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Microsoft Dynamics 365
User Training Modules
Navigation

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Contents

Background

Navigation is key to using Microsoft Dynamics. Wherever you are working within the program the basic navigation methods of getting around the system are always the same. This module takes you through the basic principles of navigation and ensures that new users feel completely comfortable working within the system before they move onto working with the more complex modules during training.

Working within the Main Navigation Bar

The main menu bar in Dynamics is the absolute key to all navigation, it will at any time display exactly where you are working within the system. The top left hand corner holds the main navigation data and will change as you move around the different entities:

The very first icon on the navigation bar will allow you to access your Home screen, and take you back to a list of the apps available to you in Dynamics 365. Alongside this icon are the words Dynamics 365 which highlight that you are currently sitting within the program. Using the downward arrow next to the words Dynamics 365 will activate a list of apps or areas within 365 that you have recently visited:
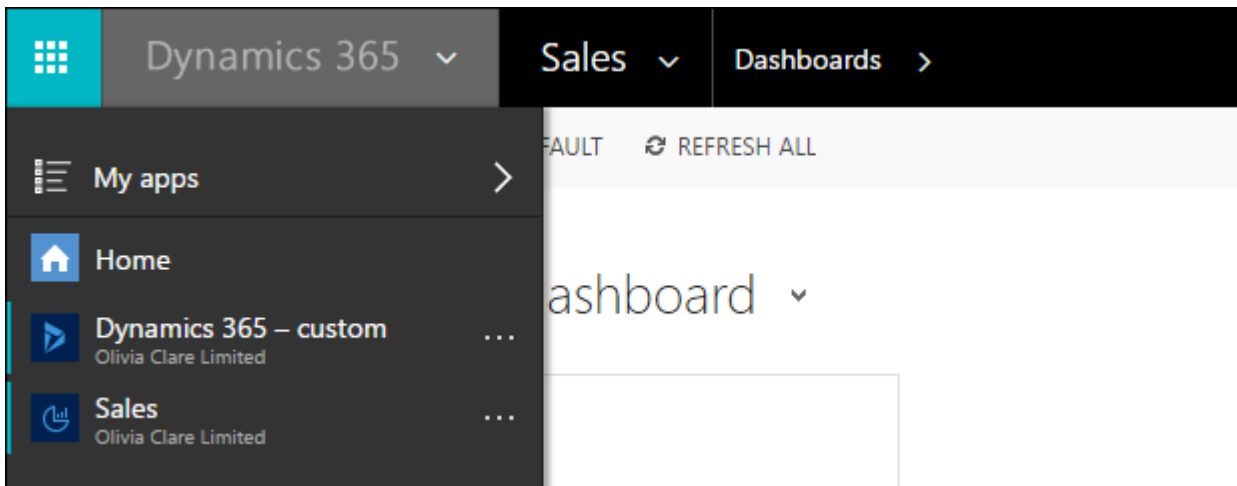

Alongside the Dynamics 365 icon, the main Sales Area of Dynamics will be visible. In addition, the Administrators of the system will have set a default entity that activates as soon as you log into the program, in the example above the Dashboard is displayed as the default entity. We have used the Dashboard entity in our courseware as it is the most commonly used default for users as they log in.

Accessing Different Entities

Clicking on the downward arrow next to the Sales Area Tab will display a list of all the Areas of the system available to the logged in user. Notice that the Area that is active is slightly more raised and larger than the other available areas.

Underneath the primary area sit a list of the entities available within the Sales area, each is displayed in a tile located under a header that holds them in common with each other. The entities that you see may be less than we have displayed in this document, as visibility of entities again are dependent on each user(s) role:
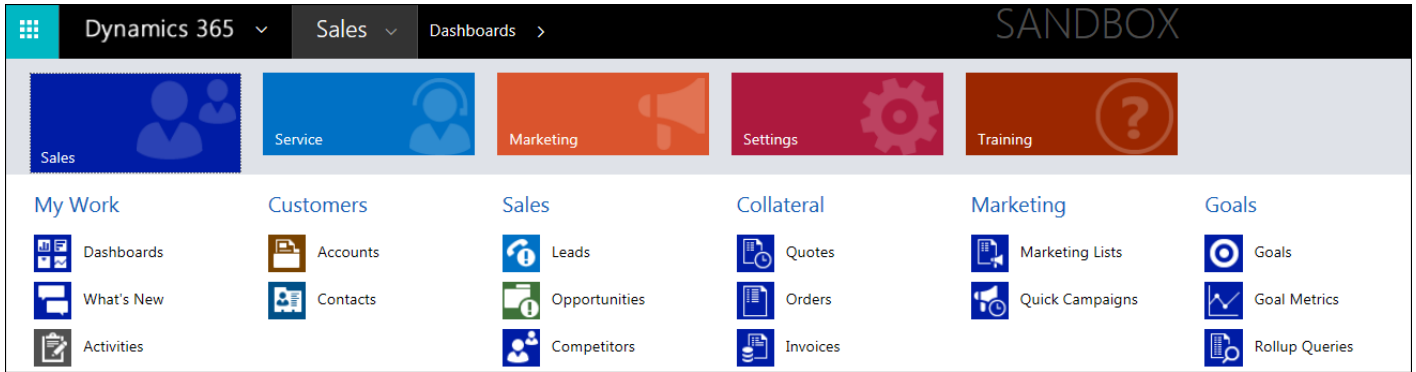
Note in the diagram above that we are currently in the Sales Area and the Dashboards entity is active. Selecting another entity will change the navigation bar to reflect our selection. In the example below we have selected Sales and then the Accounts entity. By doing so the dashboard entity has now closed and has been replaced by the Accounts Entity as the active tab:
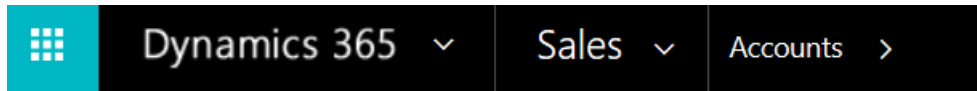

