A story of blog content theft

How to fight the copy-paste bloggers in the Microsoft Dynamics CRM community

Jukka Niiranen

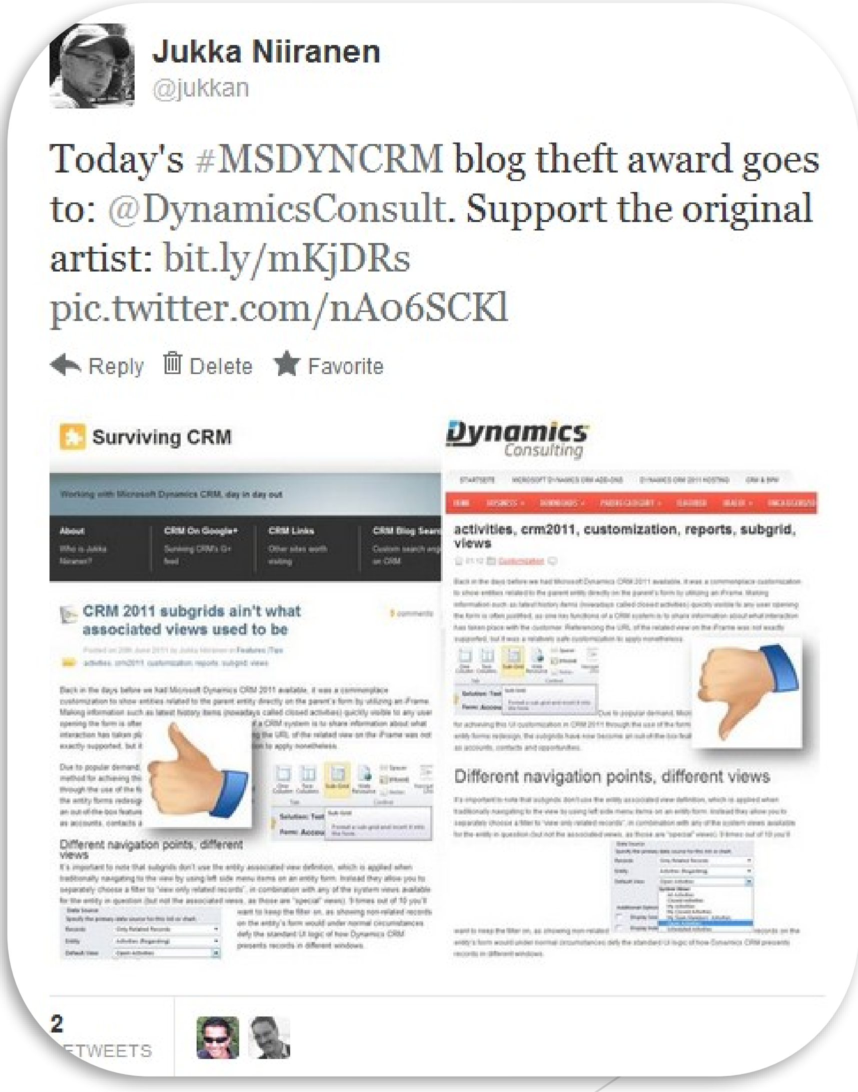
Blogger at Surviving CRM (http://niiranen.eu/crm/)

Tweetaholic at @jukkan (https://twitter.com/jukkan/)

Spotting the content theft & the opportunity

- I discovered a corporate blog that had stolen a post I wrote on my personal Surviving CRM blog
  - Original article: http://niiranen.eu/crm/2011/06/crm-2011-subgrids-aint-what-associated-views-used-to-be/
- Lucky for me they had done a pure copy & paste without editing any of the content
- This meant that also the images on their blog post were ”hotlinked”, meaning they were being loaded from my blog’s web server
- I could have easily blocked the images from being shown anywhere outside my own website by modifying the .htaccess file
- I could have even replaced them with a static image saying *”to view this content, please visit Surviving CRM”*

