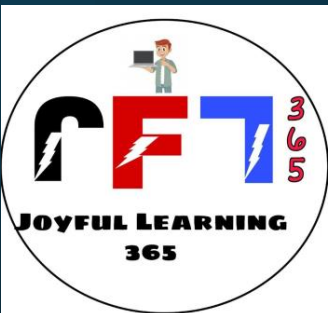


Business Rules



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Business Rules?

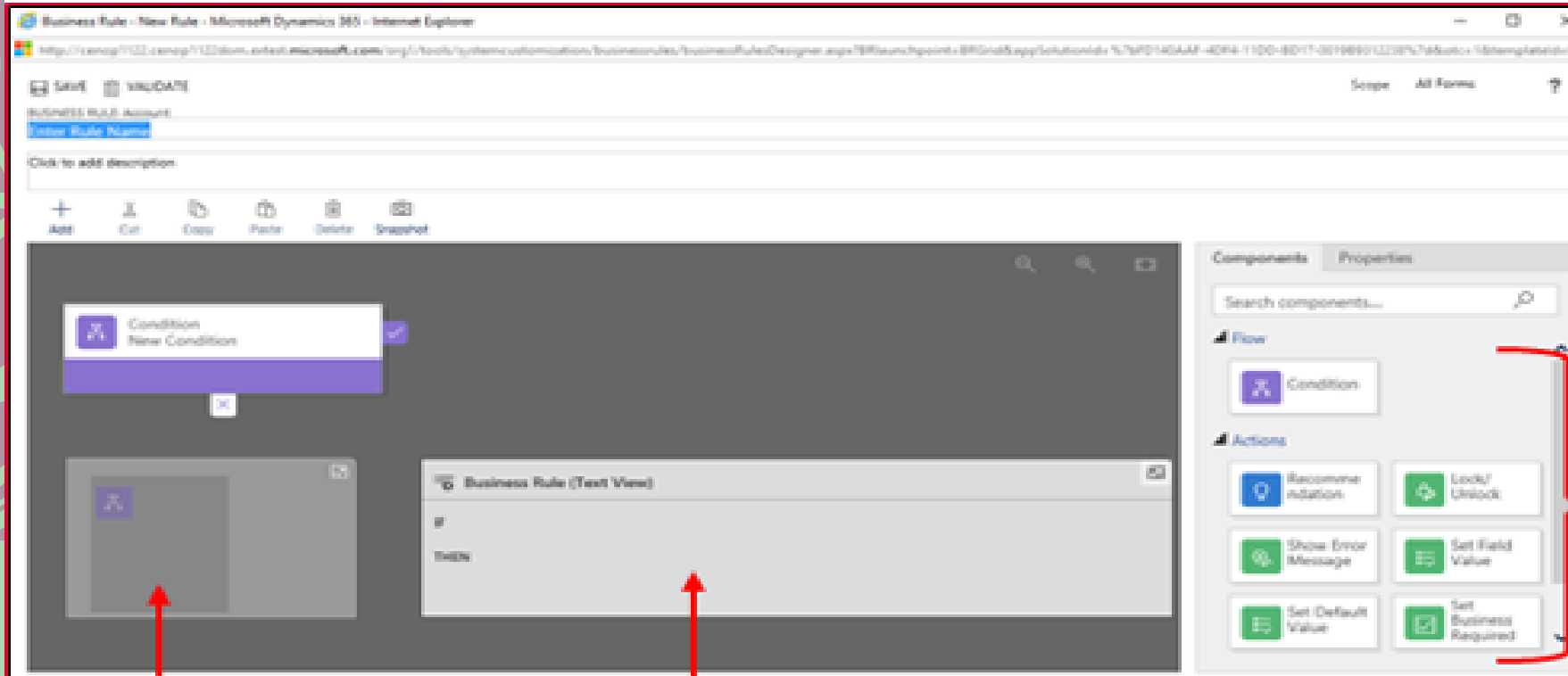
Business rules are provided in a simple to use drag-and-drop interface which allows you to quickly implement and easily change some of the most commonly used rules. The good thing with this is that a business rule runs in real-time so you will be able to see the action as soon as the condition has been met (unlike a workflow that will run on form save).



