

DYNAMICA TAGGING USER GUIDE

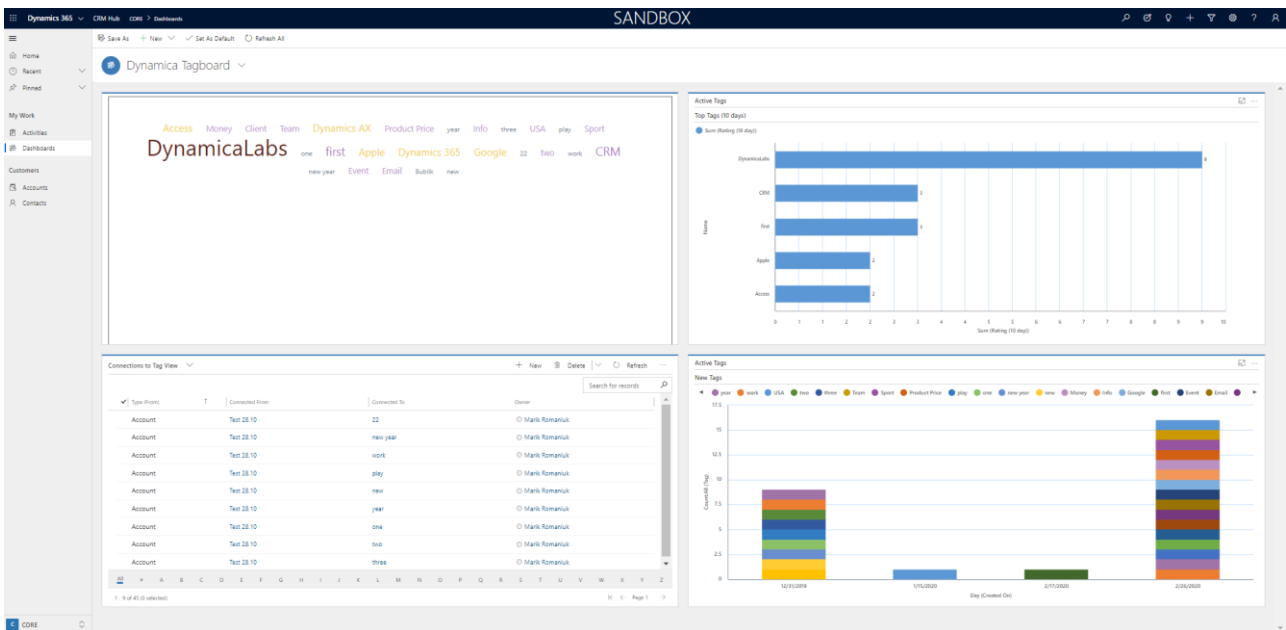
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Components

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 Dynamics 365 Tag Input section for a contact named Darrell Bromley. It includes a 'TAGS' section with a red arrow pointing to the 'Access' tag. The 'Access' tag is highlighted, and a dropdown menu shows the tag's details: 'Dyn', 'Dynamicalabs', and 'Dynamics 365'. The 'TAGS' section also includes a 'Company' field and 'RECENT CASES' and 'RECENT OPPORTUNITIES' sections.

Tag Entity

The screenshot shows the Dynamics 365 Tag Entity view for the 'Dynamicalabs' tag. It includes a table with columns for 'Name', 'Rating (1-5 days)', 'Rating (30 days)', and 'Rating'. The table shows the tag's rating across different periods. A sidebar on the left shows the 'Dynamicalabs' tag and its 'General', 'Connections', and 'Related' sections. A right sidebar shows a 'Dynamics 365' logo and a message about cookies.