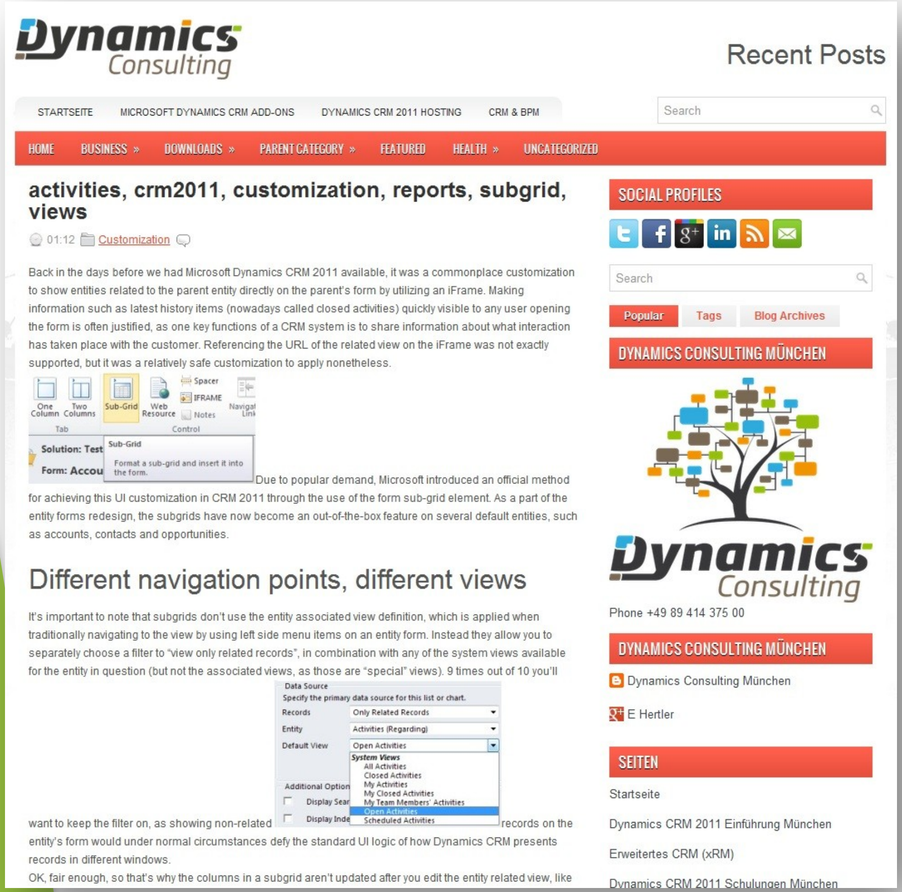
Complaining on Twitter gives a tiny little pleasure, but it doesn’t really address the problem