Entity Specific Recently Viewed Records

The word Accounts in the navigation bar has an arrow pointing right. Hovering over the word Accounts will change the arrow so that it is facing downwards, this will display a list of Recently Viewed records for the entity that that you are in. Our example below shows recently viewed Accounts:
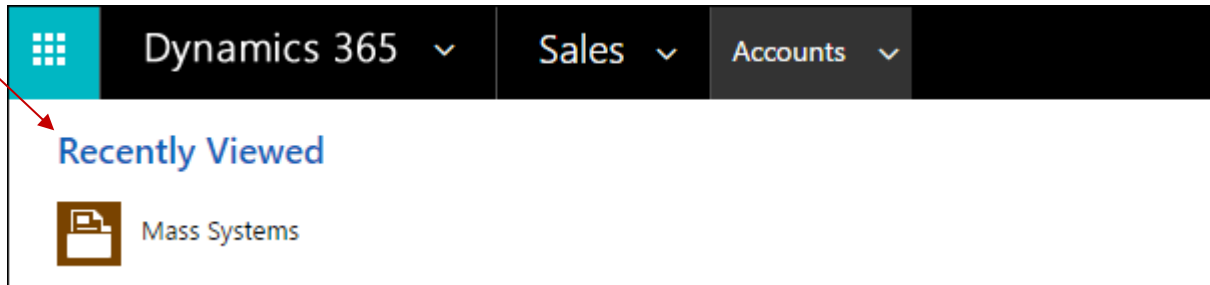

Click on the name of a record card in this case an Account and the navigation bar will change again. Now it will display that you are in **Sales > Accounts** and then the name of the record card you selected, in this Mass Systems is the selected account:
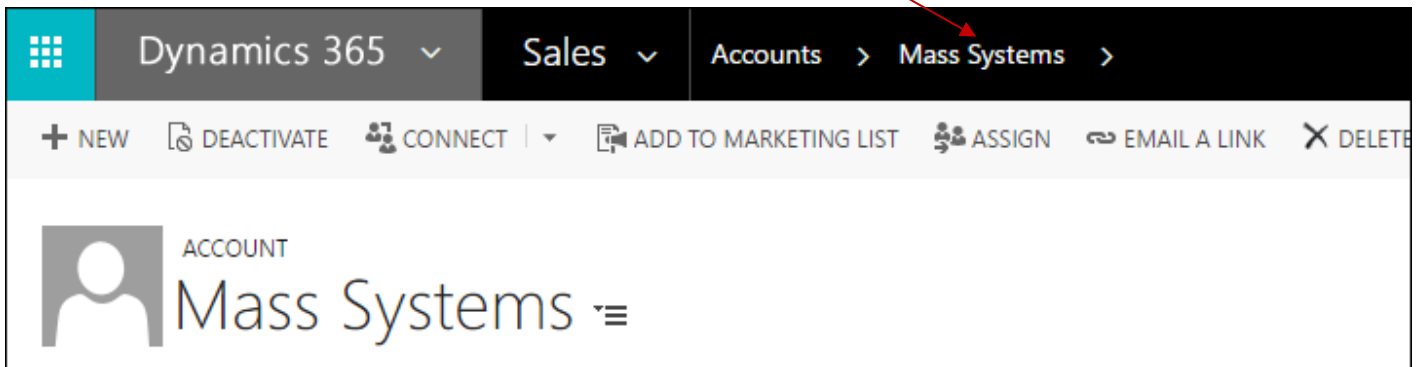
It is important to remember to reference the navigation bar, it will always reflect your current location in the system and show you the exact breadcrumb trail that you have followed to get to the entity or record that you are working within.

Activating View Data

Clicking on the actual entity name (in the case above Accounts) will always show you a list of record cards relating to whichever entity you have active at the time; the list of data will always be displayed in the default view for that entity. See the views module for more information on this topic.
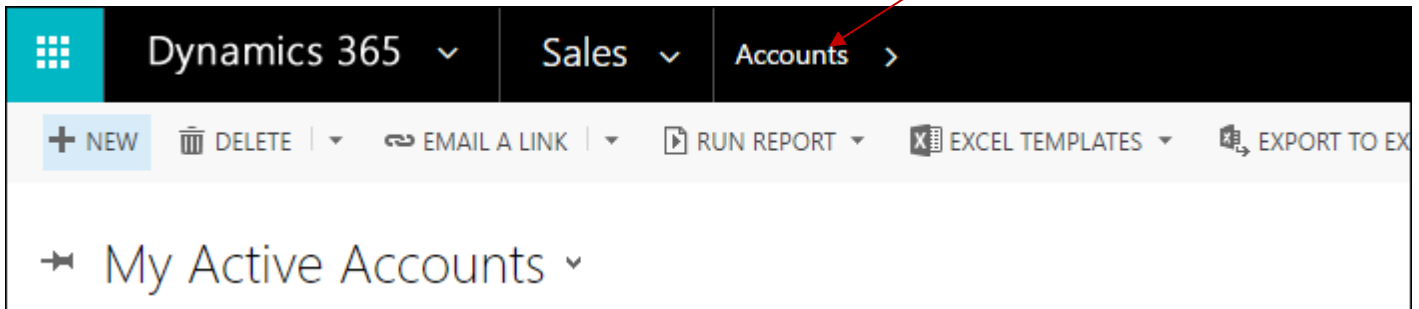

