



Supporting Document for  
Finance Investment Lead  
Management  
Insider Preview

# Finance Investment Lead Management Data View

Dynamics 365 | Finance Investment Lead Management | SANDBOX

Show Chart + New Delete Refresh View Email a Link Flow Run Report

contact view

Search this view

Title	First Name	Date of Birth	Occupation	Email	Relationship Status	Address
---	yfghn	---	---	abcde@gmail.com	---	---
---	banty	---	---	ghjkl@gmail.com	---	---
---	---	---	---	sgduyhj@gmail.com...	---	---
---	---	---	---	rtuioi@gmail.com	---	---
Dr.	abc	2/2/2000	doctor	Banty@ynamicsmon	Single	ahudeyhbjhc
Dr.	hagyuijk	---	---	abcd@gmail.com	---	---
Miss	banty	---	---	ajshajhsu@gmail.com	---	---
Miss	Olivia	10/9/1997	Teacher	olivia@smith.com	---	---

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y

1 - 15 of 15

# Liabilities

**Dynamics 365** | Finance Investment Lead Management | **SANDBOX** | Search, Refresh, Email a Link, Flow, Run Report, CM









← Show Chart + New Delete Refresh Email a Link Flow Run Report

**Active Liabilities** Search this view

Owner ↑	Description	Amount	Term and Mortgage Rate
---	MORtgage	\$20,000.00	4% for 10 years
---	---	---	---
---	---	---	---
cam	hsgdyusix	\$123,400.00	free

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# Forms

Dynamics 365 Finance Investment Lead Management **SANDBOX**        

← Save Save & Close + New Flow ▾

## New Risk and Estate Planning

Risk and Estate Planning · Risk and Estate Planning main form ▾

### General

Related To	
Related To	---

Self Insurance Details	
Do you have health insurance for self?	<input type="checkbox"/>
Amount of health Insurance	---
Underwriter of health Insurance	---
Do you have Life	

Spouse Insurance Details	
Does your spouse have health Insurance?	<input type="checkbox"/>
Amount of spouse health Insurance	---
Underwriter of spouse health Insurance	---
Does your Spouse have life Insurance?	<input type="checkbox"/>
Amount of Spouse Life Insurance	---
Underwriter of	