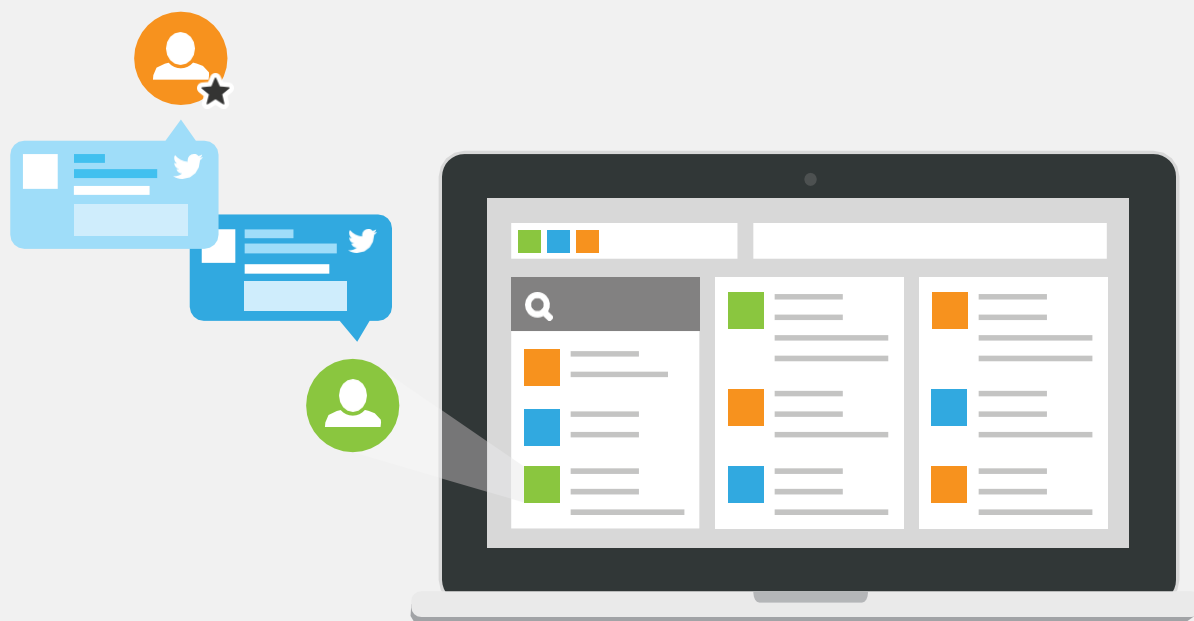


GUIDE

# Microsoft Dynamics 365 for Hootsuite

Set Up Guide & User Manual



# Microsoft Dynamics 365 for Hootsuite

## Set Up Guide & User Manual

### Overview

The main purpose of the Microsoft Dynamics 365 plug-in application is to empower sales and customer-facing teams to address customer issues, influence buying decisions and shorten sales cycles through better understanding of needs and communication of solutions with customers and prospects through social media.

The main features that the Microsoft Dynamics 365 plug-in application contains, grouped by functional categories are:

#### Search in Microsoft Dynamics Database:

- Query with Social Data
- Search Results Page
- Filters for results
- New Search
- Selecting Results

#### Entities:

- Create, view and update Leads and Opportunities manually and using social data from native streams
- Create, view and update Contacts and Accounts manually and from native streams
- Create, view and update Cases and Activities manually and using social data from native streams
- Associating Leads with Opportunities
- Associating Contacts with Accounts

# Prerequisites

## Microsoft Dynamics 365 Custom Fields Solution Install

Among other details, the Microsoft Dynamics integration application allows you to capture a social contact's Twitter or Facebook Username and Id on Lead and Contact entities. Because these are not standard fields for the afore mentioned entities, they must be created before using the application for the first time. You can do this by installing a solution that includes these fields.

These are the fields included in the package

Display Name	Name
Twitter Username	hoot2dyn_twitterusername
Twitter Id	hoot2dyn_twitterid
Facebook Username	hoot2dyn_facebookusername
Facebook Id	hoot2dyn_facebookid

In order to install the package, follow the next steps:

1. In your AppSource page, search for 'Hootsuite Microsoft Dynamics 365'. Once you find the application, click on **Free Trial** button.

AppSource Apps Consulting Services Search Microsoft AppSource

Apps > Hootsuite Microsoft Dynamics365

**Hootsuite Microsoft Dynamics365**  
Hootsuite  
★★★★★ (0) Write a review  
Free trial

**FREE TRIAL**

Products  
Dynamics 365 Sales  
Dynamics 365 Customer Service

Publisher  
Hootsuite

Acquire Using  
Work or school account

Version  
1

Categories  
Customer service  
Human resources  
Sales

Industries  
Professional services

Overview Reviews

Microsoft Dynamics 365 for Hootsuite

With Microsoft Dynamics for Hootsuite, you can deliver effective, timely, and engaging customer experiences to drive more leads and reach a wider audience

Learn more  
User Guide

Twitter Twitter data Instagram Home End Home

Home Microsoft Dynamics 365 for Hootsuite

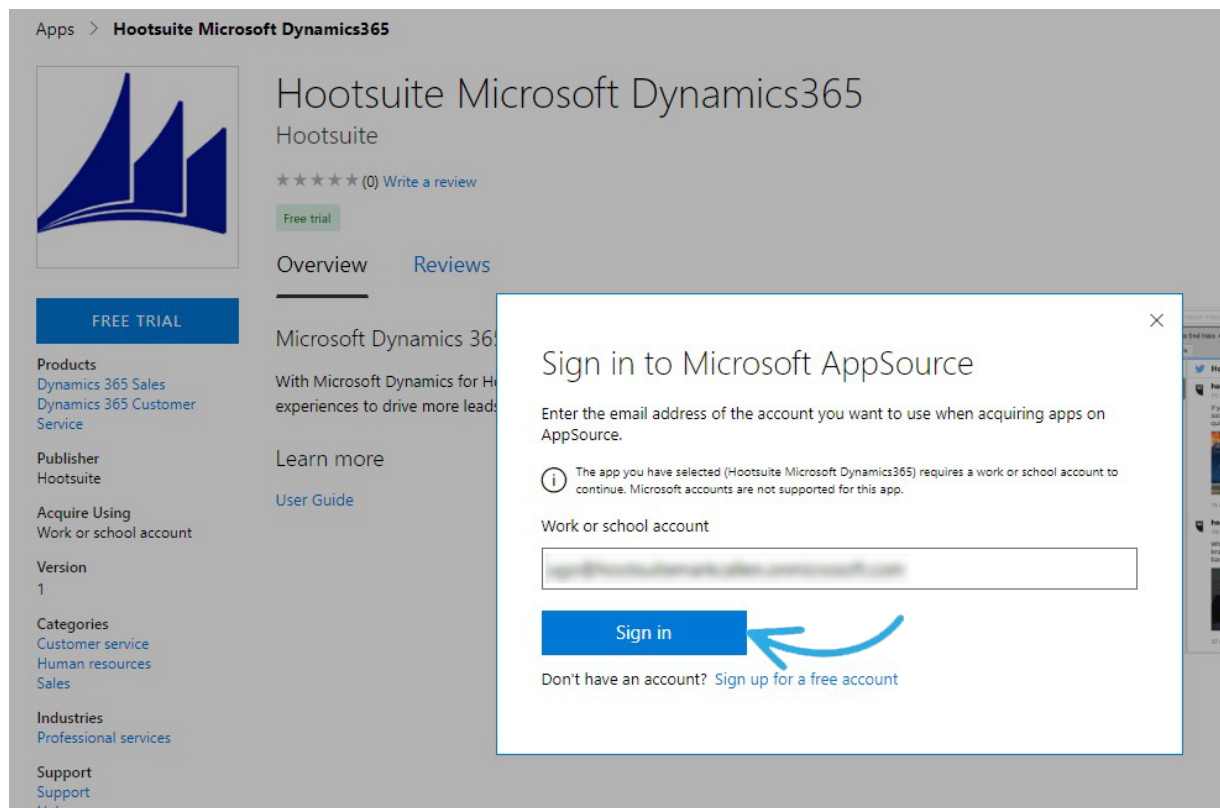
Thanks to training from The #MicrosoftPowerToGether, I'm able to grow my business for my business.

Microsoft Dynamics 365 for Hootsuite

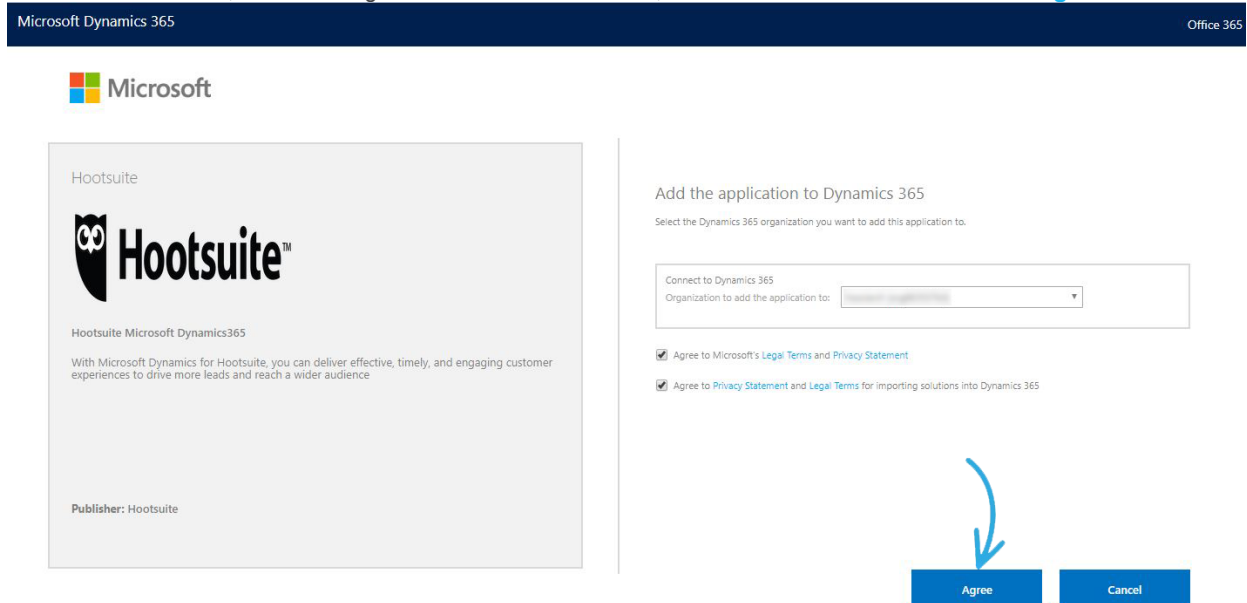
Meet the new state of Microsoft Dynamics 365 and Hootsuite. The Microsoft Dynamics 365 for Hootsuite.

Microsoft Dynamics 365 for Hootsuite

If you have not logged into the AppSource, then login with your Dynamics credentials. Enter your user id and click **Sign in** to enter password in the next screen.



2. In the next screen, select the organization name from the list, select the two checkboxes and click **Agree** button.



The solution, **Hootsuite Dynamics 365 Integration** with version 1.0.0.3 will be displayed in the list of available solutions. The solution will be installed after some time.

Microsoft | Dynamics 365

# Dynamics 365 Administration Center

There's a better way to manage your instances. Try the new Admin center

INSTANCES | **UPDATES** | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

## Manage your solutions

Manage your solutions

Select a preferred solution to manage on selected instance: hssolarch

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Hootsuite DynamicsCRM I...	1.0.0.3	12/31/2025	Installation pending
HootsuiteIntegration	1.0	6/30/2021	Installation pending
LinkedIn Sales Navigator f...	3.0.1.270	1/1/2050	Upgrade available
Live Assist for Microsoft D...	3.5.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.5.0.0	1/1/2050	Not installed
Microsoft Forms Pro	1.16.0.0	1/1/2050	Upgrade available
OData v4 Data Provider	9.0.0.106	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics 3...	1.19.1012.0	1/1/2020	Not installed
PowerApps Checker Base	1.1.1.6	1/1/2050	Installed
Project Service Automation	3.10.4.21	1/1/2050	Not installed
Routing Rules - Preview	9.1.0.1011	1/1/2050	Not installed
Sales insights add-on	9.0.1.7079	1/1/2050	Not installed
Sample Data for Marketing	1.57.1054.0	1/1/2020	Not installed
Voice of the Customer for ...	9.0.1438.4	1/1/2050	Not installed

### Hootsuite Dynamics...

Please wait while installation starts. This may take a few minutes.

