Coveo Enterprise Search 6.5

Microsoft Dynamics CRM Connector Guide

Notice

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1. Microsoft Dynamics CRM Connector Features

This Coveo prototype connector for Microsoft Dynamics CRM systems allows users to search the default Microsoft Dynamics CRM entities. Microsoft Dynamics CRM is a system that provides a set of customer relationship management (CRM) functions.

Connector features

The features of the Microsoft Dynamics CRM connector are:

Content Indexing

The connector can retrieve and index the following default Microsoft Dynamics CRM system entity types:

- Accounts
- Leads
- Opportunities
- Campaigns
- Products
- Contacts
- Incidents (service cases)

The connector also indexes notes and files attached to records of the indexed entity types.

The connector can be customized to index other default Microsoft Dynamics CRM entities (see "Customizing the Microsoft Dynamics CRM Mapping File" on page 8).

Note: This prototype of the connector does not support live indexing and does not allow to index custom entity types.

Fully Supported Security Model

The connector fully supports the Microsoft Dynamics CRM security model. This means that, in the CES search interface, a user searching Microsoft Dynamics CRM content only sees the content to which he has access in the Microsoft Dynamics CRM system.

Out-of-the-Box Configuration

The connector is ready to use with minimal configuration to indicate which Microsoft Dynamics CRM system to index.

Built-in Dynamics Facets

CES comes with built-in facets for Dynamics entities. You can add them to your search interface so that users can easily refine search results based on Microsoft Dynamics CRM entities.

What's Next?

- Review the connector requirements (see "Microsoft Dynamics CRM Connector Requirements" on page 2).
- Review the deployment process (see "Microsoft Dynamics CRM Connector Deployment Overview" on page 3).

2. Microsoft Dynamics CRM Connector Requirements

Your environment needs to meet the following requirements to be able to use the Coveo connector for Microsoft Dynamics CRM systems:

- CES 6.5

  The connector was introduced with CES 6.5 and is therefore not available in previous CES versions.

- CES license for the Microsoft Dynamics CRM Connector

  Your CES license must include support for the Microsoft Dynamics CRM Connector to be able to use this connector.

- Microsoft Dynamics CRM version 4.0

  The connector was developed and tested with Microsoft Dynamics CRM version 4.0.

What's Next?

Review the deployment process (see "Microsoft Dynamics CRM Connector Deployment Overview" on page 3).

3. Microsoft Dynamics CRM Connector Deployment Overview

The following procedure outlines the steps needed to deploy the Microsoft Dynamics CRM connector. The steps indicate the order in which you must perform configuration tasks on both the CES and Microsoft Dynamics CRM systems.

1. Validate that your environment meets the requirements (see "Microsoft Dynamics CRM Connector Requirements" on page 2).
2. In the Microsoft Dynamics CRM system, select or create the crawling account.

   The CES connector needs a Microsoft Dynamics CRM account with which it can crawl the Microsoft Dynamics CRM content (see "Setting up a Microsoft Dynamics CRM Full Read Account" on page 5).
3. Customize the default mapping file

   The default connector mapping file contains a dummy Microsoft Dynamics CRM server address that you must simply replace with the address of your server (see "Customizing the Microsoft Dynamics CRM Mapping File" on page 8).
4. In CES Administration Tool:

   a. Configure the user identity

      The connector needs to map the selected Microsoft Dynamics CRM account that you previously selected or created (see "Configuring a Microsoft Dynamics CRM User Identity" on page 11).

   b. Configure and index the Microsoft Dynamics CRM source

      The Coveo connector needs to know details about the Microsoft Dynamics CRM system to be able to index its content (see "Configuring and Indexing a Microsoft Dynamics CRM Source" on page 11).

   c. Optionally, modify hidden source parameters

      Once your Microsoft Dynamics CRM source is up and running, if you encounter time out or performance issues, consider modifying some hidden source parameters to try resolving the issues (see "Modifying Hidden Microsoft Dynamics CRM Source Parameters" on page 17).

   d. Optionally, customize the mapping file to fine-tune indexed content

      Once your Microsoft Dynamics CRM source is up and running, you can customize the connector mapping file to fine-tune the indexed content or to index other default entities in your Microsoft Dynamics CRM system (see "Customizing the Microsoft Dynamics CRM Mapping File" on page 8).
5. In the Interface Editor, add the built-in Microsoft Dynamics CRM facets

   CES comes with built-in facets for Microsoft Dynamics CRM content. You can add these facets to your search interface so that users can easily refine search results based on Microsoft Dynamics CRM entities (see "Adding Microsoft Dynamics CRM Facets to the Search Interface" on page 20).

4. Microsoft Dynamics CRM Configuration

4.1 Setting up a Microsoft Dynamics CRM Full Read Account

The Coveo connector needs to connect to the Microsoft Dynamics CRM system using an account that has read access to all the Microsoft Dynamics CRM content that you wish to index.

The Coveo connector only reads and does not modify Microsoft Dynamics CRM content. Consequently, you can configure the Coveo connector to use an existing Active Directory administrative account that already has full access to your Microsoft Dynamics CRM content.

A better practice however is to create and use a dedicated account for the Coveo connector. This account would have full read (but not write) access to the Microsoft Dynamics CRM content that you wish to index and would be used only by the Coveo connector. The following procedure describes how to create such an account.

Creating a dedicated user account with full read rights

1. Using a network administrator account or asking your network administrator, in Active Directory, create a Microsoft Dynamics CRM dedicated account:

    a. Start the **Active Directory Users and Computers** console (Windows **Start** menu > **Administrative Tools** > **Active Directory Users and Computers**).

    b. Click the appropriate domain name, and then expand the contents.

    c. Right-click **Users**, point to **New**, and then click **User**.

    d. Type the first name, last name, and user logon name (Example: `CES_Dynamics_Full_Read`) of the new user, and then click **Next**.