Name	Rating (1-5 days)	Rating (30 days)	Rating
Dynamicalabs	3	3	3

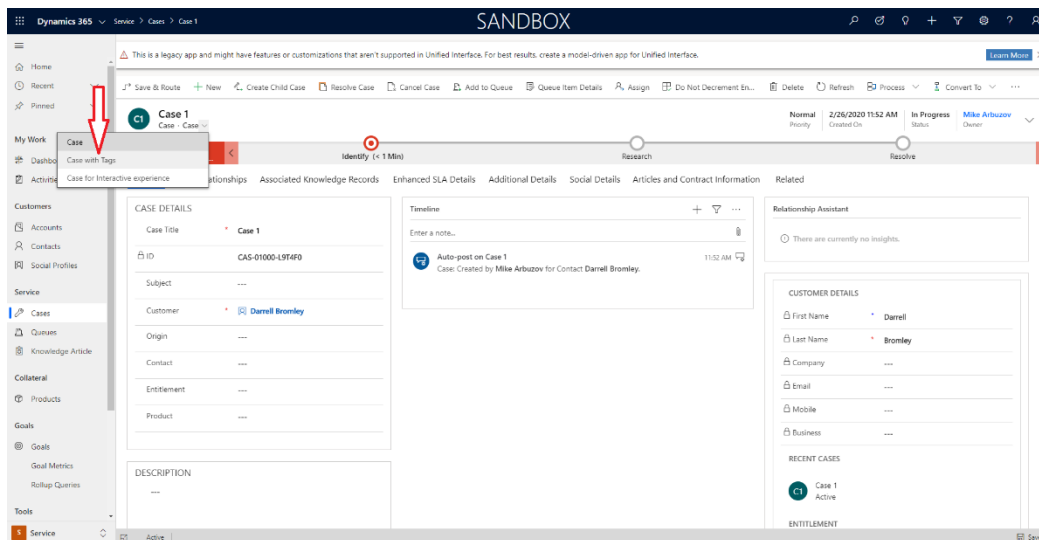
- **Field Name** – name of Tag
- **Rating** – number of use this Tag on different periods (read-only)

Usage

After installation

After successful installation, Tagging Extension ready to use:

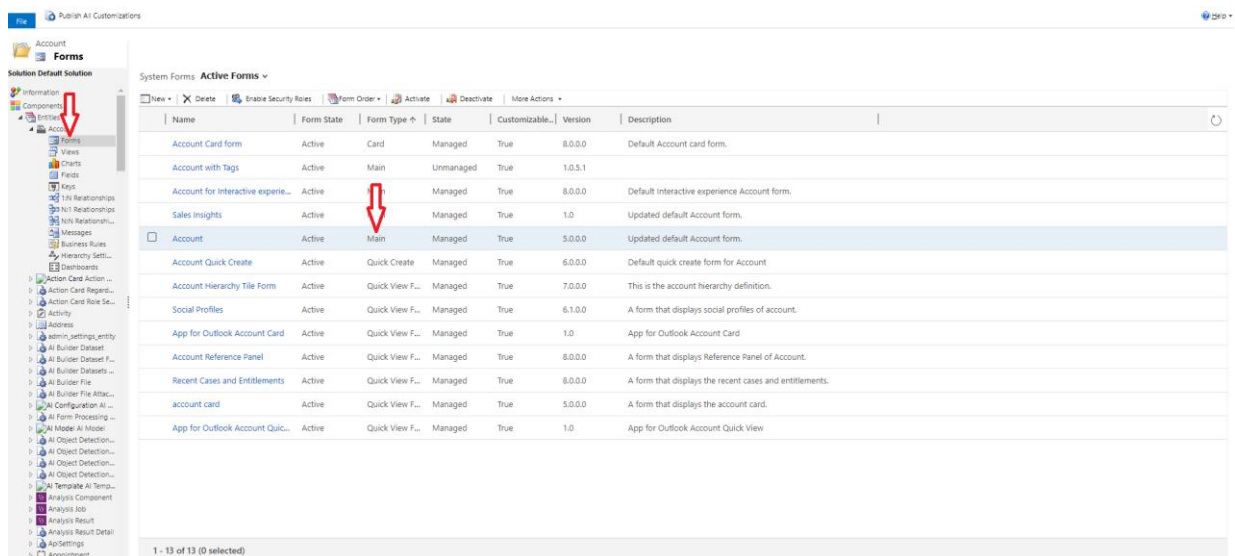
After installation, you will see a new dashboard and new forms with tags section on such entities: Account, Case, Contact, Contract, Email, Fax, Invoice, Lead, Letter, Marketing List, Opportunity, Order, Phone Call and Quote. Forms include a new section with web resource for adding new tags and displaying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