Viewing High Level Data

Whenever an Area for example "Sales" is active in the navigation bar, the user is working at the highest level of the programme. At this level, all entities display lists that hold data available across the entire organisation. For example, if a list of Opportunities is viewed at this level, it is a list of opportunities across the entire business rather than those that belong to just one Account or Contact. If you wish to view the Opportunities that just belong to an Account or a Contact, you would view them at a lower level in an associated view. A summary of this way of viewing data is explained in the section below "viewing data within a record". The diagram below shows the highest level of navigation, selecting any entity will give you data across the organisation:
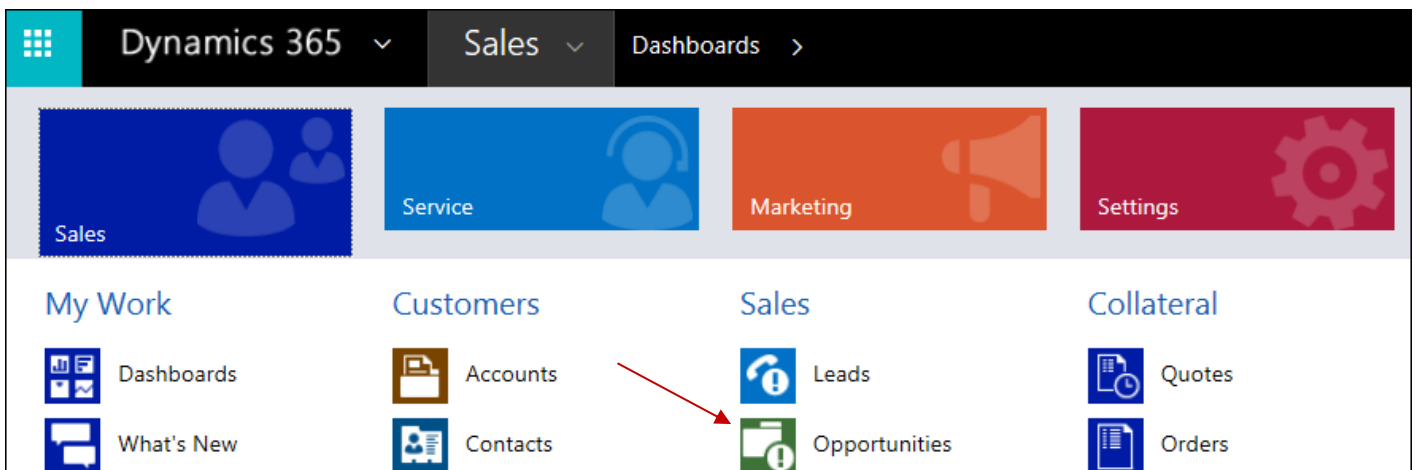

Viewing Data within a Record

Once a record is active on screen, (we have used an Account as our example in this documentation), you will see a secondary arrow sitting alongside the record itself. Selecting this arrow will active an additional set of tiles. Although these tiles appear to be the same as the ones viewable at a higher level as described above, they are slightly different in that the data they hold relates to the actual record card rather than all records across the organisation. In the example below, selecting the opportunities tile would activate just the opportunities that just belong to the Account that is active in the navigation bar (Mass Systems). This data is held in what is known as an associated view, as it is Opportunity data that is associated with the Account record that you are actively looking at.
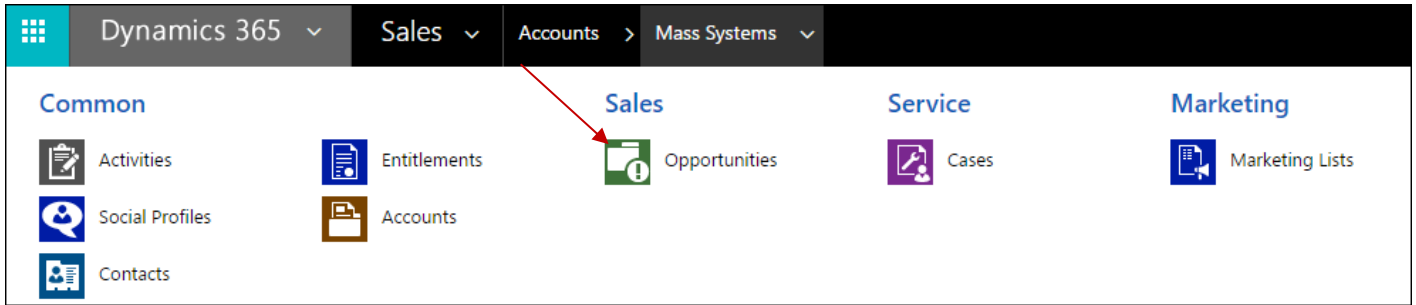
Once the Opportunities tile activates, a list of any Opportunities relating to the Account that you have on screen will display in its associated view. The main navigation bar will display that you are still sitting in **Sales > Accounts** and then the name of the Account (In this example Mass Systems) but you will now see a list of Opportunities belonging to the active Account in an Associated View:
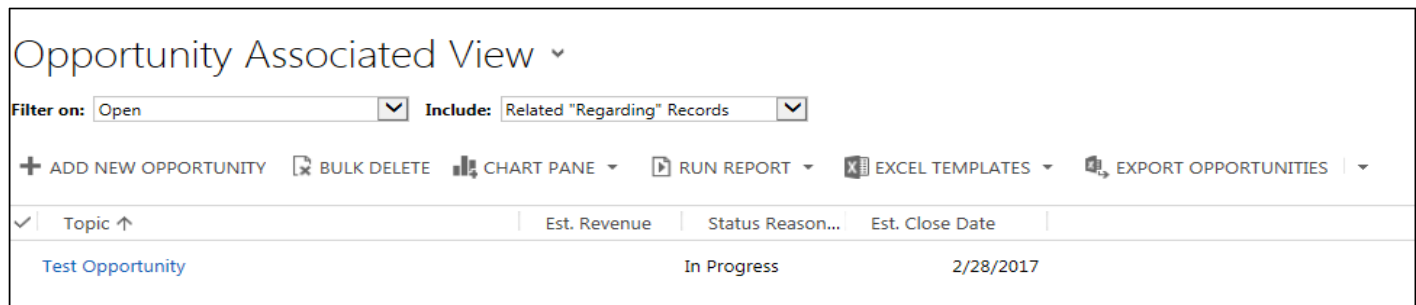