    > **Important:** Microsoft Dynamics requires that the account has a first name and a last name. These parameters must not be empty.

    e. Type a new password, and then confirm the password.

    f. For a dedicated connector user, it is recommended to select the following check boxes:

    - **User cannot change password**
    - **Password never expires**

    g. Click **Next**.

    h. Click **Finish**.

2. Log in to the Microsoft Dynamics CRM with an account that has the System Administrator role, and then perform the following steps.

3. Copy the System Administrator security role as follows:

    a. In the Navigation Pane, click **Settings**, and then click **Administration**.

    b. In the panel on the right, click **Security Roles**.

    c. Select the **System Administrator** security role.

    d. On the Actions toolbar, click **More Actions**, and then click **Copy Role**.

e. In the **Copy Security Role** dialog box, in the **New Role Name** box, type a new role name of your choice (for example: `Read-Only Administrator`).

f. Select the **Open a new security role when copying is complete** check box.

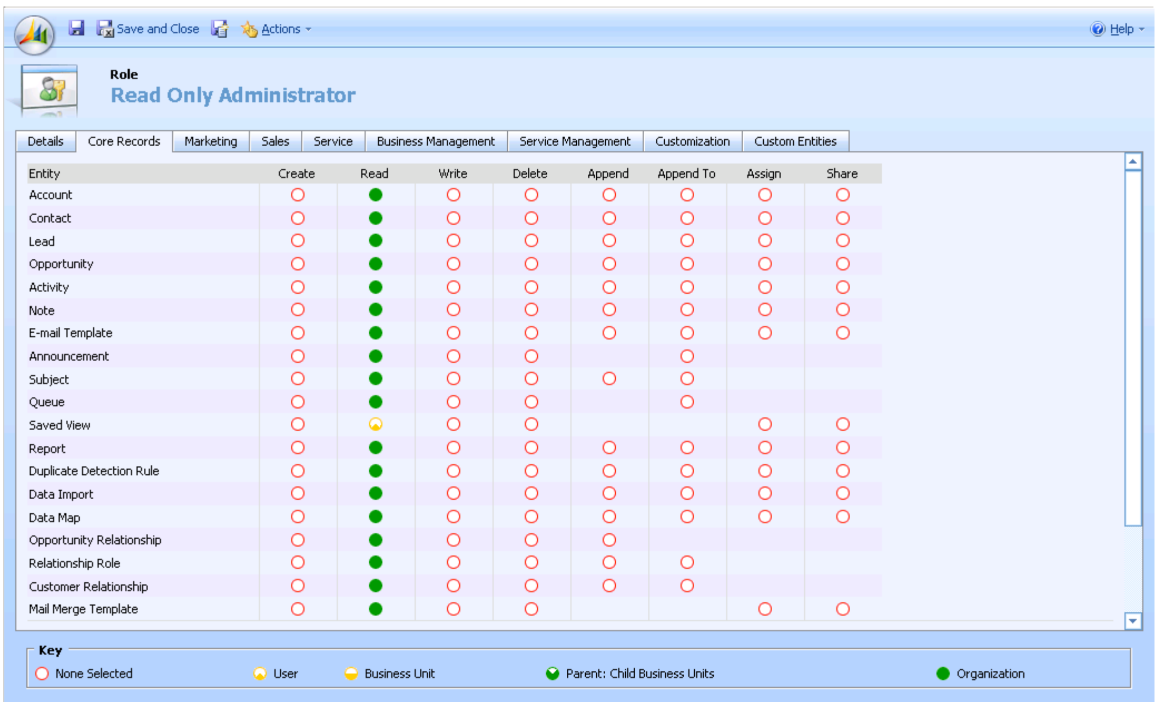
g. Click **OK**.

4. In the **Role** window that appears for the new role:

   a. Select the **Core Records** tab.

   b. Set all rights to **None Selected** except for those in the **Read** column.

   Tip: Click the label of a column to change the rights of all column items at once.



   c. Set similar rights for all the other tabs.

   d. On the bar at the top of the window, click **Save and Close**.

5. Create a new user using the Active Directory user created in step 1:

   a. In the Navigation Pane, click **Settings**, and then click **Administration**.

   b. In the panel on the right, click **Users**.

   c. In the bar at the top of the user list, click **New**, and then select **User**.

   d. In the **General** tab:

      i. In **Domain Logon Name**, enter the Active directory user created in step 1 .

      ii. In **First Name** and **Last Name**, enter the appropriate information.

iii. For both **E-mail access type- Incoming** and **Outgoing**, select **None**.

iv. In **Access Mode**, select **Full**.

e. On the bar at the top of the window, click **Save and Close**.

6. Assign the Read-Only Administrator role to this user:

a. In the **Users** list, double-click the newly created user.

b. In the **Roles** window:

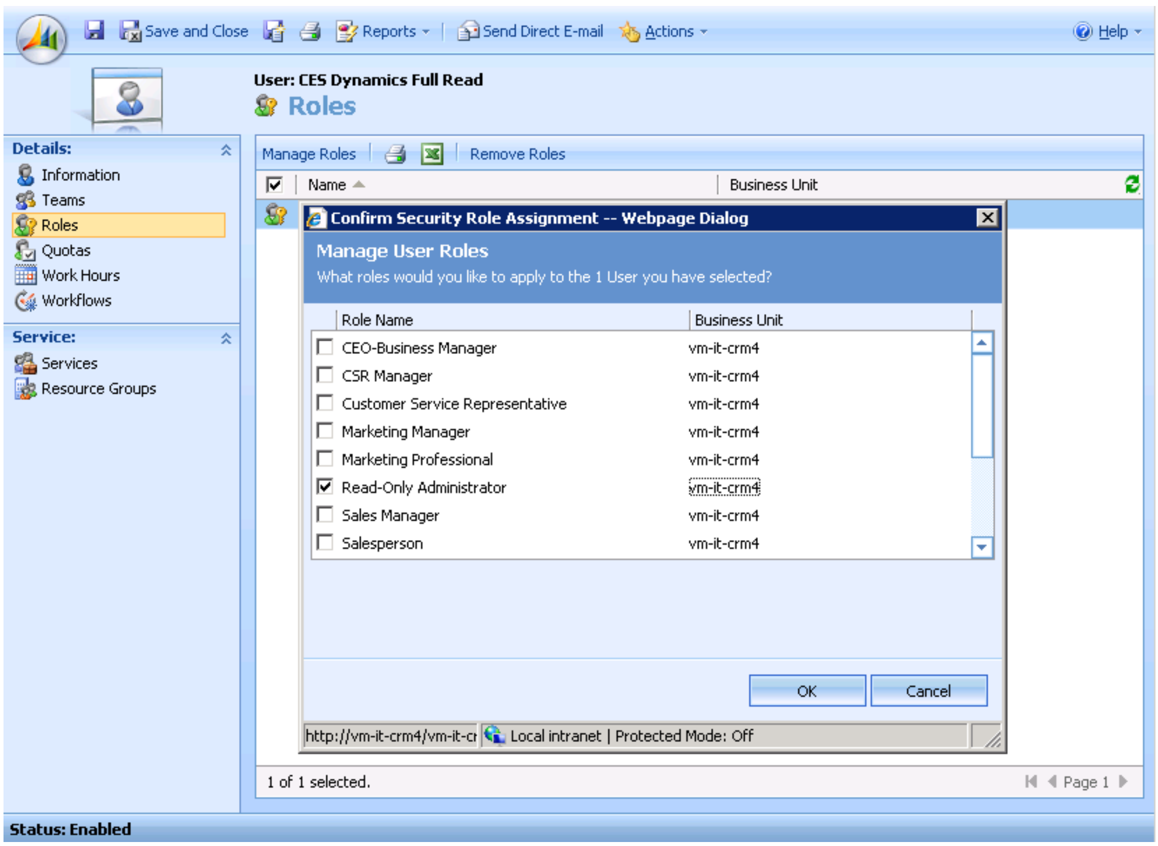
i. In the **Details** list on the left, select **Roles**.

ii. On the bar at the top of the role list, click **Manage Roles**.

c. In the **Confirm Security Role Assignment** dialog box:

i. Select the check box for the role that you created in step 4 (**Read-Only Administrator** in the example) and uncheck all other check boxes.

ii. Click **OK**.



d. On the bar at the top of the window, click **Save and Close**.

What's Next?

Customize the default mapping file (see "Customizing the Microsoft Dynamics CRM Mapping File" on page 8).

5. Customizing the Microsoft Dynamics CRM Mapping File

The Coveo connector for Microsoft Dynamics CRM systems comes with a default mapping file that makes the connector ready to index the following default Microsoft Dynamics CRM entities:

- Accounts
- Leads
- Opportunities
- Contacts
- Products
- Campaigns
- Incidents (Service Cases)

Initially, you need to edit the mapping file to specify the address of your Microsoft Dynamics CRM system so that printable and clickable URIs are valid. This is the only required customization.

Later, once you successfully indexed your Microsoft Dynamics CRM system, you can also consider customizing the mapping file to fine-tune the indexed content or to include other default Microsoft Dynamics CRM entities. Review the mapping file format to understand how it works (see "Microsoft Dynamics CRM Mapping File Format" on page 9).

Note: This prototype connector does not support mapping file customization for custom Microsoft Dynamics CRM entities.

To customize the mapping file

1. On the CES server, copy the default mapping file from its distribution folder (`C:\Program Files\Coveo Enterprise Search 6\Bin\Coveo.CES.CustomCrawlers.Dynamics.config` to a working folder of your choice where the connector will read it.

   Example: A good working folder is with other index configuration files, by default in `C:\CES6\Config`.

2. Using a text editor, open the mapping file copy from the working folder.
3. In the mapping file, find all occurrences of the dummy Microsoft Dynamics CRM server address `http://serverName/organizationName` and replace them with the address of your Microsoft Dynamics CRM server for both `<PrintableUri>` and `<ClickableUri>` tags.
4. Optionally, respecting the mapping file format (see "Microsoft Dynamics CRM Mapping File Format" on page 9), customize the file considering the following guidelines:
   - Use the `CustomFields` section to directly reference columns present on a Microsoft Dynamics CRM entity or to reference a `MetadataMapping` defined in the mapping file.
   - For mappings that apply to all entities defined in the mapping file, add the mapping tags in the `type="*"`section.
5. Save the modified mapping file.

What's Next?

Configure the user identity (see "Configuring a Microsoft Dynamics CRM User Identity" on page 11).

5.1 Microsoft Dynamics CRM Mapping File Format

The Microsoft Dynamics CRM mapping file exactly determines which Microsoft Dynamics CRM entities are indexed, what metadata is retrieved, and where this information is added in the CES index.

The default mapping file allows to index the following Microsoft Dynamics CRM default entities:

- Accounts
- Leads
- Opportunities
- Contacts
- Products
- Campaigns
- Incidents (Service Cases)

The default mapping file (`Coveo.CES.CustomCrawlers.Dynamics.config`) is distributed with CES (6.5+) in the `C:\Program Files\Coveo Enterprise Search 6\Bin` folder on the CES server.

The mapping file is an XML file that contains various sections and subsections. The root node is `<Dynamics>`. It contains various `<Mapping>` nodes, each defining one entity type to be indexed.

