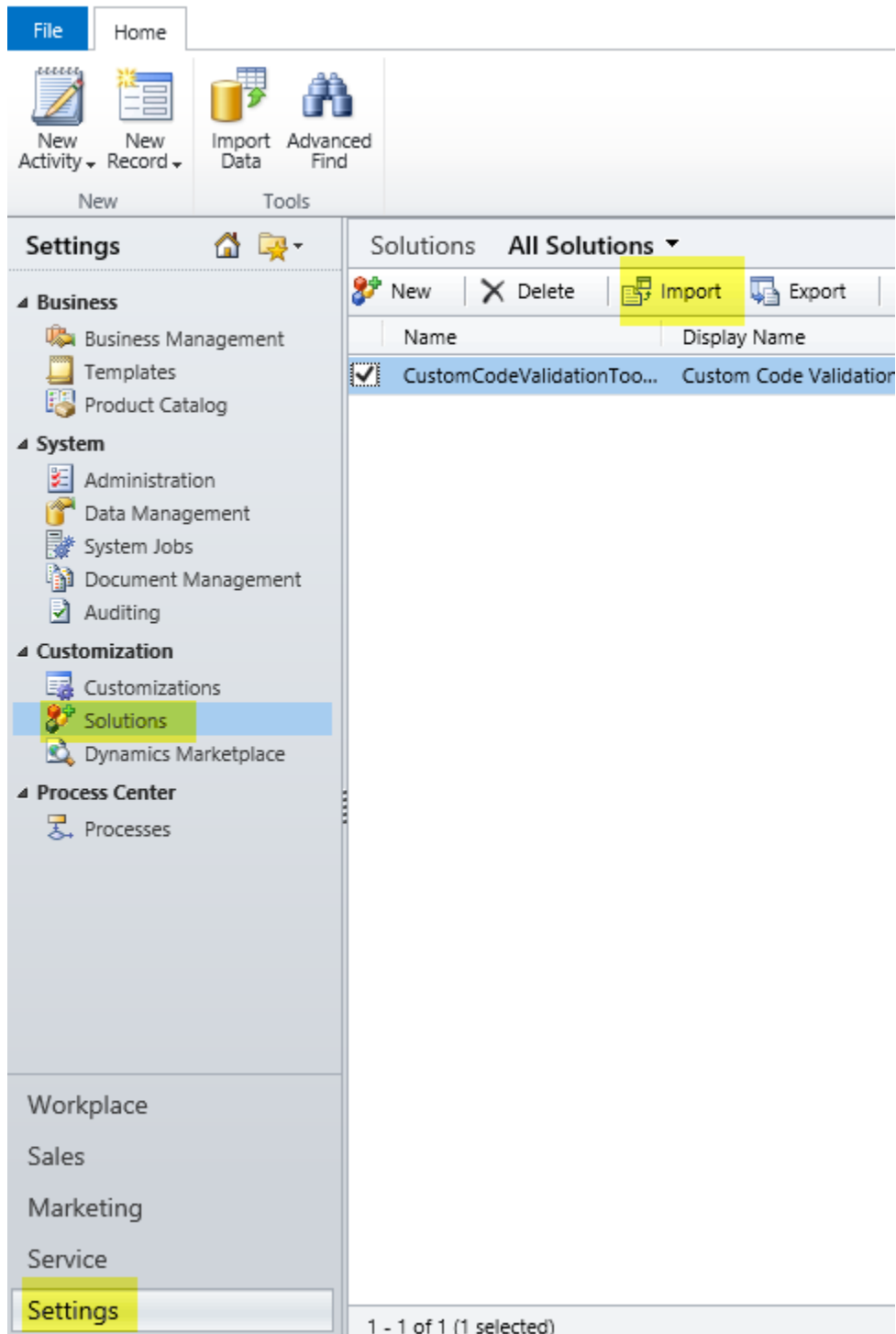# Import Workflow & Case Entity Solution

1. Navigate to Settings|Solutions & import Case_sublime_1_0_0_0.zip as shown below

Select Solution Package ⬤ Help

Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

| \Sublime\Case_sublime_1_0_0_0.zip | Browse... |

| Back | Next | Cancel |

2. Check Activate any process….

Import Options ⬤ Help

⚠ Changes applied by importing an unmanaged solution cannot be uninstalled. Do not install this solution if you want to roll back these changes.

Post Import Actions

☑ Activate any processes and enable any SDK message processing steps included in the solution.

| Back | Next | Cancel |

3. Click next and at the end publish all customizations.

Update existing Case records

1. Navigate to case entity records in CRM
2. Select Workflow view from view drop down.

3. Select all case records in the view.

4. Click on Run Workflow button on the top.

5. Select Case Subject & click ok.

Look Up Record

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Process ▼ ☐ **Show Only My Records**

View: On Demand Workflows ▼

Search: Search for records 🔍

	Process Name	Created On	Modified On	Status	Owne ⟳
☑	Case Subject	12/13/2013 12:3...	12/16/2013 1:36...	Activated	First nam

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1 - 1 of 1 (1 selected) ⋉ ◄ Page 1 ►

Properties | New

OK | Cancel | Remove Value

6. Confirm workflow execution by clicking ok.

Confirm Application of Workflow

This workflow will be applied to 25 Cases.

This workflow will be applied to 25 Cases.

You can monitor workflow jobs by opening each Case and clicking Workflows.

Are you sure that you want to continue?

OK | Cancel

7. See the last two columns. Requestor type field value is same as corresponding Subject.

	Case Number	Title (Issue Overview)	Subject	Requestor Type ▲
☐	CAS-01004-N0X...	Damaged during shipment...	Delivery	Delivery
☐	CAS-01005-F5J0...	Defective item delivered (s...	Delivery	Delivery
☐	CAS-01009-V2F...	Item defective (sample)	Delivery	Delivery
☐	CAS-01010-N1K...	Item defective on delivery...	Delivery	Delivery
☐	CAS-01014-J1G...	Missing parts (sample)	Delivery	Delivery
☐	CAS-01000-Y8R...	Average order shipment ti...	Information	Information
☐	CAS-01002-H7S...	Contact information reque...	Information	Information
☐	CAS-01003-H7D...	Contact information requir...	Information	Information
☐	CAS-01008-P9F...	Information on the produc...	Information	Information
☐	CAS-01031-M6L...	Shipping time information...	Information	Information
☐	CAS-01011-G0V...	Maintenance information (...	Maintenance	Maintenance
☐	CAS-01012-K6N...	Maintenance required (sa...	Maintenance	Maintenance
☐	CAS-01013-C3S...	Maintenance time informa...	Maintenance	Maintenance
☐	CAS-01028-P8N...	Service requested (sample)	Maintenance	Maintenance
☐	CAS-01029-Y4J5...	Service required (sample)	Maintenance	Maintenance
☐	CAS-01007-D7F...	Faulty product catalog (sa...	Products	Products
☐	CAS-01020-Y8C...	Product feature informatio...	Products	Products
☐	CAS-01023-Z5Y...	Product related question (...	Products	Products
☐	CAS-01032-W0...	Incorrect product informat...	Products	Products
☐	CAS-01015-T3F...	Need help (sample)	Query	Query
☐	CAS-01022-G3K...	Product question (sample)	Query	Query
☐	CAS-01030-C1C...	Shipment question (sample)	Query	Query
☐	CAS-01001-K9D...	Complete overhaul require...	Service	Service
☐	CAS-01016-Q7Z...	Noise from product (sampl...	Service	Service
☐	CAS-01027-X9K...	Service information requir...	Service	Service