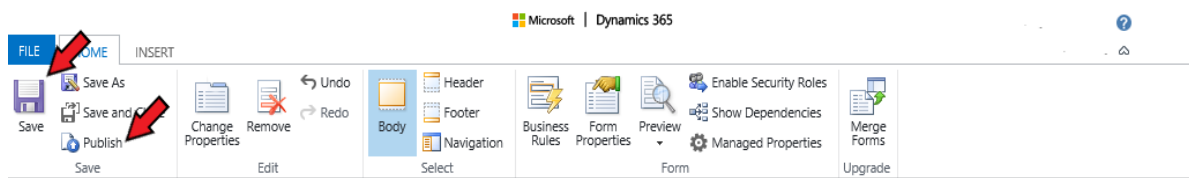


3. Add Tag Input Section (Web Resource -> **new_tagging_page**) at any place on the Form.

- To do this, go to the tab **Insert** and click **Web Resource**:



- After that click **Save** and then **Publish**:

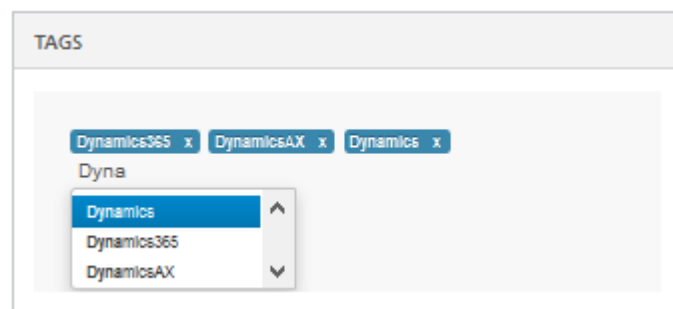


4. That is all to do. Open or create any record of this entity and start adding tags. All information about the tags and their use will be available on the Dashboard.

Tag records

To add tags to a record:

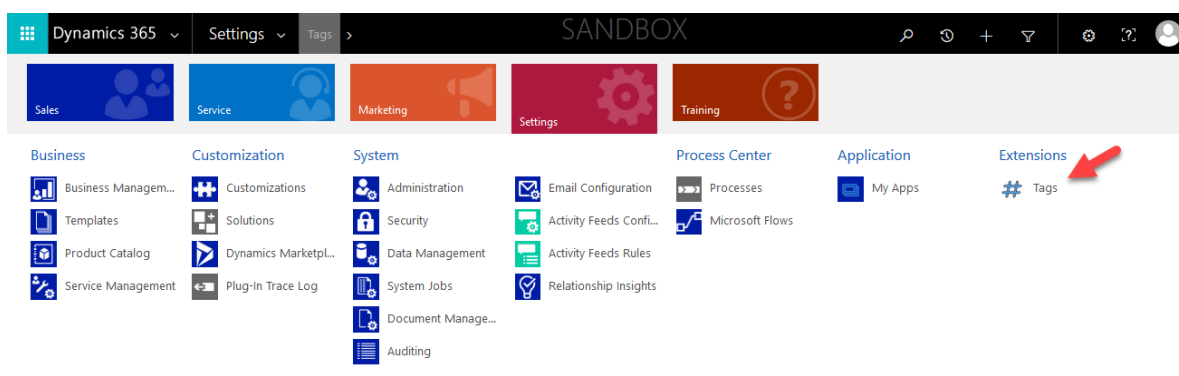
1. Open a Record;
- *If you are creating a new record you must save it first before Tags input section will become active;
2. Click on Tag input section;
3. Start typing: matching tags, that already exist in the system, will appear in drop-down list;
4. Select an appropriate tag from drop-down list OR Click Enter if you want to create a new Tag.