The first `<Mapping>` node for `type="*"`, showed in the following mapping file excerpt, contains mappings that apply to all entities defined in the mapping file.

```
<Mapping type="*">
  <MetadataMappings>
    <MetadataMapping name="author_name">
      <ConditionalMapping condition="type==systemuser">
        %[createdby.fullname]
      </ConditionalMapping>
    </MetadataMapping>
  </MetadataMappings>
  <Fields>
    <CustomFields>
      <CustomField name="sysAuthor">%[author_name]</CustomField>
    </CustomFields>
  </Fields>
</Mapping>
```

The above mapping file excerpt instructs the connector to index the author name of a Microsoft Dynamics CRM entity for all item types that are defined in the mapping file.

Note: In Microsoft Dynamics CRM, the author name is a foreign field, as the author of an item is not actually a string, but rather a system user. A system user is represented by a GUID. Unless it is resolved by looking into the table of system users, it is not a useable metadata.

In this mapping file excerpt, there are two sub-sections:

MetadataMappings

This first sub-section (lines 2 to 8) in the excerpt is used to clarify foreign fields and mappings that might need to meet certain conditions. The metadata `author_name` maps to the Microsoft Dynamics CRM field `createdby.fullname`, as long as the Microsoft Dynamics CRM item field `createdby` is of the `systemuser` type. By itself, this mapping does not do anything because it is not assigned to a CES field.

CustomFields

This second section (lines 9 to 13) in the excerpt, fills the gap by mapping the Coveo field `sysAuthor` to the value of the `author_name` metadata. This could be a value that is directly on the document, but in this case, it is a foreign field that is defined in the metadata mapping section.

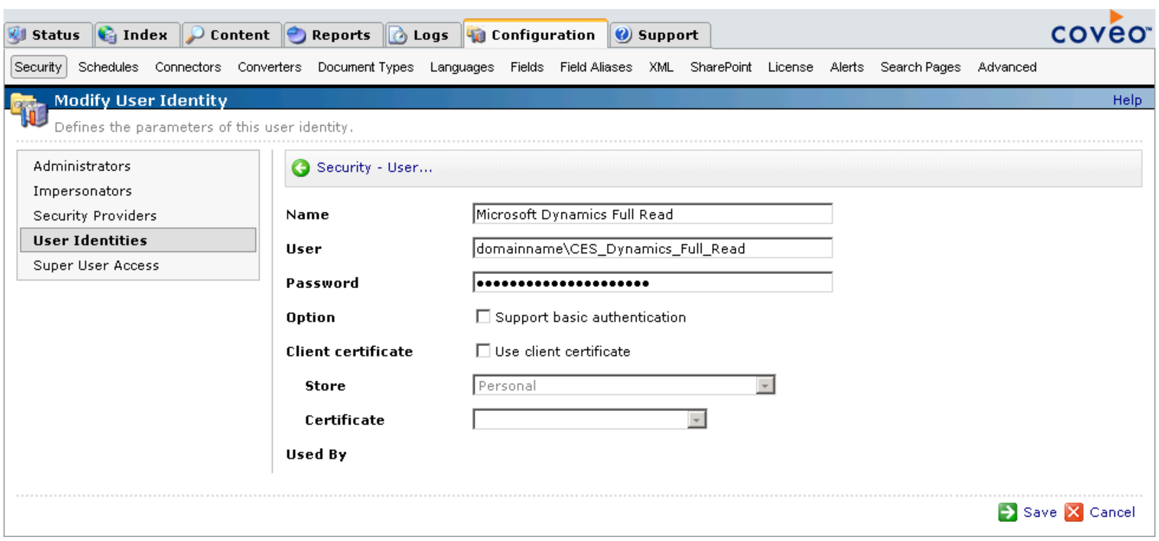
6. CES Configuration

6.1 Configuring a Microsoft Dynamics CRM User Identity

Once you selected or created a Microsoft Dynamics CRM full read account (see "Setting up a Microsoft Dynamics CRM Full Read Account" on page 5), you need to configure the CES user identity that you will use when creating the source for the connector.

To configure a Microsoft Dynamics CRM user identity

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Administration Tool**).
2. Select **Configuration** > **Security**.
3. In the **Security** page, in the left navigation pane, click **User Identities**.
4. In the **User Identities** page, click **Add**.
5. In the **Modify User Identity** page:
    a. In the **Name**, **User**, and **Password** fields, enter the credentials of the Microsoft Dynamics CRM account that you selected or created to access the entire repository content to be indexed.
    b. The other parameters (**Support basic authentication**, **Use client certificate**, **Store**, and **Certificate**) do not apply to this connector.
    c. Click **Apply Changes**.



What's Next?

Configure and index the source (see "Configuring and Indexing a Microsoft Dynamics CRM Source" on page 11).

6.2 Configuring and Indexing a Microsoft Dynamics CRM Source

A source defines a set of configuration parameters for a specific Microsoft Dynamics CRM system.

Note: In an environment with more than one Microsoft Dynamics CRM system, or more than one Microsoft Dynamics CRM organization, you need to define one source for each Microsoft Dynamics CRM organization that you wish to index.

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Administration Tool**).
2. Select **Index** > **Sources and Collections**.
3. In the **Sources** section, click **Add**.
4. In the **Add Source** page:
   a. Enter the appropriate value for the following required parameters:

Name

A descriptive name of your choice for the connector source.

Example: `Microsoft Dynamics CRM`

Source Type

The connector used by this source. In this case, select **Microsoft Dynamics CRM**.

Note: If you do not see **Microsoft Dynamics CRM** in the **Source Type** list, your environment does not meet the requirements (see "Microsoft Dynamics CRM Connector Requirements" on page 2).