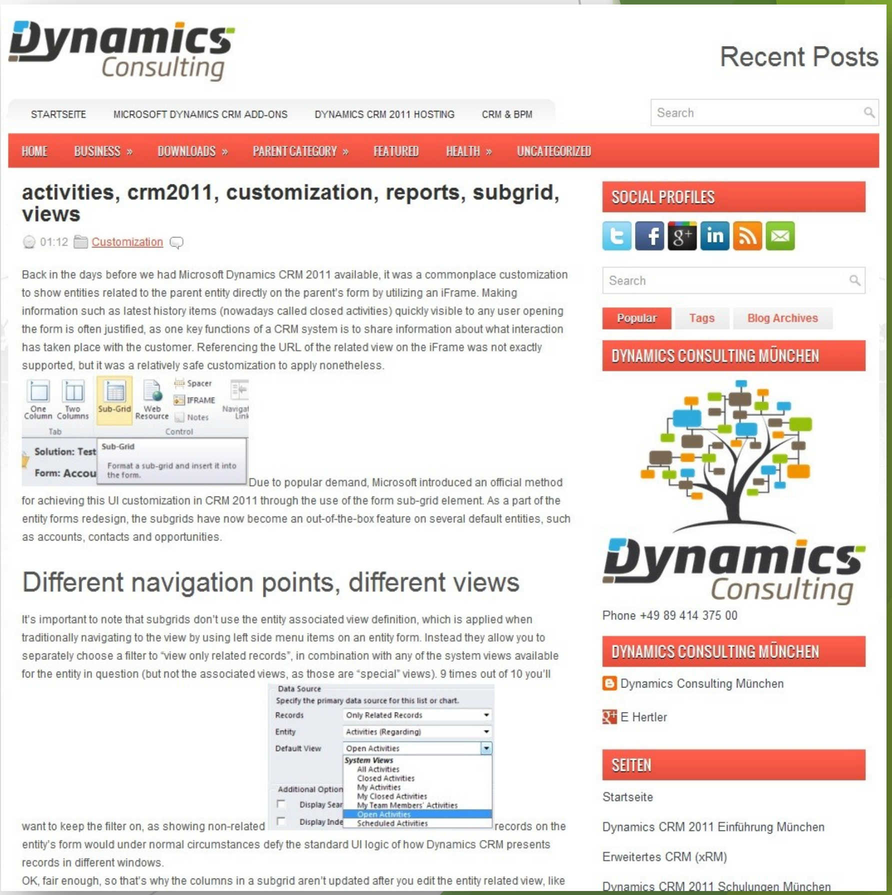


Plotting the payback

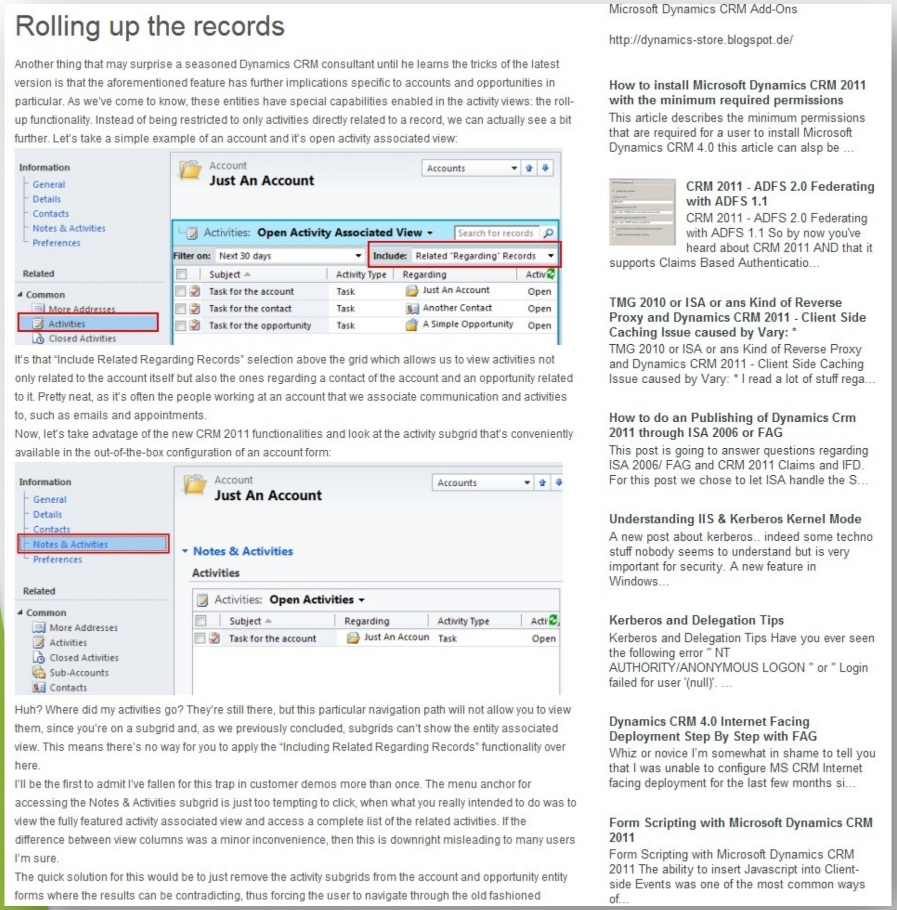
- I decided to be a bit more cheeky with my approach and replace the images with tailormade notifications for the blog in question
- I created new copies of the images and updated my own blog post to use those
- For the original images I added some text boxes into the images. These would be shown to any visitor to the offending blog as long as they were still delivered from my web server
- Naturally I also wanted to document the results into this slide deck (and my blog), in case the blog owner spots the modified images and removes the post

The first images were left as they were. This way anyone who’s just browsing the content and not reading through it (like the blog owner) may not notice the trick





On the next images I added a friendly note telling the reader where the original article is from



Rolling up the records

Another thing that may surprise a seasoned Dynamics CRM consultant until he learns the tricks of the latest version is that the aforementioned feature has further implications specific to accounts and opportunities in particular. As we've come to know, these entities have special capabilities enabled in the activity views: the roll-up functionality. Instead of being restricted to only activities directly related to a record, we can actually see a bit further. Let's take a simple example of an account and it's open activity associated view:

It's that "Include Related Regarding Records" selection above the grid which allows us to view activities not only related to the account itself but also the ones regarding a contact of the account and an opportunity related to it. Pretty neat, as it's often the people working at an account that we associate communication and activities to, such as emails and appointments.

Now, let's take advatage of the new CRM 2011 functionalities and look at the activity subgrid that's conveniently available in the out-of-the-box configuration of an account form:

Huh? Where did my activities go? They're still there, but this particular navigation path will not allow you to view them, since you're on a subgrid and, as we previously concluded, subgrids can't show the entity associated view. This means there's no way for you to apply the "Including Related Regarding Records" functionality over here.

I'll be the first to admit I've fallen for this trap in customer demos more than once. The menu anchor for accessing the Notes & Activities subgrid is just too tempting to click, when what you really intended to do was to view the fully featured activity associated view and access a complete list of the related activities. If the difference between view columns was a minor inconvenience, then this is downright misleading to many users I'm sure.

The quick solution for this would be to just remove the activity subgrids from the account and opportunity entity forms where the results can be contradicting, thus forcing the user to navigate through the old fashioned

Microsoft Dynamics CRM Add-Ons

http://dynamics-store.blogspot.de/

How to install Microsoft Dynamics CRM 2011 with the minimum required permissions
This article describes the minimum permissions that are required for a user to install Microsoft Dynamics CRM 4.0 this article can alsp be ...

