



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). This can be especially useful when working with customers who have multi-level account / contact structure.

The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SERVICE', 'Accounts', and 'DPS Europe'. The main navigation area features tabs for 'Sales', 'Service', and 'Marketing'. The 'ORGANIZATION TREE' tab is highlighted with a red box. Below the navigation, the 'Summary' section for the 'DPS Europe' account is visible. The 'ACCOUNT INFORMATION' section shows details such as 'Account Name: DPS Europe', 'Phone: 897-563-256', and 'Parent Account: DPS'. The 'CONTACTS' section indicates 'No Contact records found.' Below this, a second screenshot shows the 'DPS Europe' account page with a tree view of sub-accounts and contacts. The tree view includes sub-accounts like 'DPS Berlin', 'DPS Poland', 'DPS Gdansk', and 'DPS Warsaw'. The 'Include Inactive' and 'Include Contacts' buttons are highlighted with a red box.

Microsoft Dynamics CRM | SERVICE | Accounts | DPS Europe | Create | Adam McAm... First

ORGANIZATION TREE | ACTIVITIES SUMMARY | OPPORTUNITIES | CASES | MARKETING LISTS

Summary

ACCOUNT INFORMATION

Account Name * **DPS Europe**

Phone **897-563-256**

Fax --

Website --

Parent Account **DPS**

Ticker Symbol --

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

DPS Europe
Account: Created By Adam McAm...
On DPS Europe's wall
08/10/2013 23:03

Primary Contact --

CONTACTS +

Full Name ↑ | Email

No Contact records found.

Microsoft Dynamics CRM | SALES | Accounts | DPS Europe | Create | Adam McAm... First

ACCOUNT

DPS Europe

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

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

- 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

Organization Structure

- 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 (number of displayed records depends on user security role).
- 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).
- And you can decide whether you want to see just accounts or contacts, or both. Inactive records can also be included.

