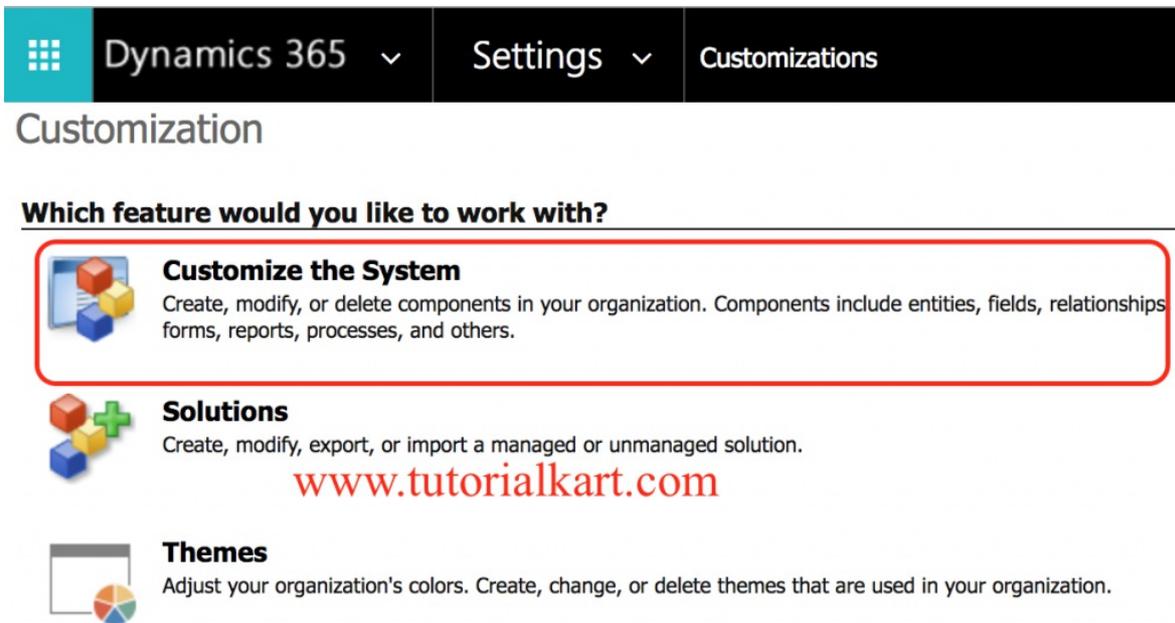


How to create Entity Forms in Dynamics 365?

How to create Entity forms in Dynamics 365?

Entity Forms in Dynamics 365 are used to show and hide the controls on a form and hiding or showing columns in a view. In [Microsoft Dynamics 365](#), we can create 4 type of forms they are : *Main form, Quick view form, Quick create form and Card form.*

To create entity forms in Dynamics 365, navigate to [Settings](#) | [Customizations](#) | [Customize the System](#).