Change or Delete tags

If you want to change or delete Tags:

1. Choose Tag.
 - Go to the tab: Dynamics 365→ Settings→ Tag:



- Or choose Tag on information table on the dashboard:

Connections to Tag View + ☰

Search for records

Type (From)	Connected From ↑	Connected To	Owner
Account	A. Datum	# Info	Yevhen Starov
Account	A. Datum	# Deal	Yevhen Starov
Account	A. Datum	# Busines	Yevhen Starov
Account	A. Datum	# provided	Yevhen Starov
Account	A. Datum	# loaded	Yevhen Starov
Account	A. Datum	# already	Yevhen Starov
Account	A. Datum	# Access	Yevhen Starov
Account	A. Datum	# COMPLETE	Yevhen Starov

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2. Change Tag name or delete Tag.

Dynamics 365 Settings Tag > Dynamicalabs

NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT OTHER ACTIVITIES

TAG : INFORMATION

Dynamicalabs

General

Name * Dynamicalabs

Rating (10 day) * 85

Rating (months) * 208

Rating * 473

Uninstallation

Before uninstallation Dynamica Tagging solution – be sure to remove all existing connections first!

Remove connections

The fastest way to remove connections is Bulk Record Deletion:

1. Go to Setting -> Data Management

Dynamics 365 Settings Solutions SANDBOX

Sales Service Marketing Settings Training

Business Customization System 1 2 Process Center Application Extensions

Business Management Customizations Administration Email Configuration

Templates Solutions Security Activity Feeds Configu...

Product Catalog Dynamics Marketplace Data Management Activity Feeds Rules

Service Management Plug-In Trace Log System Jobs Dynamics 365 App for...

Document Manageme... Relationship Insights

Auditing

2. Select Bulk Record Deletion

The screenshot shows the Dynamics 365 Data Management interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Data Management'. A yellow banner at the top states: 'You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles'. Below this, the 'Data Management' section is titled 'What would you like to do?'. It features a grid of tiles for various data management tasks. A red arrow points to the 'Bulk Record Deletion' tile, which is described as 'Manage bulk record-deletion jobs'.

Task	Description
Duplicate Detection Settings	Select default duplicate detection settings for your organization.
Duplicate Detection Jobs	Create and monitor duplicate detection jobs.
Data Maps	Create, import, and export data maps used during import.
Templates for Data Import	Download a template for Data import.
Add Ready-to-Use Business Processes	Add business processes that are ready to use and designed for common sales, service, and marketing scenarios.
Export Field Translations	Export translatable text for the localizable fields in the application.
Similar Records Suggestions Settings	Set up and manage automatic suggestion of similar records using the Azure Machine Learning Text Analytics service and search.
Duplicate Detection Rules	Create, modify and publish duplicate detection rules.
Bulk Record Deletion	Manage bulk record-deletion jobs.
Imports	Import data and view the status of imports in progress.
Sample Data	Add sample data to the system, or delete existing sample data.
Data Encryption	Check the encryption status, and change or activate the encryption key.
Import Field Translations	Import translated text for the localizable fields in the application.