CRM 2011 - ADFS 2.0 Federating with ADFS 1.1
CRM 2011 - ADFS 2.0 Federating with ADFS 1.1 So by now you've heard about CRM 2011 AND that it supports Claims Based Authenticatio...

TMG 2010 or ISA or ans Kind of Reverse Proxy and Dynamics CRM 2011 - Client Side Caching Issue caused by Vary: *
TMG 2010 or ISA or ans Kind of Reverse Proxy and Dynamics CRM 2011 - Client Side Caching Issue caused by Vary: * I read a lot of stuff rega...

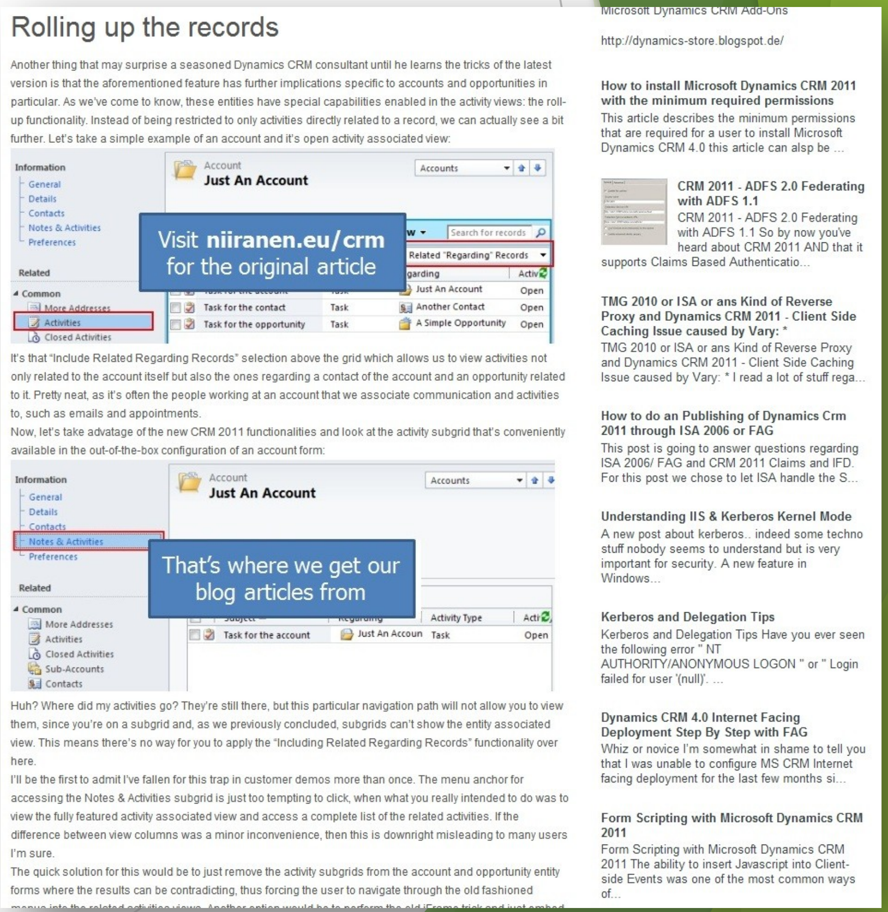
How to do an Publishing of Dynamics Crm 2011 through ISA 2006 or FAG
This post is going to answer questions regarding ISA 2006/ FAG and CRM 2011 Claims and IFD. For this post we chose to let ISA handle the S...

Understanding IIS & Kerberos Kernel Mode
A new post about kerberos.. indeed some techno stuff nobody seems to understand but is very important for security. A new feature in Windows...