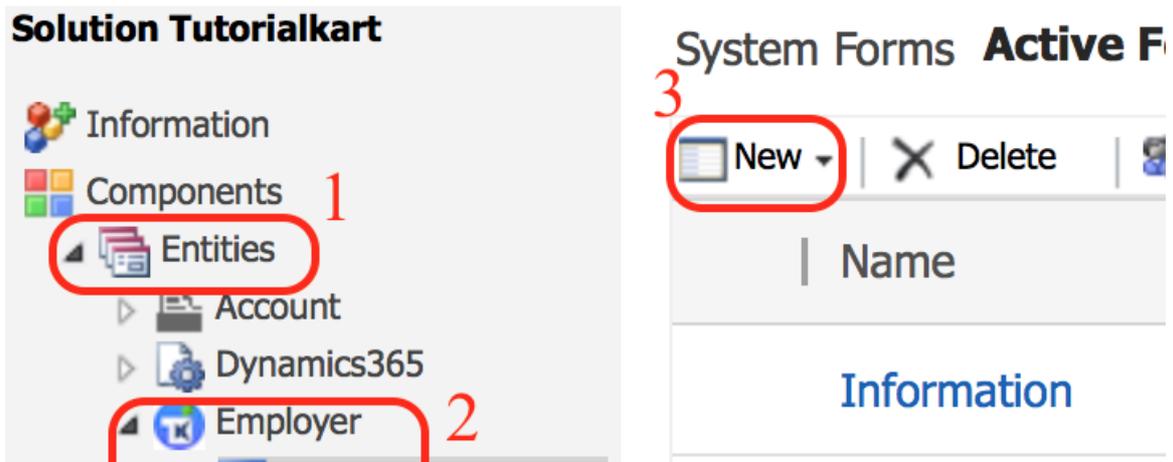


The screenshot shows the Dynamics 365 navigation pane. The top bar contains 'Dynamics 365', 'Settings', and 'Customizations'. Below this, the 'Customization' section is expanded, showing a question: 'Which feature would you like to work with?'. Three options are listed: 'Customize the System' (highlighted with a red box), 'Solutions', and 'Themes'. The 'Customize the System' option includes a description: 'Create, modify, or delete components in your organization. Components include entities, fields, relationships forms, reports, processes, and others.'

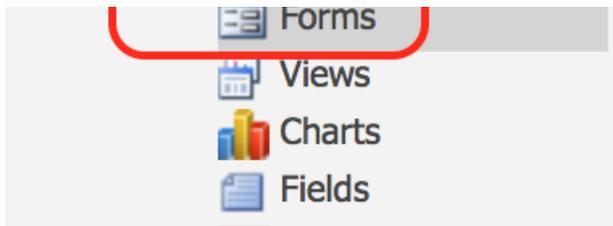
- Navigate to [Components](#) | [Entities \(expand entity\)](#) | [Forms](#) | [New](#) | [Main form](#).



The screenshot shows the 'Employer' entity selected in the navigation pane. The 'Forms' option is highlighted, and the URL www.tutorialkart.com is displayed.



The screenshot shows the 'Entities' option highlighted in the navigation pane (labeled '1'). The 'Employer' entity is selected (labeled '2'). The 'New' button is highlighted in the 'System Forms' section (labeled '3'). The 'Active F' section shows the 'Name' field and the 'Information' form.



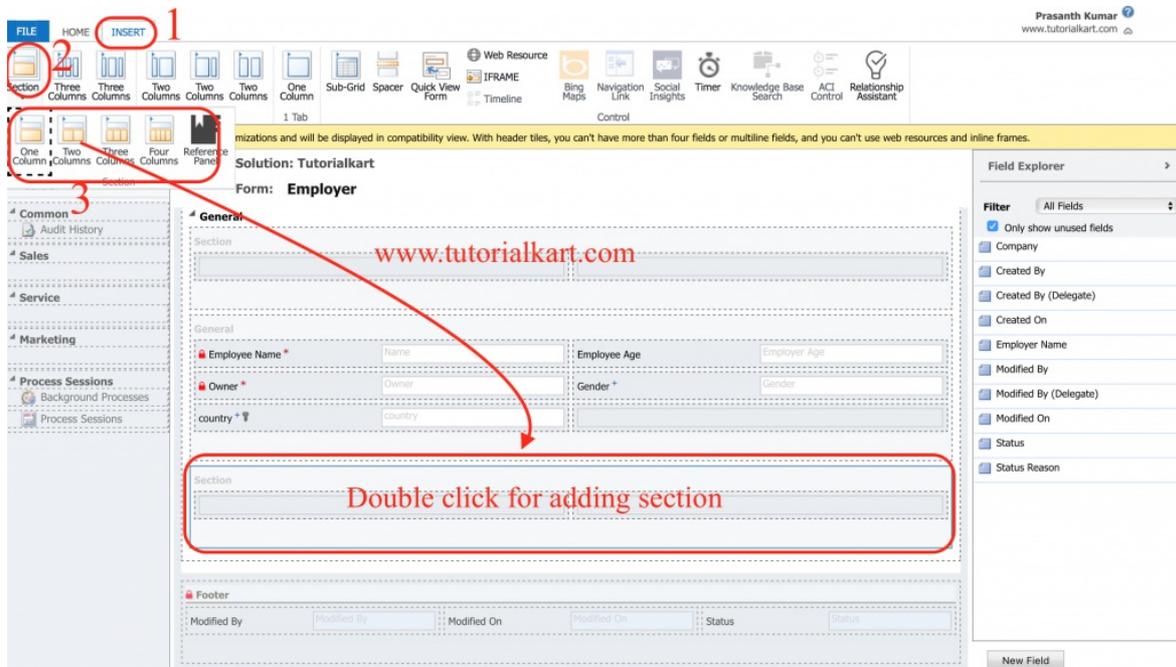
Employer Form

Information

You can add tabs with one, two, or three columns, and each column can have one or more sections. Every time you add a new tab, you also get at least one new section inside the new tab. In main form, we can add, remove and move tabs, sections, fields, IFRAMES, Bing Maps.

