



Organization Structure

For Dynamics CRM 2013



Organization Structure

- This add-on allows you to fully visualize the accounts, sub-accounts, contacts and sub-contacts hierarchy (presented as a tree view)
- Organization Tree presents selected customer Organization with its all Parent and Children records.
- The highest level in the tree view is the top level in Organization



Organization Structure

- Decide what fields are critical for your company and display them as part of Organization Structure. (You can add up to 3 fields for Account and Contact).
- You can include contacts for each account displayed in organization tree as well as inactive records.
- Number of displayed records depends on user security role



- Organization Structure is available for both Account and Contact records
- You can access Organization Structure for specific customer by selecting an Organization Tree from Navigation Bar

The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'SERVICE', 'Accounts', and 'DPS Europe'. A 'Create' button and user profile 'Adam McAma First' are also visible. Below the navigation bar, a row of tiles includes 'ORGANIZATION TREE' (highlighted with a red box), 'ACTIVITIES SUMMARY', 'OPPORTUNITIES', 'CASES', and 'MARKETING LISTS'. The main content area is divided into sections: 'Summary' with 'ACCOUNT INFORMATION' (Account Name: DPS Europe, Phone: 897-563-256), 'ADDRESS' (London, UK), and a map. The 'POSTS' section shows a post from 'DPS Europe' dated 08/10/2013. The 'CONTACTS' section shows 'No Contact records found.' and the 'RECENT OPPORTUNITIES' section shows 'No Opportunity records found.'



- You can include inactive records in tree view.
- You can include contacts in tree view.

The screenshot shows the Microsoft Dynamics CRM interface for the 'DPS Europe' account. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'DPS Europe'. The user 'Adam McAmA' is logged in. The account details section shows 'DPS Europe' with fields for 'Annual Revenue' (--) and 'No. of Employees' (--), and 'Owner' (Adam McAmA). Below this, a toolbar contains buttons for 'Create Sub-Account', 'Create Sub-Contact', 'Include Inactive', and 'Include Contacts'. The 'Include Inactive' and 'Include Contacts' buttons are highlighted with a red box. The main area displays a tree view of sub-accounts, including 'DPS Berlin', 'DPS Hamburg', 'DPS Poland', 'DPS Gdansk', and 'DPS UK', each with associated contact information.

Annual Revenue	No. of Employees	Owner*
--	--	Adam McAmA

Buttons: Create Sub-Account, Create Sub-Contact, **Include Inactive**, **Include Contacts**

Tree View:

- ACCOUNT
- DPS Europe
 - Greta Smigt - Sales Director
 - Helmut Torben - Sales Director
 - DPS Berlin
 - Thomas Burg
 - DPS Hamburg
 - DPS Poland
 - Adam Rosowski - Head of Sales
 - Eleonora Bart - Sales Director
 - Pawel Lasota - Sales Director
 - Tamara Kurikis - IT Manager
 - DPS Gdansk
 - Ania Szczupla - Sales Director - Ola Dlugosz
 - Grzegorz Rycerz - Sales Director
 - Piotr Wiagura - Sales Director - Ola Dlugosz
 - DPS Warsaw
 - DPS UK
 - Adrian Dumitrascu (sample) - Purchasing Assistant - Alan Brown

Active



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