Searching Using the Quick Find Function

The next area within the navigation bar is the quick find option. This function searches up to nine entities that are set by the database administrator:
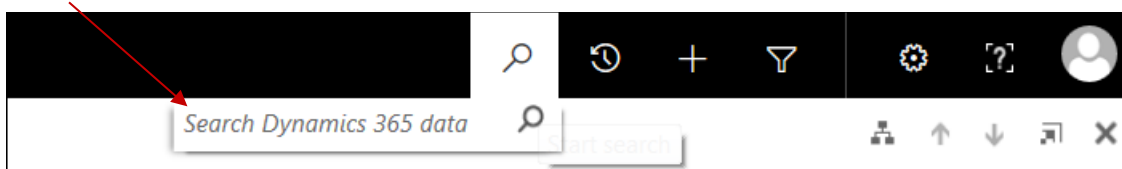

To use the global search function type part of the value of the text string you are looking for ensuring that you enclose it in asterisks. This overrides the default set by the search engine where the system automatically searches where the text string starts with a word and forces a "contains search", for example searching for *Test* wherever it appears in a string will give a result where the value appears at the beginning, middle or end of a string:
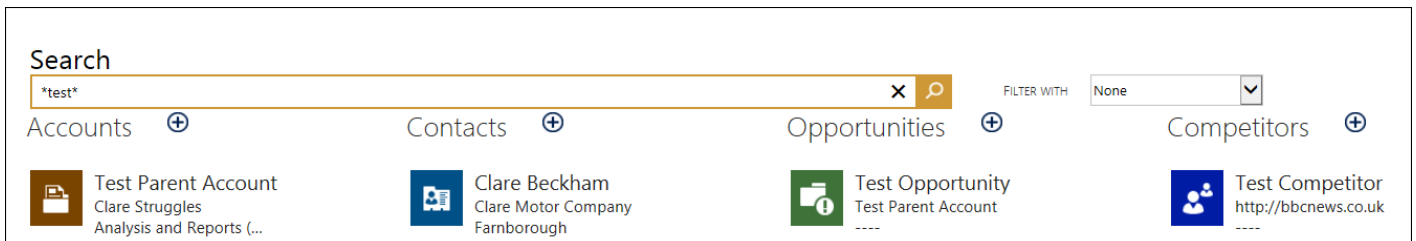

Recently Viewed Items

This option takes a shortcut back and displays any views that you have recently used, records that you have recently opened and any pinned favourites. Working with favourites is featured later in this document.
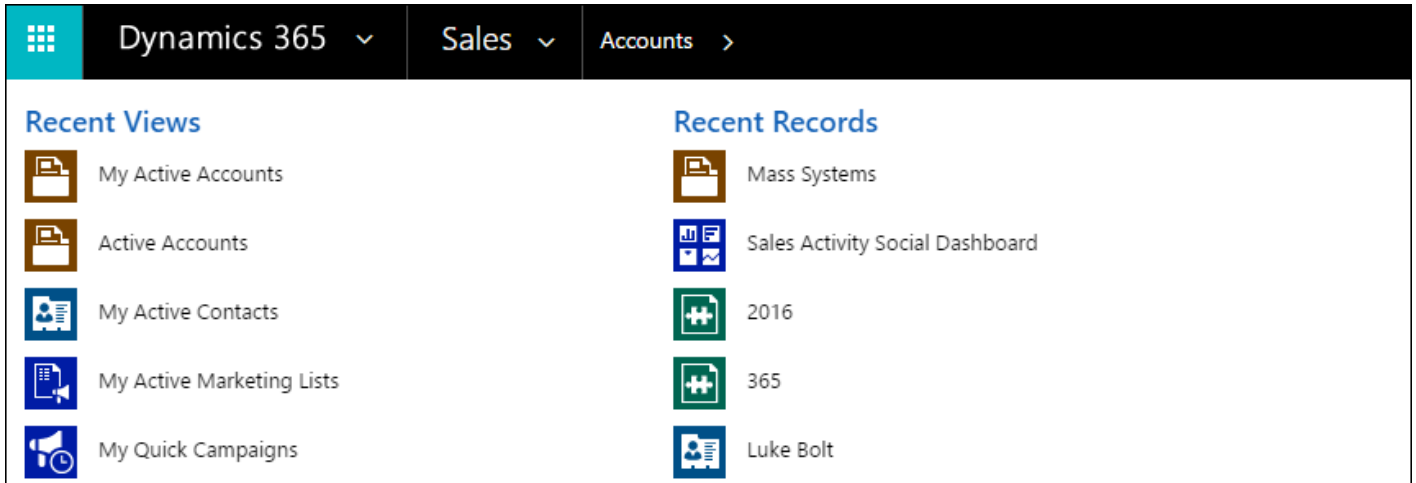
Advanced Find

Also featuring in the navigation bar, is the advanced find icon, use the Advanced Find feature to do more extensive searches within the database. In addition, new personal views that suit a user(s) specific requirements can be created here. Please refer to our documentation on creating advanced finds:
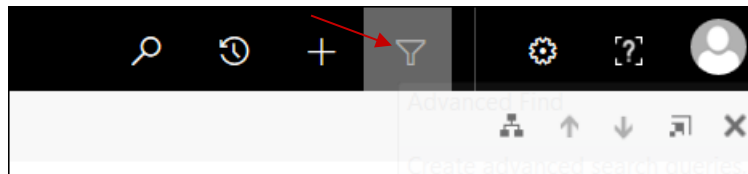