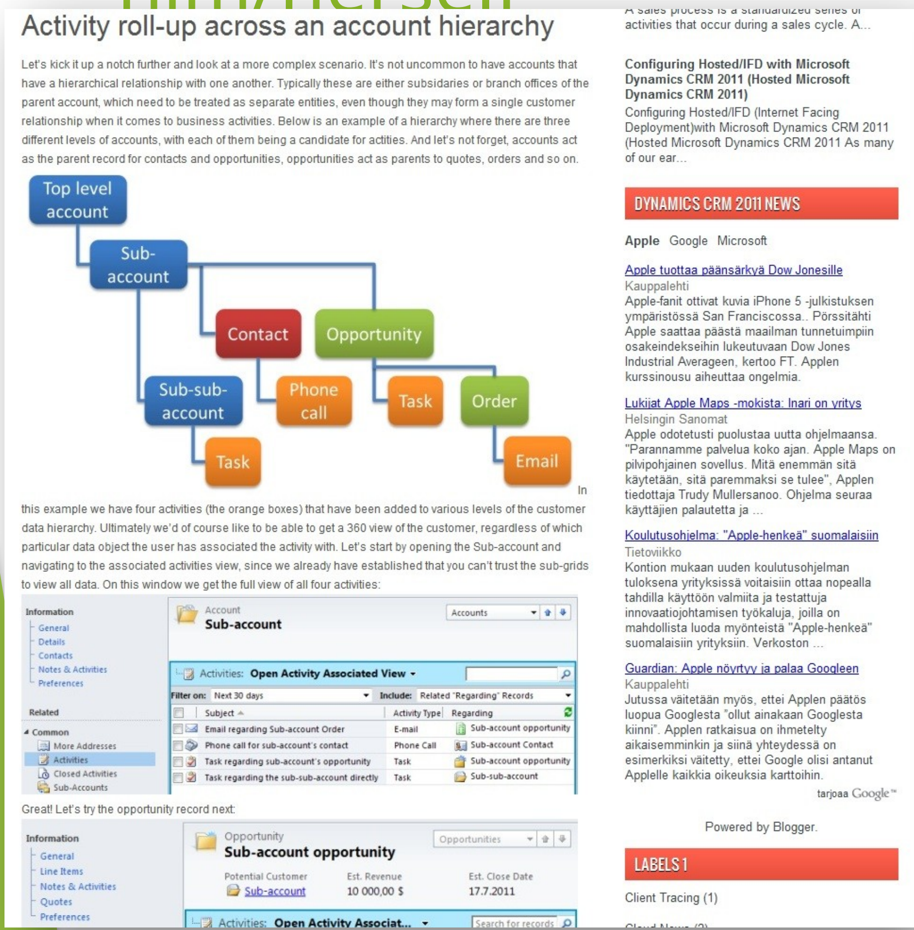
Kerberos and Delegation Tips
Kerberos and Delegation Tips Have you ever seen the following error " NT AUTHORITY/ANONYMOUS LOGON " or " Login failed for user '(null)'. ...

Dynamics CRM 4.0 Internet Facing Deployment Step By Step with FAG
Whiz or novice I'm somewhat in shame to tell you that I was unable to configure MS CRM Internet facing deployment for the last few months si...

Form Scripting with Microsoft Dynamics CRM 2011
Form Scripting with Microsoft Dynamics CRM 2011 The ability to insert Javascript into Client-side Events was one of the most common ways of...



As we move along, I point out that the ”author” of this blog couldn’t actually write a post like this him/herself



Activity roll-up across an account hierarchy

Let's kick it up a notch further and look at a more complex scenario. It's not uncommon to have accounts that have a hierarchical relationship with one another. Typically these are either subsidaries or branch offices of the parent account, which need to be treated as separate entities, even though they may form a single customer relationship when it comes to business activities. Below is an example of a hierarchy where there are three different levels of accounts, with each of them being a candidate for actities. And let's not forget, accounts act as the parent record for contacts and opportunities, opportunities act as parents to quotes, orders and so on.

In this example we have four activities (the orange boxes) that have been added to various levels of the customer data hierarchy. Ultimately we'd of course like to be able to get a 360 view of the customer, regardless of which particular data object the user has associated the activity with. Let's start by opening the Sub-account and navigating to the associated activities view, since we already have established that you can't trust the sub-grids to view all data. On this window we get the full view of all four activities:

Great! Let's try the opportunity record next:

A sales process is a standardized series of activities that occur during a sales cycle. A...

Configuring Hosted/IFD with Microsoft Dynamics CRM 2011 (Hosted Microsoft Dynamics CRM 2011)
Configuring Hosted/IFD (Internet Facing Deployment)with Microsoft Dynamics CRM 2011 (Hosted Microsoft Dynamics CRM 2011 As many of our ear...

DYNAMICS CRM 2011 NEWS

Apple Google Microsoft

Apple tuottaa päänsärkyä Dow Jonesille
Kauppalehti
Apple-fanit ottivat kuvia iPhone 5 -julkistuksen ympäristössä San Franciscossa.. Pörssitähti Apple saattaa päästä maailman tunnetuimpiin osakeindekseihin lukeutuvaan Dow Jones Industrial Averageen, kertoo FT. Applen kurssinousu aiheuttaa ongelmia.

Lukijat Apple Maps -mokista: Inari on yritys
Helsingin Sanomat
Apple odotetusti puolustaa uutta ohjelmaansa. "Parannamme palvelua koko ajan. Apple Maps on pilvipohjainen sovellus. Mitä enemmän sitä käytetään, sitä paremmaksi se tulee", Applen tiedottaja Trudy Mullersanoo. Ohjelma seuraa käyttäjien palautetta ja ...

Koulutusohjelma: "Apple-henkeä" suomalaisiin
Tietoviikko
Kontion mukaan uuden koulutusohjelman tuloksena yrityksissä voitaisiin ottaa nopealla tahdilla käyttöön valmiita ja testattuja innovaatiojohtamisen työkaluja, joilla on mahdollista luoda myönteistä "Apple-henkeä" suomalaisiin yrityksiin. Verkoston ...