Adding and Removing Sections in Dynamics 365 forms

Sections are used to group controls for related fields. The sections must be within a tab. To add a new section, click the buttons on the Insert tab under the Section group. When you double-click the new added section, the Section Properties dialog appears as shown below.

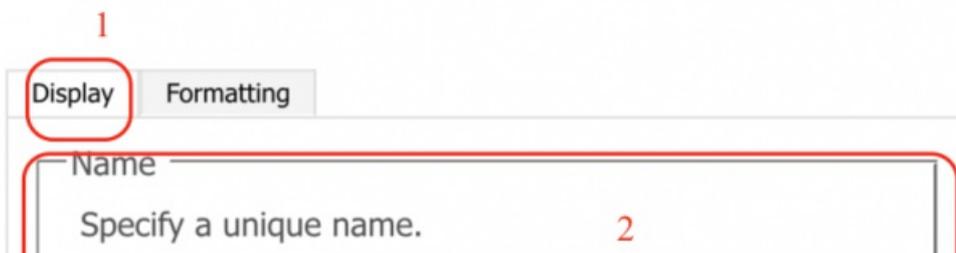


After adding section group in the main form, now double click on the section to modify the section's properties.

- Now click on display to enter name, label, Section width.

Section Properties

Modify this section's properties.



***Name**

***Label**

Show the label of this section on the Form

Show a line at top of the section

Field Label Width

Specify the width of the field label area in pixels. 

***Width**

tutorialkart.com

Visibility

Specify the default visibility of this section.

Visible by default

Availability

Specify the default availability of this section on phone.

Available on phone

Lock the section on the Form

3

- Now click on **OK button**.

To select options such as the number of columns to display data click on Formatting tab as shown below.

Section Properties

Modify this section's properties.