3. Click New

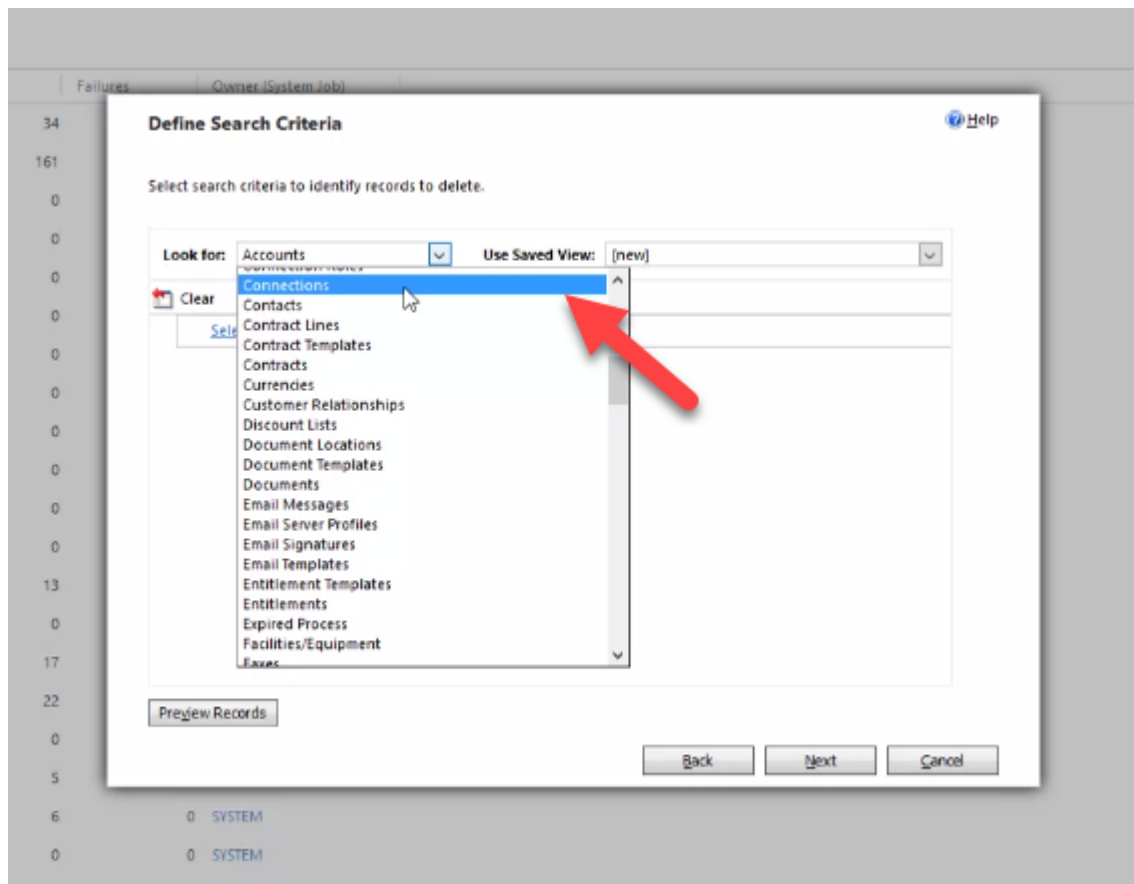
The screenshot shows the 'Bulk Record Deletion' page. The top navigation bar is the same as in the previous image. Below the banner, the page title is 'Bulk Record Deletion'. A 'filter:' dropdown is set to 'All Bulk Deletion System Jobs'. Below this is a toolbar with a 'New' button (indicated by a red arrow), a 'Home' button, and a 'More Actions' dropdown. The main content is a table with columns: 'System Job Name', 'Status Reason', 'Deleted', 'Failures', and 'Owner (System Job)'. The table contains several rows of deletion jobs.

System Job Name	Status Reason	Deleted	Failures	Owner (System Job)
Bulk Deletion - 2/2/2018 12:19:08 PM	Succeeded	34	0	Kristina Gaidiuk
Bulk Deletion - 2/2/2018 9:46:03 AM	Succeeded	161	0	Kristina Gaidiuk
Delete Booking Change records	Succeeded	0	0	Denis Bepalov
Delete completed process sessions for Sync Workflows	Succeeded	0	0	SYSTEM
Delete completed process sessions for Sync Workflows	Succeeded	0	0	SYSTEM