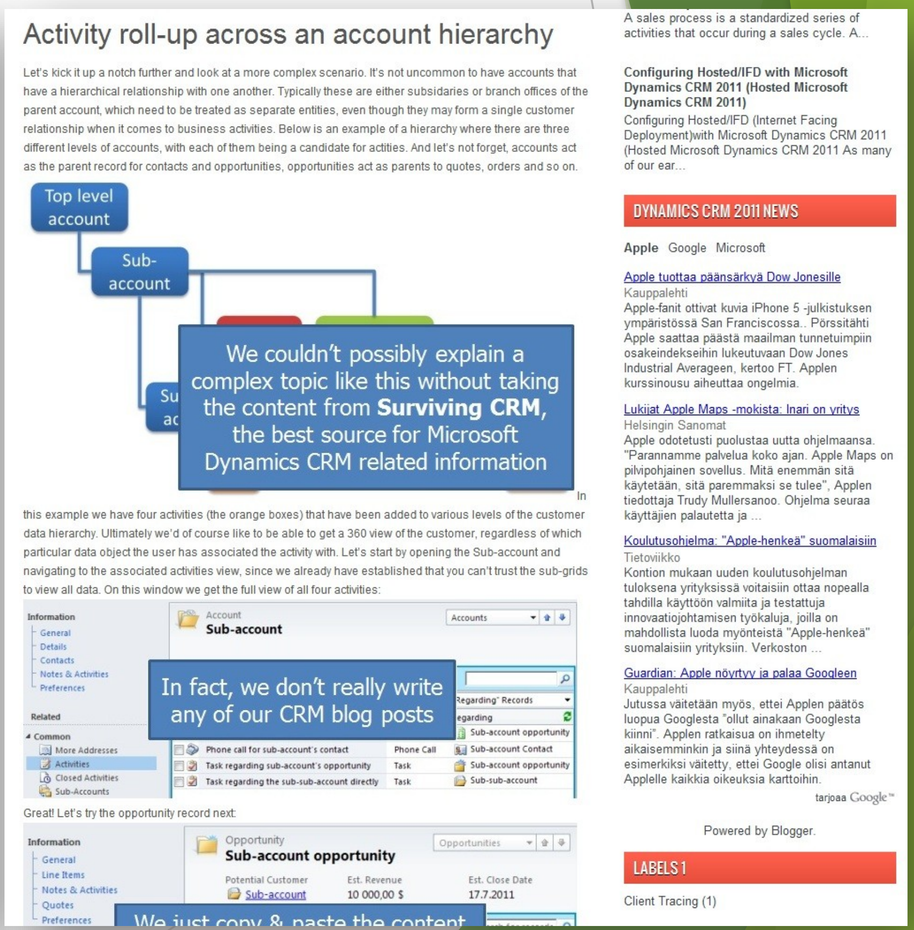
Guardian: Apple nöyrtyy ja palaa Googleen
Kauppalehti
Jutussa väitetään myös, ettei Applen päätös luopua Googlesta "ollut ainakaan Googlesta kiinni". Applen ratkaisua on ihmetelty aikaisemminkin ja siinä yhteydessä on esimerkiksi väitetty, ettei Google olisi antanut Applelle kaikkia oikeuksia karttoihin.

tarjoaa Google™

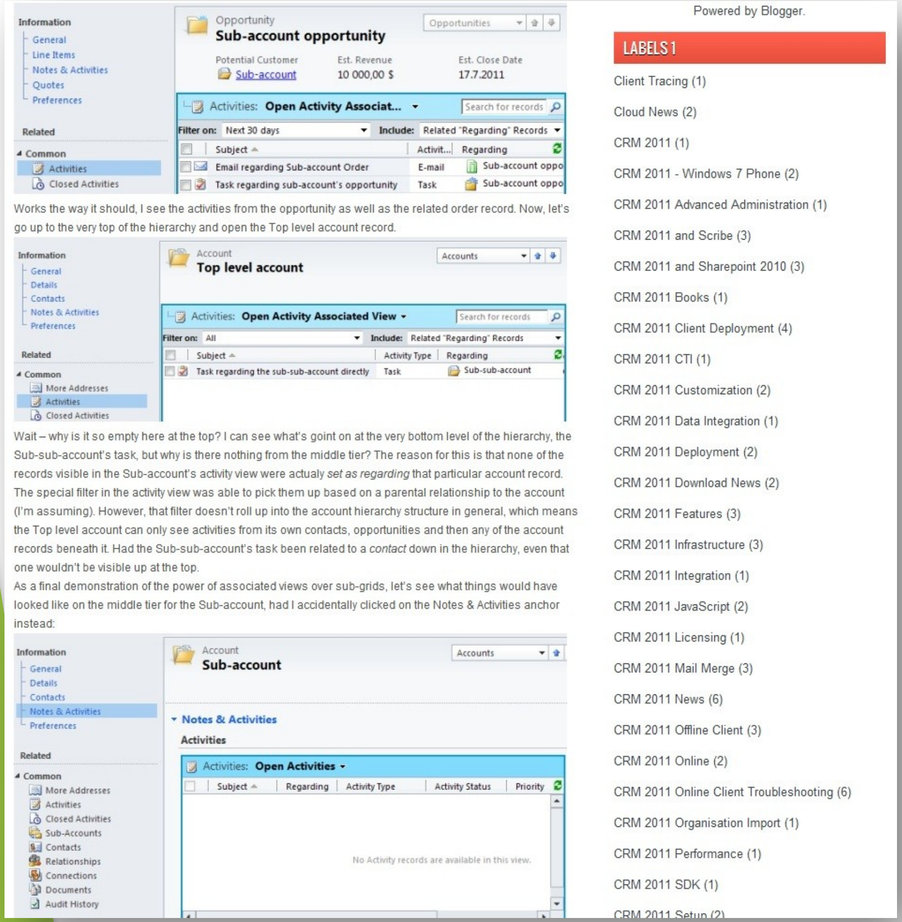
Powered by Blogger.

