



Organization Structure for Microsoft Dynamics CRM 2011



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
- 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.

Define up to 3 fields for Account and Contact that should be displayed as part of the Organization Structure.

Display settings

Account **Contact**

Add

Account Name
Account Number
Region

Remove

Format:

Default Save

Display settings

Account Contact

Add

Full Name
Assistant
Assistant Phone

Remove

Format:

Default Save



File Accounts View Charts Add Customize

New Edit Activate Deactivate Send Direct E-mail Add to Marketing List Connect Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Filter Advanced Find

Collaborate Process Data

Organization Structure is available for both Account and Contact records

Account Numbe...	Primary Contact	Address 1: City	Main Phone	E-mail	Parent Account	No. of Employee...	Relation...
DPSCORP-003-2		Berlin	123-456-985	BerlinOffice@dpc.com	DPS Germany	5	Customer
DPSCORP-001		London	897-563-256	EuropeOffice@dpc.com		20	Customer
DPSCORP-004-2		Gdansk	256-325-452	GdanskOffice@dpc.com	DPS Poland	5	Customer
DPSCORP-003		Berlin	152-698-158	GermanyOffice@dpc.com	DPS Europe	5	Customer
DPSCORP-001-3		Glasgow	789-985-452	GlasgowOffice@dpc.com	DPS UK	5	Customer
DPSCORP-003-1		Hamburg	456-452-152	HamburgOffice@dpc.com	DPS Germany	5	Customer
DPSCORP-001-1		London	123-998-452	LondonOffice@dpc.com	DPS UK	15	Customer
DPSCORP-004		Warsaw	987-654-623	PolandOffice@dpc.com	DPS Europe	15	Customer
DPSCORP-002		London	147-258-369	UKOffice@dpc.com	DPS Europe	5	Customer
DPSCORP-004-1		Warsaw	985-321-654	WarsawOffice@dpc.com	DPS Poland	6	Customer

- Accounts
- Contacts

- Workplace
- Sales
- Marketing
- Service
- Settings
- Resource Center

Click here to view the chart.



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Adam McAma
Dynamics Professional Solutions Ltd

File Account Add Customize

Save Save & Close Deactivate Add to Marketing List Connect Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

Account
DPS UK

Accounts

Owner
Adam McAma

Create Sub-Contact Include Inactive Include Contacts

Organization Tree

- DPSCORP-001 - EMEA
- DPSCORP-003 - EMEA
- - EMEA
- Hamburg - - EMEA
- DPS Poland - DPSCORP-04 - EMEA
 - DPS Gdansk - - EMEA
 - DPS Warsaw - - EMEA
- DPS UK - DPSCORP-002 - EMEA**
 - DPS Glasgow - DPSCORP-001-1 - EMEA
 - DPS London - - EMEA

You can access Organization Structure for specific customer by selecting an Organization Tree from Details section



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Save Save & Close Delete Deactivate Add to Marketing List Connect Assign Copy a Link E-mail a Link Run Workflow

Adam McAma
Dynamics Professional Solutions Ltd

Information
General
Custom Fields
Details
Contacts
Notes & Activities
Preferences

Related
Common
More Addresses
Activities
Closed Activities
Sub-Accounts
Contacts
Relationships
Organization Tree
Activities Summary
Connections
Documents
Audit History
Sales
Opportunities
Quotes
Orders
Invoices

Account
DPS UK
Primary Contact Preferred Method of Contact Any Owner Adam McAma

Create Sub-Account Create Sub-Contact **Include Inactive** Include Contacts

- ▶ DPS Europe - DPSCORP-001 - EMEA
 - ▶ DPS Germany - DPSCORP-003 - EMEA
 - DPS Berlin - DPSCORP-003-2 - EMEA
 - DPS Hamburg - DPSCORP-003-1 - EMEA
 - ▶ DPS Poland - DPSCORP-004 - EMEA
 - DPS Gdansk - DPSCORP-004-2 - EMEA
 - DPS Warsaw - DPSCORP-004-1 - EMEA
 - ▶ **DPS UK - DPSCORP-002 - EMEA**
 - DPS Bristol - DPSCORP-001-2
 - DPS Glasgow - DPSCORP-001-3 - EMEA
 - DPS London - DPSCORP-001-1 - EMEA

You can include inactive accounts in tree view.



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Adam McAma
Dynamics Professional Solutions Ltd

File Account Add Customize

Save Save & Close Deactivate Add to Marketing List Connect Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Custom Fields
- Details
- Contacts
- Notes & Activities
- Preferences

Related

- Common
 - More Addresses
 - Activities
 - Closed Activities
 - Sub-Accounts
 - Contacts
 - Relationships
 - Organization Tree
 - Activities Summary
 - Connections
 - Documents
 - Audit History
- Sales
 - Opportunities
 - Quotes
 - Orders
 - Invoices

Account

DPS UK

Primary Contact Preferred Method of Contact Owner

Any Adam McAma

Create Sub-Account Create Sub-Contact **Include Inactive** **Include Contacts**

- DPS Europe - DPSCORP-001 - EMEA
 - DPS Germany - DPSCORP-003 - EMEA
 - DPS Poland - DPSCORP-004 - EMEA
 - Adam Rosowski
 - Eleonora Bart
 - Pawel Lasota
 - Tamara Kurikis
 - DPS Gdansk - DPSCORP-004-2 - EMEA
 - Ania Szczupla - Ola Dlugosz - 022-789-654
 - Grzegorz Rycerz
 - Piotr Wiagura - Ola Dlugosz - 022-789-654
 - DPS Warsaw - DPSCORP-004-1 - EMEA
- DPS UK - DPSCORP-002 - EMEA**
 - Adrian Dumitrascu (sample) - Alan Brown - 0208 -1234-55678
 - Cathan Cook (sample)
 - Eva Corets (sample) - Anna Timpon - 0208 - 987 -456-123
 - DPS Bristol - DPSCORP-001-2

You can include inactive accounts in tree view.



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