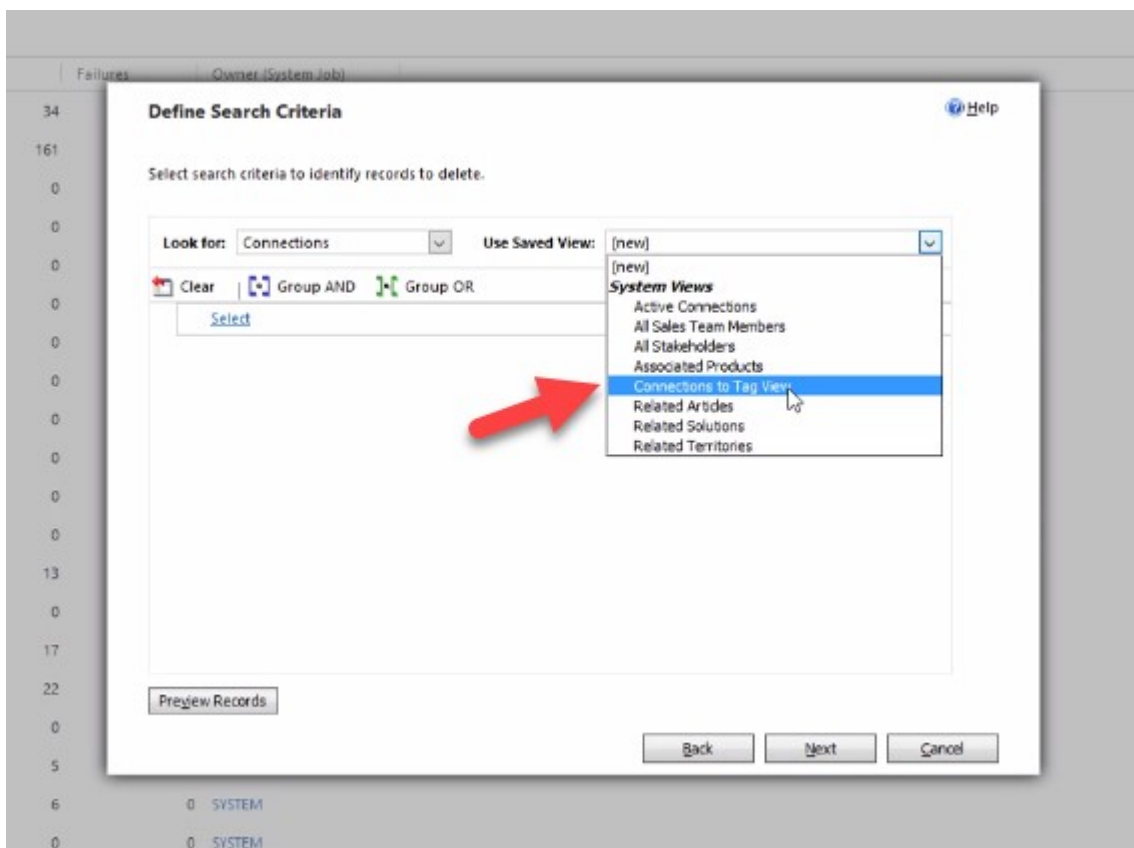
4. Click Next

The screenshot shows a 'Bulk Deletion Wizard' dialog box. The title bar says 'Bulk Deletion Wizard' with a 'Help' icon. The text inside reads: 'This wizard helps you to delete selected records from selected entities/record types in Microsoft Dynamics 365. You will be asked to: Define deletion criteria for selected entity, Select scheduling and notification options. To continue, click Next.' At the bottom of the dialog are three buttons: 'Back', 'Next' (indicated by a red arrow), and 'Cancel'.

5. Find **Connections** in **Look for** drop-down list



6. Select **Connections to Tag View** from Use Saved View drop-down list



7. You can view found connections with **Preview Records** button or click **Next** to proceed to the next step

Define Search Criteria

Select search criteria to identify records to delete.

Look for: Connections Use Saved View: Connections to Tag View

Clear Group AND Group OR

Is Tag	Equals	Yes
Is Master	Equals	Yes
Select		

[Preview Records](#) Back Next Cancel

8. Specify the name and scheduling of the **Bulk Deletion** system job, then click Next

Select Options

Specify the name of the bulk deletion system job, and scheduling and notification options.

