



User Guide_Pragmasys User Default

Version 1.0.0.0

Table of Contents

1. <u>MS CRM add on User Default.....</u>	<u>3</u>
2. <u>User Default Configuration Steps.....</u>	<u>4</u>
3. <u>Activating Load Default and Save Default Button.....</u>	<u>6</u>
4. <u>Purpose of the Buttons.....</u>	<u>8</u>
5. <u>Deactivating Load Default and Save Default Button.....</u>	<u>12</u>

MS CRM Add-On –User Default

This is a guide that depicts the enabling of the buttons i.e. 'save default' and 'load default' for an entity basis user specific. Each entity having a single record.

The objective of the 'save default' button is, whenever a user saves an entity data, a record gets created in the entity named 'Defaults' which has the data of this saved record.

Objective of 'load default' button is the default data will be loaded which is saved while creating the record.

Purpose of the guide:

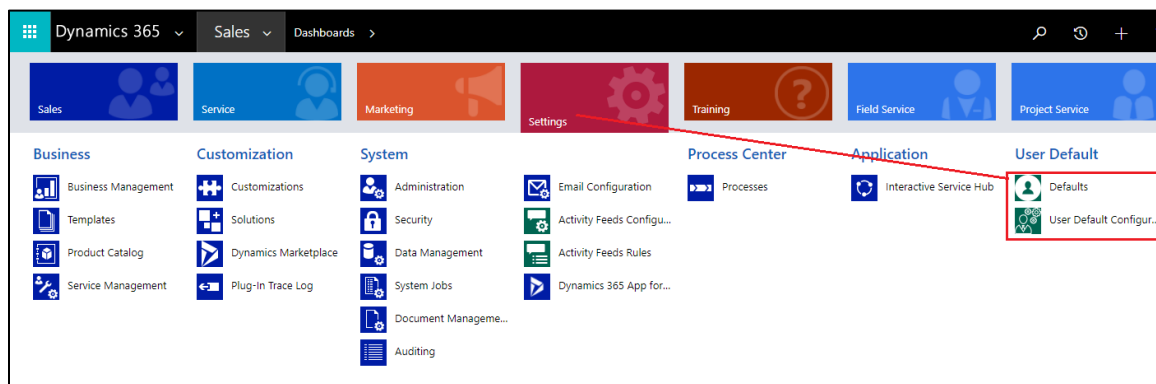
In industries, there are different departments i.e. Sales and Service where there is repetition of the data. To avoid the repetition, user can simply enable the buttons once, this can provide us the below:

- a.) It can reduce the repetition time and save the user's time
- b.) It can help cloning data basis user specific details
- c.) It can increase the accuracy of the data

Steps:

1. Login into MS CRM.
2. To view navigation of User Default & User Default Configuration entity, click on the menu bar followed by Settings sitemap. Now click on the User Default present below the Extensions option.