Solution containing the custom fields needed for Hootsuite - DynamicsCRM Integration Lead: - hoot2dyn\_TwitterId (label: Twitter Id) - hoot2dyn\_TwitterUsername (label: Twitter ... (more)

Created by: Hootsuite

[Learn more](#)

After the solution is installed successfully, the status of the solution will change to Installed

Microsoft | Dynamics 365

# Dynamics 365 Administration Center

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INSTANCES | **UPDATES** | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

## Manage your solutions

Manage your solutions

Select a preferred solution to manage on selected instance: hssolarch

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Hootsuite DynamicsCRM I...	1.0.0.3	12/31/2025	Installed
HootsuiteIntegration	1.0	6/30/2021	Installed
LinkedIn Sales Navigator f...	3.0.1.270	1/1/2050	Upgrade available
Live Assist for Microsoft D...	3.5.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.5.0.0	1/1/2050	Not installed
Microsoft Forms Pro	1.16.0.0	1/1/2050	Upgrade available
OData v4 Data Provider	9.0.0.106	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics 3...	1.19.1012.0	1/1/2020	Not installed
PowerApps Checker Base	1.1.1.6	1/1/2050	Installed
Project Service Automation	3.10.4.21	1/1/2050	Not installed
Routing Rules - Preview	9.1.0.1011	1/1/2050	Not installed
Sales insights add-on	9.0.1.7079	1/1/2050	Not installed
Sample Data for Marketing	1.57.1054.0	1/1/2020	Not installed
Voice of the Customer for ...	9.0.1438.4	1/1/2050	Not installed

### Hootsuite Dynamics...

Solution containing the custom fields needed for Hootsuite - DynamicsCRM Integration Lead: - hoot2dyn\_TwitterId (label: Twitter Id) - hoot2dyn\_TwitterUsername (label: Twitter ... (more)

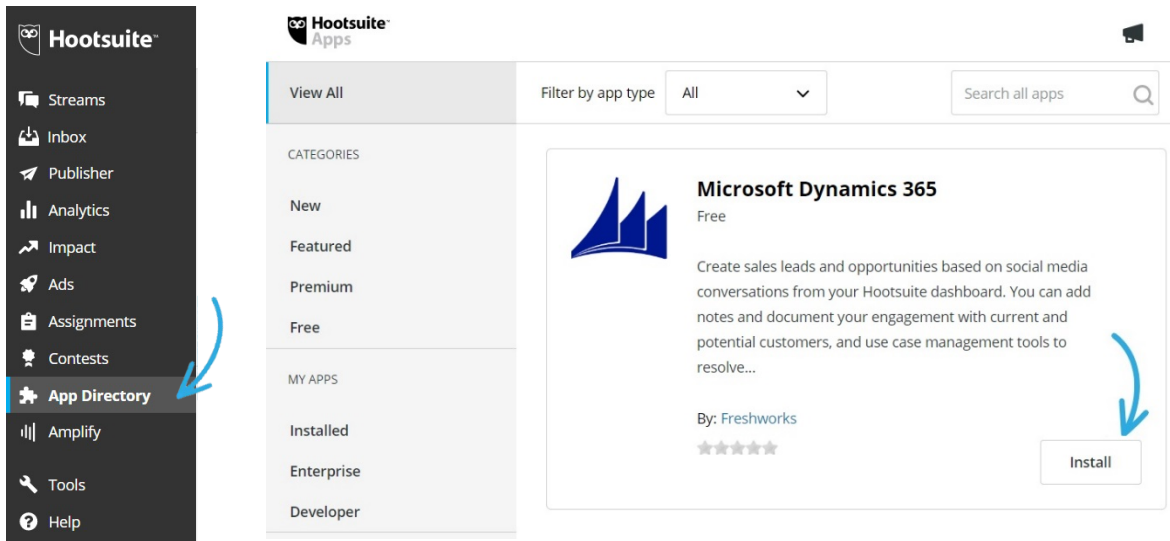
Created by: Hootsuite

[Learn more](#)

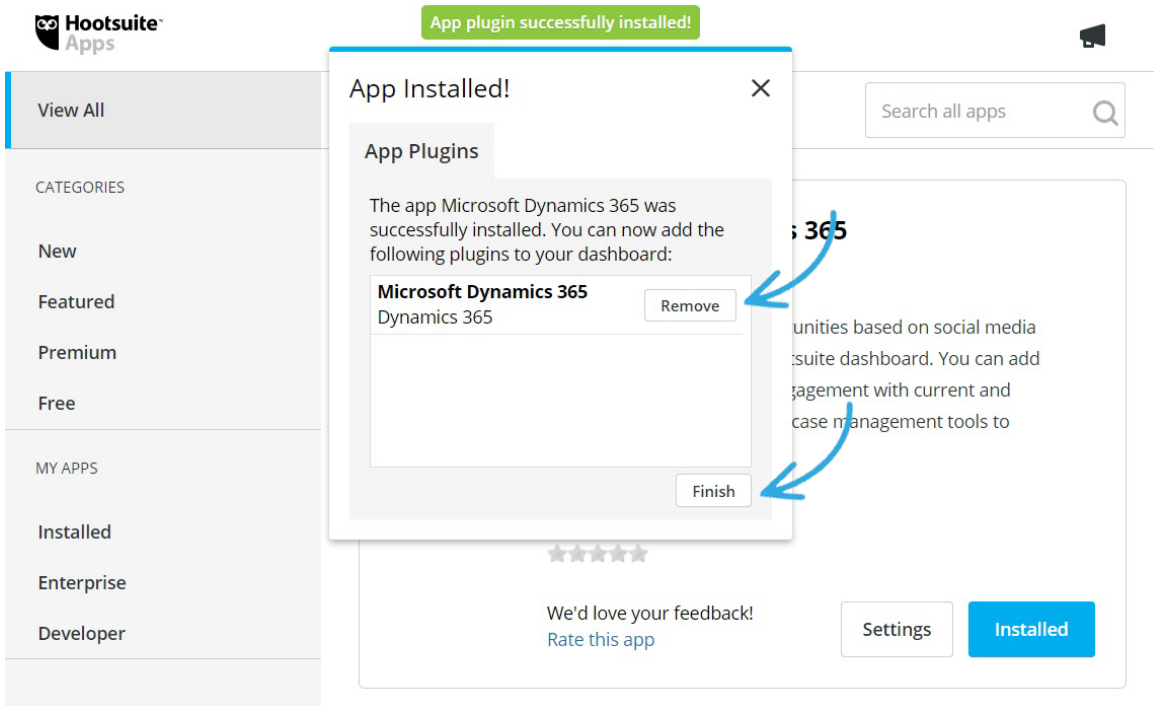
# Install Microsoft Dynamics application in Hootsuite

In order to install the Microsoft Dynamics 365 application, follow the next steps:

1. Go to [www.hootsuite.com](http://www.hootsuite.com) web site.
2. Access the left-side menu and select 'App Directory'.
3. In the pop-up window that appears select 'My Apps' folder and locate Microsoft Dynamics application that you want to install. Click on 'Install App' button.



4. From 'App Plugins' tab add Microsoft Dynamics 365 Plugin and click 'Finish' button.



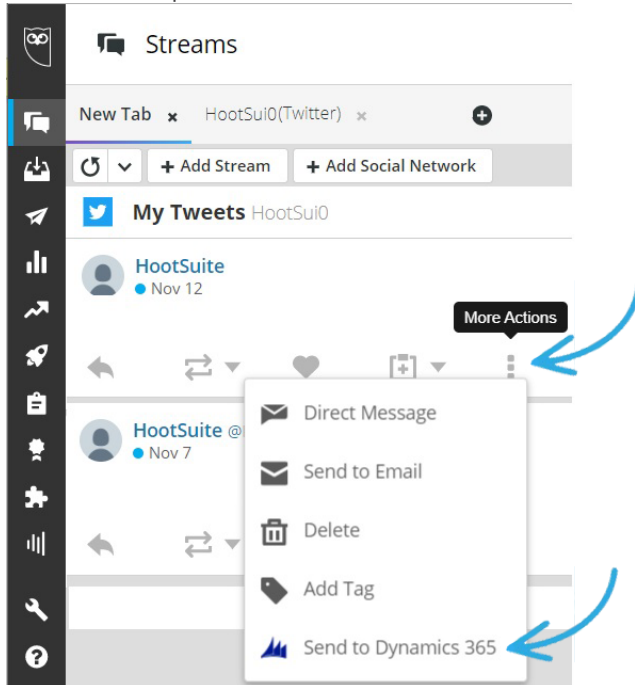
The application is installed and ready to use.

# Features

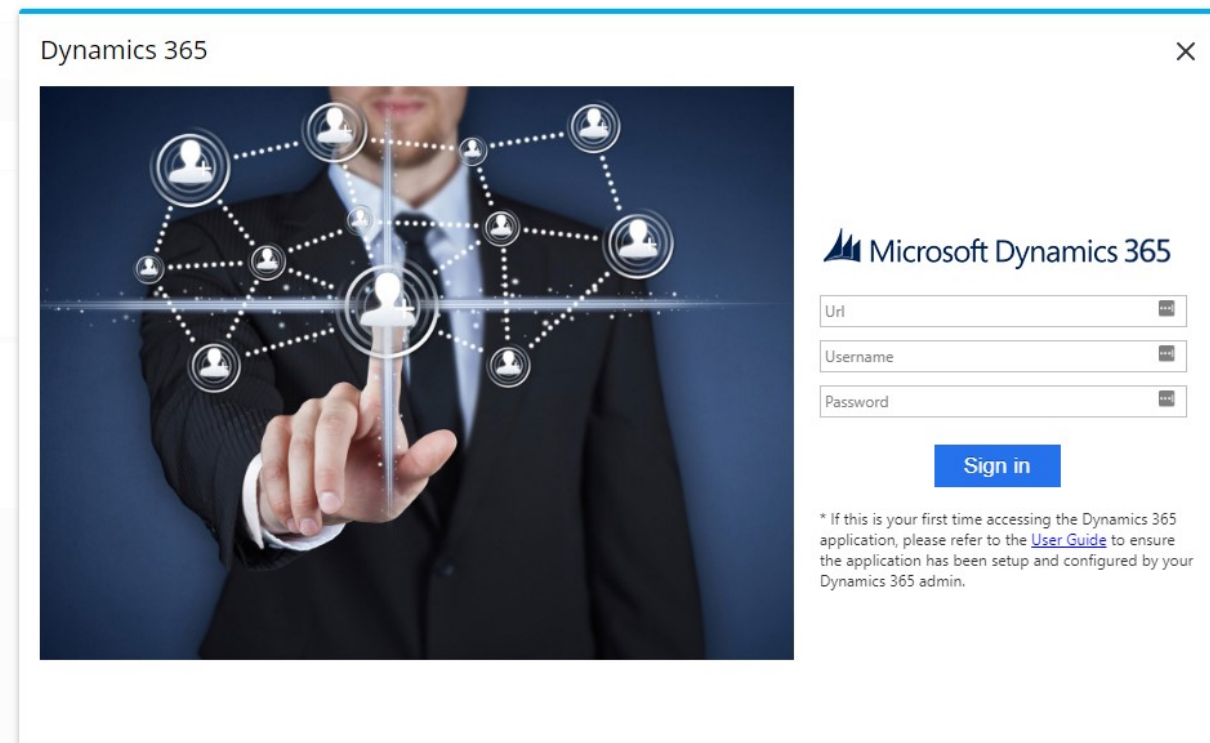
## Access Microsoft Dynamics from Hootsuite

In order to be able to capture information in Microsoft Dynamics about social contacts from Facebook and Twitter, first you must log into your Microsoft Dynamics account from Hootsuite Dashboard. You can do this by:

1. Click on a user profile in a Hootsuite stream and select **Send to Dynamics 365** option from the menu.



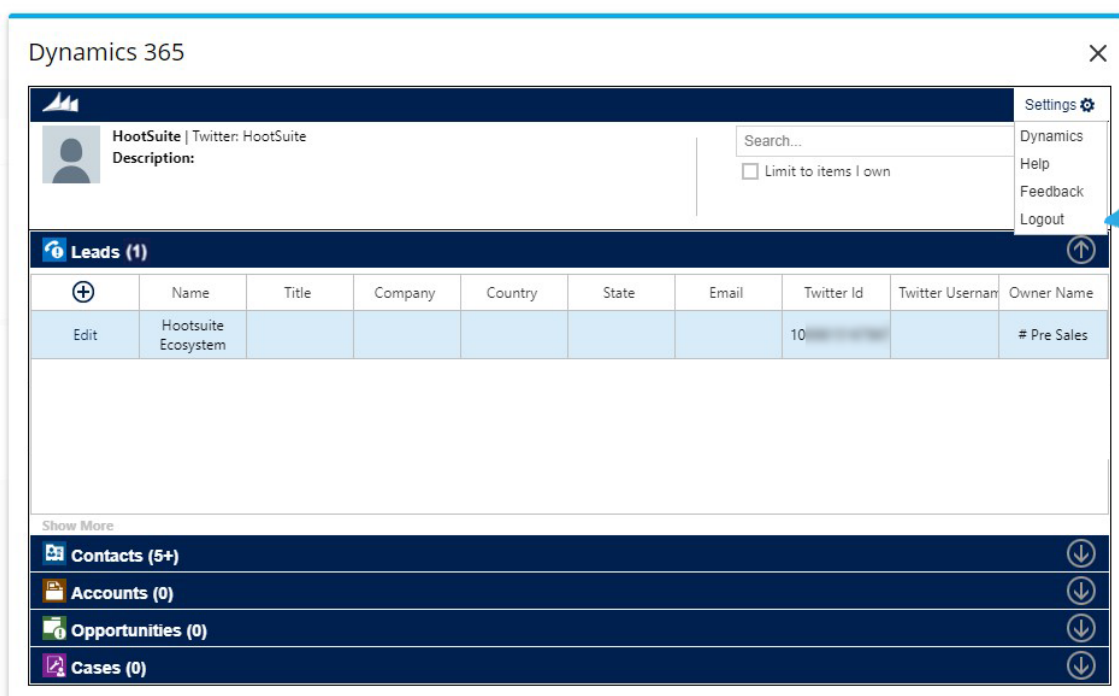
Provide the URL of your Microsoft Dynamics instance (which will be like '<https://hootsuiteinstance5.crm.dynamics.com/>'), your username and password and click 'Sign in'.





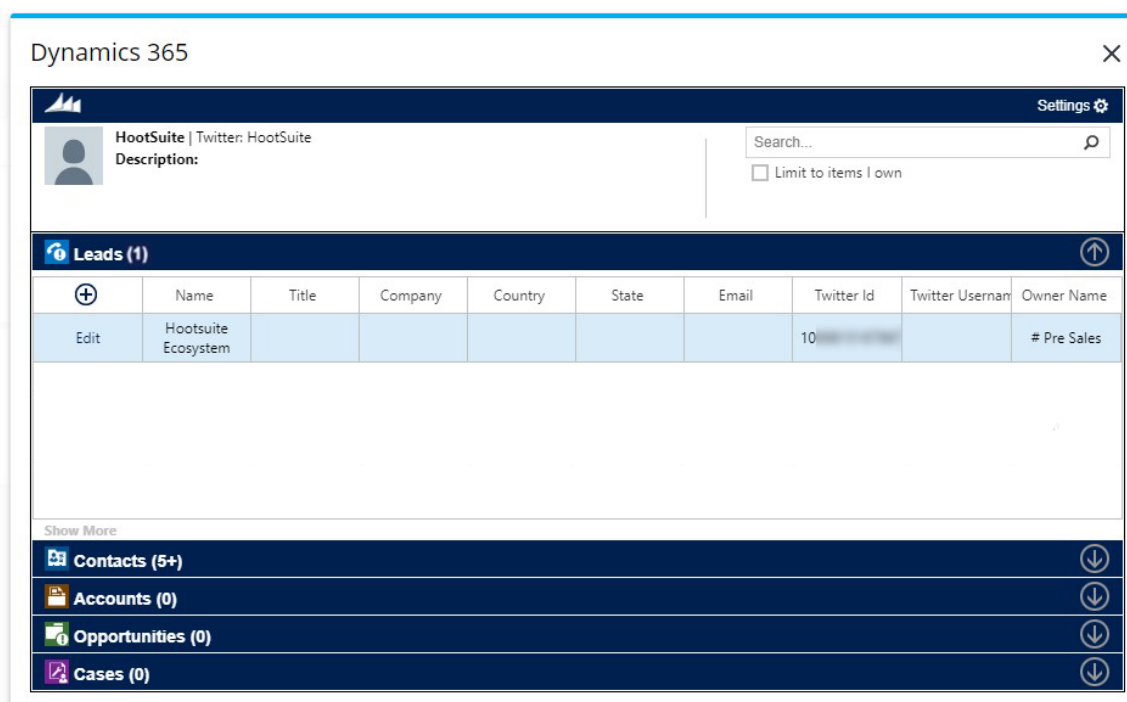
Your user will be authenticated in Microsoft Dynamics and a window containing information related to the selected contact will be then displayed on screen.

To log out from your Microsoft Dynamics account, click on **Settings** and choose **Logout** from the dropdown menu.



## Social Contact Screen

All the Leads, Accounts, Contacts, Opportunities and Cases associated with a social contact are displayed here.





---

**Leads** section contains all the leads from Microsoft Dynamics that match the selected social contact's First Name and/or Last Name, Facebook/Twitter Username or Facebook/Twitter Id.

In the **Accounts** section are displayed all the accounts whose names match the social contact's name.

**Contacts** section contains all the contacts from Microsoft Dynamics that match the selected social contact's First Name and/or Last Name, Facebook/Twitter Username or Facebook/Twitter Id.

**Opportunities** section contains all the opportunities that match the name of the social contact.

**Cases** section contains all the Microsoft Dynamics cases related to the accounts or contacts in the Accounts and Contacts tabs of the social contact.

### Search for records

You can use the search function to find a specific record on this page, or to filter the records available for a social contact. Bear in mind that the search is conducted only on the records available on the social contact's view. The following criteria are applied when searching

- For **Leads**, the search is conducted on the First Name, Last Name and Company fields
- For **Contacts**, the search is conducted on First Name, Last Name and related Account's Name fields
- For **Opportunities**, the search is conducted on Opportunity Name and related Account's Name fields
- For **Accounts**, the search is conducted on the Account Name and parent Account's Name fields
- For **Contacts**, the search is conducted on related Contact's First and Last Name and on related Account's Name fields

If your Microsoft Dynamics user has the permission to view all records for at least one of the Account, Opportunity, Lead, Case and Contact objects, you can limit the search to the items you own by checking the Limit to items I own checkbox.

## Detailed view

The screenshot shows the 'View Lead' form in Microsoft Dynamics 365. The form is titled 'Dynamics 365' and 'View Lead'. It displays the lead's information, including Twitter Id, Twitter Username, Topic, First Name, Last Name, Middle Name, Name, City, Country/Region, State/Province, Email, Email Address 2, Email Address 3, Last Campaign Date, Rating, Lead Source, Mobile Phone, Modified By, Modified On, and Need. A blue arrow points to the 'Open in Dynamics' link in the top right corner.

By clicking the Edit link (or View, depends on the permissions your Microsoft Dynamics has on the Account, Contact, Lead, Case and Opportunity objects, see the Note below) on the left of a record, the detailed view of that record will open.

All the fields that are accessible to your Microsoft Dynamics user will be displayed here. If there are Activities and Notes logged on the record, they will be displayed in the [Activities](#) and [Notes](#) tabs.

To open a new window with the Microsoft Dynamics detail page of the record, click the [Open in Dynamics](#) link. To go back to the main social contact screen, click the [Back to Search](#) button.

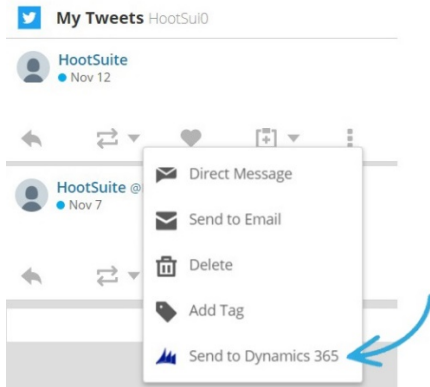
Note: The [Edit](#) link will appear if your Microsoft Dynamics user has the [Edit](#) permission on that object (Contact, Lead, Account, Case and Opportunity). If the user has only the View permission, the [Edit](#) link will be replaced by the View link.

## Leads Capture

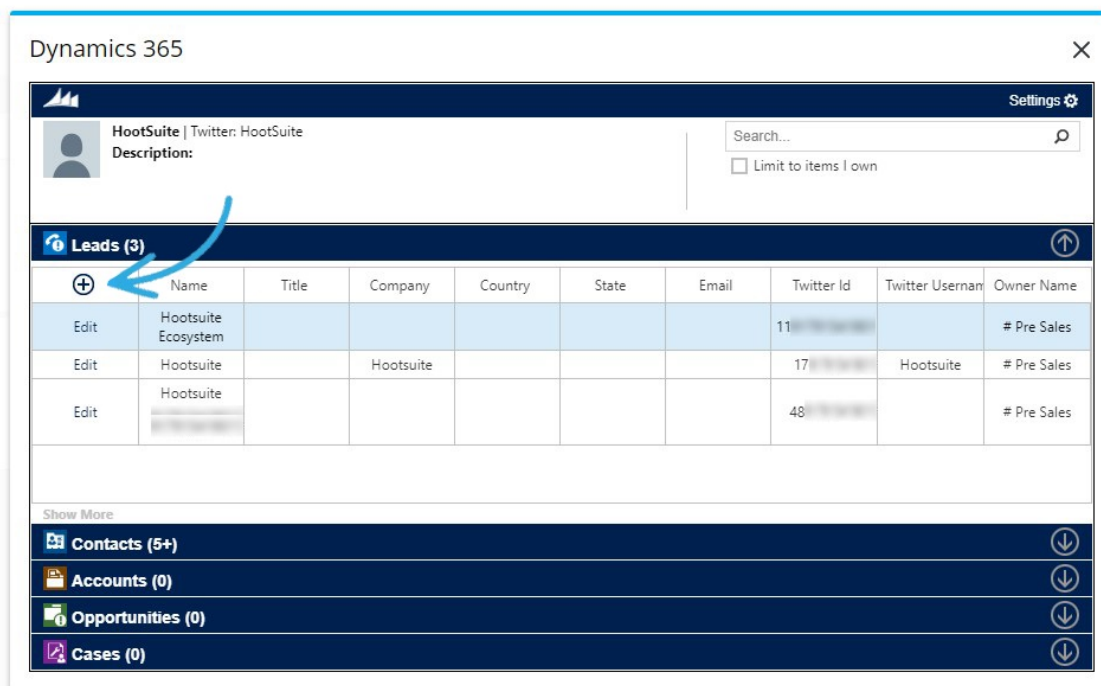
The app provides the option to capture information about any Twitter or Facebook social contact in your Hootsuite stream. In Microsoft Dynamics, the details about the selected social contact can be captured in the lead object.

### Create New Lead from Social Contact

1. From the Hootsuite stream, click on the desired social contact's profile and select the 'Send to Dynamics 365' menu option. By selecting this option from the profile menu, only the Facebook/Twitter profile information will be sent to the app. To also send the content of the social message, you must click the Microsoft Dynamics option from the More menu of the social message left by the contact.



2. Expand the Leads tab and click the '+' button to launch the lead creation wizard.



3. The First and Last Name, Description fields are automatically filled in. First and Last Name can be edited. Fill in / edit the rest of the fields and click **Save** to create a Lead record in Microsoft Dynamics for the social contact.

Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

**New Lead**

Lead

Back to search

Twitter Id: 11  
Twitter Username:  
Topic: Social Media News  
First Name: John  
Last Name: Doe  
Middle Name:  
City:  
Country/Region: Canada  
State/Province:  
Email:  
Email Address 2:  
Email Address 3:  
Rating:  
Lead Source:  
Mobile Phone:  
Need:  
No. of employees:  
Priority:  
Annual Revenue:

Save Cancel

### View/Edit Lead

All the leads associated with the selected social contact can be found in the Leads section. If your Microsoft Dynamics user doesn't have View rights on the Lead object, the Leads section won't be available. In order for a lead record to be displayed here, at least one of the following criteria must be satisfied

- Lead First Name and Last name must match the social contact's full name
- Twitter/Facebook username on the lead must match the Facebook/Twitter username of the social contact;
- Twitter/Facebook Id on the lead must match the Facebook.

To view and edit details about a lead, expand the Leads tab and click on the **Edit** link on the left of the desired lead.

Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

Search...  
☐ Limit to items I own

**Leads (2)**

	Name	Title	Company	Country	State	Email	Twitter Id	Twitter Username	Owner Name
Edit	John Doe			Canada			11		#
Edit	Hootsuite Ecosystem						10		# Pre Sales

Show More

Contacts (5+)  
Accounts (0)  
Opportunities (0)  
Cases (0)

A detailed view of the selected lead will be displayed

The screenshot shows the 'View Lead' form in Microsoft Dynamics 365. The form is titled 'Dynamics 365' and 'View Lead'. It displays the lead's information, including Twitter Id (11), Twitter Username (HootSuite), Topic (Social Media News), First Name (John), Last Name (Doe), Middle Name, Name (John Doe), City, Country/Region (Canada), State/Province, Email, Email Address 2, Email Address 3, Last Campaign Date, Rating, Lead Source, Mobile Phone, Modified By, and Modified On (12/12/2019). The Twitter Id and Username fields are highlighted in green. A blue arrow points to the 'Save' button at the bottom.

The Twitter/Facebook Id and Username fields are highlighted in green because the username and id of the social contact are similar with those on the lead.

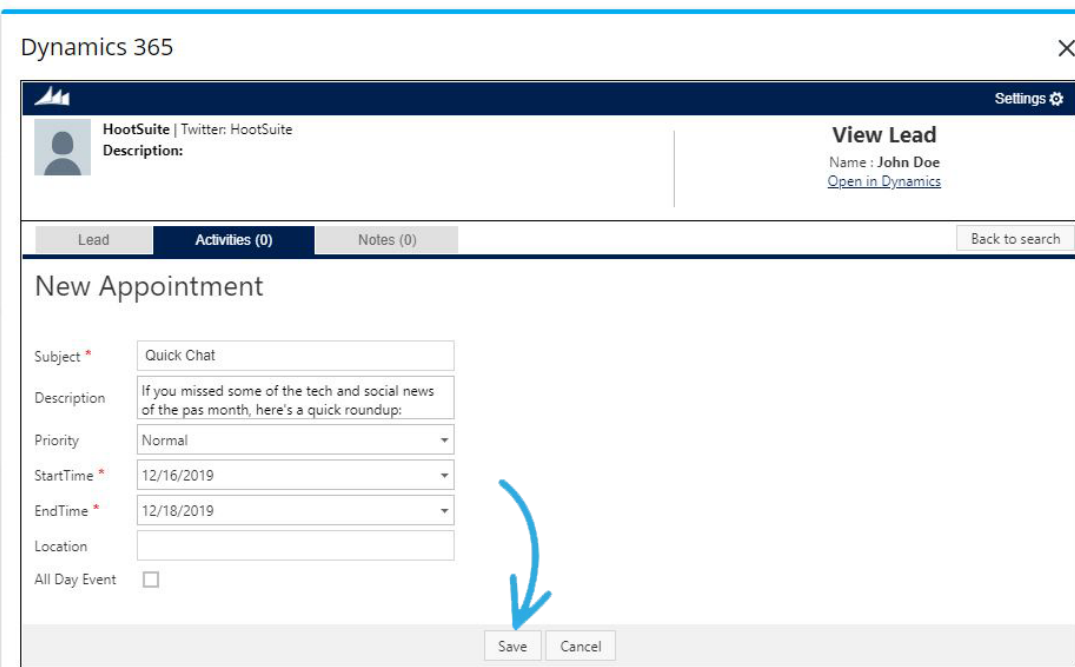
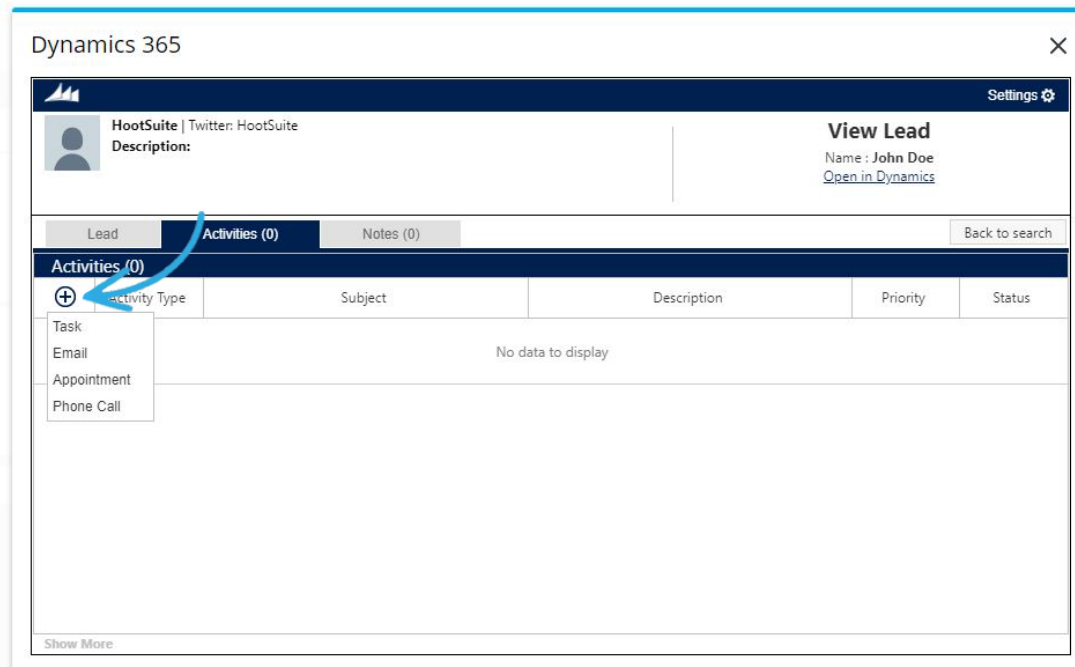
If the social contact's username and id aren't the same as the ones on the selected lead, a Save option is presented. By clicking the **Save** button, the lead is updated with the selected social contact's data.

To edit information on a lead, click on the desired field and type the new value. Attention, the greyed-out fields are not editable. When finished editing, click **Save** to update and save the lead. If your profile doesn't have the Edit permission on the Lead object, then the Edit link will be replaced by the View link in the grid view and all the fields will be greyed out in the detailed view.

## Notes and Activities

From the lead detail screen, you can also view and plan Activities for the selected lead or you can view or log Notes. To close the detailed view and go back to the main screen, click the [Back to search](#) button.

To plan an activity for the lead, access the [Activities](#) tab and click the '+' button. Select what type of activity do you want to create, fill in the fields and Save the activity.



To view an Activity, access the Activities tab and click the Select link on the left of the desired activity from the list.

The screenshot shows the Dynamics 365 'View Lead' interface for a lead named John Doe. The 'Activities (1)' tab is selected, displaying a table with one activity. A blue arrow points to the 'Select' link in the first column of the table.

	Activity Type	Subject	Description	Priority	Status
Select	appointment	Quick Chat	If you missed some of the tech and social news of the past month, here's a quick roundup:	Normal	Open

To log a Note on the selected Lead, access the Notes tab and click '+' button.

The screenshot shows the Dynamics 365 'View Lead' interface for the same lead, but with the 'Notes (0)' tab selected. The form contains fields for 'Title' (with the value 'Remember this') and 'Description' (with the value 'Appointment with Lead'). A blue arrow points to the 'Save' button at the bottom of the form.

Title \*

Description



## Qualify Lead

In Microsoft Dynamics, when a lead is qualified it can be converted to a contact and, optionally, an opportunity can be created. Using the integration app, you can qualify a lead directly from Hootsuite dashboard by following the next steps:

1. You can qualify a lead by clicking the Qualify button in the detailed view of the lead.

The screenshot shows the 'View Lead' interface in Dynamics 365. The top bar includes the Hootsuite logo and a 'Settings' gear icon. The main header shows 'View Lead' for 'John Doe' with a link to 'Open in Dynamics'. Below this is a tabbed interface with 'Lead', 'Activities (0)', and 'Notes (0)'. The 'Lead' tab is active, showing a form with fields for Twitter Id, Twitter Username, Topic, First Name, Last Name, Middle Name, Name, City, Country/Region, State/Province, Email, Email Address 2, Email Address 3, Last Campaign Date, Rating, Lead Source, Mobile Phone, Modified By, Modified On, and Need. A blue arrow points to the 'Qualify' button at the bottom of the form, next to 'Save' and 'Cancel' buttons.

2. The conversion wizard is displayed on screen. Fill in the required information and click Qualify Lead

- **Use existing Contact** – select this option if you want to assign the lead to an already existing contact.
- **Create Contact** – A new contact will be created from the lead. This contact name will be the Name of the lead.
- **Create a new opportunity upon conversion** – check this checkbox if you want a new opportunity to be created.

The screenshot shows the 'Qualify Lead' interface in Dynamics 365. The top bar includes the Hootsuite logo and a 'Settings' gear icon. The main header shows 'Qualify Lead' for 'John Doe' with a link to 'Open in Dynamics'. Below this is a tabbed interface with 'Qualify Lead' and 'Back to search'. The 'Qualify Lead' tab is active, showing a form with radio buttons for 'Create Contact' (selected) and 'Use existing Contact', and a checkbox for 'Create new opportunity upon conversion'. At the bottom, there are 'Qualify Lead' and 'Cancel' buttons.

3. After the conversion, the Lead will disappear from Microsoft Dynamics and from Leads tab of the social contact and a new Contact will be displayed.

Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

Search...

☐ Limit to items I own

**Leads (3)**

**Contacts (1)**

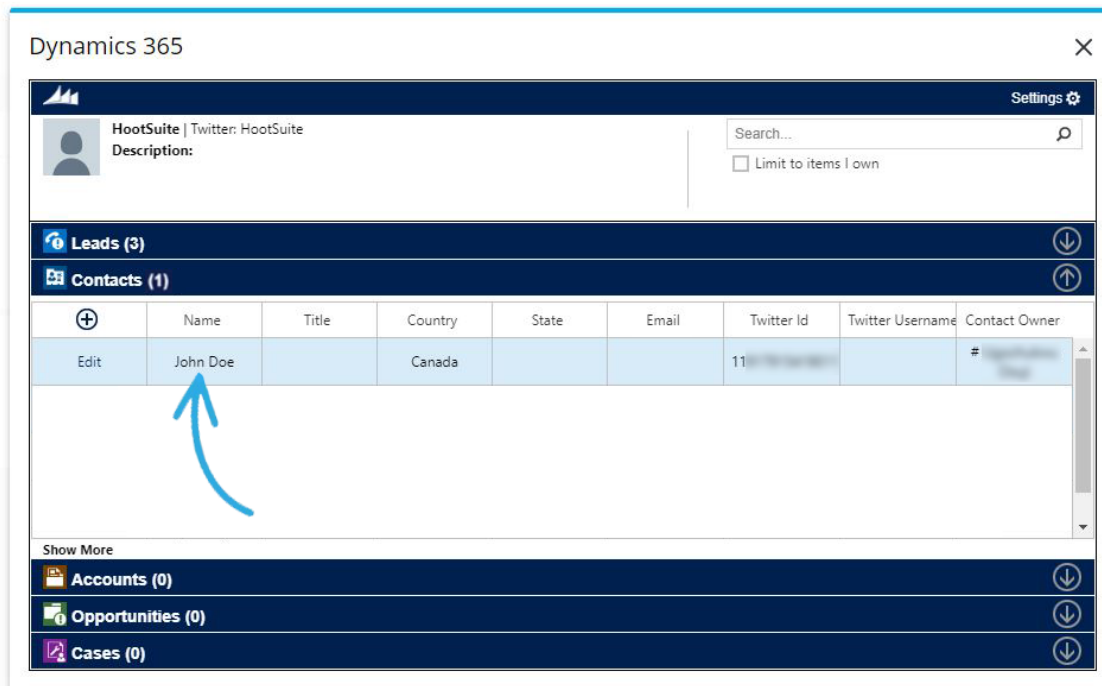
	Name	Title	Country	State	Email	Twitter Id	Twitter Username	Contact Owner
Edit	John Doe		Canada			11		#

