Get ready for holiday

Before leaving on your holiday, you can make sure that:

- Someone on your team can take care of your customers and has access to your customer records.
- Activities due while you are gone are reassigned.
- You've sent an e-mail message to your contacts letting them know who is taking care of them while you are out.

Share your records with one person

When you share a record with another person, you are giving that person permission to make changes to that record while you are gone. When you return, you can stop sharing records. This example illustrates how to share a contact. But the procedure is similar for other record types.

Share your active contacts with one person

1. In the **Navigation Pane**, click **Workplace**, and then click **Contacts**.
2. In the **View** list, select **My Active Contacts**.
3. Select all the contacts on the page. You can perform this action on only one page of records at a time.
4. On the **Actions** toolbar, click **More Actions**, and then click **Sharing**.
5. In the **Who would you like to share the selected contacts with** dialog box, under **Common Tasks**, click **Add User/Team**.
6. In the **Look Up Records** dialog box, in the **Look for** list, select **Users**.
7. In the **Look for** box, type the first few letters of the name of the record to narrow your search, and then click **Find**.
8. In the list of available records, select a user, and then click **>>** to add the user to the **Selected records** list.
9. Click **OK**.
10. In the **Who would you like to share the selected account with** dialog box, select the type of share access that you want.

    Tip

    To protect your contact information, consider giving the person you are sharing the contact records with only read, write, and append privileges. For more information about privileges, see the Help topic, "Setting Security Roles, Privileges, and Access Levels".
11. Click **OK**.

Move to the next page of results and repeat steps 4-11 until all records are shared.

This will share every record in Microsoft Dynamics CRM that is owned by you to the other person, except activities. In addition, if you are the organizer or a required or optional attendee to an appointment, you need to reassign those activities. How to share activities is discussed later.

Share your records with multiple people

Sometimes transitions are more complex than a one-to-one sharing, and you have to divide your responsibilities among two or more people. In the following example, you are responsible for sales in both Washington and Oregon, and you want Gail Erickson to own everything associated with Washington contacts and customers, and Shiraz Cupala to own everything associated with Oregon contacts and customers.
First, determine which record types have records that must be shared, such as contacts, leads, opportunities, accounts, and e-mail messages.
For accounts, contacts, leads, quotes, orders and invoices, you can determine records owned by you where the person or company resides in a specific state. You will have to specify the search a bit differently for opportunities and activities, because address information is not stored in these records.

Share accounts, contacts, leads, quotes, orders, and invoices

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select a record type: **Accounts, Contacts, Leads, Quotes, Orders** or **Invoices**.
3. If there is already search criteria listed, on the **Form** toolbar, click **New**.
4. Click **Select**, and in the **Fields** section of the list, click **Owner**. Do not change **Equals current user**.
5. On the next line, click **Select**, and then select one of the following in the **Fields** section:
   - For accounts and contacts, select **Address 1: State/Province.**
   - For leads, select **State/Province**.
   - For quotes, orders, and invoices select **Bill To State/Province**.
6. Click **Enter Value**, and then type **WA**.

   Tip

   Save this Advanced Find query so that you can use it to remove the share from the records later.
7. Click **Find**.
8. Click the check box at the top of the list that selects all records, and then on the **Actions** toolbar, click **More Actions**, and then click **Sharing**.
9. In the **Who would you like to share the selected contacts with** dialog box, under **Common Tasks**, click **Add User/Team**.
10. In the **Look Up Records** dialog box, in the **Look for** list, select **Users**.
11. In the **Look for** box, type the first few letters of the name of the record to narrow your search, and then click **Find**.
12. In the list of available records, double-click a user, and then click **OK**.
13. Repeat the search for records in **Oregon**, and assign them to Shiraz Cupala.
14. Repeat steps 2-12 until accounts, contacts, leads, opportunities, quotes, orders, and invoices are all shared.

Reassign any open or scheduled activities

Next, reassign any open or scheduled activities. Unfortunately, you cannot see the state in the Advanced Find search results. You must open each activity to determine which person to assign it to.

Reassign activities

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select **Activities**.
3. Click **Select**, and then in the **Fields** section, select the **Owner** attribute. Do not change **Equals current user**.
4. On the next line, click **Select**, and then select **Activity Status**.
5. Click **Enter Value**, double-click **Open**, double-click **Scheduled**, and then click **OK**.
6. Click **Edit Columns**, and under **Common Tasks**, click **Add Columns**, select **Due Date**, **Regarding,** and **Start Date**, and then click **OK**.
   Note
   While you're here, you may want to adjust the width of the columns so that all fit on the screen. To adjust the width, select a column, click **Change Properties,** select a width, and then click **OK**.
7. In the **Edit Columns** dialog box, click **OK**.
8. Click **Find**.
9. Look at each scheduled or open activity, and decide who to assign it to. Click the link in the **Regarding** column to see what the activity is about. You may have to click another link in the record that comes up to determine which state the activity is related to, and, therefore, who to assign the record to.
10. Select each record, and then on the **Actions** toolbar, click **Assign**.
11. Click the **Lookup** icon, find the user, and then click **OK** two times.