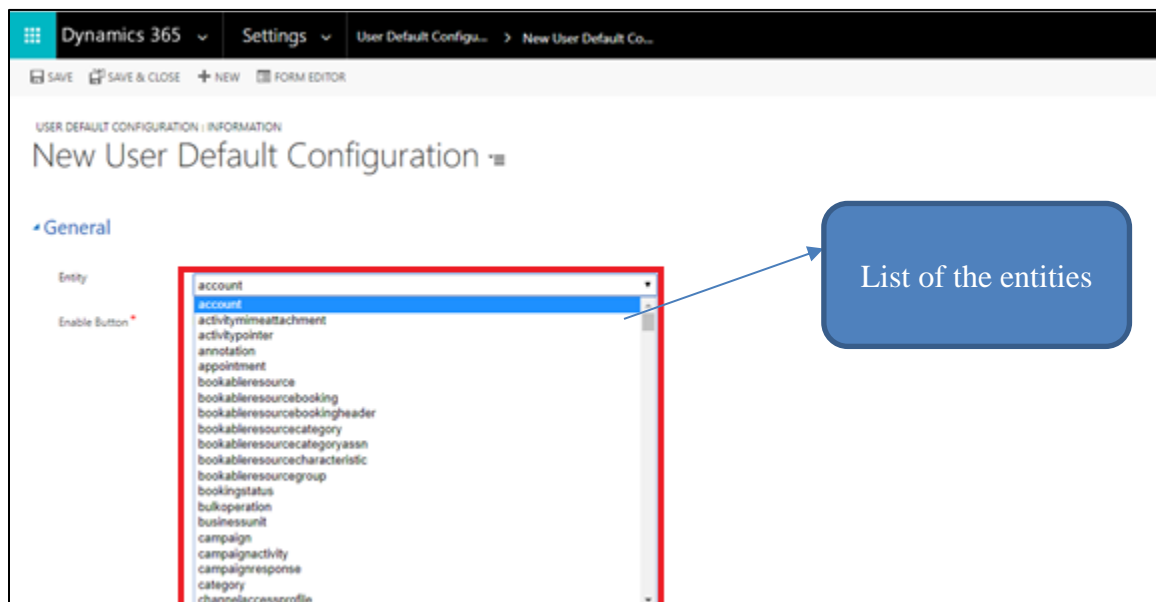
User Default



User Default → User Default Configuration

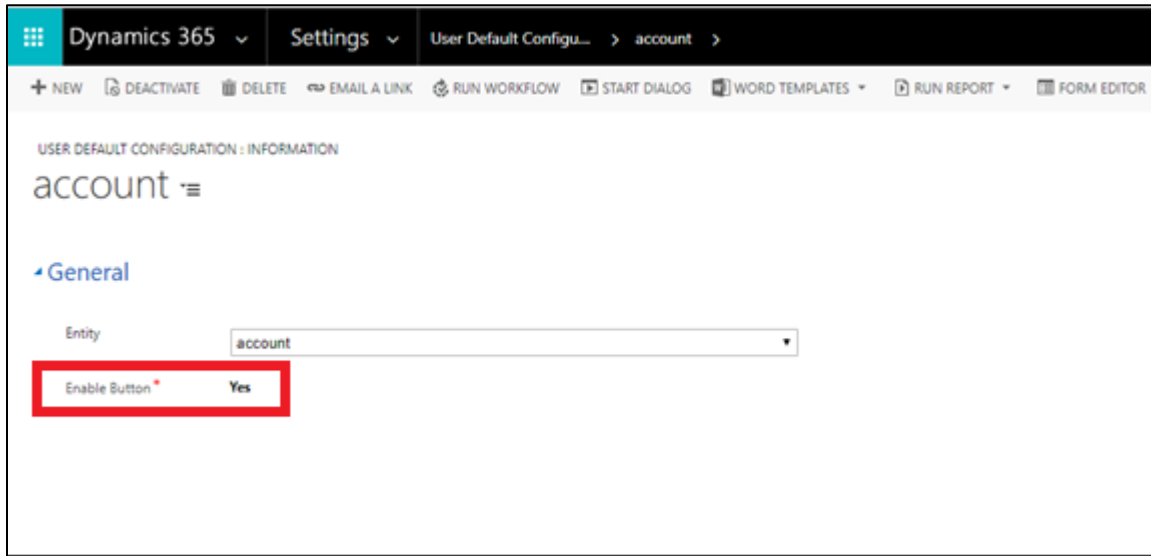
Steps to follow:

1. Click on User Default Configurations.
2. Click on New (+) and then enter the details as per your requirement in the below mentioned form.
3. Entity field will display the drop-down list for the available entities in MS CRM.
4. Select the Entity as per your requirement and select YES or NO to enable buttons for selected entity.



