

Dynamics CRM AutoNumber

Version 2.2 - Lite

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Introduction

The CRM Auto is a Dynamics CRM 2016/Dynamics 365 managed solution that provides the ability to automate the process of creating automated numerical values across entities.

The solution supports the creation of both numerical AutoNumbers and AutoNumbers made of string with prepended prefixes or appended suffixes. In the Enterprise edition, the solution also provides the ability to create AutoNumber values based on option sets and option set values as well as lookup entities and lookup entity values.

About BGBS

Established in 2005, BGBS, Inc. is a leader in delivering Microsoft Dynamics CRM and xRM solutions to business customers. As a Microsoft Certified Partner, Brite Global has an impressive and rapidly growing list of customers benefiting from Microsoft Dynamics CRM solutions. We have embraced the Power of Choice by providing our customers the choice of a hosted, on-premises or hybrid delivery options.

Headquartered in Teaneck, NJ, BGBS, Inc. provides CRM and software solutions to business in multiple industries including Public Sector and Education, Financial Services, Real Estate, Media and Entertainment, Not for Profit, Retail and Manufacturing, Professional Services and more. For more information, visit www.briteglobal.com.

Installation

This section describes the installation process of the AutoNumber managed solution. The installation is straight forward and the only requirement is for the user installing the solution to have the appropriate Security Privileges to install and configure solution in the environment.

We recommend that you install this solution in your test environment prior to having installed in your production environment.

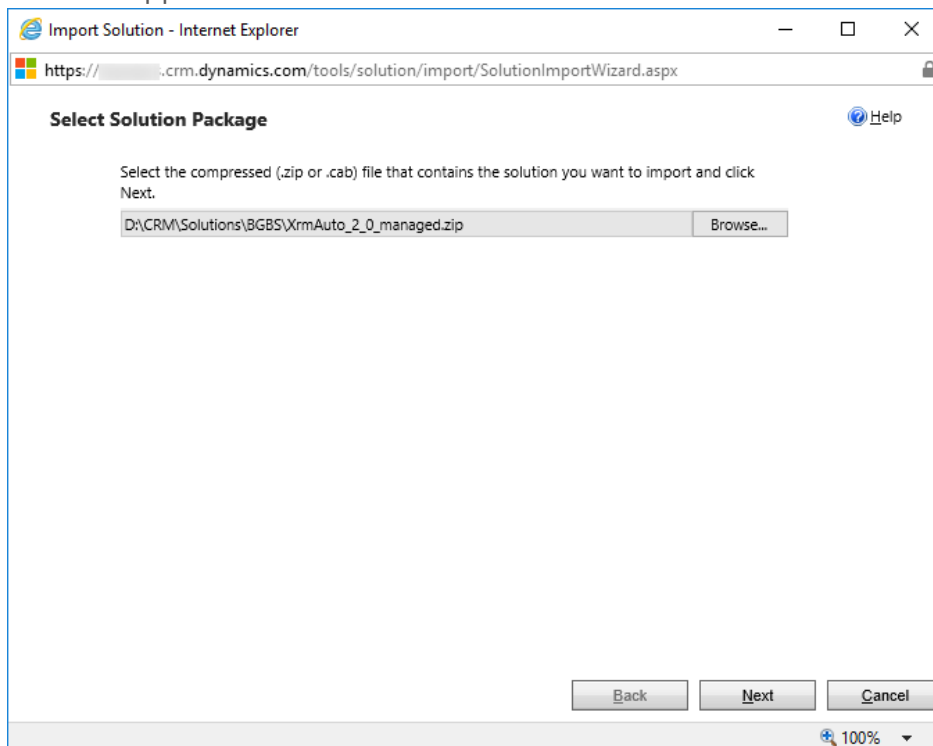
Solution Import

In your CRM environment click on the Settings Navigation area, and under the Customization Group select Solutions.