Show More

**Accounts (0)**

**Opportunities (0)**

**Cases (0)**

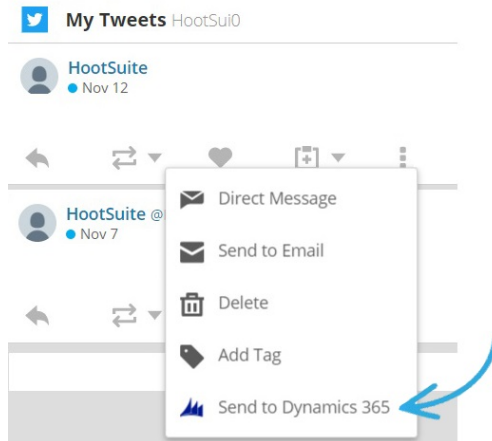


## Contacts Capture

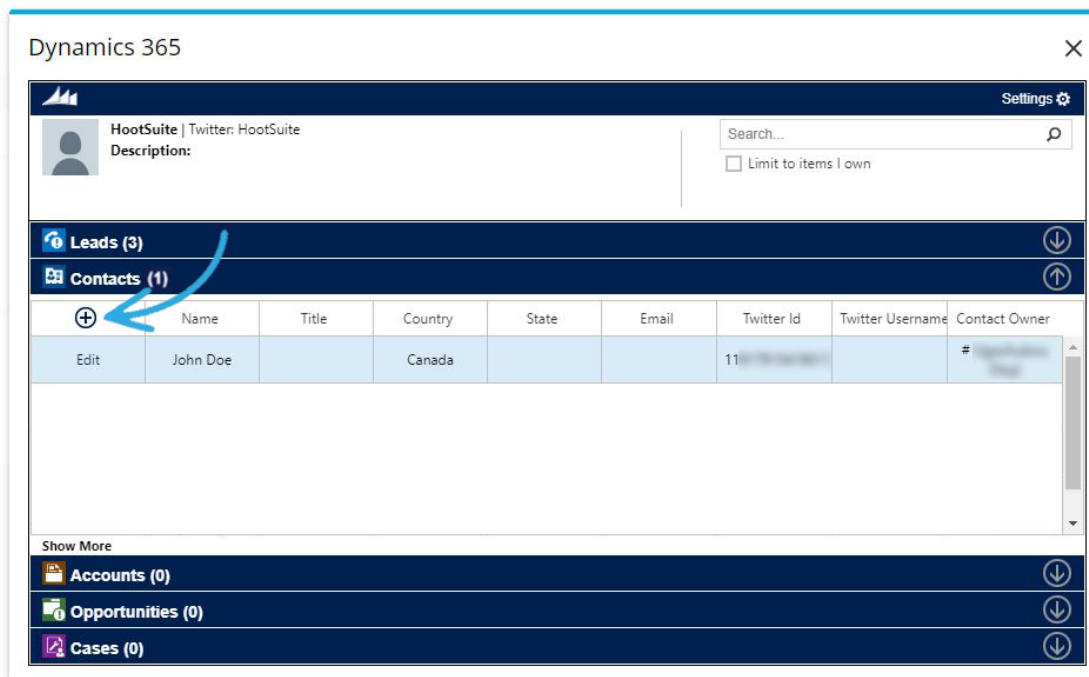
The app provides the option to capture information about any Twitter or Facebook social contact in your Hootsuite stream. In Microsoft Dynamics, the details about the selected social contact can be captured in the contact object apart from the Lead object.

### Create New Contact from Social Contact

1. From the Hootsuite stream, click on the desired social contact's profile and select the Dynamics option. By selecting this option from the profile menu, only the Facebook/Twitter profile information will be sent to the app. To also send the content of the social message, you must click the 'Send to Dynamics 365' option from the More menu of the social message left by the contact.



2. Expand the Contacts tab and click the '+' button to launch the contact creation wizard



3. The First Name, Last Name and Description, Twitter/Facebook Username and Twitter/Facebook Id fields are automatically filled in. Description, First and Last Name can be edited. Fill in/edit the rest of the fields and click **Save** to create a Contact record in Microsoft Dynamics for the social contact. In order to associate a contact with an account fill in Company Name field.

Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

New Contact

Settings

Contact Back to search

Twitter Id 11  
Twitter Username  
First Name Jane  
Last Name \* Doe  
Full Name Jane Doe  
City  
Country/Region Vancouver, Canada  
State/Province  
Department  
Description Social media news and tips from the world's

Email  
Email Address 2  
Email Address 3  
Lead Source  
Mobile Phone  
Originating Lead  
Company Name  
Status  
Status Reason  
Business Phone

Save Cancel

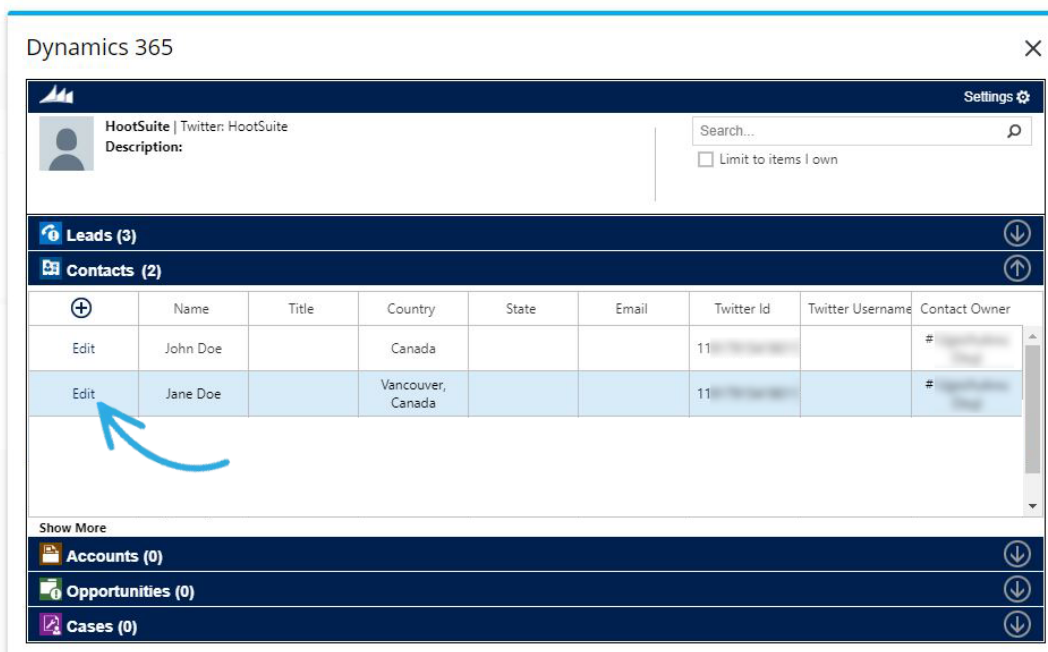
### View/Edit Contact

All the Microsoft Dynamics contacts associated with the selected social contact are displayed in the Contacts section. If your Microsoft Dynamics user doesn't have View rights on the Contact object, this section won't be available.

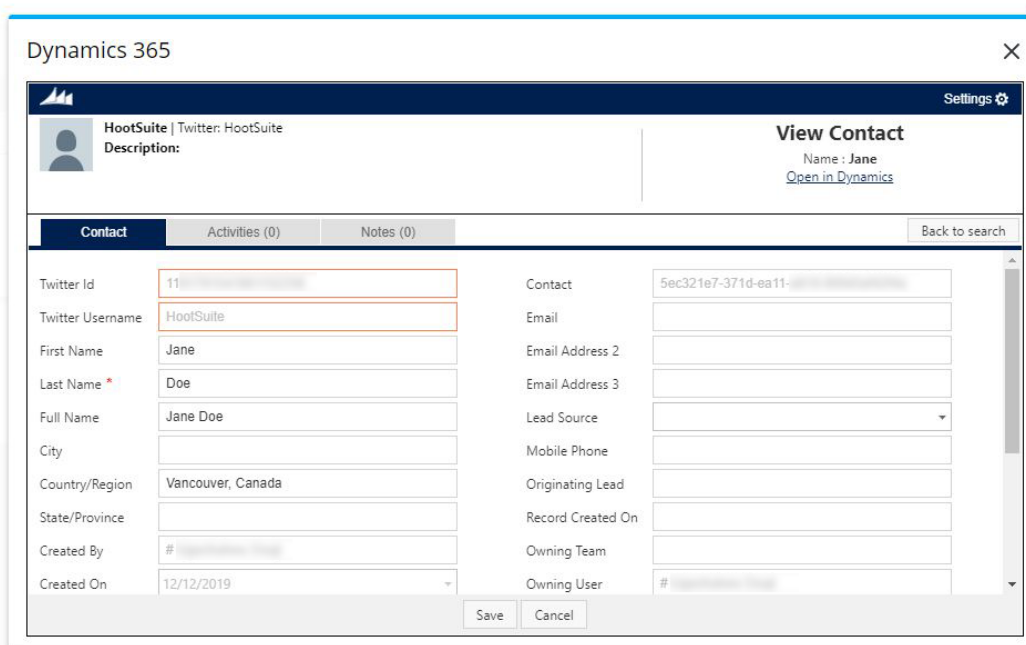
In order for a contact to be displayed here the following criteria must be fulfilled

- Microsoft Dynamics contact First Name and Last Name must match the social contact's full name
- Twitter/Facebook username on the Microsoft Dynamics contact must match the Facebook/Twitter username of the social contact;
- Twitter/Facebook Id on the Microsoft Dynamics contact must match the Twitter/Facebook id of the social contact.

To view and edit details about a contact, expand the Contacts tab and click on the Edit link on the left of the desired contact.



A detailed view of the selected contact will be displayed.



The Twitter/Facebook Id and Username fields are highlighted in green because the username and id of the social contact are similar with those on the contact record from Microsoft Dynamics.

If the social contact's username and id aren't the same as the ones on the selected Microsoft Dynamics contact, a Save

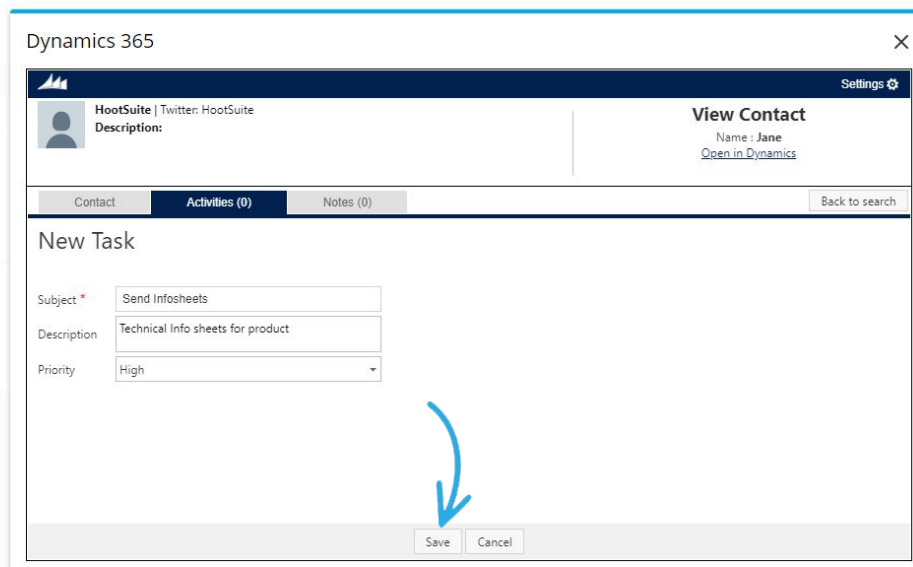
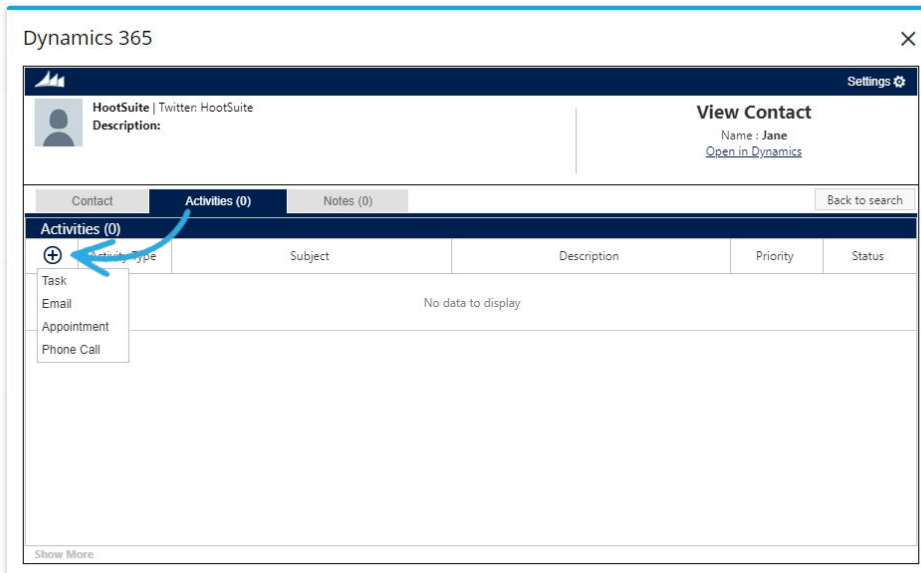
option is presented. By clicking the Save button, the Microsoft Dynamics contact is updated with the selected social contact's data.