Display **Formatting**

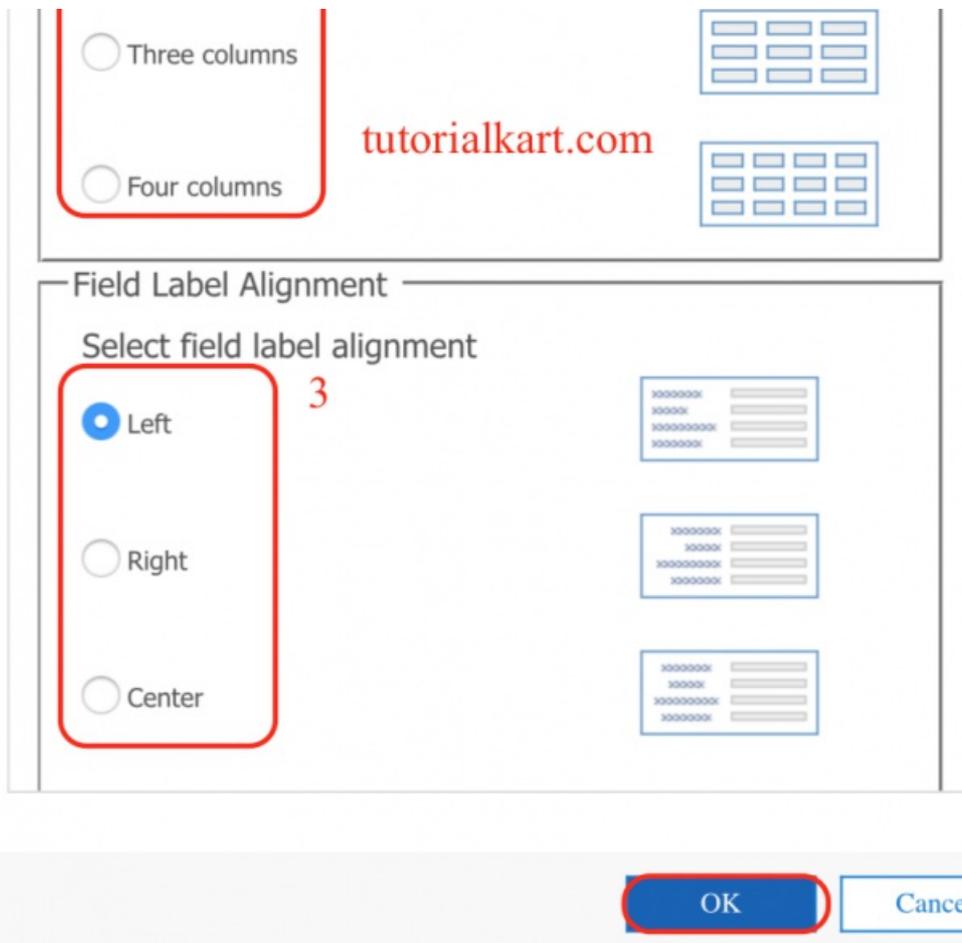
Layout

Select the number of columns in section.

One column

Two columns



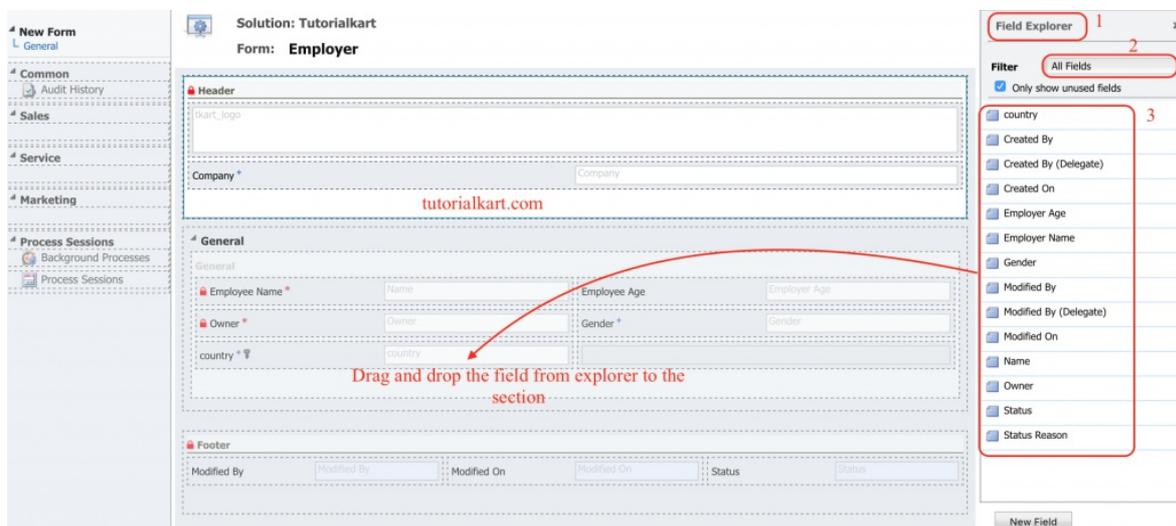


- Select the number of columns in sections and select field label alignment.

How to add Entity fields to a Form in Dynamics 365?

Fields are used to display the entity fields with input controls. We have to [create a custom entity field](#) to add an input control for that field to allow users to create record in Dynamics 365.

To add Entity fields to a Form in Dynamics 365, select the fields from the field explorer list and drop it to the section or tab where you want to add.



How to add IFRAMES to Entity form sin Dynamics 365?

You can use IFRAMEs to display custom applications or pages inside a form. Doing so is extremely helpful when you want to show content from external applications or when you need to use advanced input/output controls that are not included in the CRM controls toolset.

- Navigate to **Insert | IFRAME**



- When you click the IFRAME button, you get the Add an IFRAME dialog and enter name for the IFRAME and URL for the application. As below we have enter tutorialkart.com as URL.

Add an IFRAME



Add a new IFRAME to the Form.

1

General Formatting

Name

Specify a unique name. 2

Name * IFRAME_ tutorialkart|

URL * <https://www.tutorialkart.com>

Pass record object-type code and unique identifier as parameters.

Label

Specify the label for this field in forms.