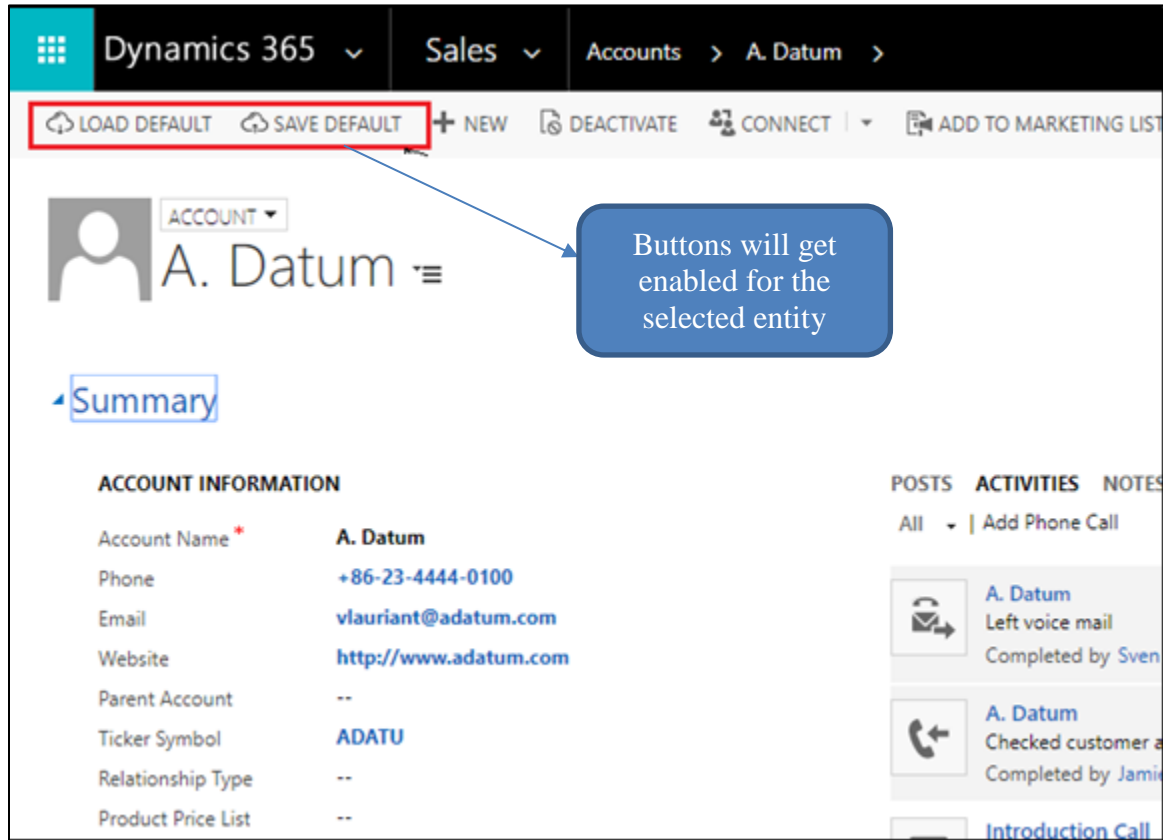
Activating Load Default and Save Default button

1. After selecting the desired entity name, select yes to enable the button



The screenshot shows the Dynamics 365 interface for configuring user defaults for the 'account' entity. The breadcrumb trail is 'Dynamics 365 > Settings > User Default Configur... > account >'. The top navigation bar includes options like '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'WORD TEMPLATES', 'RUN REPORT', and 'FORM EDITOR'. The main content area is titled 'USER DEFAULT CONFIGURATION : INFORMATION' and 'account'. Under the 'General' section, the 'Entity' dropdown is set to 'account'. The 'Enable Button' field is highlighted with a red box and is set to 'Yes'.

Result: Verify whether the buttons are enabled for the account record



The screenshot shows the Dynamics 365 interface for an account record. The breadcrumb navigation at the top reads "Dynamics 365 > Sales > Accounts > A. Datum >". The command bar contains several buttons: "LOAD DEFAULT", "SAVE DEFAULT", "+ NEW", "DEACTIVATE", "CONNECT", and "ADD TO MARKETING LIST". A red box highlights the "LOAD DEFAULT" and "SAVE DEFAULT" buttons. A blue callout box with an arrow pointing to these buttons contains the text: "Buttons will get enabled for the selected entity".

