

Create a CRM Entity Activity

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CRM 4.0

Context

Use the Create CRM Entity Activity to create an entity in Dynamics CRM and populate it with workflow data.

Use Cases

- With a listener activity, identifies new leads generated from a website, and they are created as leads in CRM. performs additional manipulation (text extraction).

Wizard Tips

1. In the left pane of the Request section, click **BusinessEntity**, then from the **Type** drop-down menu, select the entity type you want to create.
2. Expand the **BusinessEntity** tree, then select and define values for the selected entity fields. You can manually define the values, select them from a workflow field, or basing the value on a workflow expression.

CRM 2011/2013

Context

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There are two general options for creating an entity:

Entity Option	Description
Typed	You select the entity type from the Type drop-down menu, for example, <i>Contact</i> . The CRM object displays with the entity-relevant attributes. For list attributes, creates an Enumerable of the attributes in the right-panel tree.
Untyped	Use the default entity Type , which is <i>Entity</i> . Create the entity attributes and set their types yourself; refer to CRM. This option takes significantly longer than the Typed option, and is only appropriate for exceptional circumstances.

Use Cases

- With a listener activity, identifies new leads generated from a website, and they are created as leads in CRM. performs additional manipulation (text extraction).

Wizard Tips

1. In the left pane of the Request section, click **Entity**, then from the **Type** drop-down menu, select the entity type you want to create.
2. Expand the **Entity** node, then select and define values for the selected entity fields. You can manually set the values, select them from a workflow field, or base the value on a workflow expression.

If you use the **Typed** option, you cannot create relationships (as properties). To work with relationships, for example, $1:N$, $N:1$, $N:N$, you must use the **Untyped** option, or a dedicated activity.