Look for additional appointments

The last assignment task is to look for appointments where you are not the owner, but are listed as the organizer or as a required or optional attendee.

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select **Appointments**.
3. Click **Select**, and in the **Related** section, select **Activity Parties (Activity)**.
4. Click **Select,** and in the **Fields** section, select **Party.**
5. Do not change **Equals Current User**.
6. Click **Find**.
7. Open each appointment, and look both on the **Appointment** and **Details** tabs to see whether you are required, optional, or the organizer of the appointment, and change the data as required.

The appointments will appear in the new owner's list of activities and on their Workplace calendar.

Block your schedule for future appointments and service activities

After you block your schedule for your holiday, your time slots in the Service Calendar will show that you are unavailable and your name will not be returned for any scheduling. Direct appointments and service activities can still be made for you. But an alert will be displayed that you are being scheduled outside your work hours.

1. In the **Navigation Pane**, click **Workplace**, and then click **Personalize Workplace**.
2. On the **General** tab, at the bottom of the page, click the **here** link to open your user record.
3. Under **Details,** click **Work Hours**.
4. In the calendar, select the first day of your holiday.
5. On the **Set Up** menu, click **Time Off**.
6. In the **Schedule Time Off** dialog box, in the **Reasons** box type "**Holiday**" or another explanation.
7. Make sure that the **All Day Event** check box is selected.
8. If you were going to be out for more than one day, in the **Duration** list, select the number of days.
9. Click **OK**. In the calendar, a red color block displays the time off.
10. Click **Save and Close** to close your user record.

Notify your customers of your plans

You can send e-mail to all your Microsoft CRM contacts to let them know who will be helping them while you are gone.

There are two basic steps:

1. Create an e-mail template for notifying contacts about changes.
2. Send the e-mail to your contacts.

Create an e-mail template

First, prepare an e-mail template with the message to send to the contacts.

1. Click **Settings,** and in the **Settings** area, click **Templates**.
2. Click **E-mail Templates**, and then click **New**.
3. In **E-mail Template Type** dialog box, click **Contact**, and then click **OK**.
4. In the **Title** box, type something like "**Notify contacts about holiday**". This information will be used by you to select the correct contacts, but is not seen by customers.
5. In the **Subject** box, type the subject line of the e-mail that will go to customers. For example, you could enter "**Contact Information for your Adventure Works account while I am on holiday**".
6. In the body, type and format the text of the e-mail message you want to send. You can insert fields from the **Contact** record. For example, to start your message with Dear contact_first_name:
    1. After you type **Dear**, click **Insert/Update**, and then click **Add**.
    2. In **Record Type**, select **Contact**.
    3. In **Field**, select **First Name**, and then click **OK**.

    Tip

    To avoid blank salutations if the record does not include a name, include a default value, such as **Dear valued customer:** in the **Default Text** box.
7. If this template will be used by multiple users, make sure that the signature inserts the name of the user who's using the template. For example, you could select the **Full Name** and **Job Title** of the user from **Insert/Update**. The result will resemble this in the file: {!User: Full Name;User : Job Title;}
8. When you're satisfied with your text and formatting, click **Save and Close**.

Send e-mail to your contacts

Now you're ready to send e-mail to the shared contacts.

1. In the **Contacts** list, click **Advanced Find**, and then click **New**.
2. Click **Select**, and then under **Fields**, select **Modified By**.
3. Do not change **Equals current user**.
4. On the next line, click **Select**, and then select **Modified On**.
5. Click **Enter Value**, click the calendar control, and then select **Today**.
6. Click **Select**, and then under **Fields**, select **Owner**.
7. Click **Equals current user**, and then select **Equals**.
8. Click **Enter Value**, click the **Lookup** icon, select the new owner, and then click **OK**.
9. Click **Find**.
10. Click the **Select All** check box.
11. On the **Actions** toolbar, click **Send Direct E-mail**.
12. In the **Send Direct E-mail** dialog box, select the new template you created.
13. In the **Send direct e-mail to** section, select "Selected records on current page."
14. In the **Send direct e-mail from** section, click the **Lookup** icon, select your name, and then click **OK**.
15. Click **Send**.

Your customers now know who to contact, and all work items are reassigned so that your contacts are not forgotten while you are on holiday.