ACCOUNT INFORMATION

Account Name *	A. Datum
Phone	+86-23-4444-0100
Email	vlauriant@adatum.com
Website	http://www.adatum.com
Parent Account	--
Ticker Symbol	ADATU
Relationship Type	--
Product Price List	--

POSTS ACTIVITIES NOTES

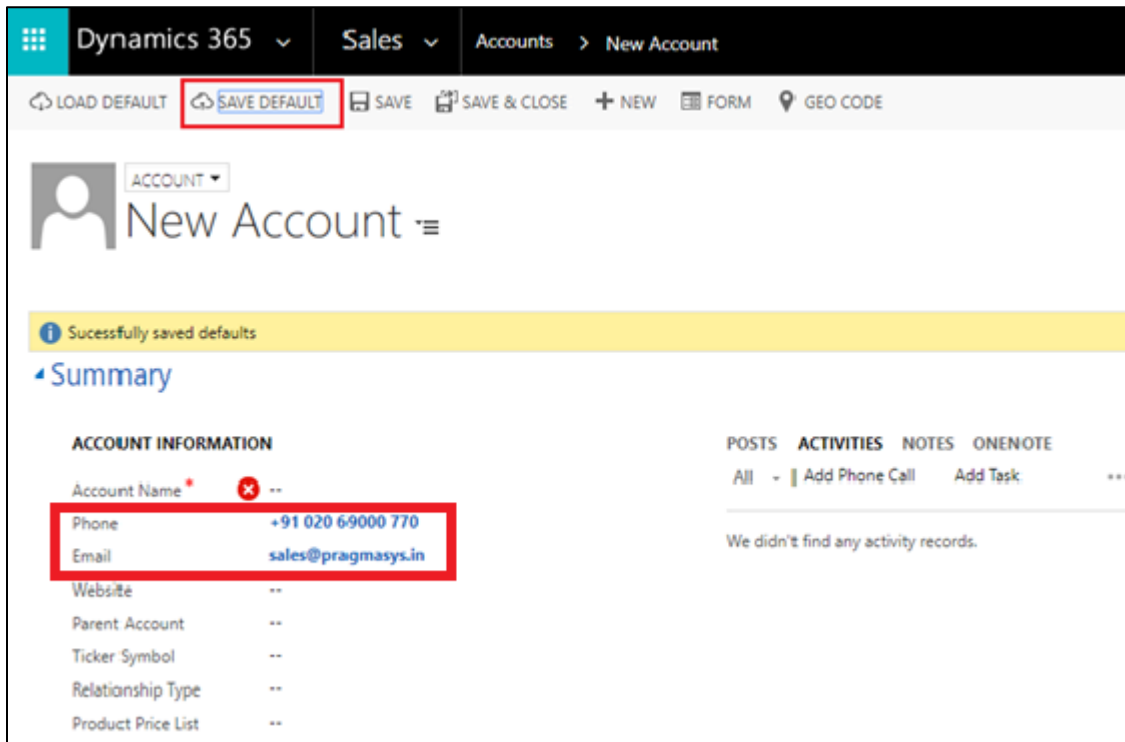
All | Add Phone Call

- A. Datum
Left voice mail
Completed by Sven
- A. Datum
Checked customer a
Completed by Jamie
- Introduction Call

Purpose of the buttons:

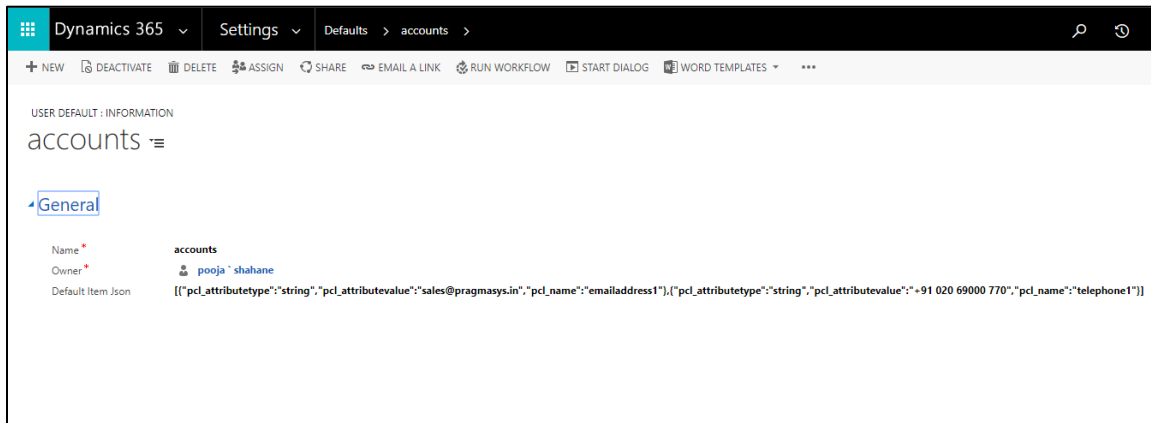
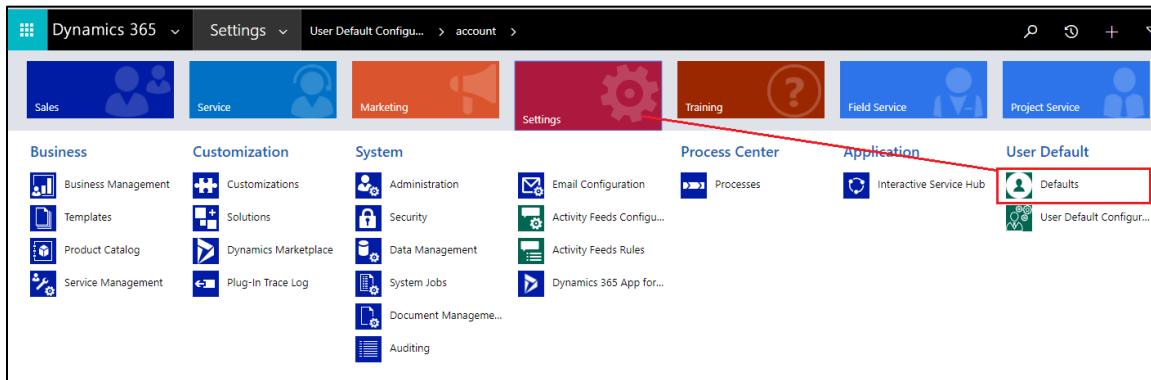
a.) Save Default – On saving the record details, a record gets created in the entity named 'Defaults' which holds the data of this saved record

Provide the field values which you want to save and Click on the SAVE DEFAULT button