Setting Personal Options

Allows the user to set their own personal items such as the default log in screen, Outlook synchronisation timings, and how calendar settings are displayed to name just three examples. The settings that the user can change in here do not affect the entire business. Any global settings are initial set and then changed when necessary by the system administrators. In addition to setting personal options, a user can also access help files and other Microsoft specific areas from here:

Accessing System Help Files

As described you can access help files and search for training assistance using this area:
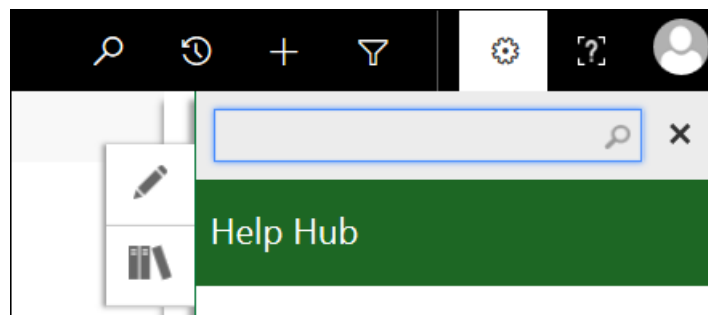
Changing Profile Avatar, Locating Database Name and Signing Out

The final area of the navigation bar allows the user to change the default profile avatar to a picture of themselves, hovering over the icon displays the current database that the user is logged into and displays the user name.

Navigation Functions within Views

As described previously in this module, the quickest way to go back to a view is to click on its entity name in the navigation bar:
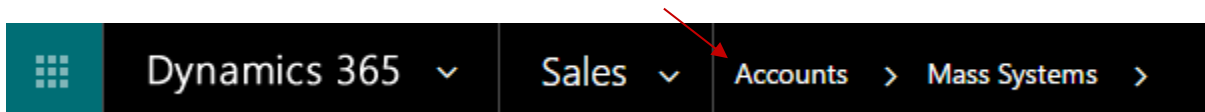

Once the view screen is active, you will find there are several additional functions that you can access within a secondary icon bar sitting directly under the navigation bar. Again, most of these options are functional and common to all entities as soon as you activate a view:
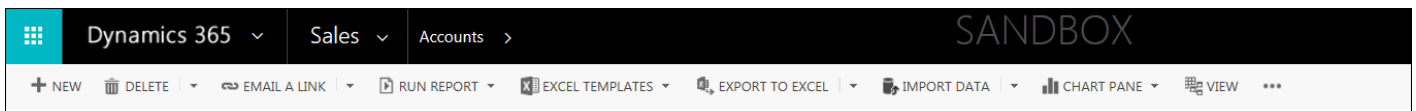
The functions that are available in this area are as follows:

- **New:** Creates a new record card within the entity that you are currently working.
- **Delete**: Deletes any highlighted record within the entity or view that you are currently working. There is also a bulk delete option in here but only if you have the access rights within your role to access and use it.
- **Email a Link:** Allows you to email a link to the page you are working on to another user, it is an invaluable function as it is a huge time saving feature, if you simply want to direct a user to a certain record or element within CRM.
- **Run Report:** Holds a selection of reports for the currently open entity or record available for the user to run.
- **Excel Templates:** Allows you to export data to either an Excel or Word Template.
- **Export to Excel:** Exports the data out to excel in one of the following formats:
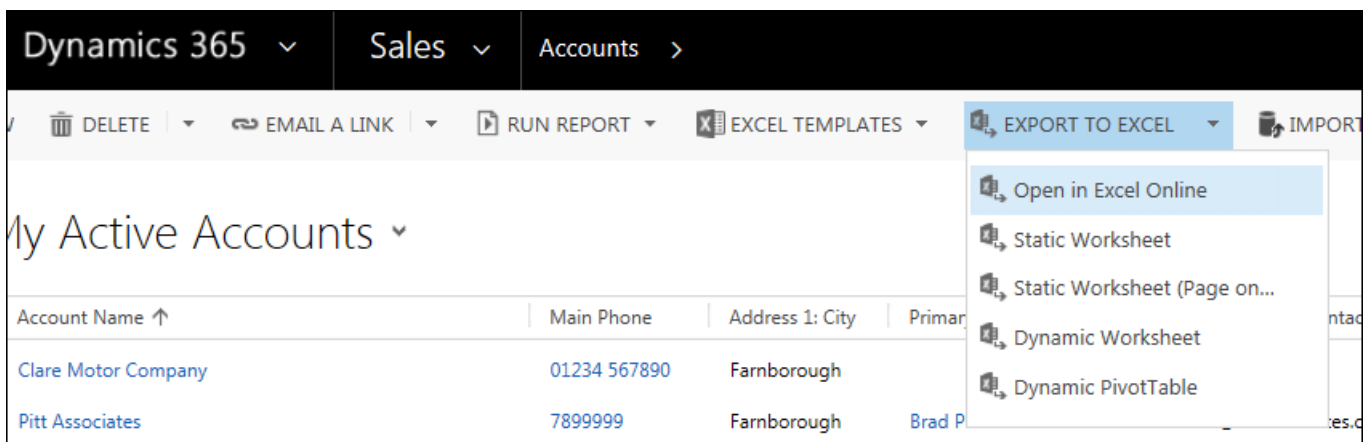
- **Import Data:** If a user has a role that allows the import of data, then this option will allow the user to either import data directly into the entity, or allow the user to download a system template to prepare data for import directly into an entity at a later date.