Name: Bulk Deletion - 2/5/2018 8:37:12 PM

Bulk deletion job start time:

☐ Immediately

☒ At scheduled time: 2/5/2018 8:37 PM

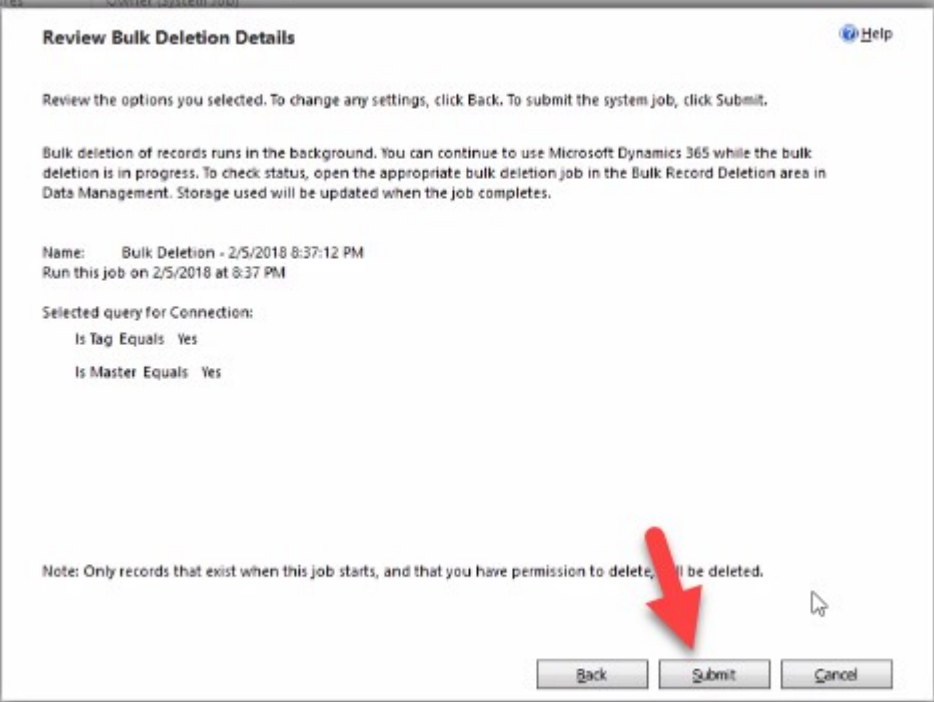
☐ Run this job after every: 30 days

☐ Send an email to me (denis.bespalov@dynamicalabs.com) when this job is finished.

Also notify:

Back Next Cancel

9. Review the system job information. If everything is ok – click **Submit**

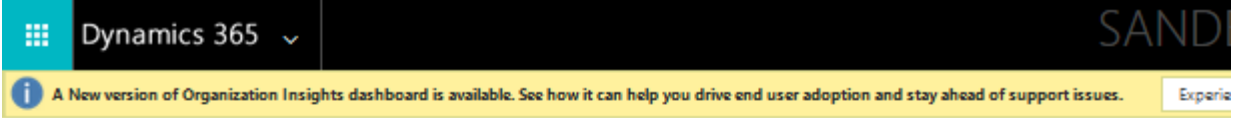


The dialog box titled "Review Bulk Deletion Details" contains the following information:

- Review the options you selected. To change any settings, click Back. To submit the system job, click Submit.
- Bulk deletion of records runs in the background. You can continue to use Microsoft Dynamics 365 while the bulk deletion is in progress. To check status, open the appropriate bulk deletion job in the Bulk Record Deletion area in Data Management. Storage used will be updated when the job completes.
- Name: Bulk Deletion - 2/5/2018 8:37:12 PM
Run this job on 2/5/2018 at 8:37 PM
- Selected query for Connection:
 - Is Tag Equals Yes
 - Is Master Equals Yes
- Note: Only records that exist when this job starts, and that you have permission to delete, will be deleted.
- Buttons: Back, Submit, Cancel

A red arrow points to the **Submit** button.

10. Wait until **Bulk Record Deletion** system job finish deletion (you may need to refresh page F5)



The page header shows the Dynamics 365 logo and a notification about a new version of the Organization Insights dashboard. The title "Bulk Record Deletion" is displayed below the header.