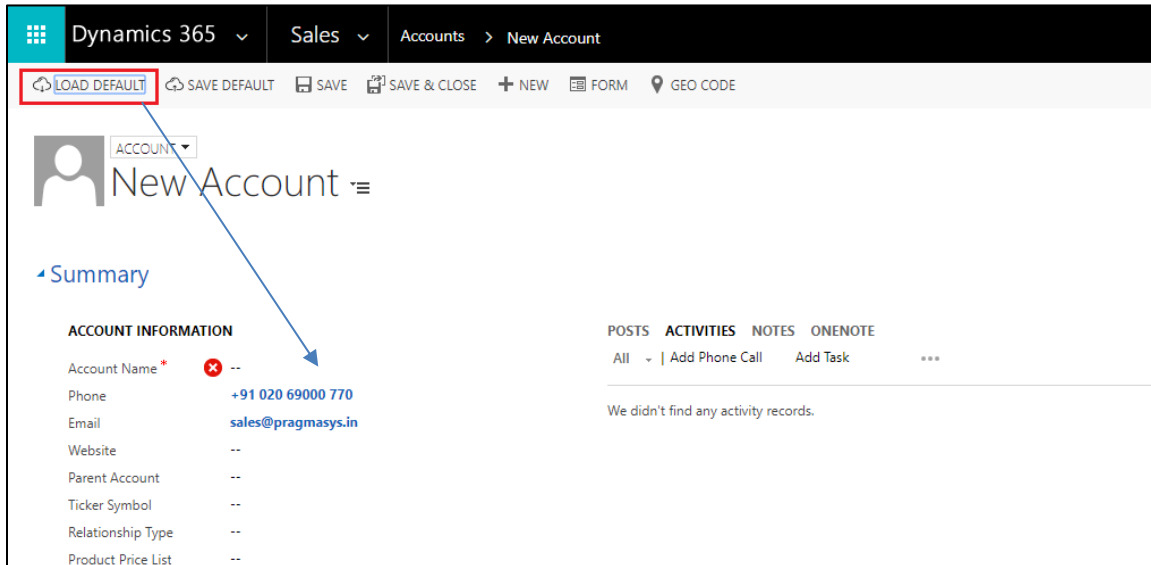
The screenshot shows the Dynamics 365 interface for creating a new account. The breadcrumb trail is 'Sales > Accounts > New Account'. The command bar includes 'LOAD DEFAULT', 'SAVE DEFAULT' (highlighted with a red box), 'SAVE', 'SAVE & CLOSE', '+ NEW', 'FORM', and 'GEO CODE'. The page title is 'New Account'. A yellow notification bar states 'Successfully saved defaults'. The 'Summary' section contains 'ACCOUNT INFORMATION' with fields: 'Account Name' (redacted), 'Phone' (+91 020 69000 770), 'Email' (sales@pragmasys.in, highlighted with a red box), 'Website', 'Parent Account', 'Ticker Symbol', 'Relationship Type', and 'Product Price List'. On the right, there are tabs for 'POSTS', 'ACTIVITIES', 'NOTES', and 'ONENOTE', with 'ACTIVITIES' selected. Below the tabs, it says 'We didn't find any activity records.'

Click on the Defaults entity to view saved record data
(It will automatically create a record in Defaults entity in which it shows saved record as shown below)



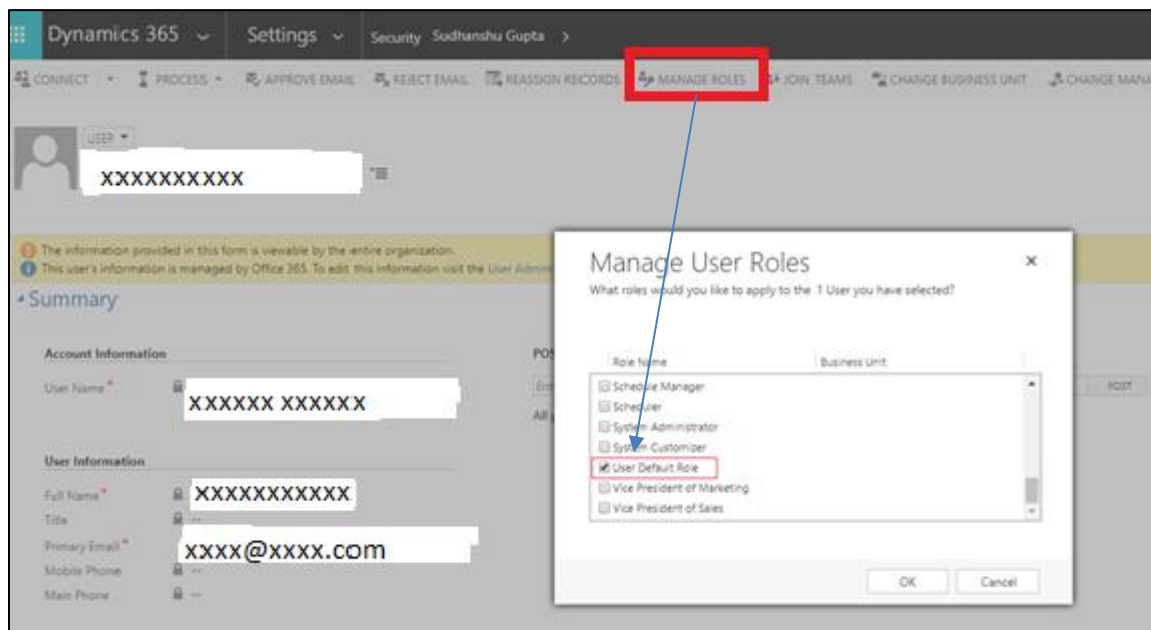
b.) Load Default – On clicking of the Load Default button, the default data will be loaded which is saved while creating the record

