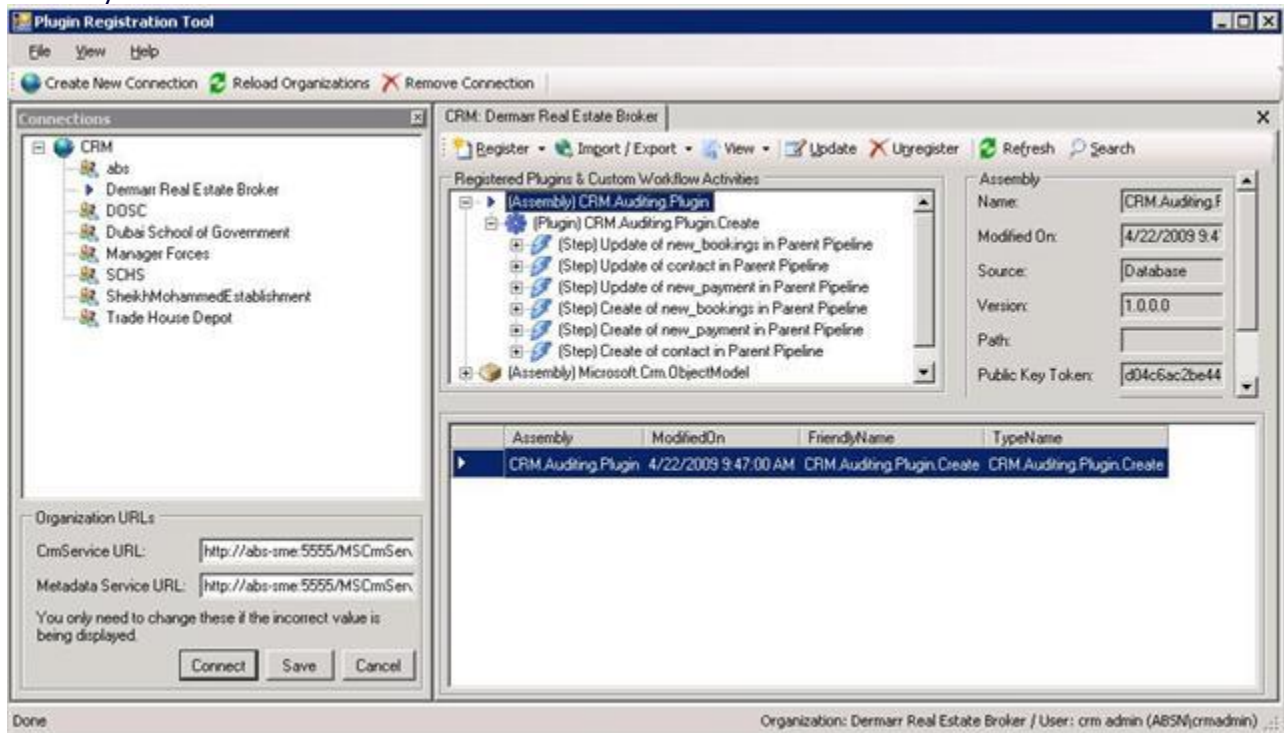


Audit Trail

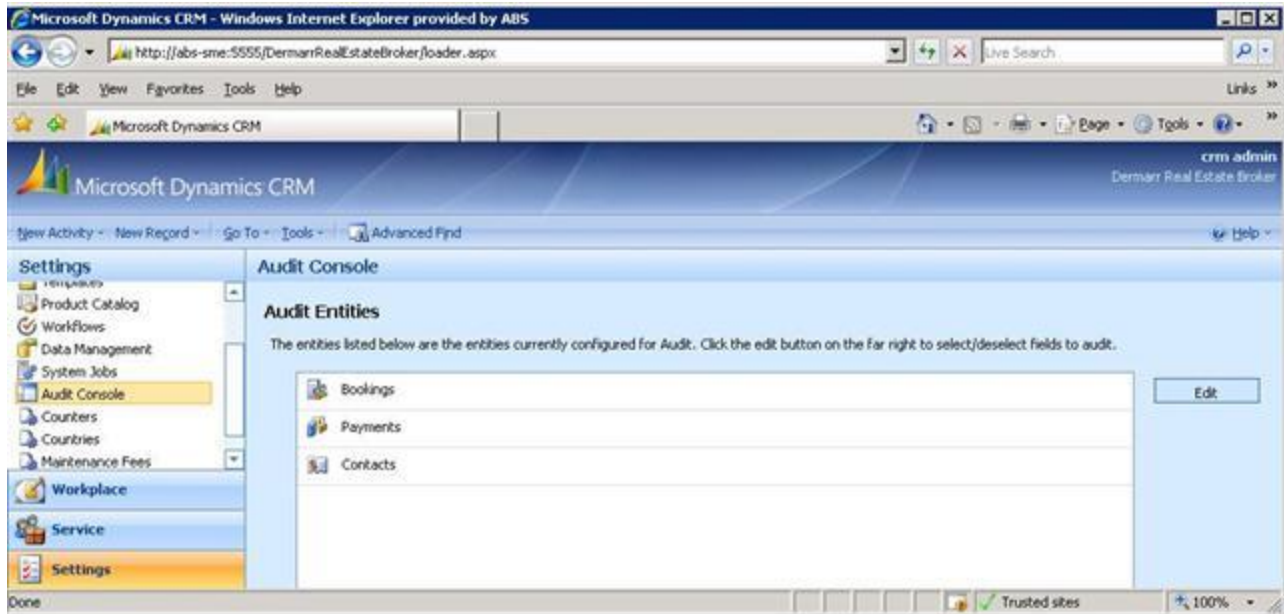
An Audit Trail is extremely useful when you need to record the changes made to specific data in Microsoft CRM. This may be necessary due to