Using tags on custom entities

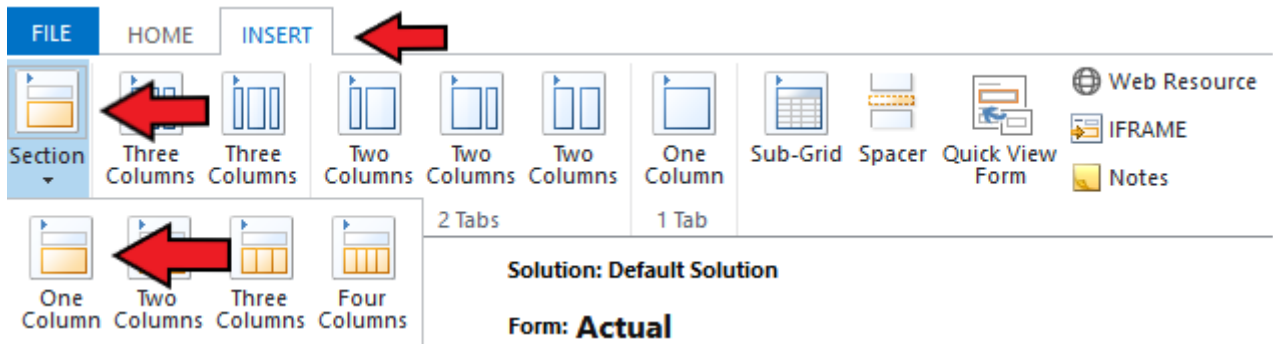
If you want to customize another entity to use tags, complete simple instruction below:

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.



Name	Form State	Form Type	State	Customizable	Version	Description
Account Card form	Active	Card	Managed	True	8.0.0.0	Default Account card form.
Account with Tags	Active	Main	Unmanaged	True	1.0.5.1	
Account for interactive experie...	Active	Managed	Managed	True	8.0.0.0	Default interactive experience Account form.
Sales Insights	Active	Managed	Managed	True	1.0	Updated default Account form.
Account	Active	Main	Managed	True	5.0.0.0	Updated default Account form.
Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Default quick create form for Account.
Account Hierarchy Tile Form	Active	Quick View F...	Managed	True	7.0.0.0	This is the account hierarchy definition.
Social Profiles	Active	Quick View F...	Managed	True	6.1.0.0	A form that displays social profiles of account.
App for Outlook Account Card	Active	Quick View F...	Managed	True	1.0	App for Outlook Account Card
Account Reference Panel	Active	Quick View F...	Managed	True	8.0.0.0	A form that displays Reference Panel of Account.
Recent Cases and Entitlements	Active	Quick View F...	Managed	True	8.0.0.0	A form that displays the recent cases and entitlements.
account card	Active	Quick View F...	Managed	True	5.0.0.0	A form that displays the account card.
App for Outlook Account Quick...	Active	Quick View F...	Managed	True	1.0	App for Outlook Account Quick View

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:

Add Web Resource
Add an existing web resource to the Form.

General | Formatting | Dependencies

Web resource

Web resource * **new_tagging_page**

Field Name and Properties

Name * **WebResource_tags**

Label * **Tagging**

☐ Display label on the Form

Visibility

☒ Visible by default

Web Resource Properties

Custom Parameter(data)

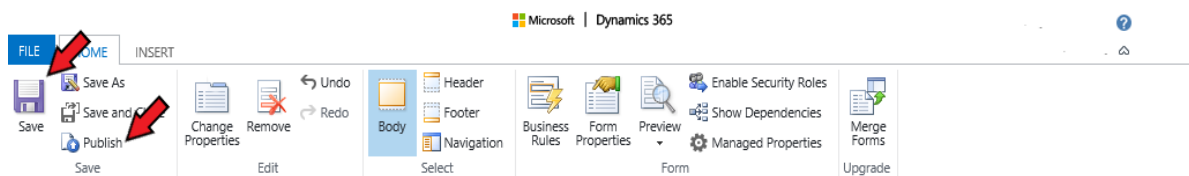
☐ Restrict cross-frame scripting, where supported.

☐ Pass record object-type code and unique identifier as parameters.

☐ Enable for tablet

OK **Cancel**

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



- 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.