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Business Rules Interface?



Drag components to the design area and set properties to create a business rule.

Use the mini-map to navigate quickly to part of the business rule.

As you create the business rule, Dynamics 365 builds the code here.

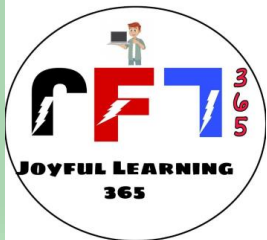
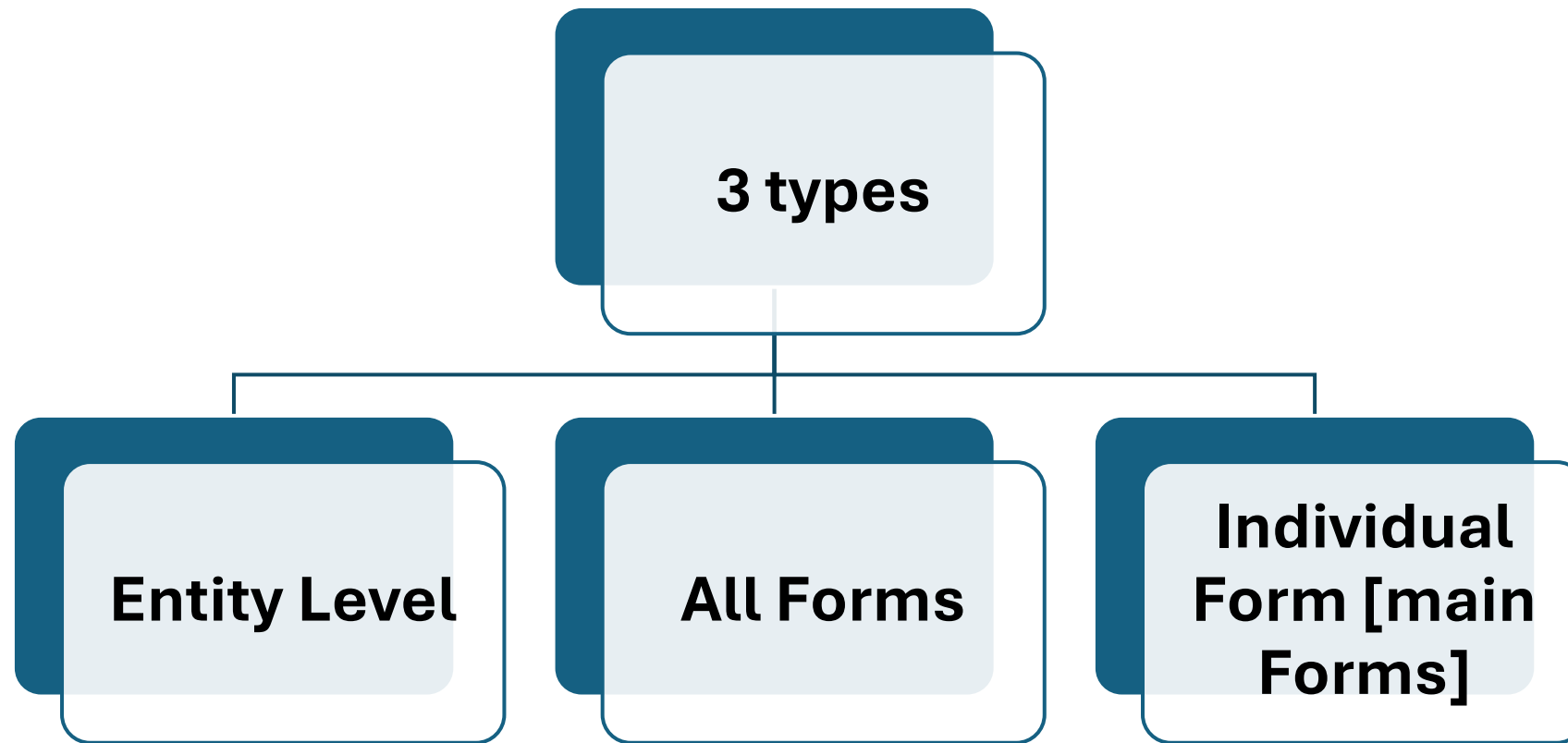


