Creating a group

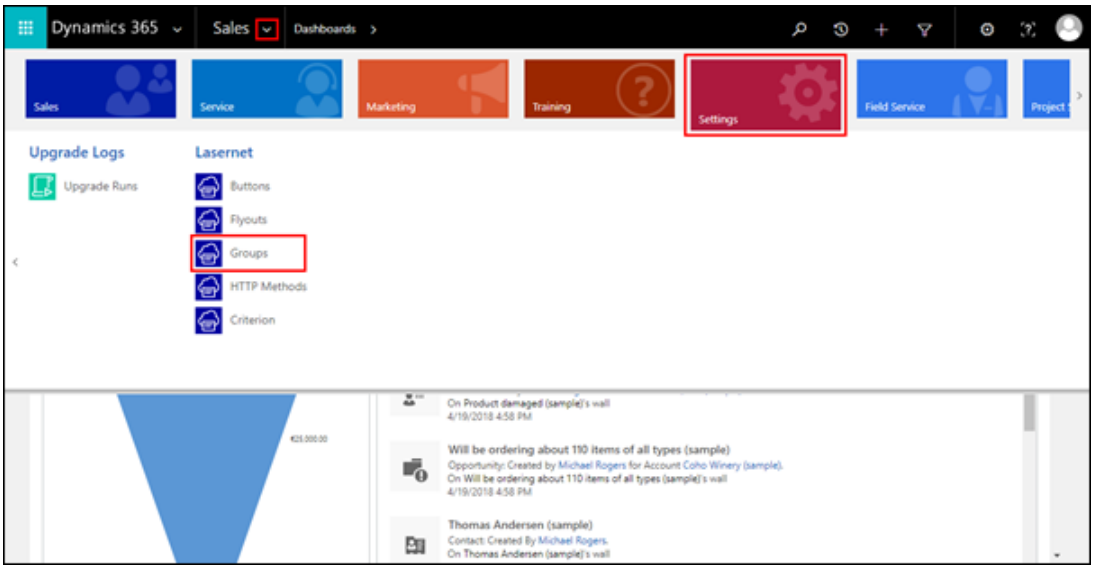
- 2021-07-12 - Comments (0) - Lasernet CE Connector General Information

Lasernet for Dynamics 365

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

1. Sign into your Microsoft Dynamics 365 Customer Engagement system.

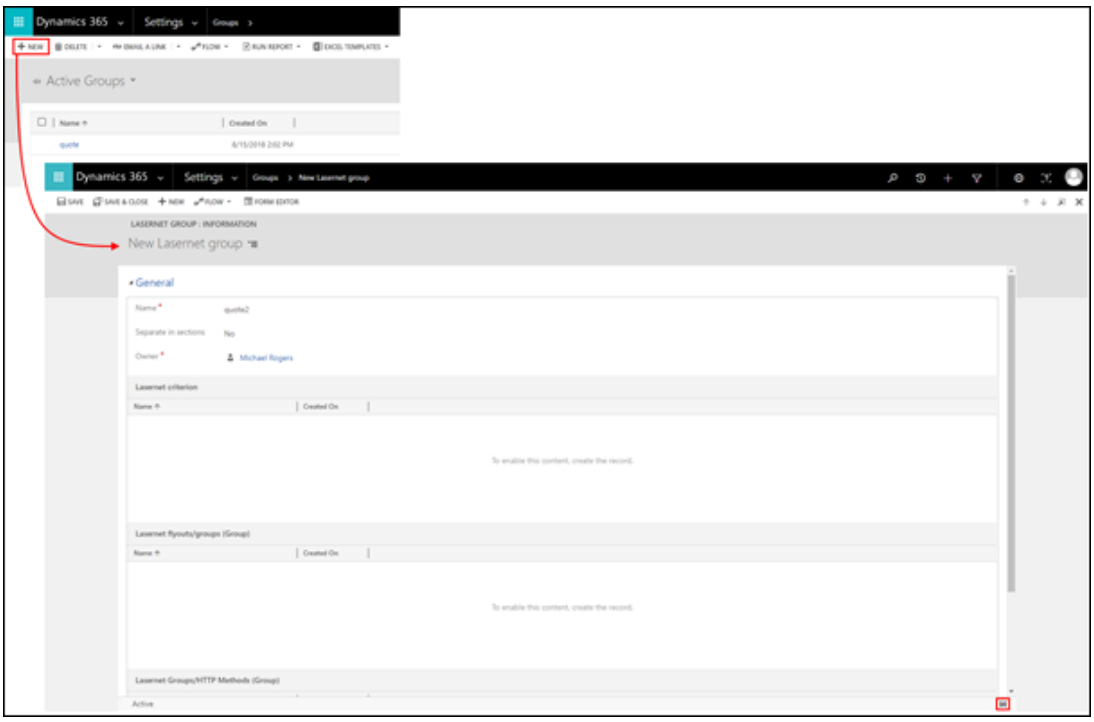
2. On the *Sales* menu, click the drop-down menu to show the navigation menu flyout, and then under the *Settings flyout*, click **Groups** in the Lasernet list.