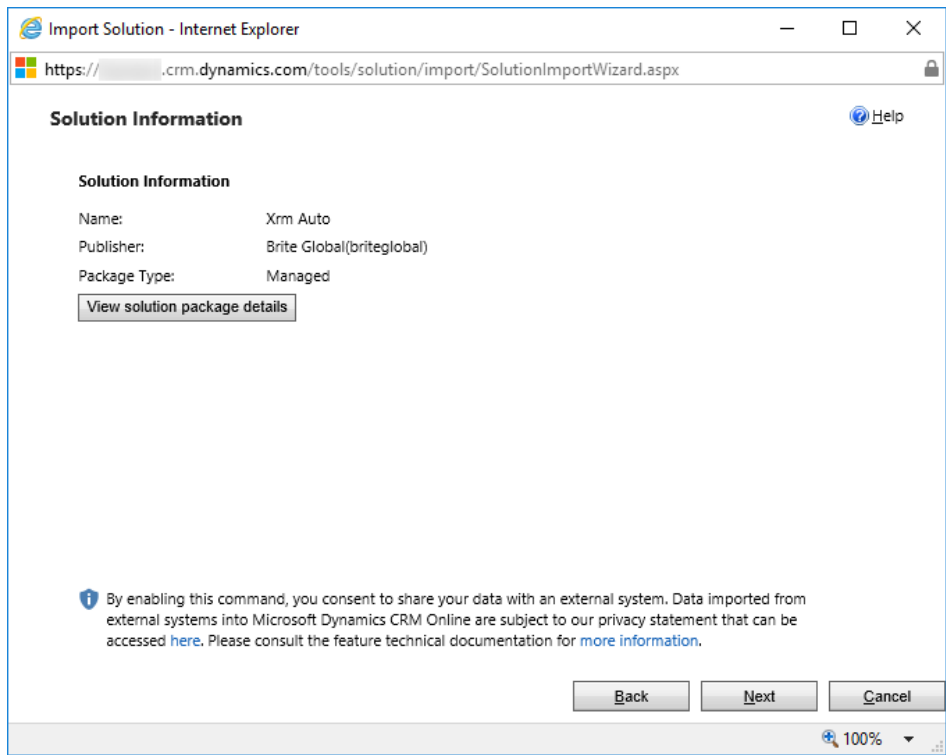
Click on the Import button on the Solution grid toolbar as shown in the image below.



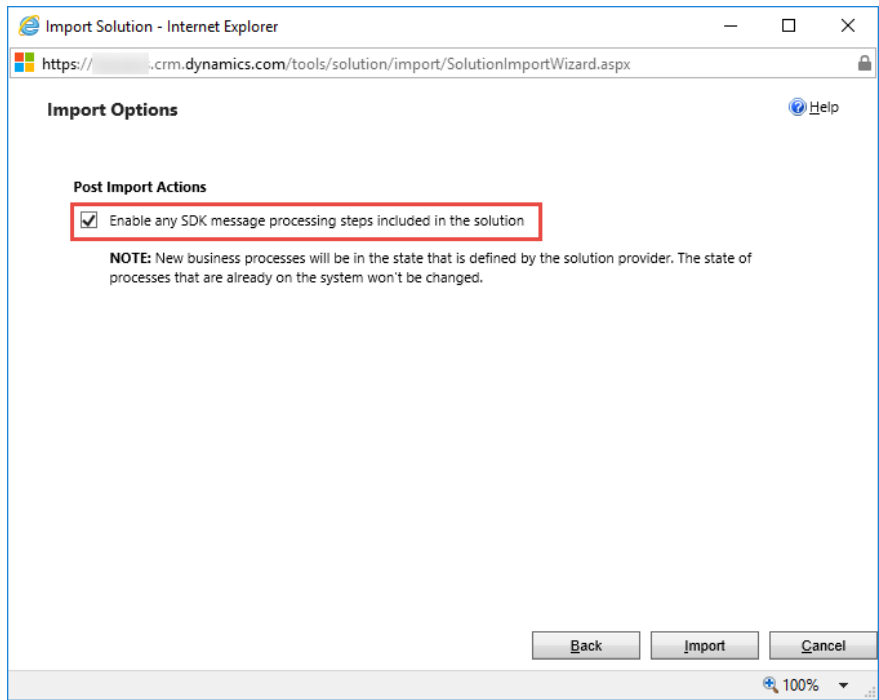
This will launch the Import Solution wizard. In the Select Solution Package page, click on the Browse button, navigate to the folder containing the managed solution installation file that you received, and select the file so that it appears in the text box next to the Browse button:



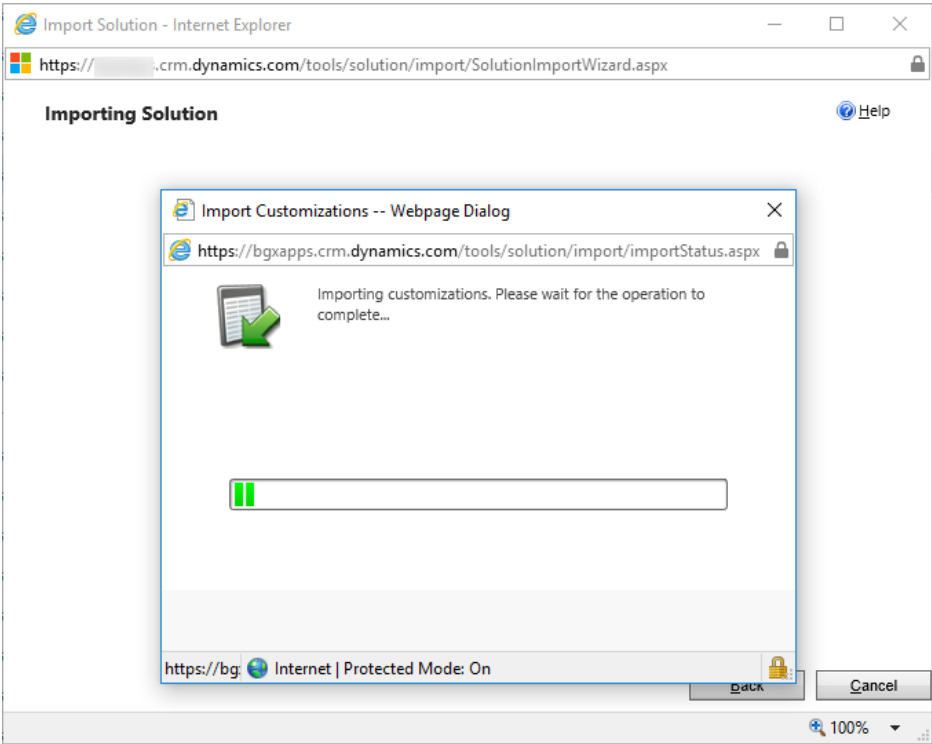
Click on the Next button. This will show you the Solution information page. If you would like to see the contents of the solution package, you can click on the *View solution package details*, however this is not required.



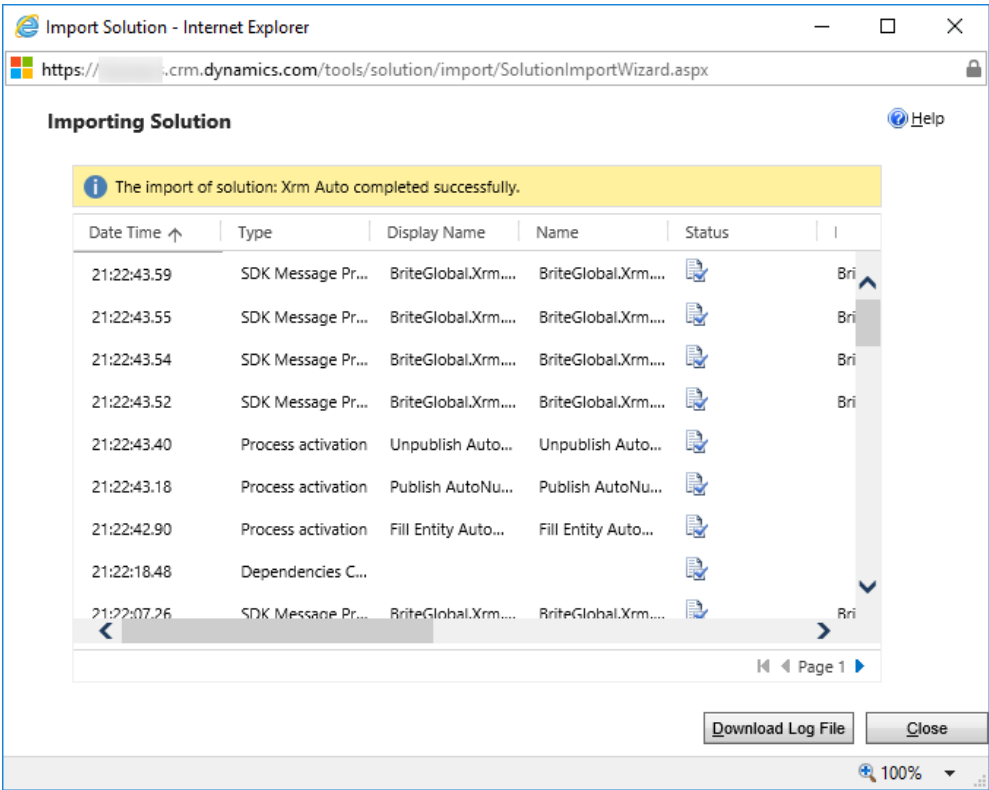
Click on the Next button. The Import Options page will display. In the Post Import Actions area, click on the checkbox that says *Activate any processes and enable any SDK message processing steps included in the solution*, as shown below.



Click on the Next button. The import of the solution will commence, and the progress will be displayed as shown in the image below:



Once the solution has been imported an Installation summary page will appear as shown below:



Click on the Close button. There is no need to publish your customizations at this point.

Security Role Requirements

After the installation of the managed solution has been completed, you can start adding your AutoNumber rules. Make sure to refresh your browser window.

