

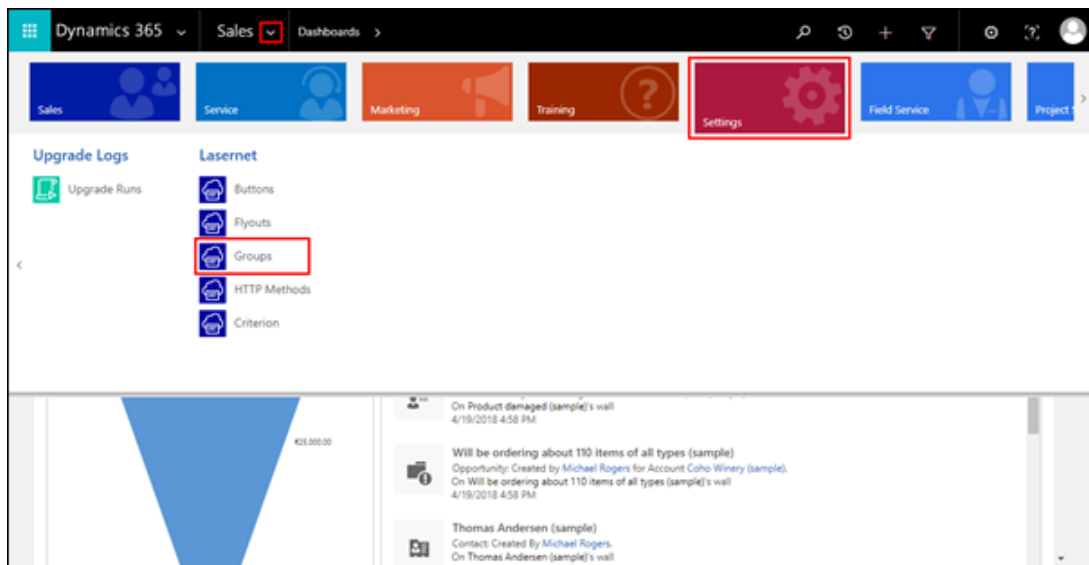
Creating a group

- 2021-07-12 - Comments (0) - Lasetnet CE Connector General Information

Lasernet for Dynamics 365

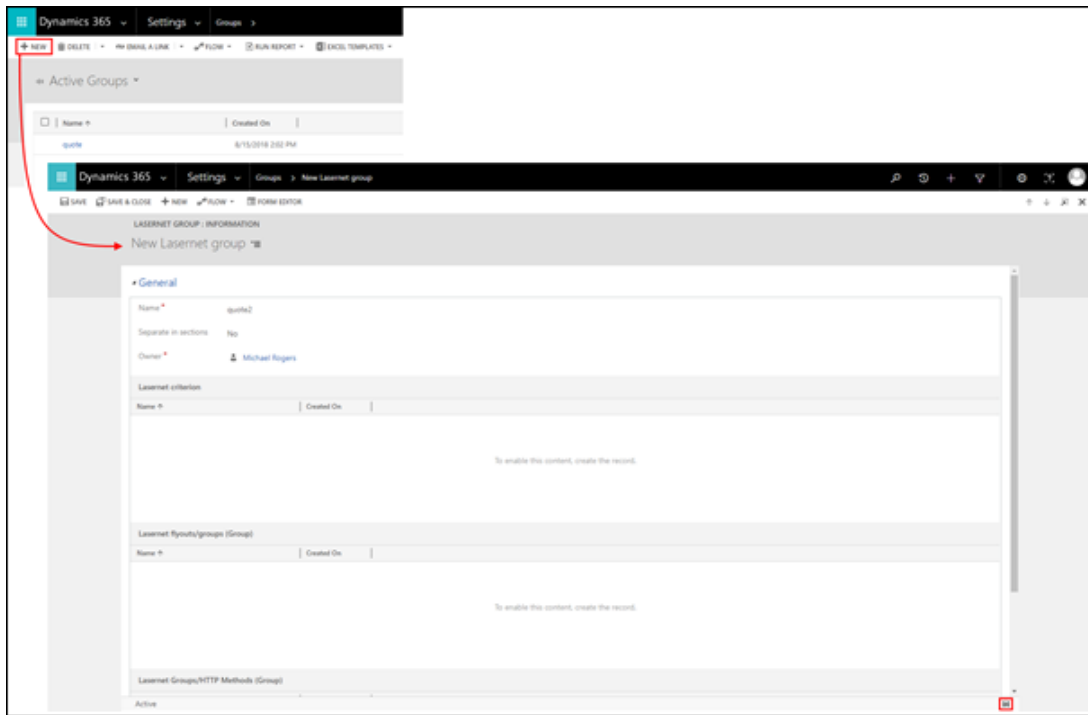
This article provides step-by-step instructions on how to create a group as a part of the Lasetnet Connector configuration within Microsoft Dynamics 365 Customer Engagement (D365 CE).