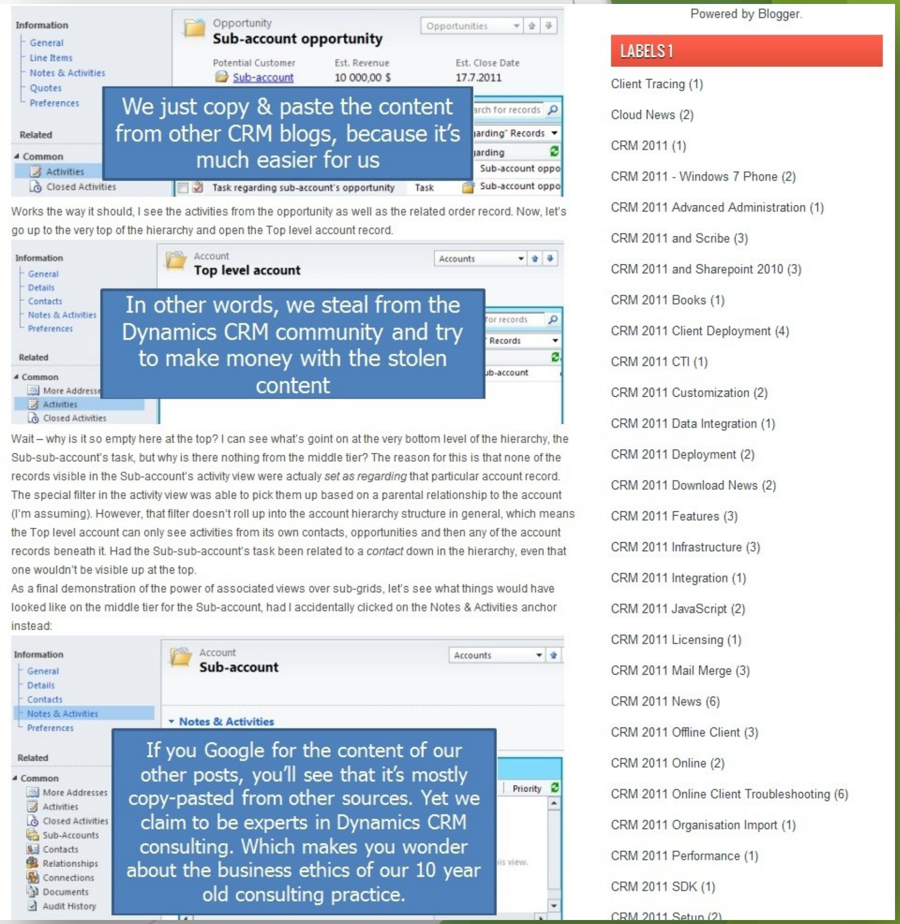
LABELS 1

Client Tracing (1)