Addresses

The root address of the Microsoft Dynamics CRM organization in the format:

`http://[serverName:port]/[organizationName]`

where you replace:

- `[serverName:port]` by the host name and port of your Microsoft Dynamics CRM server. The port is optional when equal to 80.
- `[organizationName]` by the name of the Microsoft Dynamics CRM organization that you wish to index.

Note: When you want to index more than one Microsoft Dynamics CRM server or more than one organization, the best practice is to enter only one address here, for one server/organization and create other sources for other server/organizations.

Mapping File

The absolute full path pointing to the connector mapping file that you adapted and saved (see "Customizing the Microsoft Dynamics CRM Mapping File" on page 8).

Example: `C:\CES6\Config\Coveo.CES.CustomCrawlers.Dynamics.config`

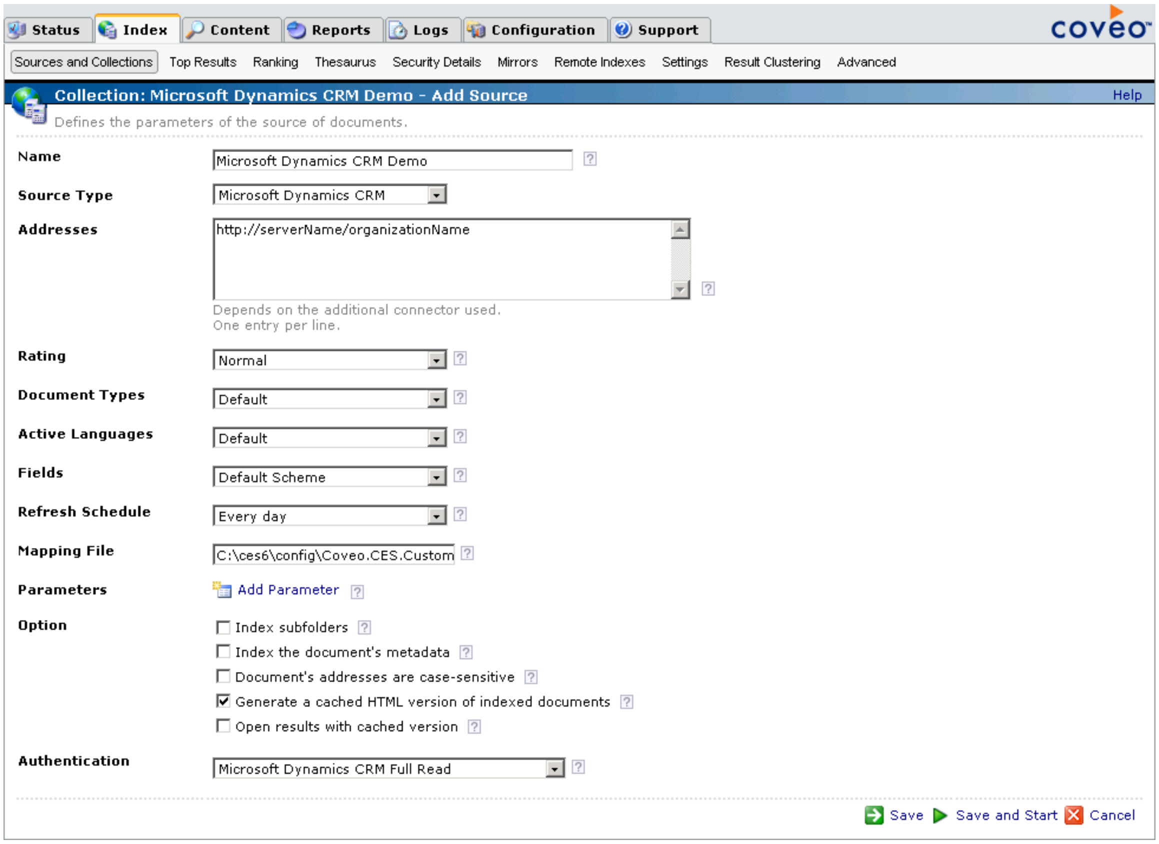
Refresh Schedule

Time interval at which the index is automatically refreshed to keep the index content up to date. By default, the **Every day** option instructs CES to refresh the source everyday at 12 AM.

Because live indexing is not available for this prototype connector, ensure to select the **Every day** option, as this is the only mechanism that keeps the index content up to date.

Authentication

Select the user identity that you created previously for the Microsoft Dynamics CRM system (see "Configuring a Microsoft Dynamics CRM User Identity" on page 11).



b. The following parameters generally do not need to be changed:

Rating

Change this value only when you want to globally change the rating associated with all items in this source relative to the rating to other sources.

> **Example:** If this source was for a legacy system, you may want to set this parameter to **Low**, so that in the search interface, results from this source appear later in the list compared to those from other sources.

Document Types

If you defined custom Document Type sets, ensure to select the most appropriate for this source.

Active Languages

If you defined custom Active Language sets, ensure to select the most appropriate for this source.

Fields

If you defined custom Field sets, ensure to select the most appropriate for this source.

Parameter

Click **Add Parameter** when you want to show advanced source parameters (see "Modifying Hidden Microsoft Dynamics CRM Source Parameters" on page 17).The connector for this type of source does not use this parameter.

c. The **Option** check boxes generally do not need to be changed:

Index Subfolders

Leave check box cleared. The connector for this type of source does not use this parameter.

Index the document's metadata

Leave the check box cleared to prevent seeing metadata values appear as separate items in the search results.

Document's addresses are case-sensitive

Leave the check box cleared. This parameter needs to be checked only in rare cases for systems in which distinct documents may have the same name but different casing (for example: `mydocument` and `MyDocument`).