Click on Load Default button



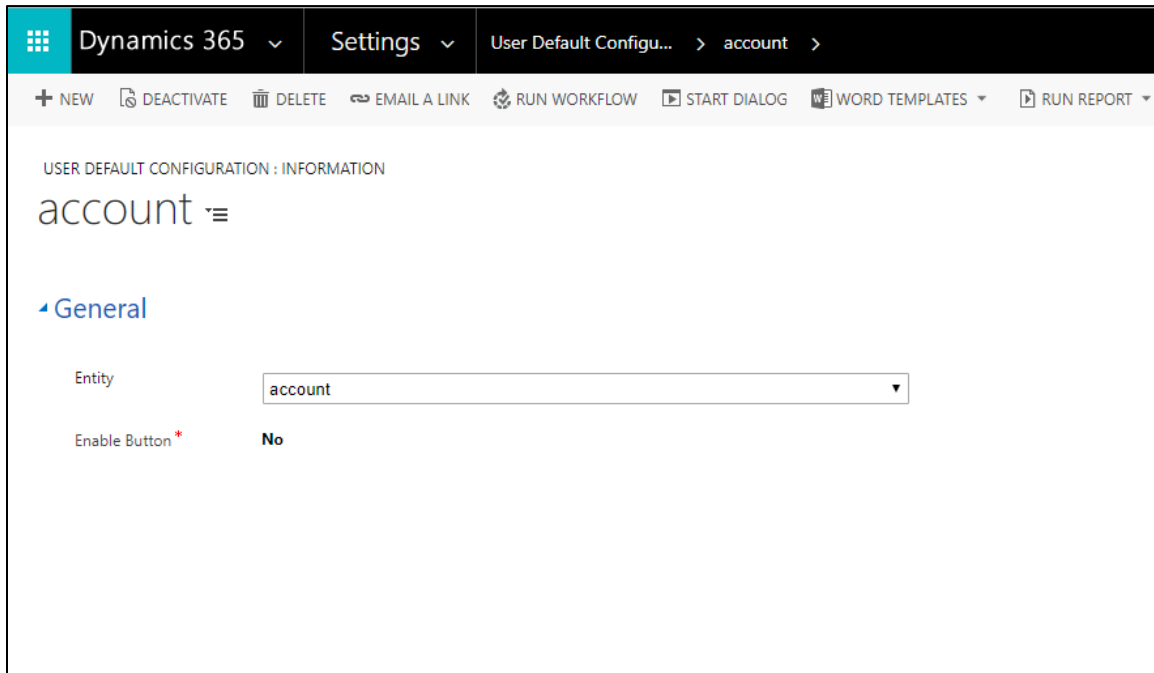
Note: If a user has security role e.g. CSR Manager role instead of 'System Administrator' then give role as 'User Default Role' as well

1. To assign role, Navigate to Settings->Security->Users
2. Click -> Manage Roles
3. Select User Default Role
4. Click OK