1. Sign into your Microsoft Dynamics 365 Customer Engagement system.
2. On the *Sales* menu, click the drop-down menu to show the navigation menu flyout, and then under the *Settings flyout*, click **Groups** in the Lasetnet list.

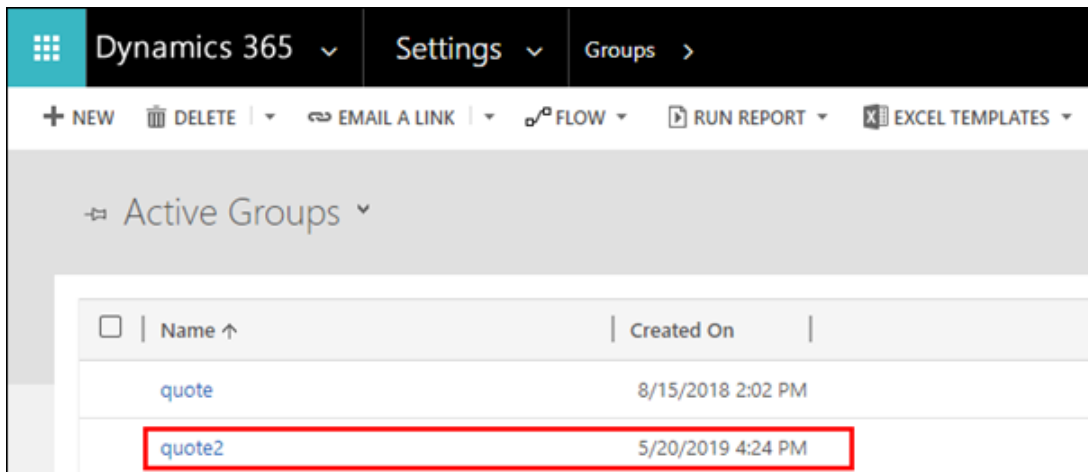


As a result, you are redirected to the *Active Groups* page. Follow the steps listed below to create a new group.

3. On the *Active Groups* page, click the **NEW** button.
4. Fill in all the fields as it is shown on the image below and then click the **Save** icon.



As a result, a new group is listed on the *Active Groups* page.



5. In the *Active Groups* list, click a record of a group you have added. You can see the group page opens for editing.

6. In the *Lasetnet Criterion* section, click a **plus** icon to add a criterion record.

7. Type a criterion name in the text box or use the magnifying glass icon to search for a criterion. If you want to create a new criterion, click the **New** button. Once you are done, click the **Save** icon to save the changes.

Dynamics 365 Settings Groups quote2

NEW CONTACTS DELETE ASSIGN SHARE PIN EMAIL A LINK RUN WORKFLOW CHAT DIALOG

LASERNET GROUP INFORMATION

quote2

General

Name quote2

Separate in sections No

Owner Michael Rogers

Latest version

Name #	Created On
Quote2	5/15/2019 1:01 PM
Quote2	5/15/2019 1:02 PM

Link Up More Records

2 results

Latest Rynuts/groups (Group)

Name #	Created On
Rynut_group	5/20/2019 4:32 P...

Active