To **edit** information on a contact record, click on the desired field and type the new value. Attention, the greyed out fields are not editable. When finished editing, click **Save** to update and save the contact record. If your profile doesn't have the **Edit** permission on the **Contact** object, then the **Edit** link will be replaced by the **View** link in the grid view and all the fields will be greyed out in the detailed view.

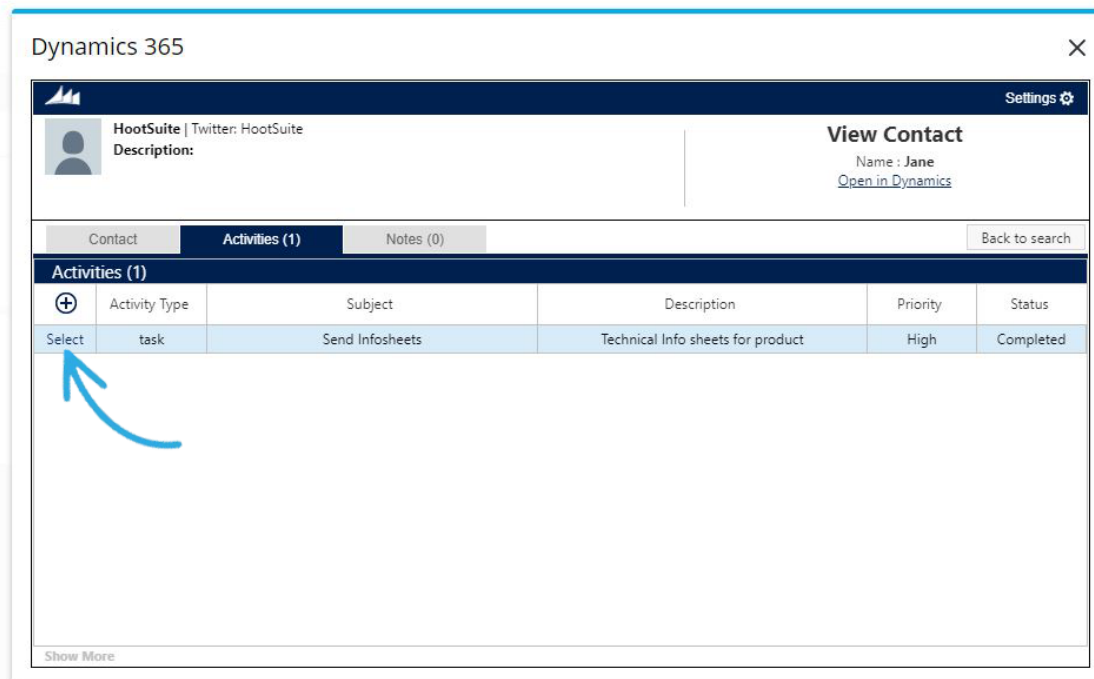
## Notes and Activities

From the contact detail screen, you can also view and plan Activities for the current contact or you can view or log Notes. To close the detailed view and go back to the main screen, click the **Back to Search** button.

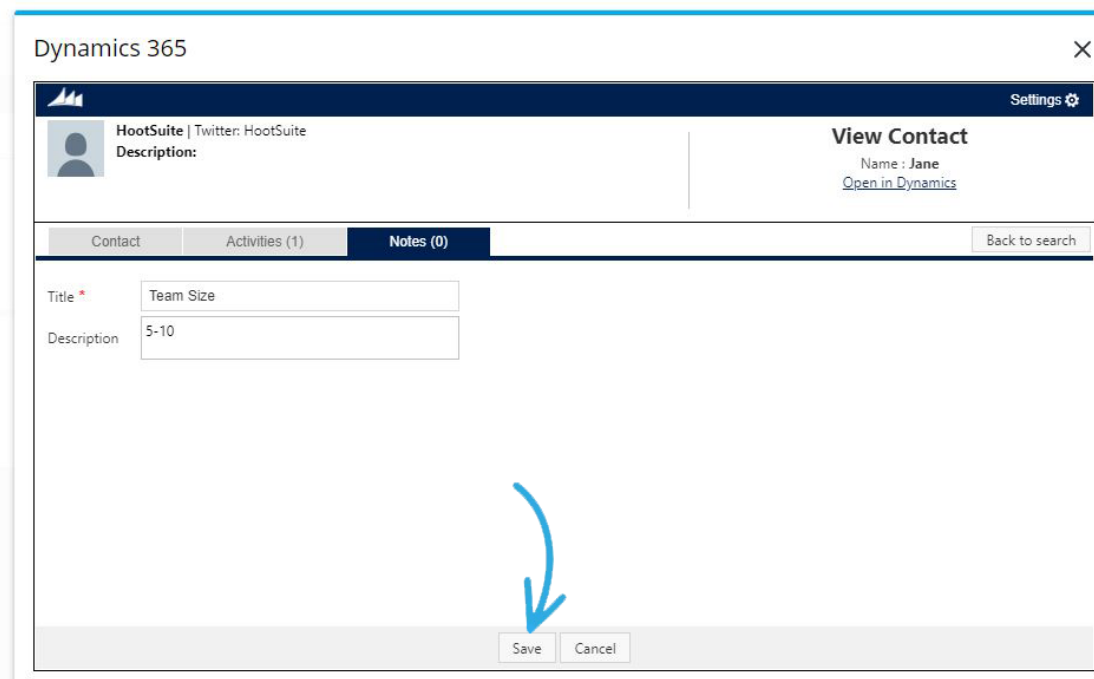
To plan an activity for the contact, access the **Activities** tab and click the '+' button. Select the activity type and fill in the fields. Click **Save** and a new activity will be created and associated with the Microsoft Dynamics contact.



To view an Activity, access the Activities tab and click the **Select** link on the left of the desired activity from the list then click Back to go back to the activities list.



To log a Note on the selected Contact, access the Notes tab and click '+' button.





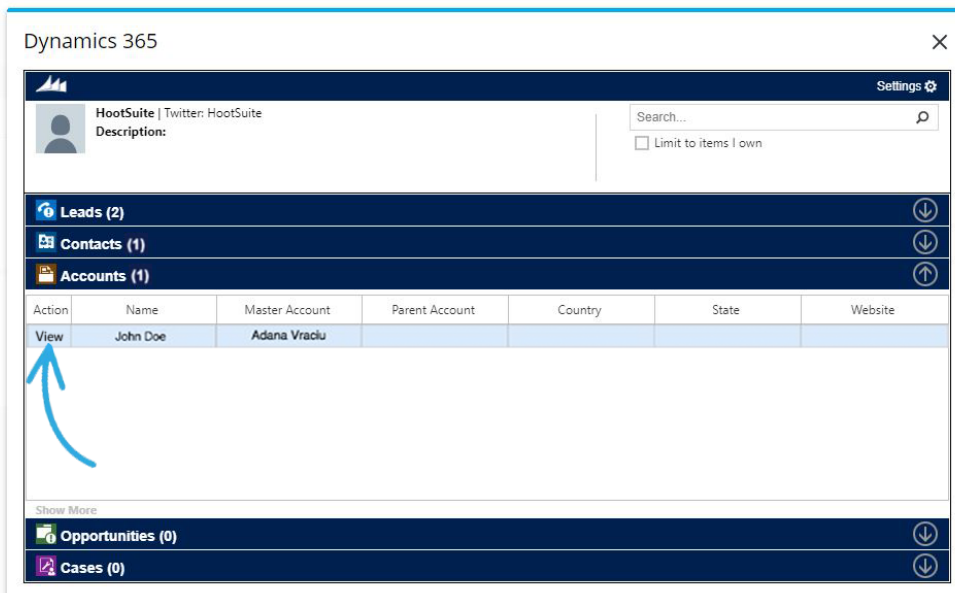
## View Accounts

Accounts cannot be manually created in the Microsoft Dynamics integration app.

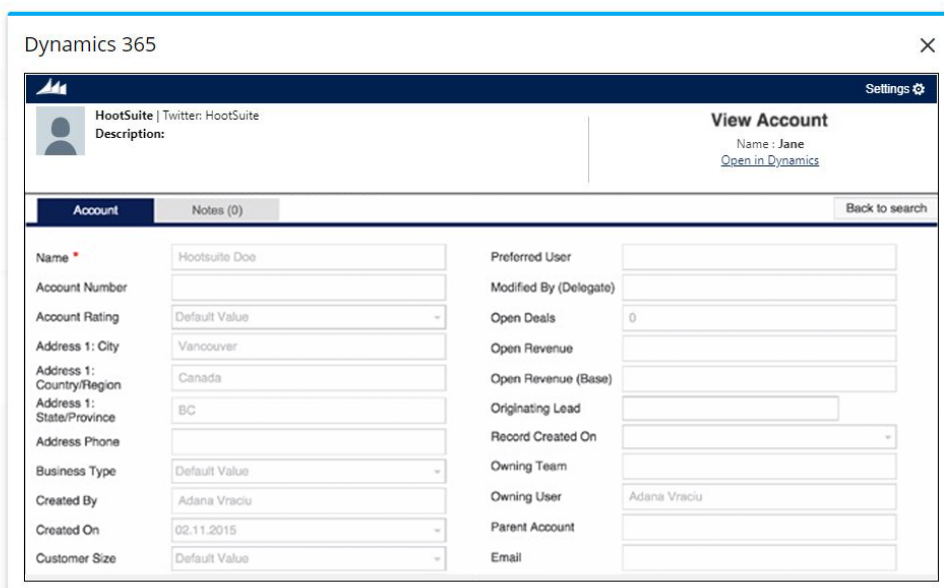
All the Accounts considered relevant for a social contact can be found in the Accounts section. This section won't be available if your Microsoft Dynamics user doesn't have View rights on the Accounts object.

In order for an Account to be displayed here, the Microsoft Dynamics Account name must match the social contact's full name

To view details about an Account, expand the Accounts section and click on the [View](#) link on the left of the desired account and a detailed view of the selected account will be displayed.

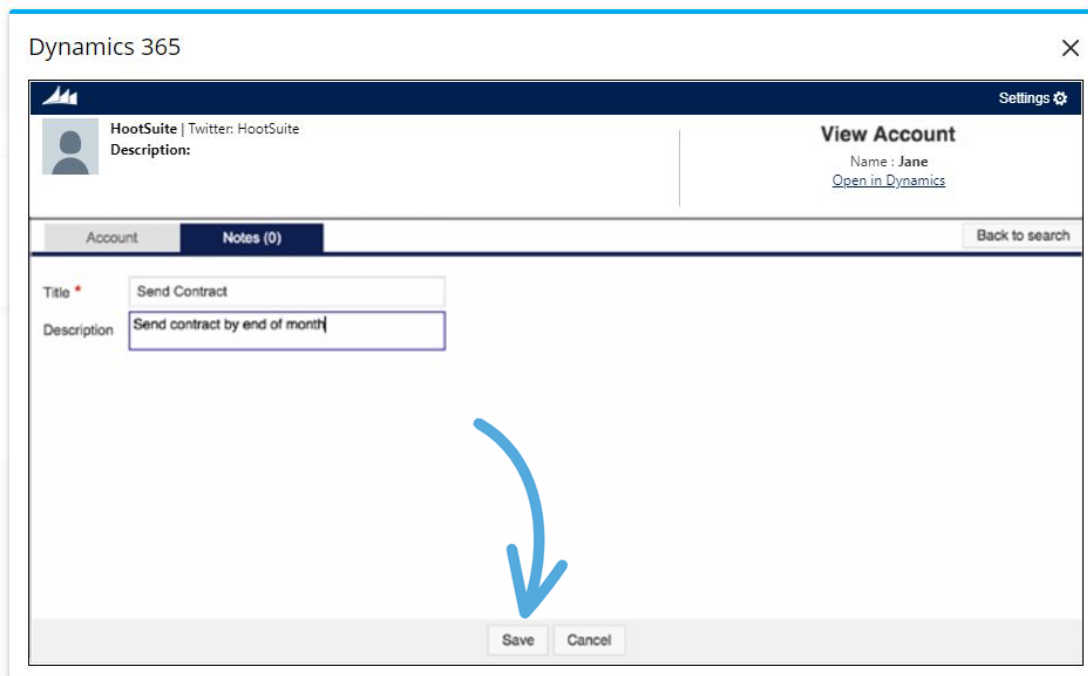


From the Account detail screen, you can also view you can view or log Notes on the account. To close the detailed view and go back to the main screen, click the Back to Search button.