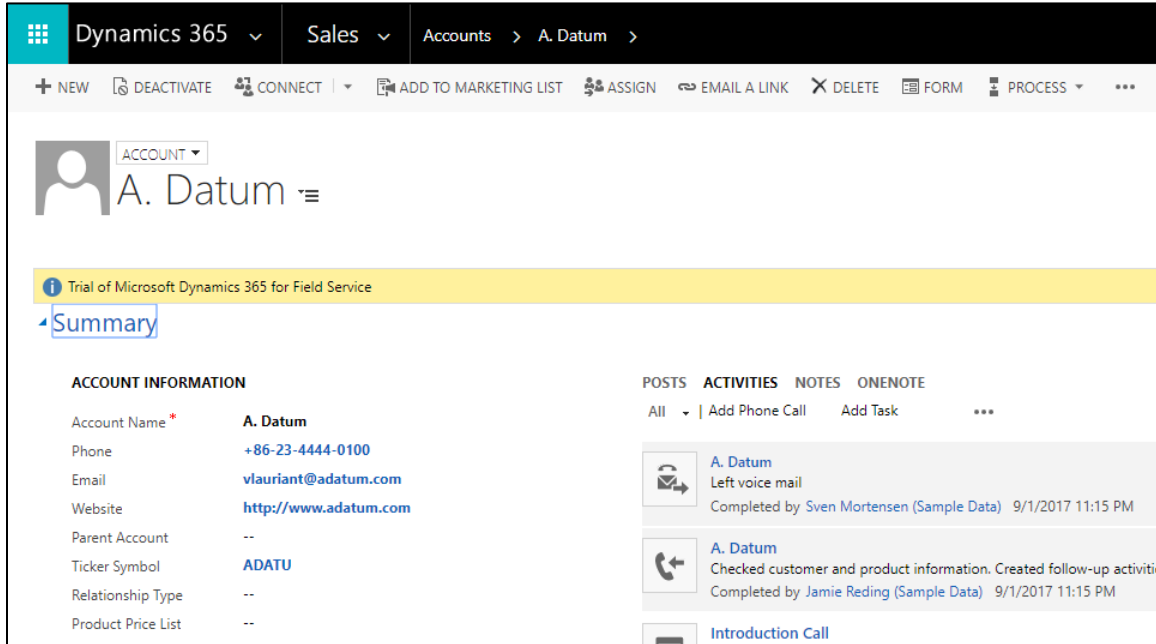
Deactivating Save Default and Load Default button

1. After selecting the desired entity name, select No as an option in the field name Enable Button.



The screenshot shows the Dynamics 365 user interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'User Default Configur...' with a breadcrumb for 'account'. Below the navigation bar is a ribbon with options: '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'WORD TEMPLATES', and 'RUN REPORT'. The main content area is titled 'USER DEFAULT CONFIGURATION : INFORMATION' and 'account'. Under the 'General' section, there are two fields: 'Entity' with a dropdown menu showing 'account', and 'Enable Button*' with a radio button selected for 'No'.

Result: Verify whether the buttons are disabled for the account record



The screenshot shows the Microsoft Dynamics 365 interface for an account record. The breadcrumb navigation at the top reads: Dynamics 365 > Sales > Accounts > A. Datum >. Below this is a toolbar with buttons for NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, FORM, and PROCESS. The account name 'A. Datum' is displayed prominently. A yellow banner indicates a trial of Microsoft Dynamics 365 for Field Service. The 'Summary' tab is active, showing 'ACCOUNT INFORMATION' on the left and a list of 'ACTIVITIES' on the right. The account information includes fields for Account Name, Phone, Email, Website, Parent Account, Ticker Symbol, Relationship Type, and Product Price List. The activities list shows three items: 'Left voice mail', 'Checked customer and product information', and 'Introduction Call', each with completion details.

ACCOUNT INFORMATION		POSTS	ACTIVITIES	NOTES	ONENOTE
Account Name *	A. Datum	All	Add Phone Call	Add Task	...
Phone	+86-23-4444-0100				
Email	vlauriant@adatum.com				
Website	http://www.adatum.com				
Parent Account	--				
Ticker Symbol	ADATU				
Relationship Type	--				
Product Price List	--				