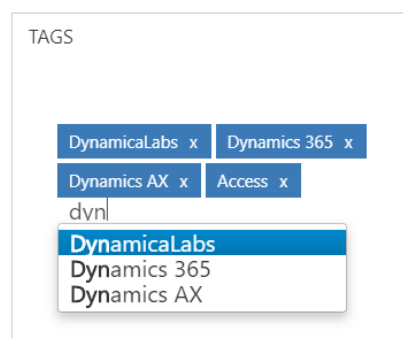
Tag records

To add tags to a record:

- Open a Record;

**If you are creating a new record you must save it first before Tags input section will become active;*

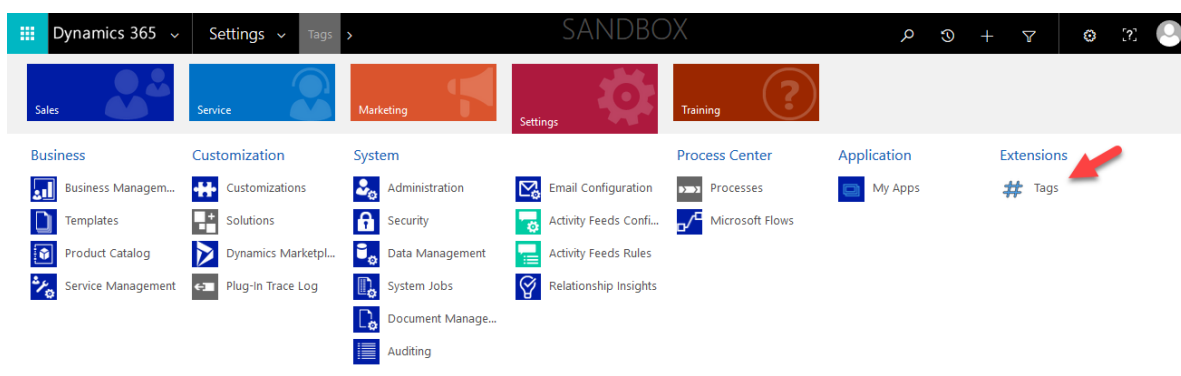
- Click on Tag input section;
- Start typing: matching tags, that already exist in the system, will appear in drop-down list;
- Select an appropriate tag from drop-down list OR Click Enter if you want to create a new Tag.



Change or Delete tags

If you want to change or delete Tags:

- 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 CRM Hub CORE > Dashboards >> Dynamicalabs

SANDBOX

+ New Deactivate Delete Refresh Email a Link Flow Word Templates Run Report

Dynamicalabs Tag

General Connections Related

Name	Dynamicalabs	Rating (10 day)	9
		Rating (month)	9
		Rating	9

Dynamica Microsoft Partner

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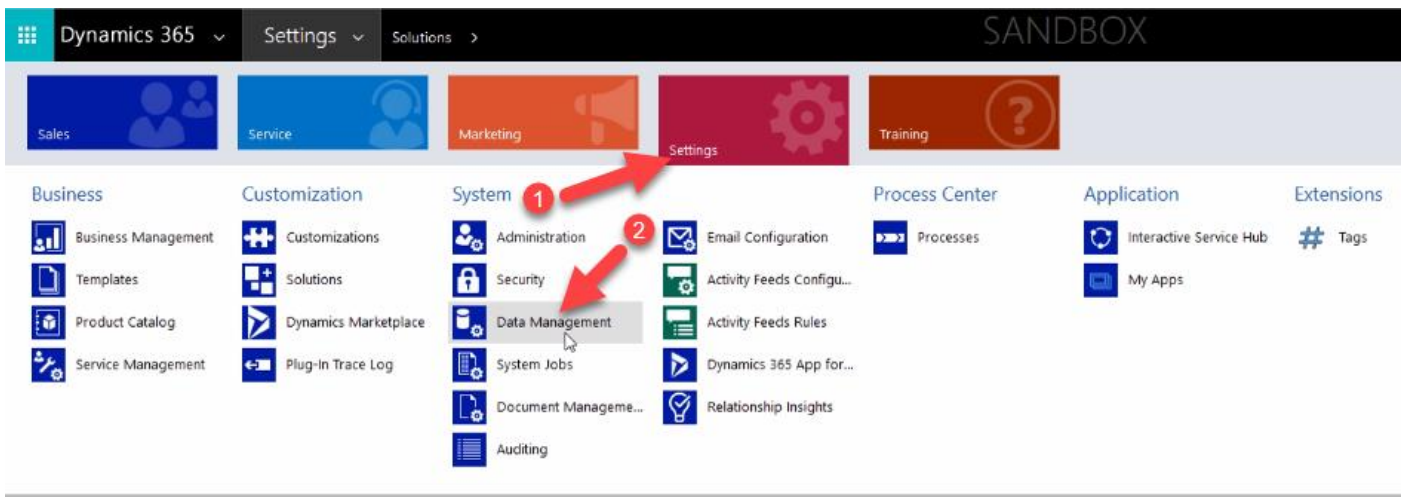
Uninstallation