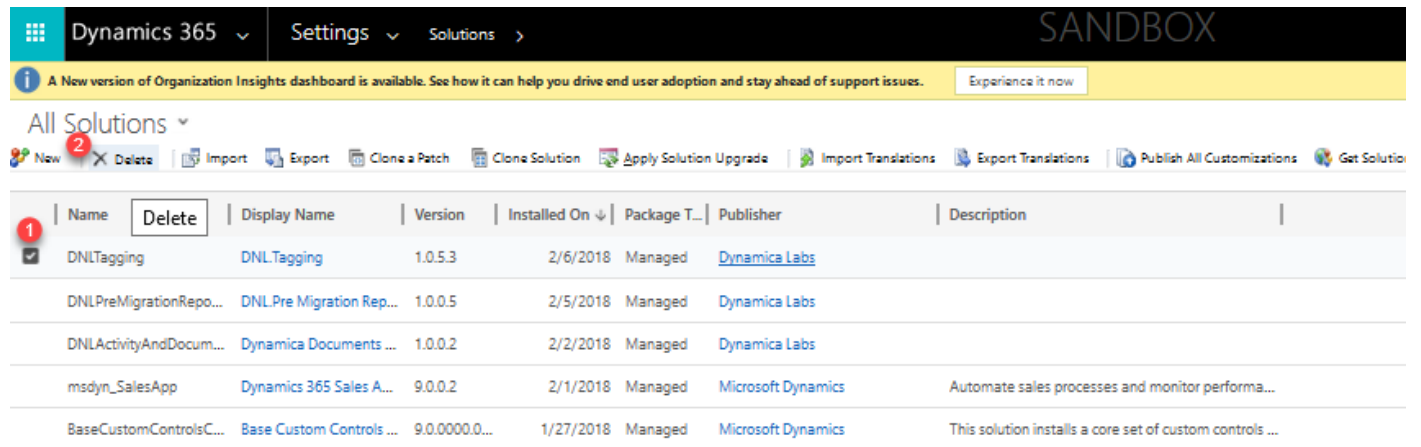
View: All Bulk Deletion System Jobs

System Job Name	Status Reason	Deleted	Failures	Owner (System Job)
Bulk Deletion - 2/6/2018 3:38:25 PM	Succeeded	0	0	Alexander Chervuk
Bulk Deletion - 2/6/2018 3:55:48 PM	Succeeded	2	0	Alexander Chervuk
Bulk Deletion - 2/6/2018 6:57:02 PM	Succeeded	20	0	Alexander Chervuk
Delete completed pipeline events	Succeeded	0	0	SYSTEM
Delete completed pipeline events	Succeeded	0	0	SYSTEM
Delete completed pipeline events	Succeeded	0	0	SYSTEM

Two red arrows point to the "Status Reason" and "Deleted" columns of the table.

11. Go to **Settings -> Solutions**

12. Select the **Dynamica Tagging** solution and click **Delete**



The screenshot shows the Dynamics 365 Solutions page in a sandbox environment. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. A yellow banner at the top indicates a new version of the Organization Insights dashboard is available. Below the banner, the 'All Solutions' section is active, showing a list of installed solutions. The 'DNLTagging' solution is selected, and the 'Delete' button is highlighted. A red circle with the number '1' is next to the 'Delete' button, and a red circle with the number '2' is next to the 'Delete' button in the top navigation bar.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
DNLTagging	DNL.Tagging	1.0.5.3	2/6/2018	Managed	Dynamica Labs	
DNLPreMigrationRepo...	DNL.Pre Migration Rep...	1.0.0.5	2/5/2018	Managed	Dynamica Labs	
DNLActivityAndDocum...	Dynamica Documents ...	1.0.0.2	2/2/2018	Managed	Dynamica Labs	
msdyn_SalesApp	Dynamics 365 Sales A...	9.0.0.2	2/1/2018	Managed	Microsoft Dynamics	Automate sales processes and monitor performa...
BaseCustomControlsC...	Base Custom Controls ...	9.0.0000.0...	1/27/2018	Managed	Microsoft Dynamics	This solution installs a core set of custom controls ...

13. Wait for the solution to be uninstalled.