Glossary of CRM Terms

Microsoft Dynamics CRM Software

A list of terms and definitions that applies to Microsoft Dynamics CRM Software

Term	Definition
access right	A specific right assigned to a user for an entity instance or record. Primary examples are read, write, append, delete, share, and assign.
account	Person or business to which the salesperson tries to sell a product or service. The company billed in business transactions.
activity	An action to be performed, such as a task, or a communication item that is sent or received, for example, email, phone calls, and appointments. The status of activities is tracked and the activity history is stored in the system, so that users can view the open and closed activities.
activity feed	A series of information updates, or posts, on the wall in Microsoft Dynamics CRM.
address	Stores address and shipping information for a customer. This entity is used to store additional addresses for an account.
Append	An access right available in Microsoft Dynamics CRM that enables users to attach entity instance to the selected entity instance. The Append and Append To access rights are a pair of rights that work in combination with one another. For example, when you attach a note to a case, you must have the Append access right on the note and the Append To access right on the case for the operation to work.
application instance	A customized implementation of a Microsoft Dynamics CRM application (plus any partner-defined functionality outside the scope of Microsoft Dynamics CRM) using the core Microsoft Dynamics CRM services. An instance uses a single store or service deployment unit, typically a database or database cluster.

appointment	An activity represented by a time interval that has a start time, an end time, and a duration. An appointment does not include a service or check for conflicts, and you cannot search for available times.
article	A text-based piece of content in the knowledge base.
assign	To specify the owner of a record, such as an account or case, or an activity, such as an email message or phone call. Users can assign cases and activities to either a user or a queue.
asynchronous event	An event that occurs as part of the overall platform operation for which registered plug-ins are queued to be executed later.
attribute	The name or structure of a field in a database entity. For example, lastname, firstname, and phone are attributes of each record in a PhoneList entity. The size of a field and the type of information that it contains are also attributes of a database record.
availability	The periods of time when a resource can be scheduled to participate in a service activity.
base language	The default language for your organization's implementation of Microsoft Dynamics CRM.
basic	An access level that specifies the user has access to records the user owns or shares. Basic is the most restrictive access level. The application refers to this level as User.
business	An entity that provides goods and/or services to others.
business entity	An entity that is a part of the Microsoft Dynamics CRM default installation, such as account.
business unit	A business, division, or department in the Microsoft Dynamics CRM database.
campaign	A marketing program designed to accomplish a specific result, such as introducing a new product or increasing market share. The main way to accomplish this result is through communicating the benefits of a product or service to people and businesses. Campaigns often include more than one communication method, such as print advertisements, promotional discounts, and direct mail.
campaign activity	An activity that includes additional, campaign-specific

	information, such as budgets and vendor names. Campaign activities result in contacting a customer through one of the channels, such as sending an email or making a phone call.
campaign response	An entity that captures responses from existing or potential new customers for a campaign.
capacity	The ability of a resource to produce an amount of output in a specified amount of time.
case	A problem reported by a customer and the activities that customer service representatives use to resolve it. Sometimes referred to as an "incident" or "ticket." Cases are frequently associated with service contracts.
case resolution	An activity that includes such information as the description of the resolution, billing status, and the duration of the case.
child business unit	A business unit that is immediately under another business unit in the business hierarchy of an organization.
competitor	An entity that sells similar products or services and competes for the same customer segment.
condition	The state of an expression or a variable (for example, when a result can be either true or false, or equal or not equal).
contact	A person who represents a customer or potential customer, or an individual related to an account. For example, an individual who purchases products or services for their own use, or an employee of an account. A contact may also be a person involved in a business transaction, such as a supplier or a colleague.
contract	An agreement to provide support during specified coverage dates or for a specified number of cases or length of time. When customers contact customer service, the level of support they receive is determined by their contract.
contract line	A line item in a contract that describes the service support to be provided. A contract line often includes pricing information and how support will be allotted.
contract template	A template for a contract containing the standard attributes of a contract.
conversation	A collection of posts and all related comments.

custom entity	An entity that can be added to the system after installation to address specific business needs of the organization.
customer	The account or contact with which a business unit conducts a business transaction.
customer relationship	Relationship between a customer and a partner in which either can be an account or contact.
customer service	The functionality to ensure that customers of a business, both individuals and other businesses, can keep in communication with that business to ensure that they receive needed levels of service before, during, and after purchasing the business products or services.
customer service representative	A security role users can be assigned in Microsoft Dynamics CRM. A customer service representative (CSR) provides service to the customers of the organization or business unit through the opening and resolution of cases, among other activities.
customization	The modification of or additions to entities, attributes, forms, and views in the Microsoft Dynamics CRM application as it was shipped.
deep	An access level that specifies the user has access to records within his or her business unit and down the business unit hierarchy. The application refers to this level as Parent: Child Business Units.
deployment	The process of distributing and installing a software program throughout an entire organization. A deployment is a single installation of Microsoft Dynamics CRM.
deprecated	Refers to a class, member, or feature that works in this version but will be removed in a future update. A deprecated API or feature is currently supported for backward compatibility; however, it might become obsolete and unsupported in the future. When possible, always use the new class, member, or feature. See also *obsolete*, which is a related – but different – term.
discount	A reduction in the selling price of products or services, usually offered by the seller when the buyer agrees to meet specific conditions.
discount list	A group of price reductions that can be applied to a product, based on volume purchased.