- **Chart Pane**: Changes the position of the chart pane to right, top or turns it off altogether. By default the chart pane sits on the right of the view.
- **Ellipse:** The ellipse holds any options that are not displayed as icons in the main tool bar through lack of space, this could be due to a smaller screen resolution for example. The least used functions will sit in the ellipse which appears at the end of the icons:
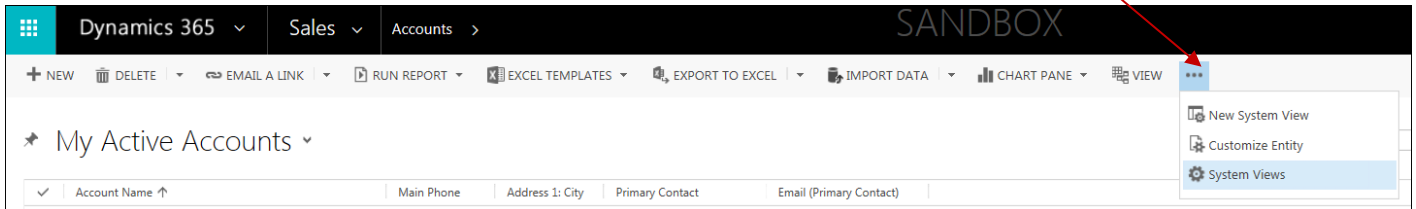

Trainers Note: Administrators may see more elements than the ones listed in this documentation, the functionality of these will be covered in the administrator modules.

Navigation Functions within Record Cards

Predominantly all entities work in the same way and are structured in the same format, so as soon as you are aware how to navigate in one, then the same rules apply whatever the record type. In the following example, we will use the Accounts entity to explain record navigation. The easiest way to open any record card is to access it from the view where it sits. From the main menu line navigate to **Sales > Accounts** and when the accounts entity activates, click on the hyperlink of the **Account Name.** As soon as you hover over the account name itself, a hyperlink will underline the text indicating that you can click through to the record card.

It is important that you select the actual account name itself, if you click on a different hyperlink you may open a completely different record. In the graphic below we can see that the Owner column is first in the Accounts view, clicking on the Owner name rather than the account name will simply open the user record card of the user that owns that record. Several areas are hyperlinked for speed and ease of use in the system but sometimes these hyperlinks can be more of a hindrance than a help if you select the wrong one, and are then unsure exactly where you have been directed:
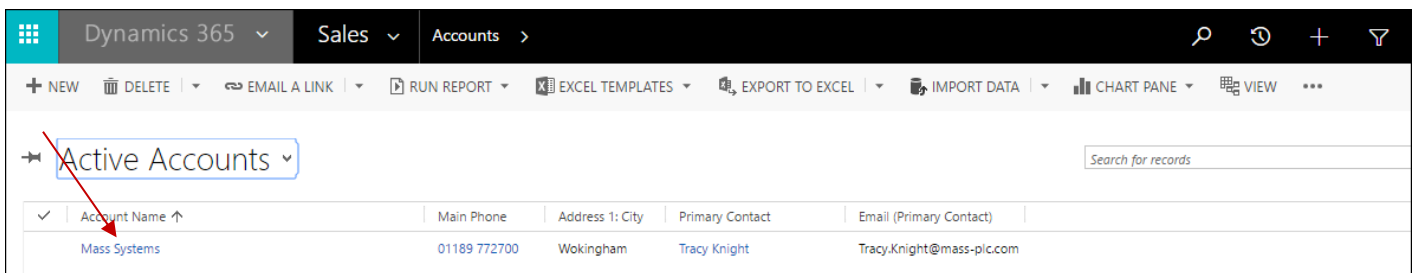

Once a hyperlink is clicked and the record is active on screen another series of options will become available in a second toolbar:
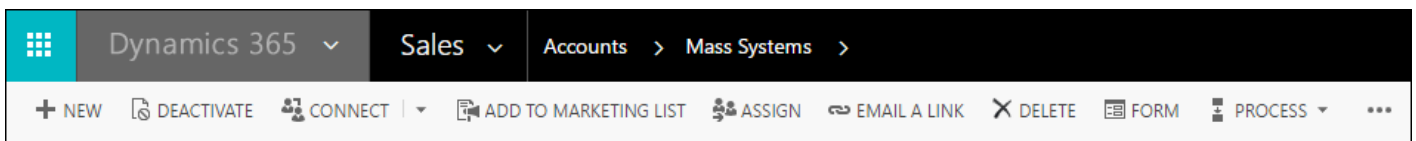
The following section outlines the core functionality available to users once they open a record such as an Account or a Contact:

- **Save**: Saves any changes to the record card without closing the form.
- **Save & Close**: Saves any changes to a record card and closes the form usually returning to the default view.

- **New**: Allows the user to create a new record for the entity that they are in, for example in this exercise we are in the Accounts entity and therefore a new account would be created.
- **Deactivate:** If the record is active then this option will say deactivate and allow the user to deactivate the record card. If the record has already been deactivated, then this icon will display the word activate and is used to reactivate the record.
- **Connect**: Allows the user to connect the record to another, see the documentation on connections to understand how this functionality works.
- **Add to Marketing List:** Adds the currently active record to a marketing list, these are generally controlled by marketing departments.
- **Assign**: Allows the record to be assigned to another user or team. See the documentation on assigning record cards.
- **Email a Link**: Copies the link to the currently open record and places it directly into an email so that another user can be directed straight to this page via the link.
- **Delete:** Deletes the active record.
- **Share:** Share the current record with another user or team, see the documentation on sharing and assigning records.
- **Follow:** Following a record card will place any post updates in the dashboards of the users that follow them. If the record card that is on screen is currently being followed, then this option will change to unfollow.
- **Word Templates:** Holds a list of any word templates that have been designed for the records in this entity so that word templates can be generated directly from the record. They normally pull key data from the record card itself, such as the contact name and address, as well as any generic text for that template.
- **Run Report:** The system administrators will set specific reports that will run from each entity or record, use the arrow facing right to select from the pre-built reports:
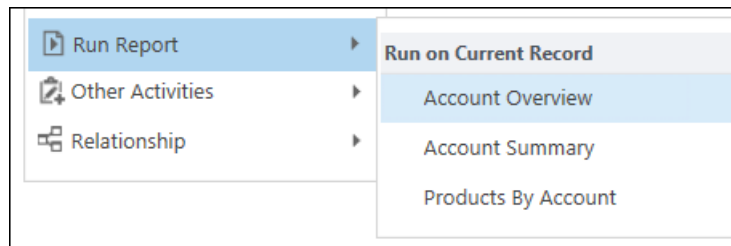
*We have taken a screen shot of the Accounts entity for the example above as it has more default reports available on display, the option to run reports however is on all key entities in the elipse.

