

FormContext Cheat Sheet for Dynamics 365 CE with Examples

1. Accessing the formContext

- Use `executionContext.getFormContext()` inside form events.
- Example:

```
function onLoad(executionContext) {  
    var formContext = executionContext.getFormContext();  
}
```

2. Working with Attributes (Fields)

- `getAttribute(fieldName)` → returns the attribute object.
- `getValue()` → gets the current value.
- `setValue(value)` → sets a new value.
- `setSubmitMode(mode)` → `always`, `never`, `dirty`.
- `getIsDirty()` → checks if value changed.
- `setRequiredLevel(level)` → `none`, `required`, `recommended`.
- Example:

```
var estRevenue = formContext.getAttribute("estimatedvalue").getValue();  
formContext.getAttribute("new_highvalue").setValue(true);  
formContext.getAttribute("closeprobability").setRequiredLevel("required");
```

3. Working with Controls

- `getControl(controlName)` → returns the control object.
- `setVisible(true/false)` → show/hide.
- `setDisabled(true/false)` → enable/disable.
- `setNotification(message, uniqueId)` → field-level message.
- `clearNotification(uniqueId)` → remove notification.
- Example:

```
formContext.getControl("closeprobability").setVisible(false);  
formContext.getControl("customerid").setNotification("Please select a  
customer", "custNotif");  
formContext.getControl("customerid").clearNotification("custNotif");
```

4. Form UI Notifications

- `setFormNotification(message, level, uniqueId)` → levels: `INFO`, `WARNING`, `ERROR`.
- `clearFormNotification(uniqueId)` → remove notification.
- Example:

```
formContext.ui.setFormNotification("High-value opportunity detected!",  
"INFO", "highValueNotif");  
formContext.ui.clearFormNotification("highValueNotif");
```

5. Lookup Fields

- `getValue()` returns array: `[{id, entityType, name}]`.
- Example:

```
var customer = formContext.getAttribute("customerid").getValue();  
var customerId = customer[0].id;
```

6. Web API Integration

- Use `Xrm.WebApi.retrieveRecord(entityName, id, options)` to fetch related data.
- Example:

```
Xrm.WebApi.retrieveRecord("account", customerId, "?$select=emailaddress1")  
.then(function(result){  
  
formContext.getAttribute("new_customeremail").setValue(result.emailaddress1);  
});
```

7. Events Summary

- **OnLoad:** Initialize form, set defaults, show notifications.
- **OnChange:** Respond to field changes, show/clear notifications, update other fields.
- **OnSave:** Cleanup, clear notifications, enforce validations.

8. Tips & Best Practices

- Always pass `executionContext` and get `formContext`.
- Use unique IDs for notifications.
- Clear notifications when conditions change.
- Test asynchronous Web API calls carefully, use notifications to indicate loading.