The Auto Numbers entity will appear under Extensions in the Settings Navigation area, as shown in the picture to the right

Security Role Configuration

There are two security roles that have to be configured for the use of the AutoNumber.

The first role, is the user that will be creating the AutoNumber rules. If that user has the System Administrator security role, then you do not need to make any configuration. If the user is of a different security role, you will need to provide Organization Create, Read and Write access to the role as shown in the image below:

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Auto Number	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

The second role, is for ALL users of the application. If you have a shared Security role that is used by all users, make the modifications there. If you have different roles for different users, you will have to make the modification for each security role, or you can create a new role that will contain the AutoNumber permissions and add it to all the users. The required permissions for the regular users is displayed below:

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Auto Number	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

AutoNumber Rules

In this section we will show the different options for the different rules that are available for creating AutoNumbers.

Creating AutoNumber Rules

There are several different options for Creating AutoNumbers, and should be used based on your business requirements.

The following table explains each of these different options:

Relationship Type	Attribute Type	Description
Primary Entity*	Whole Number	Create an AutoNumber for an entity, and store the AutoNumber in a numeric field in the entity
Primary Entity*	Single Line of Text	Create an AutoNumber for an entity, and store the AutoNumber in a text field in the entity



Additional options for the creation of AutoNumber exist in the Enterprise edition

The option to create a single AutoNumber across multiple entities, has been deprecated.

AutoNumber Numeric Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against. Use lowercase letters when using the entity names, such as account.

Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Primary Entity. This means that we are not running rules based on other values in the entity.
Attribute Type	Whole Number. This AutoNumber is numeric, and does not support custom rules using Prefix and Suffix numbers.
Field Name	The name of the attribute in the target Entity. This is the Whole Number field where the AutoNumber will be stored.
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Primary Entity with a Whole Number Attribute Type.

The screenshot shows the configuration page for an AutoNumber rule. The title is "Account Entity Number AutoNumber for crm_id field". The "General" tab is selected. The configuration details are as follows:

Field	Value
Name	Account Entity Number AutoNumber for crm_id field
Entity Name	account
Relationship Type	Primary Entity
Attribute Type	Whole Number
Field Name	crm_id
Starting Value	10,000
Current Value	10,000
Next Value	10,000
Preview	--

The status at the bottom is "Active".

AutoNumber Text Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against. Use lowercase letters when using the entity names, such as account.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Primary Entity. This means that we are not running rules based on other values in the entity.
Attribute Type	Single Line of Text. This AutoNumber is a string value, and therefore supports the use of Prefixes and Suffixes.
Field Name	The name of the attribute in the target Entity. This is the Single Line of Text field where the AutoNumber will be stored.
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system
Prefix	A text value that can be entered as a prefix for the AutoNumber. This field is not required.
Suffix	A text value that can be entered as the suffix for the AutoNumber. This field is not required
Length	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Primary Entity with a Single Line of Text Attribute Type.

+ NEW
DEACTIVATE
DELETE
AUTO FILL NUMBERS
SET NEXT AUTONUMBER
PUBLISH
EMAIL A LINK
RUN WORKFLOW
...
↑
↓

AUTO NUMBER : INFORMATION

Account Entity Text AutoNumber for..

Entity Name*
account

Field Name*
accountnumber

General

Name*
Account Entity Text AutoNumber for accountnumber field

Entity Name*
account

Relationship Type*
Primary Entity

Attribute Type*
Single Line of Text

Field Name*
accountnumber

AutoNumbering Value Settings

Starting Value*
10,000

Current Value*
10,000

Preview
--

Next Value*
10,000

Text AutoNumber Settings

Prefix
ACCT

Suffix
--

Separator Character
--

Length
5

Status
Active

Primary Entity Text AutoNumber Creation

In order to generate the AutoNumbers, as in our example for the account entity, simple create a new account record. Do not enter any data in the account number field. The account number field does not physically have to be on the form.

ACCOUNT INFORMATION

Account Name*
Los Angeles Department of Water and Power

Account Number*
--

Phone
--

Fax
--

Website
http://www.ladwp.com

Parent Account
--

Ticker Symbol

ACCOUNT INFORMATION

Account Name*
Los Angeles Department of Water and Power

Account Number*
ACCT10000

Phone
--

Fax
--

Website
http://www.ladwp.com

Parent Account
--

Ticker Symbol
--

The following tables shows an example of how the auto numbers will appear:

Prefix	Suffix	Length	Next Value	Generated AutoNumber
ACCT		5	10000	ACCT10000
ACCT		5	10001	ACCT10001

The logic basically is irrelevant of the entity, so when you create a new contact or customer record, the AutoNumber gets incremented, which means that you can have gaps within a particular entity, but not when you look at the data of both entities.