duration	The amount of time that a record is in effect.
dynamic entity	A programming construct that supports writing code that will work with entities that are not yet defined.
email	An activity that is delivered using email protocols.
email template	A template for an email message that contains the standard attributes of an email message.
entity	A concrete or abstract thing represented by a noun, like employee, customer, or order. An entity manages data for an application.
entity name	The name that uniquely identifies an entity.
entity record	An instance of an entity in a database.
equipment	The tools or assets used to perform a service activity.
event	Any significant occurrence in the system or an application that triggers a notification. In Microsoft Dynamics CRM, an event is typically a system or user action that is detected and acted upon by the workflow system or by the client Web forms.
facility	A physical space, such as a conference room or service bay, where a service activity can be performed.
facility/equipment	A resource that can be scheduled.
fax	An activity that tracks call outcome and number of pages. Optionally stores the electronic copy of the actual document.
Fetch	The XML-based query language that is used to retrieve information from the Microsoft Dynamics CRM database.
filtered view	A view of data in the Microsoft Dynamics CRM database used for reports and exported dynamic Microsoft Office Excel files. When users view a report or file that uses a filtered view, they can see only the data that they have permission to view.
fiscal period	A division of a fiscal year that is reflected on financial statements. Common accounting periods are days, weeks, months, quarters, or years.
follow	An action taken by a user on a Microsoft Dynamics CRM record

	that enables that user to see the posts about the record on their personal wall.
fiscal year	A span of time during which the financial activities of an organization are calculated. A fiscal year is divided into fiscal periods, typically defined as semesters, quarters, or months. The organization determines the dates that begin and end its fiscal year, which may not correspond to a traditional calendar year.
global	An access level that specifies the user has access to records anywhere within the organization. The application refers to this level as Organization.
IFRAME	A windowless inline floating frame, typically used for including web pages, such as a page from a SharePoint site, a section of HTML such as a button, or a custom application, in a form.
impersonation	The ability of a thread to run in the security context of a security principal different from the security principal that started the process. This is usually so that a process can gain access to resources on behalf of a user.
incident (case)	A customer service issue or problem reported by a customer and the activities that customer service representatives use to resolve it.
Internet-facing deployment (IFD)	A way to deploy on-premises Microsoft Dynamics CRM so that remote users can connect to the application from the Internet.
invoice	An order that has been billed. It is also a record of a sale to an account, including details about the products or services purchased.
invoice product	A line item in an invoice that contains detailed billing information.
ISV configuration file	A configuration file, isv.config, that can be used to update the navigation structure of Microsoft Dynamics CRM, including adding custom buttons, tabs, and menus to entities.
KB	See other term: knowledge base
keyword	A word associated with an article to identify the article in a search.
kit	A group of finished items that compose a set. In Microsoft Dynamics CRM, a kit is comprised of a set of products in the product catalog.

knowledge base	A feature in Microsoft Dynamics CRM that provides a process for drafting, submitting, reviewing, and publishing articles about an organization's products and services. Users with manager-level security privileges can approve, reject, add comments to, and unpublish articles that are submitted for review.
lead	A potential customer who must be contacted by a salesperson and either qualified or disqualified as a sales opportunity. Leads will be converted into accounts, contacts, or opportunities if they are qualified. Otherwise they are deleted or archived.
letter	An activity that tracks the delivery of a letter. The activity can contain the electronic copy of the letter.
license	A set of the Microsoft Dynamics CRM application functionality that an organization purchases. Each license type is associated with a group of user rights.
local	An access level that specifies the user has access to records within his or her own business unit. The application refers to this level as Business Unit.
logical operator	In a query, a connector between two expressions, two subclauses, or a combination of an expression and a subclause. There are three primary logical operators: AND, OR, NOT.
many-to-many	A relationship that lets users relate one or more entity instances from another entity to an entity instance of the current entity. A many-to-many relationship may be self-referential. This means that one or more other entity instances of the current entity can be related to an entity instance of the same entity.
many-to-one	A hierarchical relationship created or viewed from the related entity. Many entity instances from the related entity can reference any one entity instance from the primary entity.
Marketing Automation	Automating the business processes involved in marketing: creating and launching campaigns, targeting markets, collecting and analyzing responses, and adding the responses to the Microsoft Dynamics CRM system.
marketing list	A group of accounts, contacts, or leads who are identified through their demographics as people or businesses who might be the most receptive to a campaign. For example, to introduce a new product, you can create a marketing list of accounts that have previously purchased similar products and send them brochures about the