## Notes

To log a Note on the selected Account, access the Notes tab and click '+' button.



The screenshot shows the Dynamics 365 interface for adding a new note to the HootSuite account. The top header includes the Dynamics 365 logo and a close button. Below the header, the account information for HootSuite is displayed, including a profile picture, name, and description. The 'View Account' section shows the name 'Jane' and a link to 'Open in Dynamics'. The main content area has two tabs: 'Account' and 'Notes (0)'. The 'Notes (0)' tab is active, showing a form with a 'Title' field containing 'Send Contract' and a 'Description' field containing 'Send contract by end of month'. A blue arrow points to the 'Save' button at the bottom of the form.

Dynamics 365

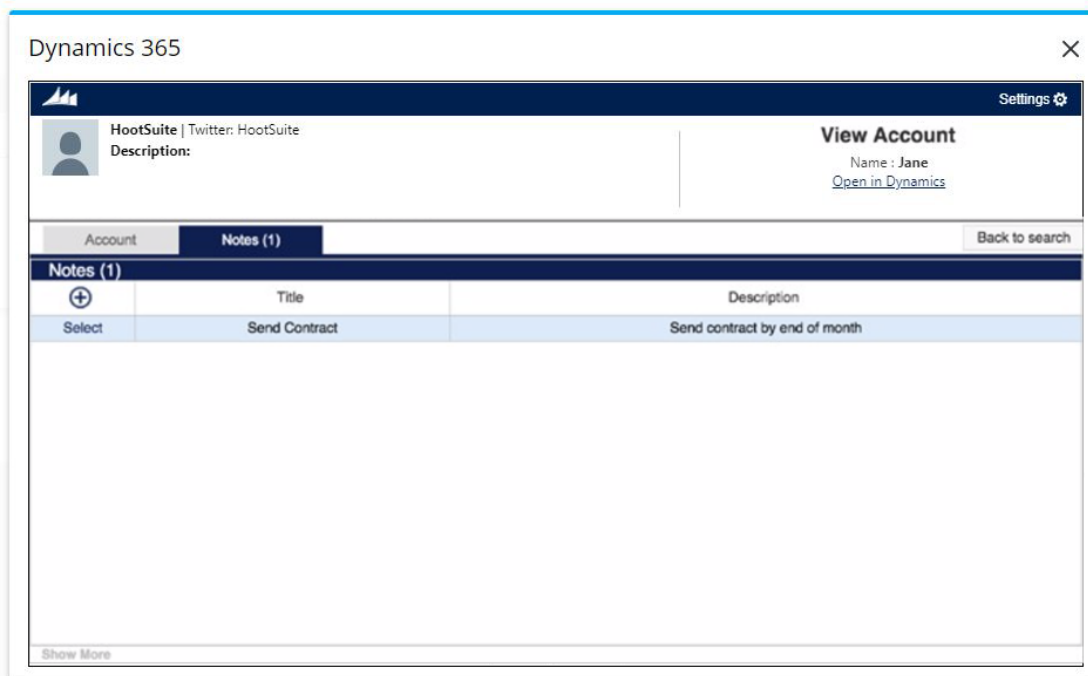
HootSuite | Twitter: HootSuite  
Description:

**View Account**  
Name : Jane  
[Open in Dynamics](#)

Account Notes (0) Back to search

Title \* Send Contract  
Description Send contract by end of month

Save Cancel



The screenshot shows the Dynamics 365 interface for the 'Notes' list view for the HootSuite account. The top header includes the Dynamics 365 logo and a close button. Below the header, the account information for HootSuite is displayed, including a profile picture, name, and description. The 'View Account' section shows the name 'Jane' and a link to 'Open in Dynamics'. The main content area has two tabs: 'Account' and 'Notes (1)'. The 'Notes (1)' tab is active, showing a table with one note. The table has columns for 'Title' and 'Description'. The note has the title 'Send Contract' and the description 'Send contract by end of month'. A 'Select' button is visible next to the note. A 'Show More' link is at the bottom of the table.

Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

**View Account**  
Name : Jane  
[Open in Dynamics](#)

Account Notes (1) Back to search

	Title	Description
Select	Send Contract	Send contract by end of month

Show More

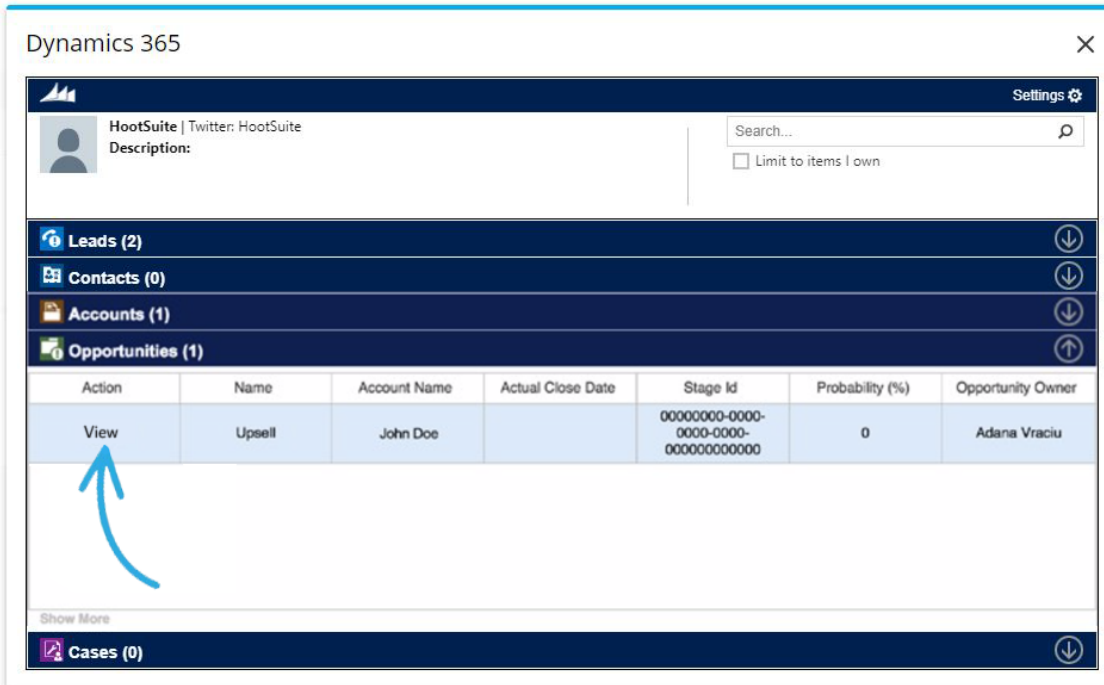
## View Opportunities

Opportunities cannot be manually created in the Microsoft Dynamics integration app. They can be created manually in Microsoft Dynamics (and they will be displayed on a social contact's page in the app) or automatically from the app when qualify a lead.

All the Opportunities considered relevant for a social contact can be found in the Opportunities section. The section won't be available if your Microsoft Dynamics user doesn't have View rights on the Opportunity object.

In order for an Opportunity to be displayed here, the Microsoft Dynamics Opportunity name must match the social contact's full name.

To view details about an Opportunity, expand the Opportunity section, click on the [View](#) link on the left of the desired record and a detailed view of the selected opportunity will be displayed.



The screenshot shows the Dynamics 365 interface. At the top, there's a header bar with the Dynamics 365 logo and a close button. Below the header, there's a section for 'HootSuite | Twitter: HootSuite' with a description field and a search bar. The main content area is divided into several sections: 'Leads (2)', 'Contacts (0)', 'Accounts (1)', and 'Opportunities (1)'. The 'Opportunities (1)' section is expanded, showing a table with columns: Action, Name, Account Name, Actual Close Date, Stage Id, Probability (%), and Opportunity Owner. A blue arrow points to the 'View' link in the 'Action' column of the first row. Below the table, there's a 'Show More' link and a 'Cases (0)' section.

Action	Name	Account Name	Actual Close Date	Stage Id	Probability (%)	Opportunity Owner
<a href="#">View</a>	Upsell	John Doe		00000000-0000-0000-0000-000000000000	0	Adana Vraciu

From the Opportunity detail screen, you can also view you can view or log Notes. To close the detailed view and go back to the main screen, click the Back to search button.

## Notes

To log a Note on the selected Opportunity, access the **Notes** tab and click **'+' button**.

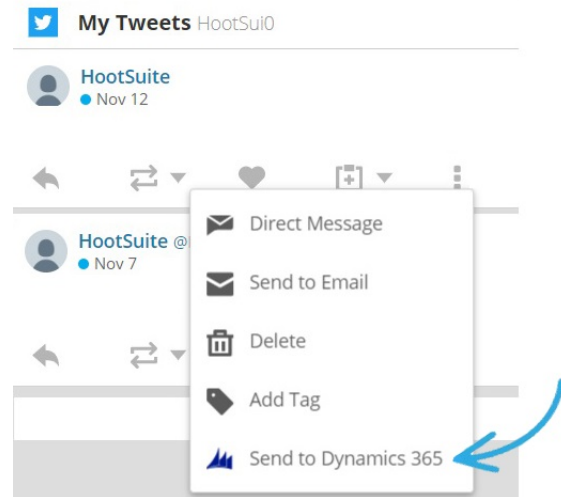
The screenshot shows the Dynamics 365 user interface for viewing an opportunity. At the top, the title bar reads 'Dynamics 365' with a close button. Below it, a dark blue header contains the HootSuite logo and name, and a 'Settings' gear icon. The main header area is split: the left side shows 'HootSuite | Twitter: HootSuite' and a 'Description:' label; the right side shows 'View Opportunity' with 'Name : Jane' and a link 'Open in Dynamics'. Below the header is a tabbed interface with 'Opportunity' and 'Notes (0)' tabs, and a 'Back to search' button. The main content area has a 'Title' field with 'Follow-up' and a 'Description' text area. At the bottom, there are 'Save' and 'Cancel' buttons. A large blue curved arrow points from the center of the form down to the 'Save' button.

# Capture Cases

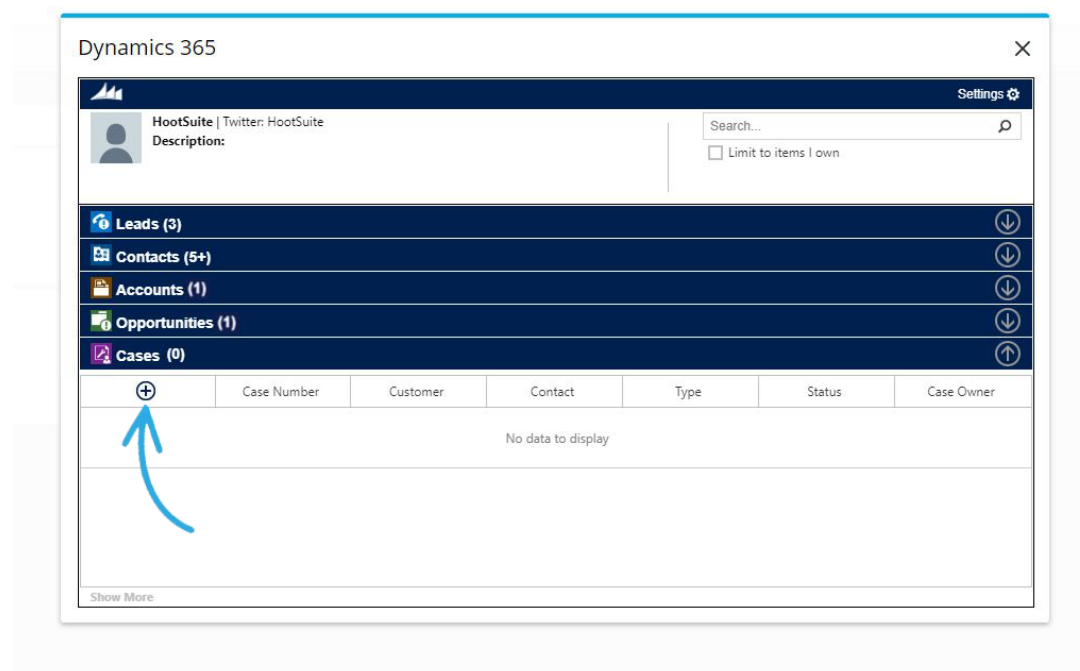
The Microsoft Dynamics integration app also provides the option of creating Microsoft Dynamics cases from messages left on Facebook and Twitter social networks.