1. Statutory requirements
2. Need to record time taken for specific activities
3. Requirement of monitoring non-authorized creation, editing, deletion of specific data within Microsoft CRM

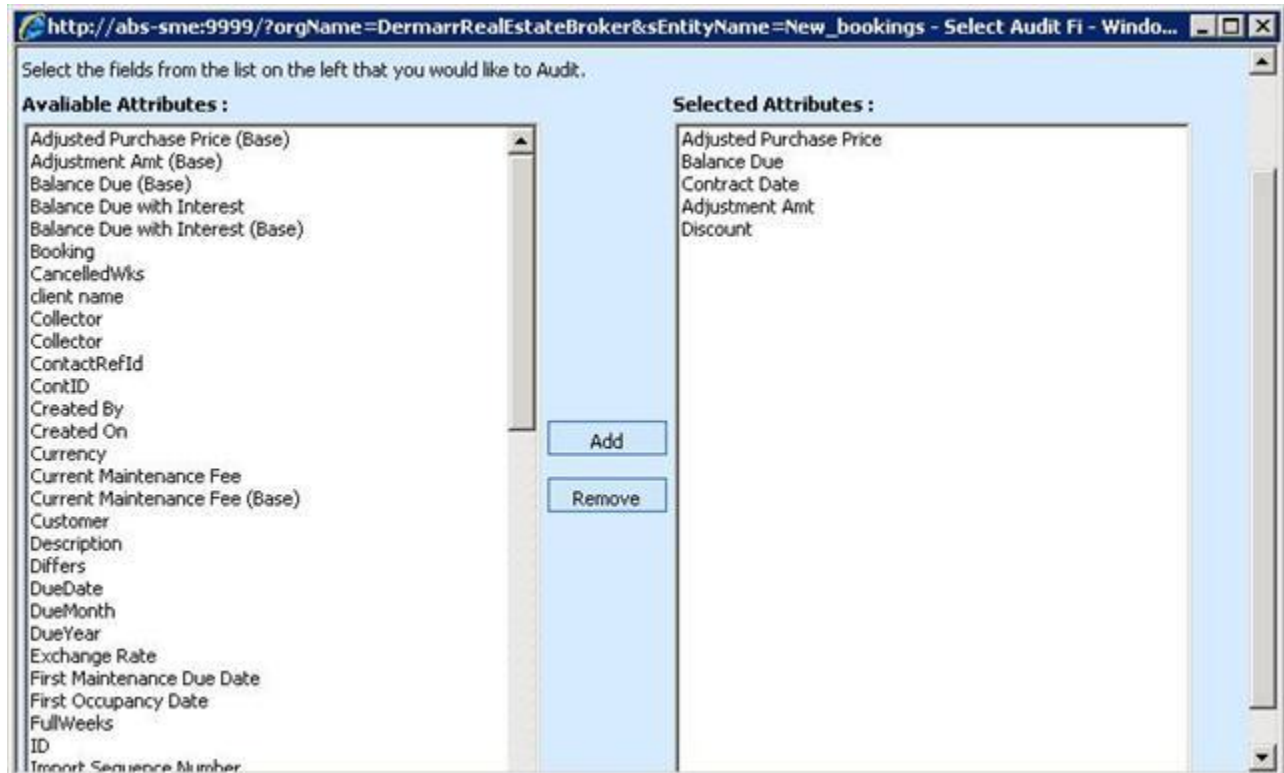
It is simple to set up your own Audit Trail. The first step is to configure the Audit Trail on your CRM implementation. As an example, the following screen shows the steps that need to be implemented by ABS for you:



Based on the above configuration, the Entities to be tracked are available within CRM:



In addition, the specific fields within the Entities that are to be tracked can be selected by the User within CRM:



The Audit Trail is thus set up to track the creation, updates, assign, cancel, close... for the data in the selected Entities and fields.

Thus the details relating to creation, updates, assign, cancel, close etc. can be seen on the Audit Trail screen, as shown below.:

The screenshot displays the Microsoft Dynamics CRM Audit Trail interface. The browser window title is "Microsoft Dynamics CRM - Windows Internet Explorer provided by ABS". The address bar shows the URL "http://abs-sme:5555/DermarrRealEstateBroker/loader.aspx". The page title is "Microsoft Dynamics CRM" and the user is logged in as "crm admin".

The "Audit Trail" section is active, showing a table of records. The table has the following columns: ID, Created By, Created On, EntityName, Attribute Name, Current Value, and Previous Value. The view is set to "Active Differences".

ID	Created By	Created On	EntityName	Attribute Name	Current Value	Previous Value
3,607	Hani Alkassis	22-Apr-09 6:57 AM	Bookings	new_discount	2500	
39,496	Maysoun Rabah	22-Apr-09 6:54 AM	Payments	new_installment	14250.0000	10000.0000
39,497	Maysoun Rabah	22-Apr-09 6:54 AM	Payments	new_paidamount	7350.0000	10000.0000
11	crm admin	22-Apr-09 6:46 AM	Contacts	emailaddress1	abbas_#5272@yaho...	abbas@abs.ae
11	crm admin	22-Apr-09 6:46 AM	Contacts	firstname	Abbas-Ismail	Abbas

The interface also includes a "Workplace" sidebar with options like Payments, UnitDetails, Pricings, Ownerships, Receipts, Cancelled Receipts, Audit Trail (selected), Reservations, and Reservation Payments. At the bottom, it shows "1 of 5 selected" and a keyboard navigation bar.