Generate a cached HTML version of indexed documents

When you select this check box (recommended), at indexing time, CES creates HTML versions of indexed documents. In the search interfaces, users can then more rapidly review the content by clicking the Quick View link rather than opening the original document with the original application. Consider clearing this check box only if you do not want to use Quick View links or to save resources when building the source.

Open results with cached version

Leave this check box cleared (recommended) so that in the search interfaces, the main search result link opens the original document with the original application. Consider selecting this check box only when you do not want users to be able to open the original document but only see the HTML version of the document as a Quick View. In this case, you must also select **Generate a cached HTML version of indexed documents**.

d. Click **Save and Start** to save the source configuration and start the indexing of the new source.

5. Validate that the source building process is executed without errors:

- In the navigation panel on the left, click **Status**, and then validate that the indexing proceeds without errors.

  OR

- Start the CES Console to monitor the source building activities (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **CES Console**).

What's Next?

Add built-in Microsoft Dynamics CRM facets to your search interface (see "Adding Microsoft Dynamics CRM Facets to the Search Interface" on page 20).

6.3 Modifying Hidden Microsoft Dynamics CRM Source Parameters

The **Add Source** and **Source: ... General** pages of the Administration Tool present the parameters with which you can configure the connector for most Microsoft Dynamics CRM setups. More advanced and more rarely used parameters are hidden. You can choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value. Consider changing values of hidden parameters only when you encounter time out error messages or performance issues.

The following list describes the available advanced hidden parameters for Microsoft Dynamics CRM sources. The parameter type (integer, string,...) appears between parenthesis following the parameter name.

BatchSize (integer)

Number of items to fetch per request made to the Microsoft Dynamics CRM Server. The default value is 100. The minimum value is 1. A small value forces the connector to make small but frequent queries to Microsoft Dynamics. A larger value leads to larger and less frequent queries.

AnnotationBatchSize (integer)

Number of annotations to fetch per request made to the Microsoft Dynamics CRM Server. The default value is 5. Annotations correspond to notes and attachments in Microsoft Dynamics CRM. Consider reducing the value to prevent server overload when records contain large attachments.

Use the following procedure only when you want to modify one or more of the above hidden source parameters.

To modify hidden Microsoft Dynamics CRM source parameters

1. Refer to "Showing Advanced Hidden Source Parameters" on page 17 to add one or more Microsoft Dynamics CRM hidden source parameters.
2. For a new Microsoft Dynamics CRM source, access the **Add Source** page of the Administration Tool to modify the value of the newly added advanced parameter:
   a. Select **Index** > **Sources and Collections**.
   b. Under **Collections**, select the collection in which you wish to add the source.
   c. Under **Sources**, click **Add**.
   d. In the **Add Source** page, edit the newly added advanced parameter value.
3. For an existing Microsoft Dynamics CRM source, access the **Source: ... General** page of the Administration Tool to modify the value of the newly added advanced parameter:
   a. Select **Index** > **Sources and Collections**.
   b. Under **Collections**, select the collection containing the source you wish to modify.
   c. Under **Sources**, click the existing Microsoft Dynamics CRM source in which you wish to modify the newly added advanced parameter.
   d. In the **Source: ... General** page, edit the newly added advanced parameter value.

6.3.1 Showing Advanced Hidden Source Parameters

When you create or configure a source, the CES Administration Tool user interface presents source parameters with which you can configure the connector for most setups. For many connectors, more advanced and more rarely used source parameters also exist but are hidden by default. CES then uses the default value associated with each of these hidden parameters.

You can however choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value.

To show advanced hidden source parameters

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Administration Tool**).
2. Access the **Modify Additional Connector** page:
   a. Select **Configuration** > **Connectors**.
   b. In the panel on the left, select **Additional Connector**.
   c. In the list on the right, select the connector for which you wish to show advanced hidden parameters.
3. In the **Modify Additional Connector** page, for each hidden parameter that you wish to modify, perform the following steps:
   a. Click **Add Parameter**.
   b. In the **Modify the parameters of the additional connector** page:
      i. In the **Type** list, select the parameter type as specified in the parameter description.
      ii. In the **Name** box, type the parameter name exactly as it appears in the parameter description, noting that parameter names are case sensitive.
      iii. In the **Default Value** box, enter the default value specified in the parameter description.

      Important: Do not set the value that you wish to use for a specific source. The value that you enter here will be used for all sources defined using this connector so it must be set to the recommended default value. You will be able to change the value for each source later, in the **Add Source** and **Source: ... General** pages of the Administration Tool.

      iv. In the **Label** box, enter the label that you wish to see for this parameter.

      To easily link the label to the hidden parameter, you can simply use the parameter name, and if applicable, insert spaces between concatenated words.

      Example: For the **BatchSize** hidden parameter, enter `Batch Size` for the label.

      v. Optionally, in **Quick Help**, enter the help text that you wish to see for this parameter when clicking the question mark button ? beside the parameter value.

      Tip: Copy and paste the key elements from the parameter description.

      vi. For the **Predefined values** parameter type only, in the **Value** box, enter the parameter values that you wish to see available in the drop-down parameter that will appear in the Administration Tool interface. Enter one value per line. The entered values must exactly match the values listed in the hidden parameter description.
      vii. Select the **Optional parameter** check box when you wish to identify this parameter as an optional parameter. When cleared, CES does not allow to save changes when the parameter