	new product.
mention	A part of a post that refers to a Microsoft Dynamics CRM record. One post can have multiple mentions.
metadata	Information about the properties of data, such as the type of data represented in the database.
Microsoft Dynamics CRM	A browser-based customer relationship management (CRM) application used to automate sales and marketing functions and to manage sales and service activities in an organization. Microsoft Dynamics CRM is accessible from the Web and from Microsoft Office Outlook, through Microsoft Dynamics CRM for Outlook.
Microsoft Dynamics CRM data migration framework	A set of tools designed to move data from a source system into a destination system.
Microsoft Dynamics CRM for Outlook	A client application that provides a subset of the Microsoft Dynamics CRM application functionality within Microsoft Office Outlook. Microsoft Dynamics CRM synchronizes a local copy of a user's contacts, tasks, appointments, and email data with Outlook.
Microsoft Dynamics CRM for Outlook with Offline Access	A client application that allows you to work offline from the Microsoft Dynamics CRM server. You can create Microsoft Dynamics CRM email messages that are sent when you go back online. If you send Outlook email messages, those are sent immediately.
notes	A small item of information that can be appended to any record. Notes can be appended to only one record.
obsolete	Refers to a class, member, or feature that is not supported in this version and should not be used. See also *deprecated*, which is a related – but different – term.
one-to-many	A hierarchical relationship created or viewed from the primary entity. Any one entity instance from the primary entity can be referenced by many entity instances from the related entity.
opportunity	A potential revenue-generating event, or sale to an account, that needs to be tracked through a sales process to completion.
opportunity product	An association between an opportunity and a product.

opportunity relationship	A type of relationship role that describes the relationship between an account or contact and an opportunity.
order	A confirmed request for delivery of goods and services based on specified terms. An order is a quote that has been accepted by a customer.
order product	A line item in a sales order.
organization	The top level of the business hierarchy. The organization is divided into business units. There can be only one organization per deployment.
parent	A device, bus, function, or process at one level of a hierarchy. The parent controls the behavior of components below it in the hierarchy. In Microsoft Dynamics CRM, the relationship between entities controls the propagation of actions from parent to child in the hierarchy.
participant	A user linked to an appointment or service activity. A user could be the owner, organizer, required resource, or optional resources for the appointment or resource.
party	A user linked to an appointment or service activity.
phone call	An activity to track a telephone call.
platform core operation	The main operation that the system is to perform. Some examples of operations are Create, Update, Delete, Merge, Send, Assign, SetState, and GrantAccess.
plug-in	Custom business logic (compiled code) that is executed in response to a Microsoft Dynamics CRM event. For a plug-in to be invoked when an event is fired, you must register the plug-in code with the desired event. A plug-in can also be called an event handler.
post	A message or other information that appears in an activity feed on a wall in Microsoft Dynamics CRM.
price list	A compilation of the specific prices that can be charged for each unit in the unit group of a product. Salespeople use price lists to determine the pricing in a quote for a customer. In addition, a default price list can be added to a product.
price list item	Information about how to price a product in the specified price

	level, including pricing method, rounding option, and discount type based on a specified product unit.
primary entity	The entity that a related entity is associated to.
privilege	A user's right to perform a specific action on a specific entity type or to perform a task. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update Account and Publish Customizations.
process	A definition for an automated workflow consisting of steps, including the actions the workflow should take at each step, and the rules the workflow should use to proceed to the next step.
process instance	A running instance of a process.
process template	A process that is not intended to be run, but is used as a starting point to create other processes.
product	The entity that contains information about products and their pricing.
product catalog	A compilation of all products that are available for sale.
query	An instruction to a database to either return a set of records or perform a specified action on a set of records.
queue	A holding container for work items. There are queues that contain cases and activities in the Workplace, and queues of articles in the knowledge base.
quick campaign	A communication method that creates a single activity for distribution to a group of marketing lists, accounts, contacts, or leads. Contrast with a campaign, which supports an end-to-end marketing program that has multiple activities.
quota	A revenue objective specified as a monetary amount that has been assigned to a salesperson for a specified fiscal period.
quote	A formal offer for products or services, proposed at specific prices and related payment terms.
related entity	An entity instance type that is associated with another entity instance type. For example, most entities have a related notes entity.