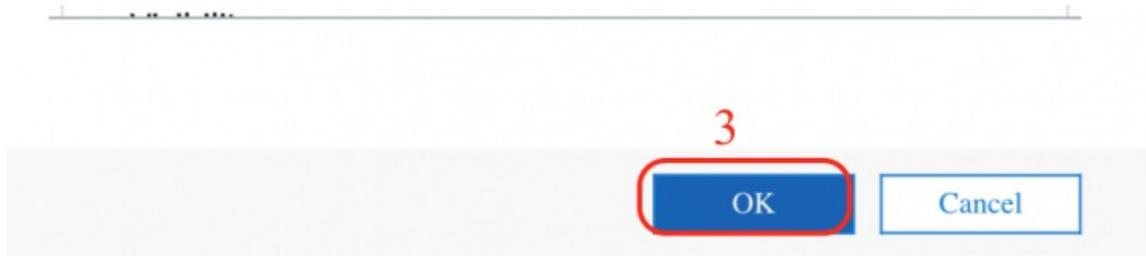
Label * IFRAME

Display label on the Form tutorialkart.com

Security

Select whether to restrict cross-frame scripting.

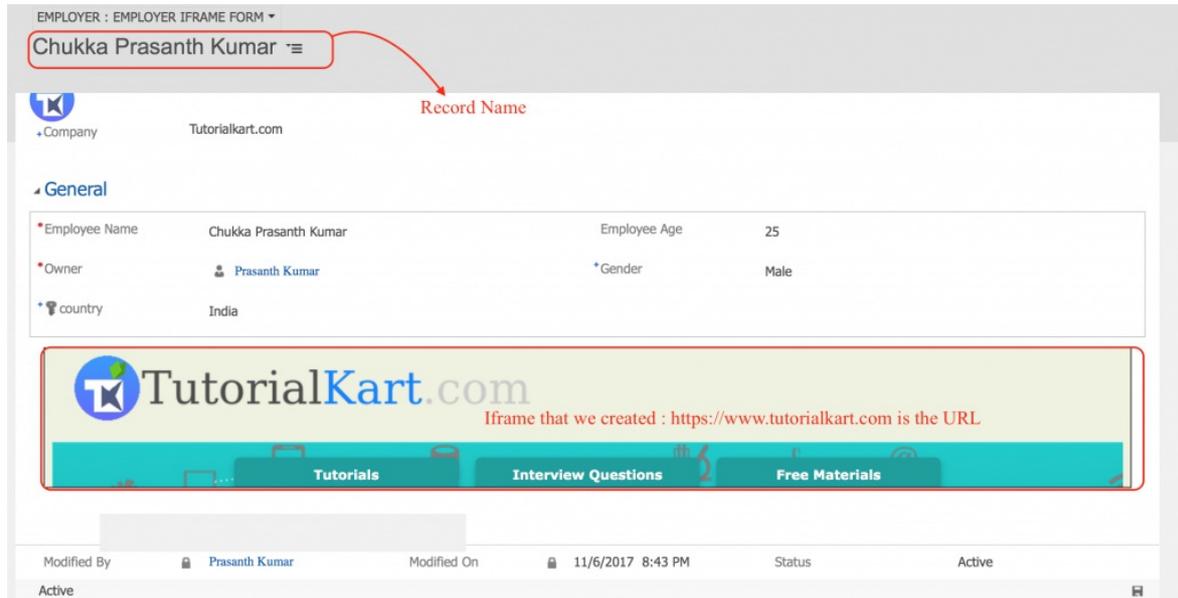
Restrict cross-frame scripting, where supported.
[For more information, click here.](#)



- Finally click on **OK** button.



- Finally click on **Save** button and publish all the customizations.



Output :

Microsoft Dynamics 365 Basics

- ◆ What is Microsoft Dynamics 365?
- ◆ Microsoft Dynamics CRM Modules.
- ◆ Navigation and User Interface

- ◆ What is an Entity?
- ◆ What is Solution?
- ◆ What are Web Resources?
- ◆ What is a site map Designer?

Microsoft Dynamics 365 for Sales

- ◆ Dynamics 365 for Sales Basics
- ◆ How to create an Entity in Dynamics CRM?.

⇒ **Creating Entity Form in Dynamics CRM**

- ◆ Different Sales Module Entities
- ◆ How to create a lead.
- ◆ How to create an opportunity?
- ◆ How to add a Lead Source?
- ◆ How to convert a lead to an Opportunity.
- ◆ Relationships in Dynamics CRM : 1:N, N:1, N:N

Microsoft Dynamics 365 for Service.

- ◆ Service Dashboards.
- ◆ Service Reports

Microsoft Dynamics 365 for Marketing.

- ◆ Marketing Module Entities
- ◆ Marketing Dashboards.
- ◆ Marketing Reports