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

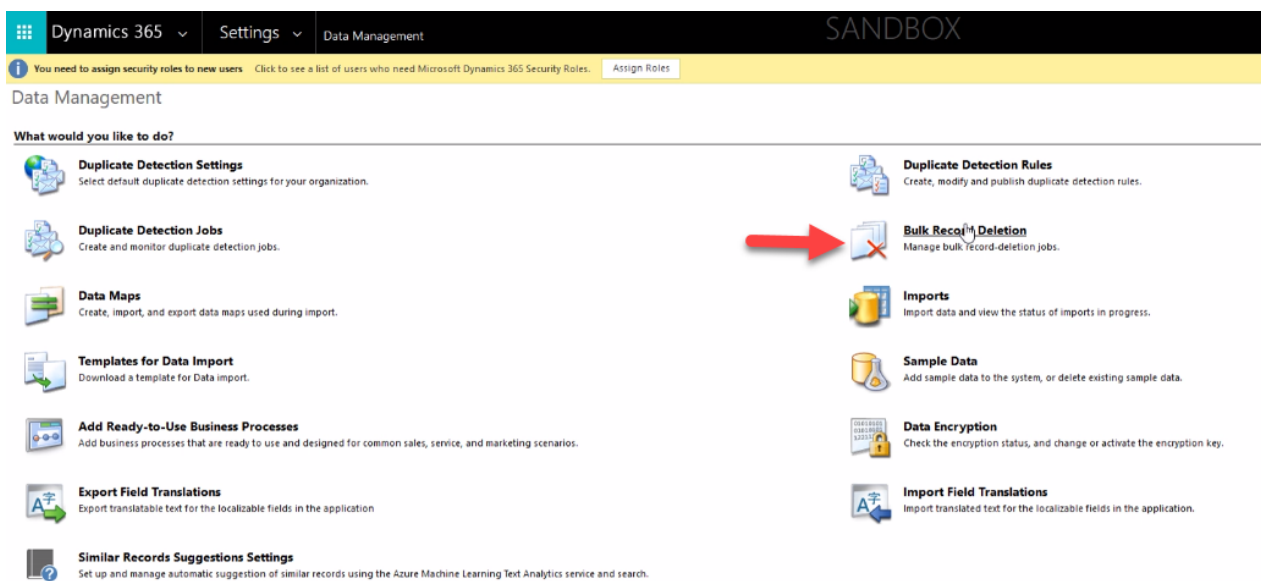
Remove connections

The fastest way to remove connections is Bulk Record Deletion:

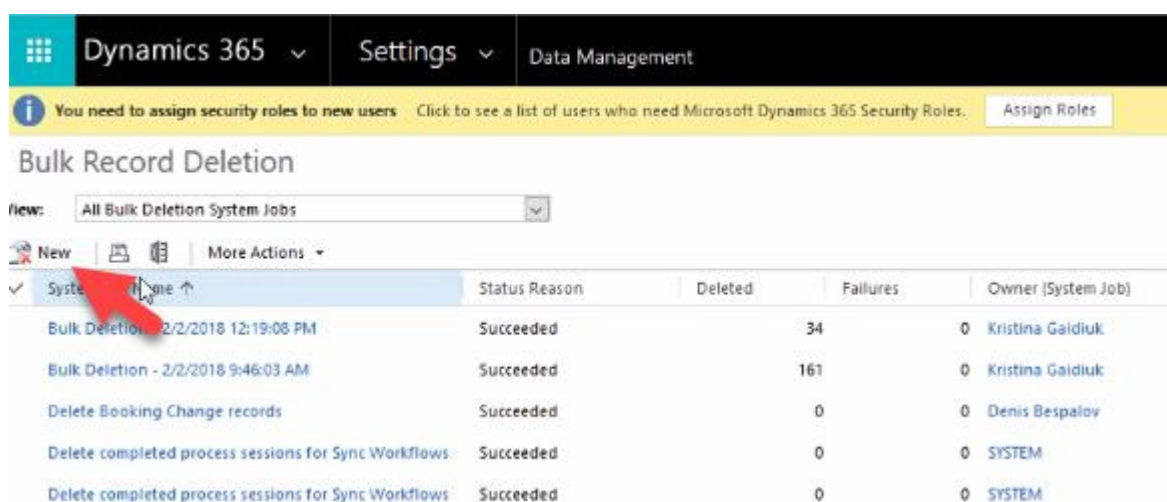
1. Go to Setting -> Data Management



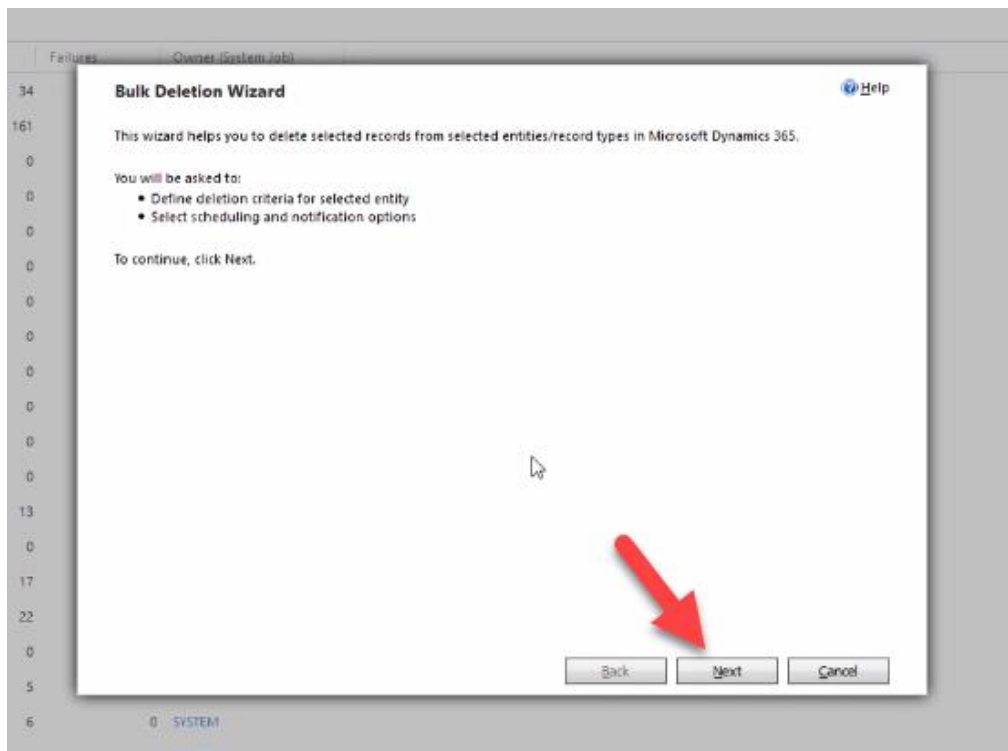
2. Select Bulk Record Deletion



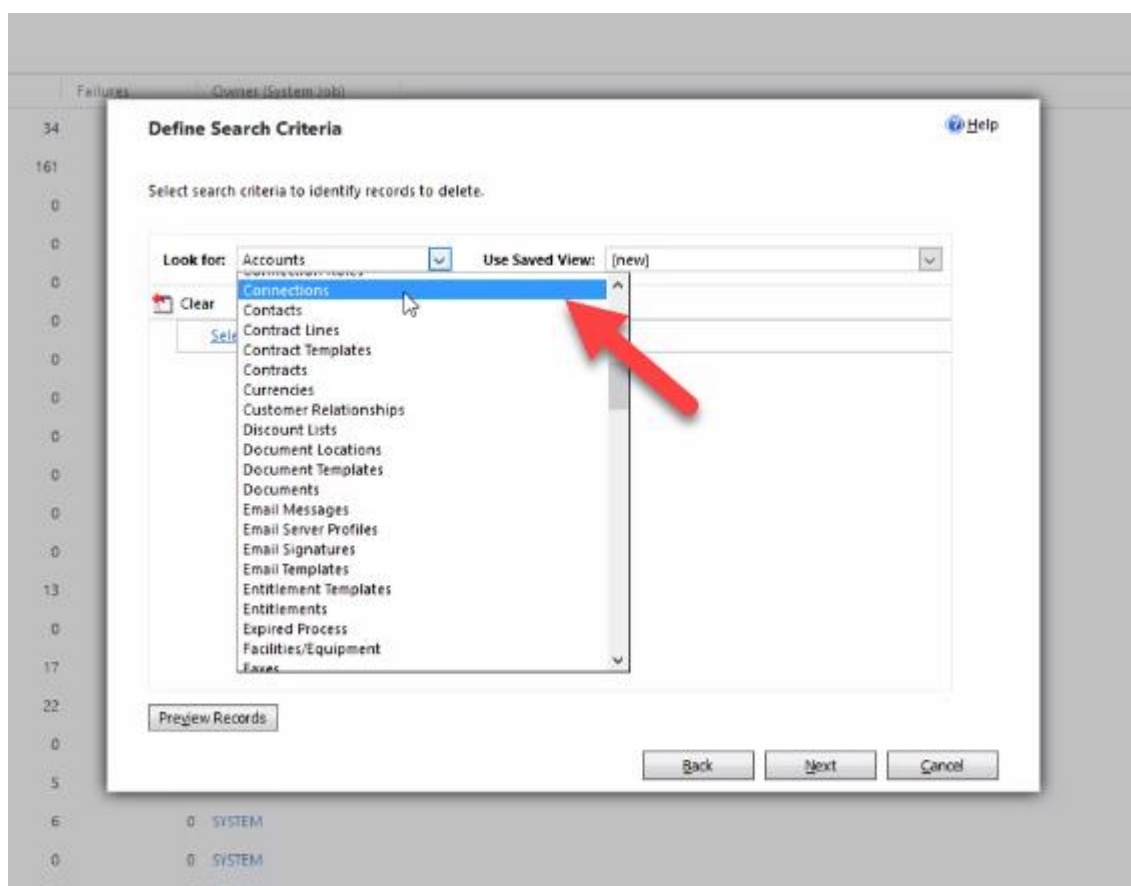
3. Click New



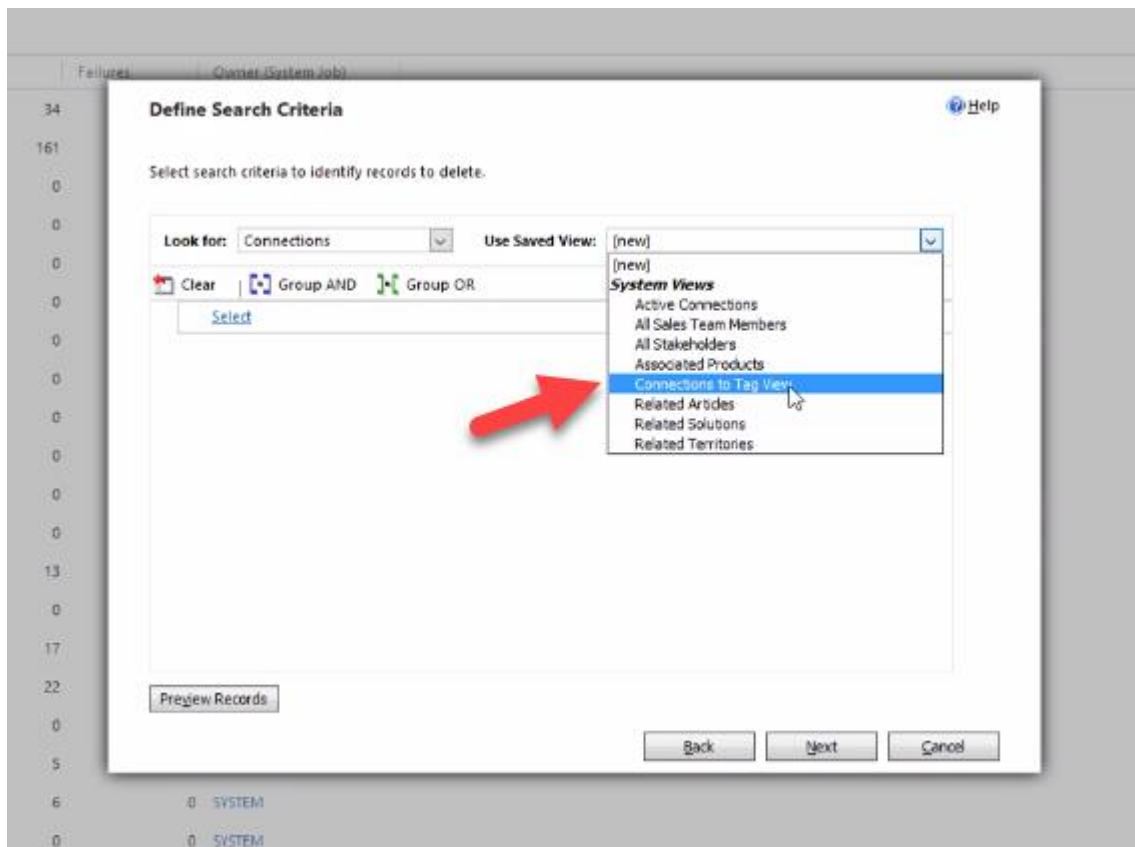
4. Click Next



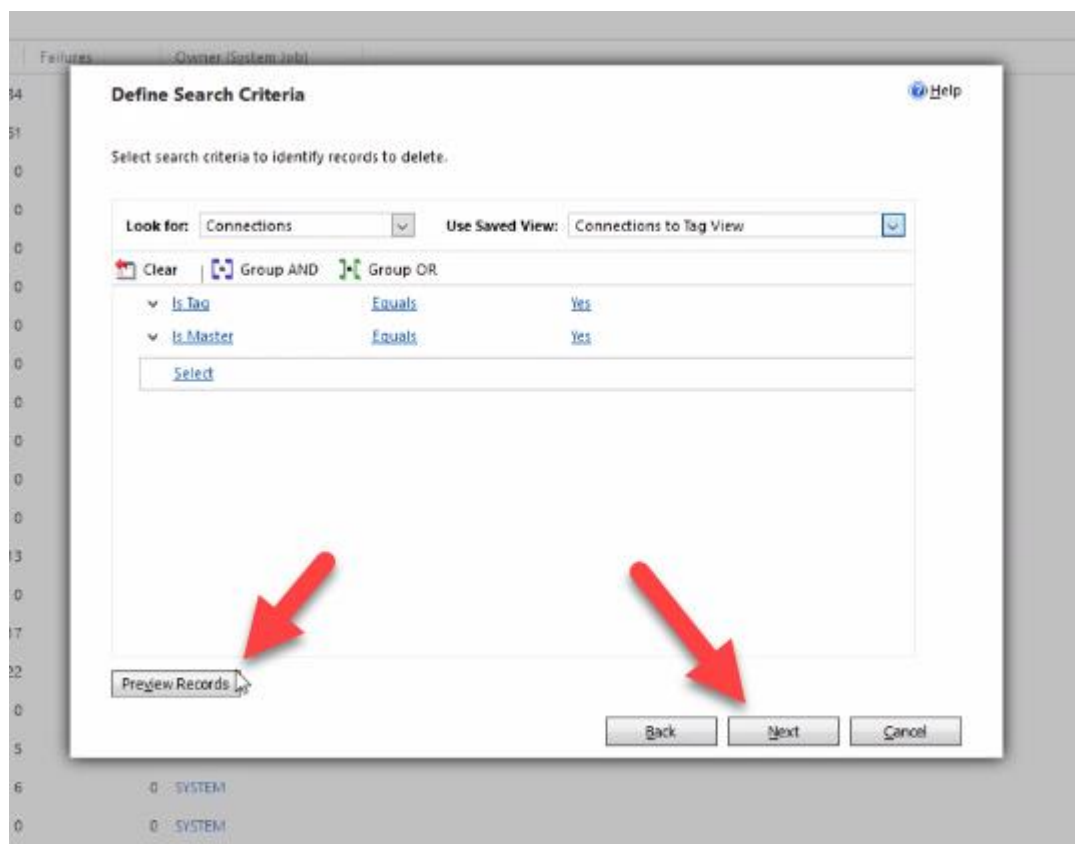
5. Find **Connections** in **Look for** drop-down list



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



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

Failures Overview (System Job)

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

0 SYSTEM
0 SYSTEM

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

Failures Overview (System Job)

Review Bulk Deletion Details

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.

Back Submit Cancel

0 SYSTEM
0 SYSTEM

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

Dynamics 365

SAND

A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues.

Experience it now

Bulk Record Deletion

View:

All Bulk Deletion System Jobs

New

More Actions

<input type="checkbox"/>	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

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

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

Dynamics 365

Settings

Solutions

SANDBOX

A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues.

Experience it now

All Solutions

New

Delete

Import

Export

Clone a Patch

Clone Solution

Apply Solution Upgrade

Import Translations

Export Translations

Publish All Customizations

Get Solution

	Name	Delete	Display Name	Version	Installed On	Package T...	Publisher	Description
<div><div>1</div><div><input checked="" type="checkbox"/></div></div>	DNLTagging		DNLTagging	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.