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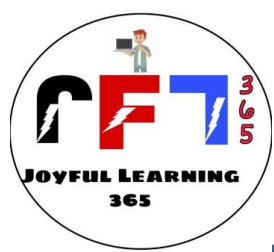
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What is Scope in Business Rules ?

There are 3 levels of scope when configuring the business rules in your Microsoft Dynamics 365. The scope controls when the Business Rules will be triggered.



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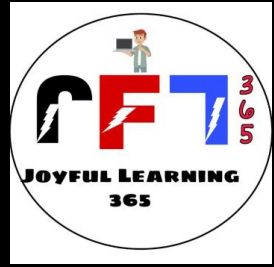
What is Scope in Business Rules ?



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- 1) **Entity Level :** This Business Rule runs server side, and you do not have to be on a Form for the Business Rule to run. This Business Rule will run if you make a change programmatically to a record. It acts more like a real-time workflow or plug-in in this way, making it a critical feature.
- 2) **All forms :** This Business Rule will apply on any form. You must be on the form, however, for the Business Rule to run.
- 3) **Individual form** - There will be one of these for each Main Form you have. This Business Rule will only run on the form selected. This is the lowest level of scope and provides flexibility to provide different experiences on different forms.



7 Types of Actions

- 1) Recommendation
- 2) Lock / Unlock
- 3) Show Error Message
- 4) Set Field Value
- 5) Set Default Value
- 6) Set Business Required
- 7) Set Visibility

Business Rules Action



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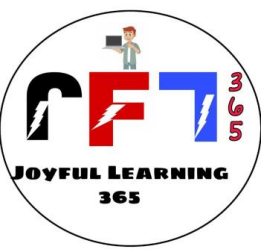
Advantages of Business Rules

Set	Set Field Value
Field	Clear Field Values
Set	Set Field Requirement Levels
Validate	Validate Data & Show Error Messages
Show	Show Fields
Hide	Hide Fields
Enable	Enable Fields
Disable	Disable Fields
Create	Create Business Recommendations



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Limitations of Business Rules in Dynamics 365



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Business rules will not work, if Business rules associated fields are not available in the forms.

Business rules cannot trigger when record is saved.

Cannot interact with tabs and section, for example we cannot show hide sections/tab using Business rules.

JavaScript Onchange event will not trigger if we set value of using business rules to any field. Which means JavaScript cannot be called from Business Rules.

Up to 10 IF-ELSE condition supported in business Rules.

Business rules cannot execute during bulk edits and imports.

Business rule can be acted only on the fields of local entities and not on the fields related entities or parent entities.

The execution of a business rule is always enforced. There is no control over their execution.

No exception or error handling mechanism available. We can't debug and trace business rules like we do in JavaScript.

Business rules has limited actions. For example, Business Rules does not allow concatenation of fields while doing set value.



Question and Answers

Java Script

Java Script
Execute First
or Business
Rules ?

Reason: Business rules will only work after it gets **converted** to JavaScript files (which happens in the background). So basically, be it be a JavaScript or Business Rule, both gets processed only as JavaScript file. Eventually, JavaScript files will get loaded in **lesser time compared to Business Rule** as it doesn't require any conversion to JavaScript format



Mohammed Shafiuddin

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