relationship role	A definition of one side of a business relationship between accounts, opportunities, or contacts.
reports	A collection and grouping of business data that answers a question or aggregates data in some way.
resource	A user that performs a service, or the equipment or facility that is required for a service.
resource group	Two or more resources (users, facilities, or equipment) that can be scheduled interchangeably.
role	See other term: security role
sales literature	The documents that are created with specific information about products and/or services and given to customers to help increase sales.
salesperson	A security role assigned to users. A salesperson finds and qualifies leads, and works with opportunities, accounts, and contacts to complete sales activities.
schedule	Verb: To cross-reference resource schedules to find a period of time available for a service activity. Noun: A list of times that a resource is available for work. Also, a list of service activities for a specific period of time.
schema	The definition of the structure of an XML file. A schema contains property information as it pertains to the records and fields within the structure.
Secure Sockets Layer (SSL)	A protocol that improves the security of data communication by using a combination of data encryption, digital certificates, and public key cryptography. SSL enables authentication and increases data integrity and privacy over networks. SSL does not provide authorization or nonrepudiation.
security principal	A person or group that can own or access an entity instance within the system. There are two types of security principals within Microsoft Dynamics CRM: users and teams.
security role	A defined set of user rights. The security role assigned to a user determines which tasks the user can perform and which parts of the user interface the user can view. All users must be assigned at least one security role in order to access the system.

selection rule	A set of criteria that specifies which personnel, equipment, facilities, or resource groups are required to perform a service, or how to select these resources, based on parameters like quantity and capacity.
service	A type of work performed for a customer by one or more resources. Services are schedulable activities.
service activity	A schedulable appointment to provide a service to a customer. A service activity uses one or more resources to perform a service at a specific time and place.
service calendar	A scheduling component of Microsoft Dynamics CRM that is used to view and manage appointments and service activities.
service level	The support that customer service is required to provide for a case. The service contract a customer purchases determines the service level for its associated cases.
service restriction	A limitation of when a resource can perform a specific service.
service rules	The collection of service restrictions imposed on a resource.
share	To allow another user or team to have a specified amount of access to a record, such as a case, account, or contract. For example, you can share an account with a team and specify that its members can read the account record, but cannot have write access to it.
site	A business location to which resources are assigned. A site is used to ensure that all resources required for a service are in the same physical location.
Site Map	An XML representation of the structure of the Navigation Pane in Microsoft Dynamics CRM, including the areas, groups, and subareas where entities are displayed, and the user rights associated with each subarea.
state change	A change in the internal state of the Microsoft Dynamics CRM system caused by the execution of a core operation upon one or more entities.
status	The state of a record or activity. For example, a case can be Active or Resolved, and an email activity can have a status of Draft or Sent. Status is also used by workflow rules to determine when to move to the next stage in a workflow or sales process.

status reason	The description of the status of a record or activity. For example, if a case has a status of Active, the status reason could be Researching or Waiting for Details.
subject	A category used in a hierarchical list to correlate and organize information. Subjects are used in the subject tree to organize products, sales literature, and knowledge base articles.
subject tree	The hierarchical list of categories used to correlate and organize information.
synchronous event	An event that occurs as part of the overall platform operation for which registered plug-ins are executed instantly.
system entity	An entity that used by Microsoft Dynamics CRM to handle all internal processes, such as workflows, asynchronous jobs, and other internal jobs. You cannot delete or customize system entities.
task	A generic activity that represents work that needs to be done. A task can be tracked in the system from start to completion.
team	A group of users who share and collaborate on business records. A team can consist of members who all report to one business unit or members who report to different business units.
template	A framework for an email message, contract, or article. Templates are used to ensure consistent layouts and content in similar types of documents.
territory	An entity that represents sales regions.
unfollow	An action taken by a user on a Microsoft Dynamics CRM record that stops posts about that record from being displayed on the user's personal wall.
unit	Unit of measure.
unit group	A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.
user	A person who has access to the Microsoft Dynamics CRM system

	and who owns records in the Microsoft Dynamics CRM database.
view	A filter applied to a list of records. Users can choose different views that contain all the records or activities of a particular type or that are a subset of that type.
wall	A place in Microsoft Dynamics CRM where activity feeds are displayed.
Web service	A unit of application logic that provides data and services to other applications that can be invoked using standard Internet transport protocols such as Hypertext Transfer Protocol (HTTP), Simple Mail Transfer Protocol (SMTP), or File Transfer Protocol (FTP). Web services can perform functions ranging from simple requests to complicated business processes.
Web Services Description Language (WSDL)	An XML grammar that developers and development tools use to represent the capabilities of an XML Web service.
workflow	The automation of business processes, where business documents and tasks are automatically passed from one user to another for action, according to a set sequence.
workflow activation	A workflow record that contains the compiled workflow XOML that can be executed by the Windows Workflow Foundation runtime.
workflow definition	A series of interrelated action steps and the rules that drive the transition between these steps. The definition must include a primary entity and events that trigger the workflow execution.
workflow instance	A running instance of the workflow definition.
workflow process	See workflow definition.
workflow registration	The process of publishing a workflow. Publishing a workflow creates a workflow activation.