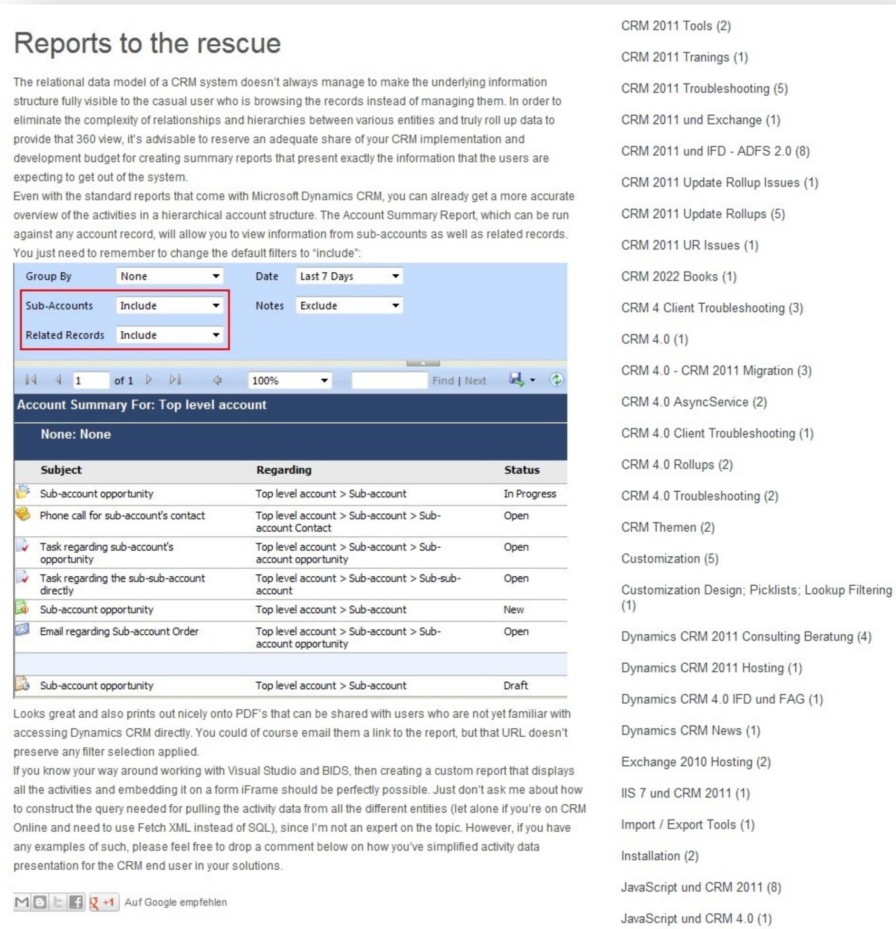


Since this is a blog for a company, next I questioned what their business ethics are like if they resort to such content theft in their online marketing





On the last picture we advice the potential customer to always check the backgrounds of CRM consultants that they wish to hire, to protect themselves from fraudulent players



Reports to the rescue

The relational data model of a CRM system doesn't always manage to make the underlying information structure fully visible to the casual user who is browsing the records instead of managing them. In order to eliminate the complexity of relationships and hierarchies between various entities and truly roll up data to provide that 360 view, it's advisable to reserve an adequate share of your CRM implementation and development budget for creating summary reports that present exactly the information that the users are expecting to get out of the system.

Even with the standard reports that come with Microsoft Dynamics CRM, you can already get a more accurate overview of the activities in a hierarchical account structure. The Account Summary Report, which can be run against any account record, will allow you to view information from sub-accounts as well as related records. You just need to remember to change the default filters to "include":

Group By None · Date Last 7 Days
Sub-Accounts Include · Notes Exclude
Related Records Include

1 of 1 · 100% · Find | Next

Account Summary For: Top level account

None: None

Subject	Regarding	Status
Sub-account opportunity	Top level account > Sub-account	In Progress
Phone call for sub-account's contact	Top level account > Sub-account > Sub-account Contact	Open
Task regarding sub-account's opportunity	Top level account > Sub-account > Sub-account opportunity	Open
Task regarding the sub-sub-account directly	Top level account > Sub-account > Sub-sub-account	Open
Sub-account opportunity	Top level account > Sub-account	New
Email regarding Sub-account Order	Top level account > Sub-account > Sub-account opportunity	Open
Sub-account opportunity	Top level account > Sub-account	Draft

Looks great and also prints out nicely onto PDF's that can be shared with users who are not yet familiar with accessing Dynamics CRM directly. You could of course email them a link to the report, but that URL doesn't preserve any filter selection applied.

If you know your way around working with Visual Studio and BIDS, then creating a custom report that displays all the activities and embedding it on a form iFrame should be perfectly possible. Just don't ask me about how to construct the query needed for pulling the activity data from all the different entities (let alone if you're on CRM Online and need to use Fetch XML instead of SQL), since I'm not an expert on the topic. However, if you have any examples of such, please feel free to drop a comment below on how you've simplified activity data presentation for the CRM end user in your solutions.

+1 Auf Google empfehlen

Conclusions

- Content theft is all too commonplace on the web today and its very difficult to protect yourself from becoming a victim of it
- Many copy-paste bloggers will remove the stolen blog posts if you contact them, but this means they can just continue with their practice and none of the readers will know about it
- If you'd link to the stolen content from your original blog article, you might just end up giving them a higher search engine ranking as a result (that's what they are ultimately looking for with their practice)
- As a blogger, you need to be creative in using different means to draw attention to the content thieves
- As blog readers, we should all be alert in spotting content theft and notifying the original bloggers as well as the copy-pasters about it