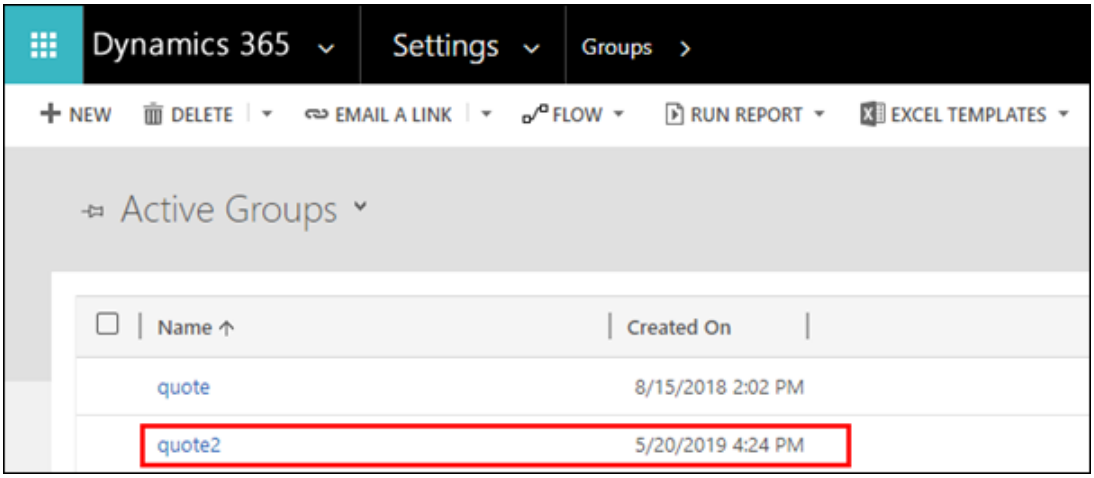
As a result, you are redirected to the *Active Groups* page. Follow the steps listed below to create a new group.

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.



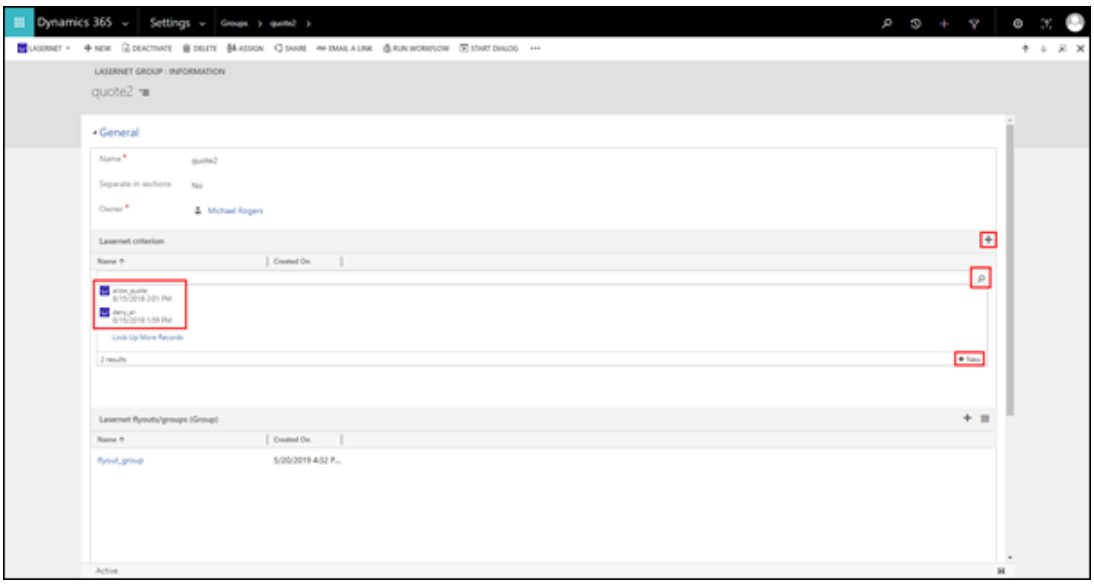
As a result, a new group is listed on the *Active Groups* page.



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 *Lasernet 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
LASERNET
NEW
DEACTIVATE
DELETE
ASSIGN
SHARE
EMAIL A LINK
RUN WORKFLOW
START DIALOG
LASERNET GROUP : INFORMATION
quote2
General
Name *
quote2
Separate in sections
No
Owner *
Michael Rogers
Lasernet criterion
Name
Created On
Look Up More Records
2 results
New
Lasernet flyouts/groups (Group)
Name
Created On
flyout_group
Active