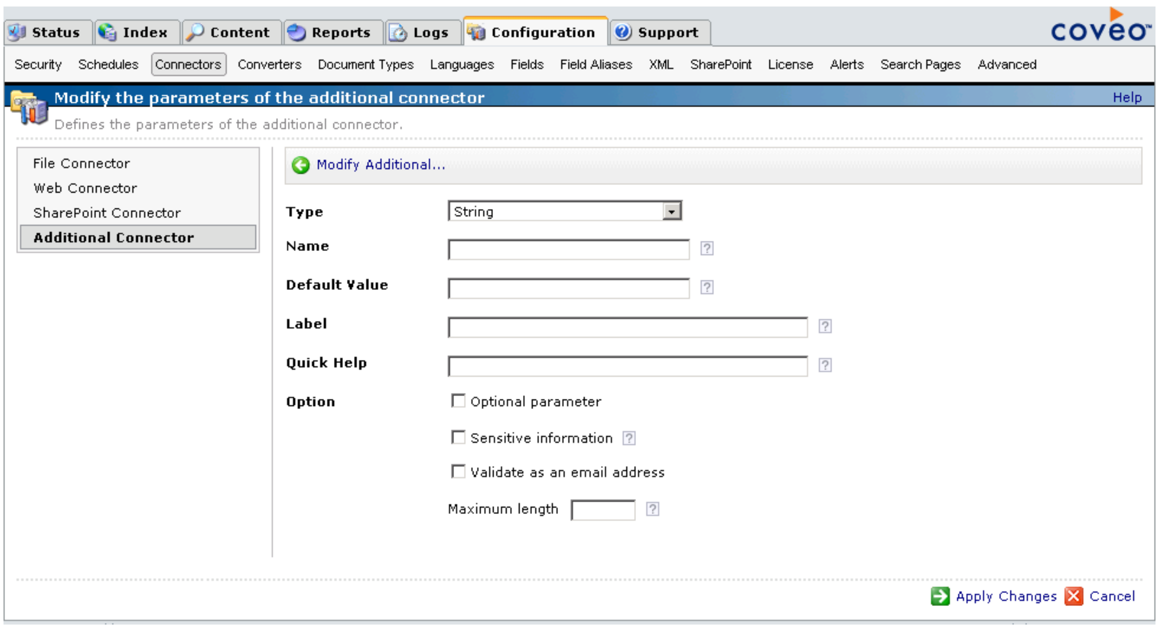
is empty. This parameter does not appear for **Boolean** and **Predefined values** parameter types.

viii. Select the **Sensitive information** check box for password or other sensitive parameter so that in the Administration Tool pages where the parameter appears, the parameter value appears hidden (ex.: ). This parameter appears only for the **String** type.

ix. Select the **Validate as an email address** check box when you want CES to validate that the text string that a user enters in this parameter is respecting the format of a valid email address. This parameter appears only for the **String** type.

x. In the **Maximum length** box, enter the maximum number of characters for the string. This parameter appears only for the **String** type.

xi. Click **Apply Changes**.



c. Back in the **Modify the parameters of the additional connector** page, click **Apply Changes**.

The hidden parameter now appears in the **Add Source** and **Source: ... General** pages of the Administration Tool for the selected source. You can change the parameter value from these pages.

Note: You can delete advanced hidden parameters that you made to show (see "Hiding Advanced Source Parameters" on page 19).

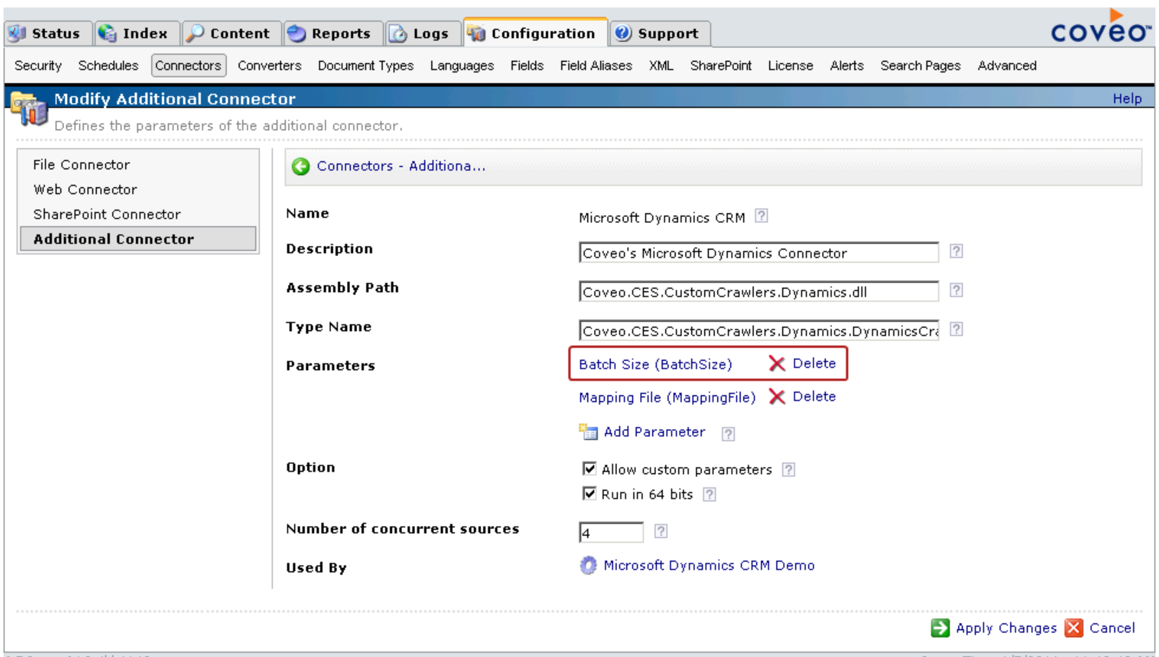
6.3.2 Hiding Advanced Source Parameters

You can hide an advanced source parameter for a given source type so that you will no longer see it in the **Add Source** and **Source: ... General** pages of the Administration Tool. CES will then use the default value for this parameter.

You may want or need to hide an advanced source parameter for example if you want to modify how it appears. In this case, you need to first hide it, and then configure it to show in the modified way (see "Showing Advanced Hidden Source Parameters" on page 17).