## Create New Case from Social Contact/Social Message

1. From the Hootsuite stream, click on the desired social contact's profile and select the Dynamics option. By selecting this option from the profile menu, only the Facebook/Twitter profile information will be sent to the app. To also send the content of the social message, you must click the 'Send to Dynamics 365' option from the More menu of the social message.



2. Expand the Cases tab and click the '+' button to launch the Case creation wizard



3. The Case Origin and Contact Name fields are automatically filled in with the source social network and the Microsoft Dynamics Contact related to the social contact. Fill in the mandatory Status field, fill in/edit the rest of the fields and click **Save** to create a Case record in Microsoft Dynamics for the social contact. The case will be associated with the Contact and the Account whose names you provided (if you filled in these fields).

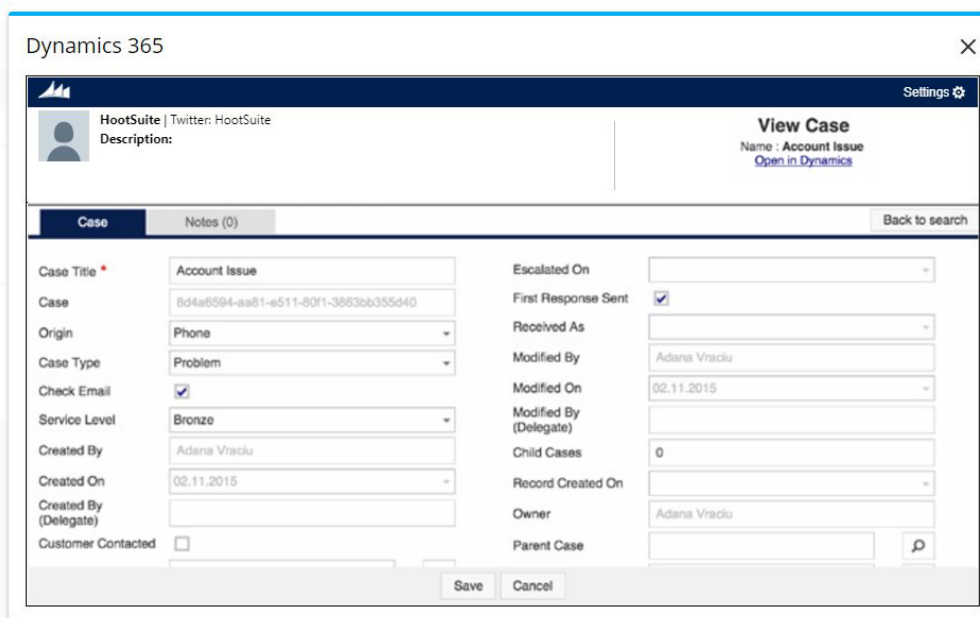
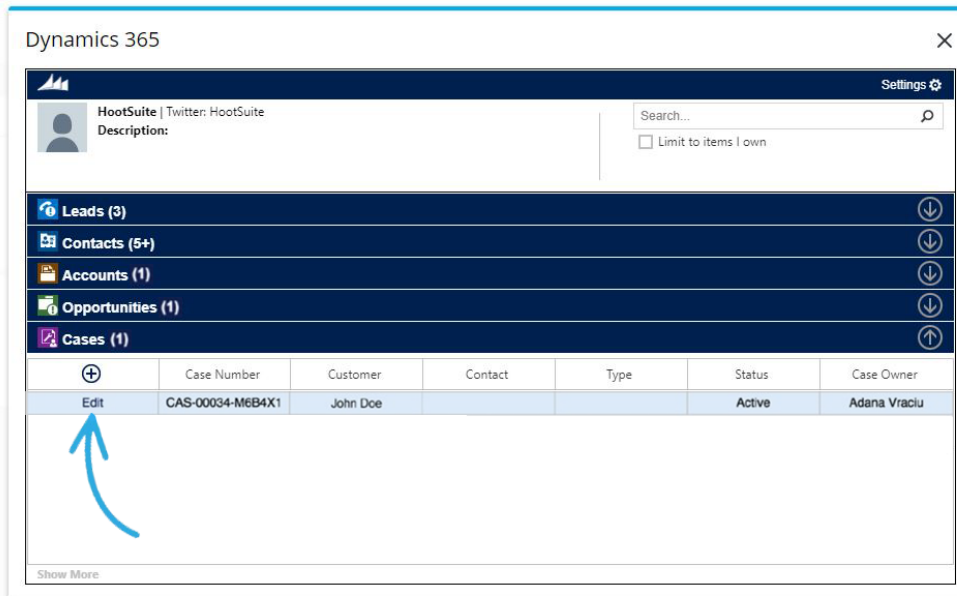
The screenshot shows the 'New Case' form in Microsoft Dynamics 365. The form is titled 'Dynamics 365' and 'New Case'. It features a 'Case' tab and a 'Back to search' button. The form contains several fields for creating a new case, including Case Title, Origin, Case Type, Check Email, Service Level, Customer Contacted, Customer, Satisfaction, Description, Entitlement, First Response Sent, Received As, Child Cases, Parent Case, Contact, Priority, Sentiment Value, Severity, Social Profile, and Status. A blue arrow points to the 'Save' button at the bottom right of the form.

## View/Edit Case

All the cases associated with the selected social contact can be found in the **Cases** section. If your Microsoft Dynamics user doesn't have View rights on the Case object, this section won't be available. In order for a case record to be displayed here it must be related to a Microsoft Dynamics account or to a Microsoft Dynamics contact associated with the social contact.

To view details about a case, expand the Cases section and click on the **Edit** link on the left of the desired case and a detailed view of the selected case will be displayed.

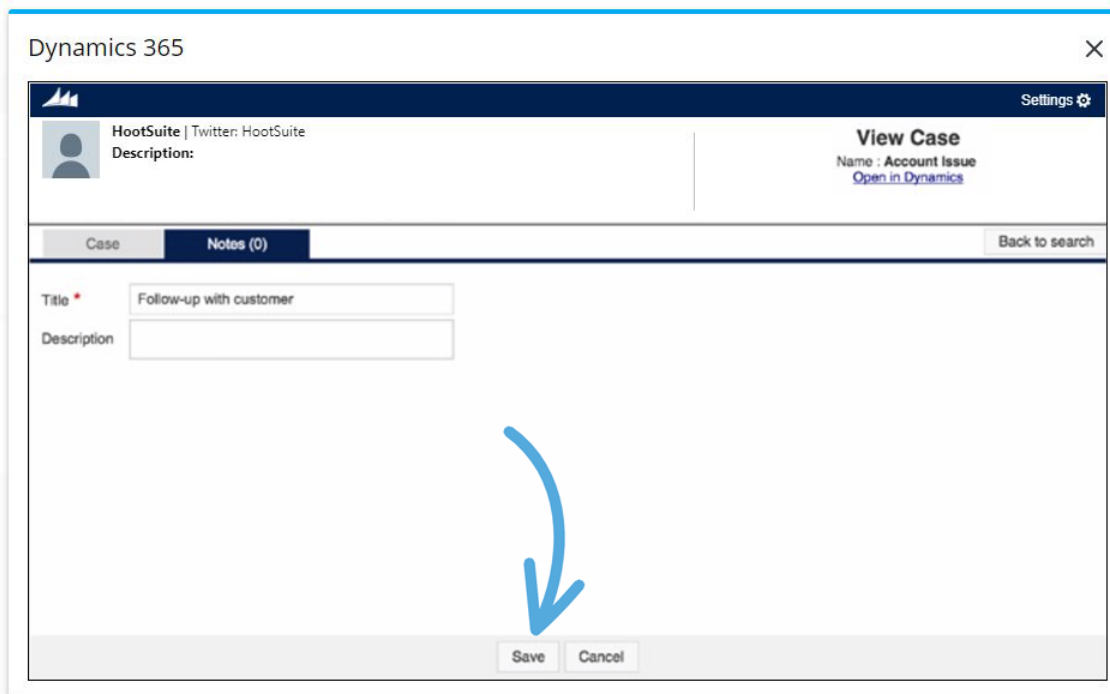
To **edit** information on a Case record, click on the desired field and type the new value. Attention, the greyed out fields are not editable. When finished editing, click **Save** to update and save the lead. If your profile doesn't have the Edit permission on the Case object, then the **Edit** link will be replaced by the **View** link in the grid view and all the fields will be greyed out in the detailed view.





## Notes

To log a Note on the selected Case, access the **Notes** tab and click **+** button. Provide a title for the note and click **Save**.



Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

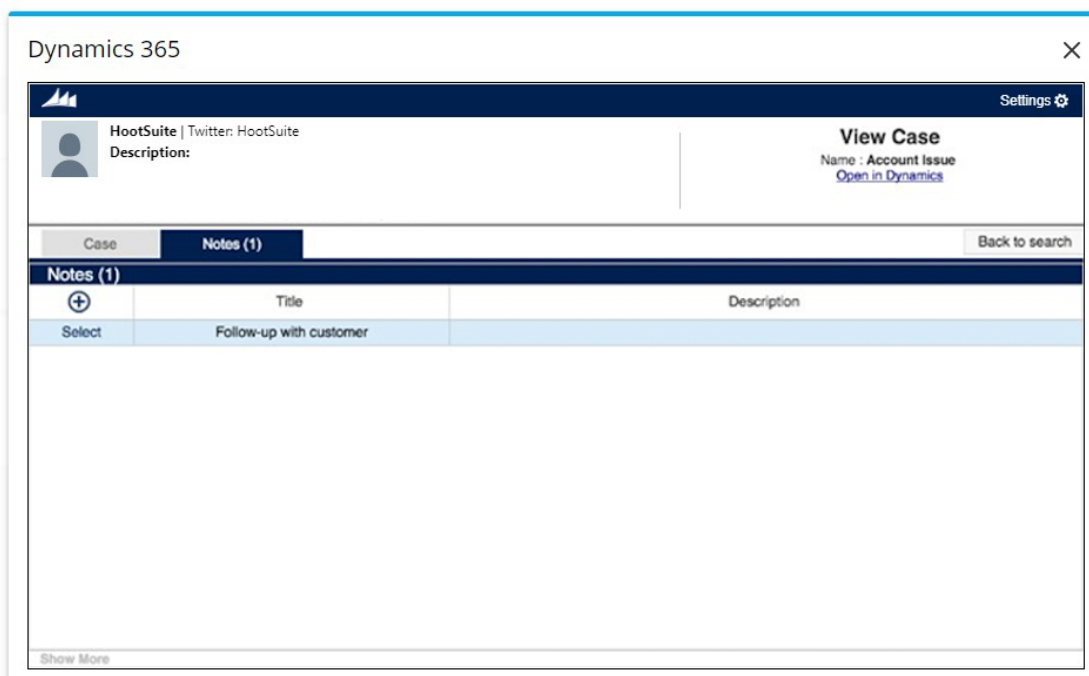
**View Case**  
Name : Account Issue  
[Open in Dynamics](#)

Case Notes (0) Back to search

Title \* Follow-up with customer

Description

Save Cancel



Dynamics 365

HootSuite | Twitter: HootSuite  
Description:

**View Case**  
Name : Account Issue  
[Open in Dynamics](#)

Case Notes (1) Back to search

Notes (1)		
	Title	Description
+	Follow-up with customer	
Select		

Show More

# About Hootsuite Enterprise

Partner with Hootsuite to accelerate your social transformation



Hootsuite is the most widely used platform for managing social media, loved by over 10 million people around the globe and trusted by more than 800 of the Fortune 1000. Hootsuite Enterprise empowers organizations to execute business strategies for the social media era and scale social media activities across multiple teams, departments, and regions. Our versatile platform supports a thriving ecosystem of social networks complemented by 200+ business applications and integrations, allowing organizations to extend social media into existing systems and programs.

Along with our channel and agency partners, we help organizations build deeper relationships with customers, stay connected to the needs of the market, grow revenue, and draw meaningful insights from social media data. Innovating since day one, we continue to help organizations pioneer the social media landscape and accelerate their success through product training, group training and tailored organizational training, as well as security and compliance services.

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