- **Relationships:** Link the current record to a different type of record using relationships, for example you may want to link an Account to an Opportunity. Most of this functionality is automated but there may be occasions when you wish to create a manual link.

Trainers Note: We have covered the general functionality available within an entity or record, system administrators may see additional functionality and details of this are covered in our system administrator documentation.

Navigating Through Form Sections

The main screen of any record is known as a Form, some for example the Account form are very complex as they hold quite a lot of field data about an Account. Commonly users tend to scroll up and down forms looking for relevant information about certain topics. It is important to remember however that when forms are designed fields of a certain type are general placed in the design together. For example, you will find all Account type information at the top of the form as it is the data that you will use the most and do not want to scroll far to locate. To make navigation easier fields that relate to each other are designed in sections and have a section header:

By default, sections within a form sit open but can be collapsed by clicking on their section headers. In the example below, the Marketing Information section is collapsed whereas in the diagram above it is activated as open, the opportunities section is open in both diagrams so does not look any different:

To un-collapse a section simply click its header title again and the section will open.

Navigating Between Sections

As well as having the ability to open and close sections within a form, a user can also move quickly up and down a form without scrolling through the form in its entirety. At the very top of the form the design will contain the name of the record underneath the name of the entity that it sits within. In the example below we are looking at Mass Systems which is sitting in the Account entity.

At the end of the record name you will also see a small icon that holds a list of form sections for the active record. Click on this icon and each section of the form will be represented with a header representing each section in the form:
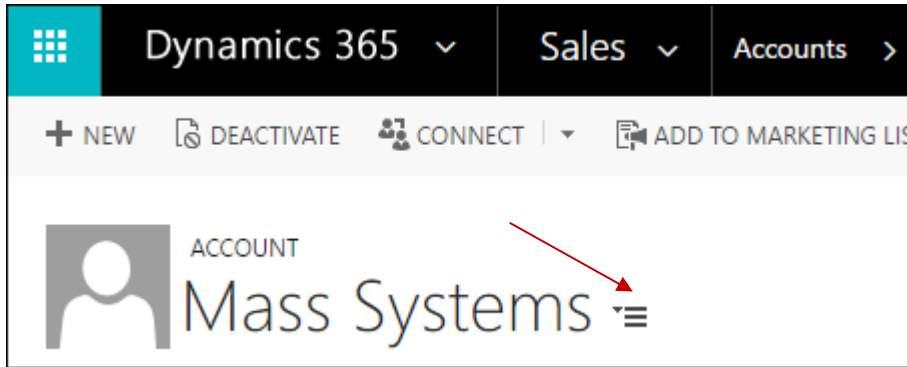
Select a Form Section name and that section will automatically activate allowing you to move quickly up and down the form without having to take time to scroll, the programme will open the section of the form that you selected.
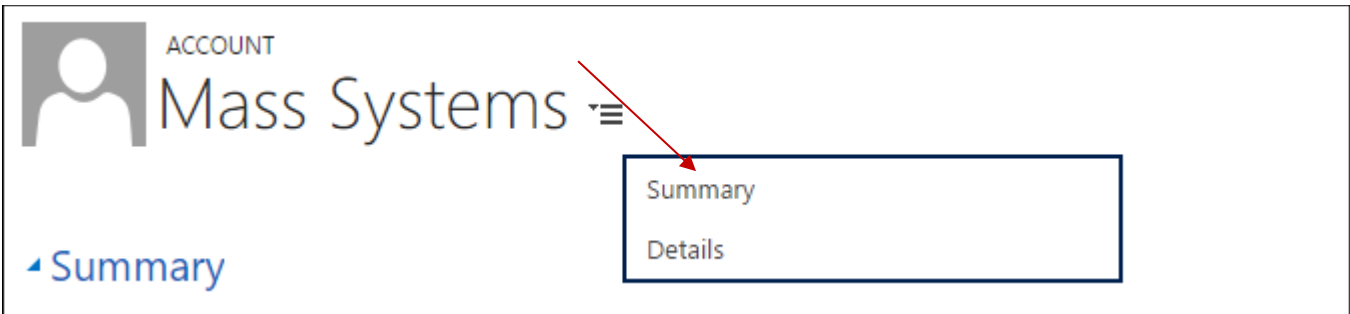

Working with Sub Grids in Forms

When any record is opened, the data within it is displayed on screen in a form. Forms are designed to hold as much key data as possible about a record and generally this information is held in fields. Some data within a record however may be held in a one to many relationship and would be impossible to view in a field there would be too much data. For example, an Account may have many contacts that belong to it. To ensure that data in a one to many format is viewed efficiently, sub-grids are built into the main form design and hold this data in a list view format. To see an example of this, activate a record on screen, in our example we have used an Account. Once the account is active, on the right side of the screen you will see a sub grid containing a list of contacts that belong to that specific account:
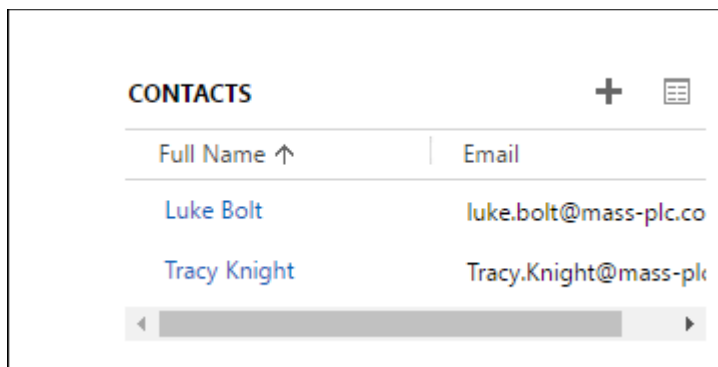

The sub grid that the contacts are displayed in is designed to display key data displayed from within the linked entity using a column format.

