

MSCRM Data Group Type

The MSCRM data group type gathers data from a Microsoft Dynamics® CRM system using views set up within Dynamics CRM itself.

To create a MSCRM data group you simply select the Microsoft Dynamics® CRM view to use. To assist, you can select from a list of entities for which views are available to filter the list of views to those corresponding.

This list of available views is itself gathered using a designated DSD. Typically this finds view marked for use by fSeries based on the text fSeries or fData being present in the view's description, but any appropriate mechanism may be used to identify and gather the list of available views to suit your own implementation.

Each view contains selection criteria and fSeries will analyse the view selected and compare it with the available placeholders for the data group. fSeries will suggest placeholders that may be required to properly process the data group based on the view's selection criteria and the entity's primary key field. For example, a view that uses the Quotes entity will typically (but not always) need a quoteid placeholder (or user entry). When the data group is processed fSeries automatically replaces all selection criteria whose field name matches a placeholder with the value of the placeholder.

The MSCRM data group type gathers data using the Microsoft Dynamics® CRM API. User permissions are checked and respected to return only data that the user is permitted to view.

fDocs generated document may be deployed in Microsoft Dynamics® CRM either by links from the ribbon or through workflows.

Note: fSeries can operate over multiple Microsoft Dynamics® CRM systems and if it is set up this way you may also select the "Source" system.

Please refer to documentation for details on set up and configuration.