To hide advanced source parameters

1. On the CES server, open the Administration Tool (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Administration Tool**).
2. Access the **Modify Additional Connector** page:
   a. Select **Configuration** > **Connectors**.
   b. In the panel on the left, select **Additional Connector**.
   c. In the list on the right, select the connector for which you wish to hide advanced parameters.
3. In the **Modify Additional Connector** page:
   a. For each hidden parameter that you wish to hide, click **Delete** appearing next to the parameter.



   b. Click **Apply Changes**.

6.4 Adding Microsoft Dynamics CRM Facets to the Search Interface

CES comes with built-in facets specifically defined for Microsoft Dynamics CRM content. Using the Interface Editor, you can add these built-in facets to the search interface used to search Microsoft Dynamics CRM content so that users can easily refine search results based on Microsoft Dynamics CRM entities.

The available built-in Microsoft Dynamics CRM facets are:

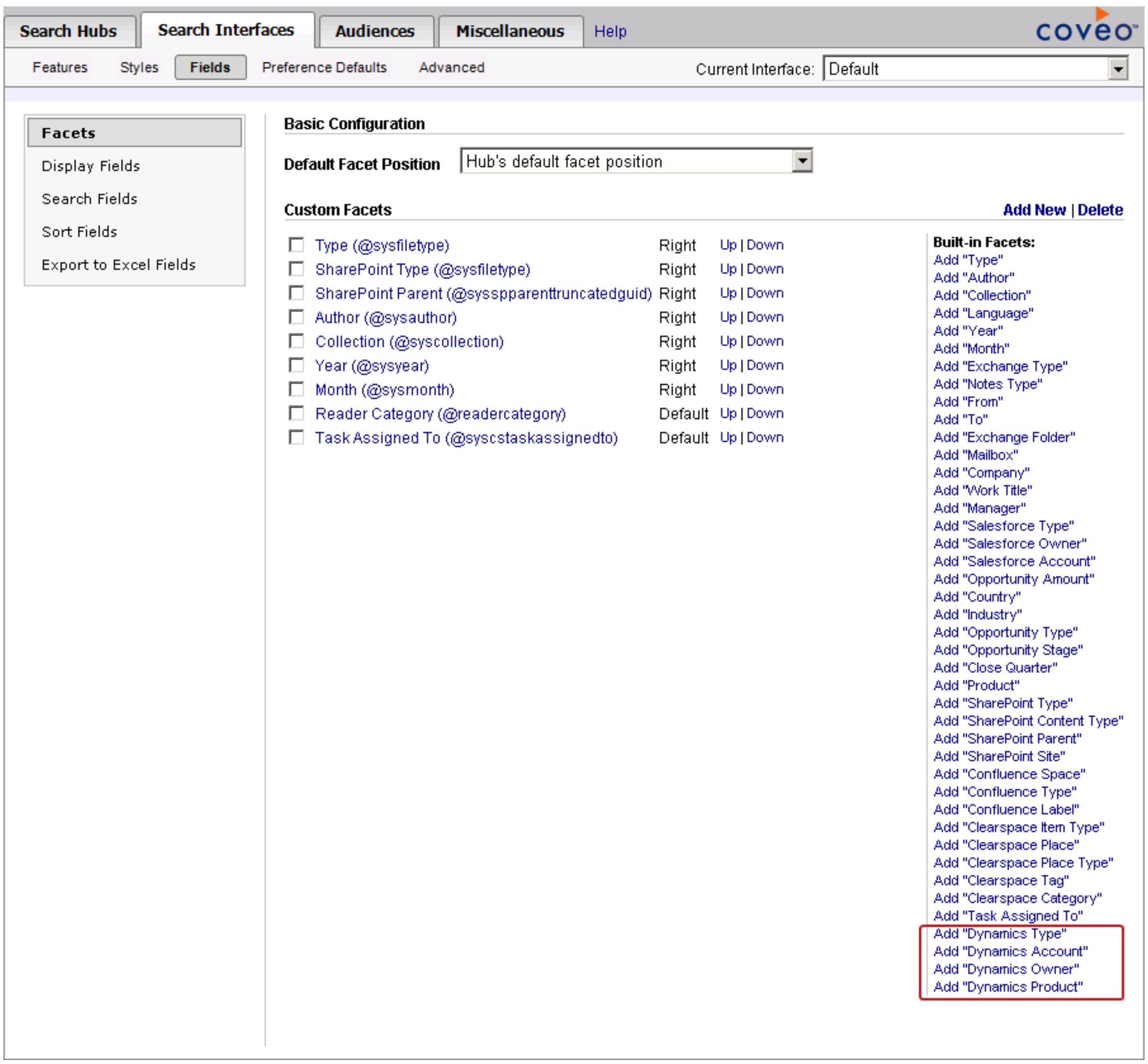
- Dynamics Type (@sysfiletype)
- Dynamics Account (@syscrmaccount)

- Dynamics Owner (@syscrmowner)
- Dynamics Product (@syscrmproduct)

To add Microsoft Dynamics CRM facets to the search interface

1. On the CES server, open the Interface Editor (Windows **Start** menu > **All Programs** > **Coveo Enterprise Search 6** > **Interface Editor**).
2. Select **Search Interfaces** > **Fields**.
3. In the **Current Interface** drop-down list at the top of the page, select the interface for which you wish to add one or more Microsoft Dynamics CRM facets.
4. In the **Built-in Facets** list on the right of the page, click the desired **Add Dynamics** links.

   The clicked facets appear in the **Custom Facets** list.



5. Open the modified search interface, search for Microsoft Dynamics CRM content, and then verify that the added Microsoft Dynamics CRM facets appear.