Add a New Record: The plus button on the top right of the grid allows you to create a new record card within the form that you are working. Note that if you are creating a new record of any type, then the plus button will not activate until the record is saved to the database. As soon as the record card is saved, and its name appears alongside its entity in the navigation bar, then you can add sub-grid items.
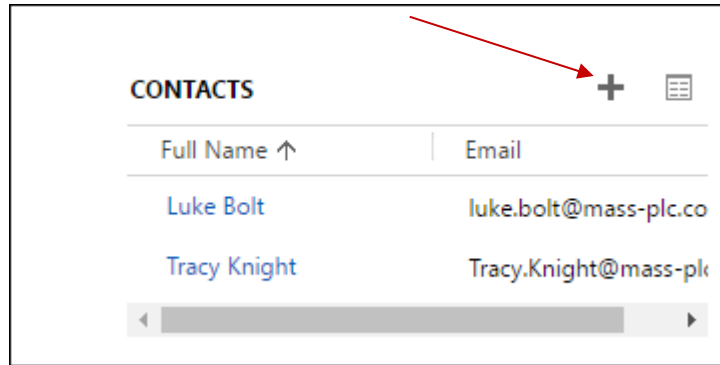
See the records associated with this view: Selecting this option will take you directly to the Associated View that holds the list of contact records. This function is useful as it allows you to access the main associated view for the sub grid very quickly, working with associated views is covered in the next element of this document:
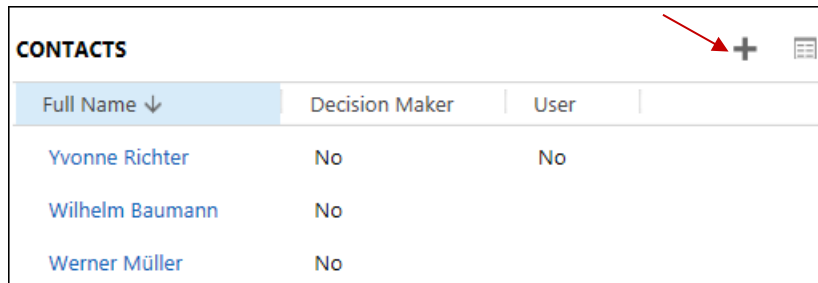

Working with Associated Views

It would be impossible to design the record forms to have a sub grid for every entity that relates to it. For this reason, much of the data is held in sub-areas behind the record card and these are named Associated Views. To access an associated view, firstly activate a record on screen and then select the downward arrow next to the record name to see any entities associated with the entity that you have active:
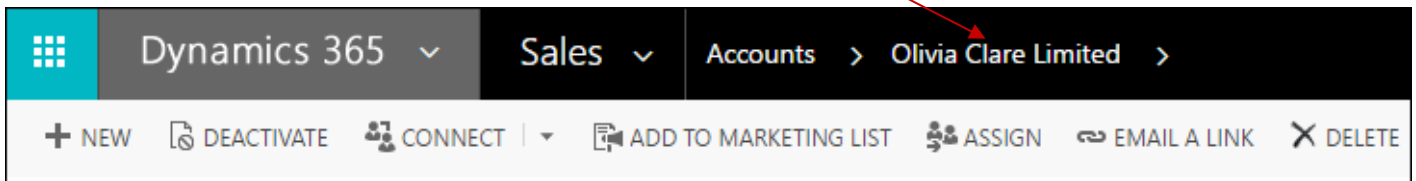
In our example above, we are in the Account entity with the record Clare Training Account active in the navigation bar, selecting the downward arrow next to the Account will display the entity tiles:
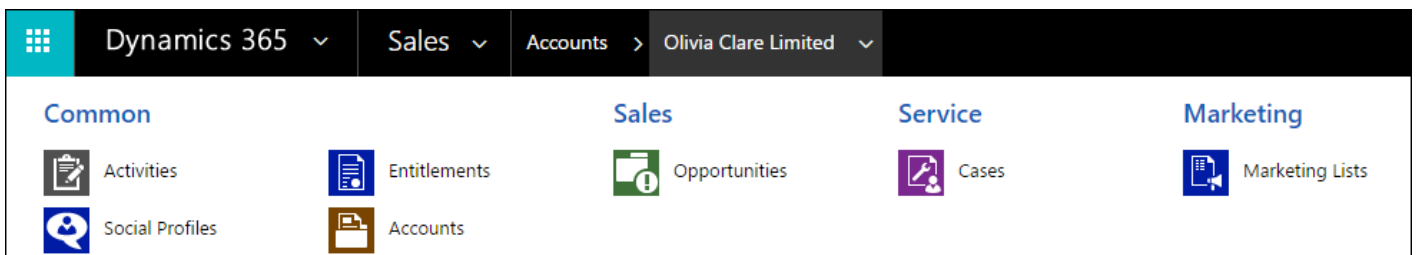
Select a tile from those available for example contacts and the form will change to display the Contacts Associated View, any contacts that are linked to the original record, in this case the Account:

Note that the original record is still active but a list of the contacts within the Account are displayed. You can now hyperlink and click through to the contact that you wish to work with directly by double clicking on the record line. To return to the main account form, select the hyperlinked account name or select the Account name in the header.