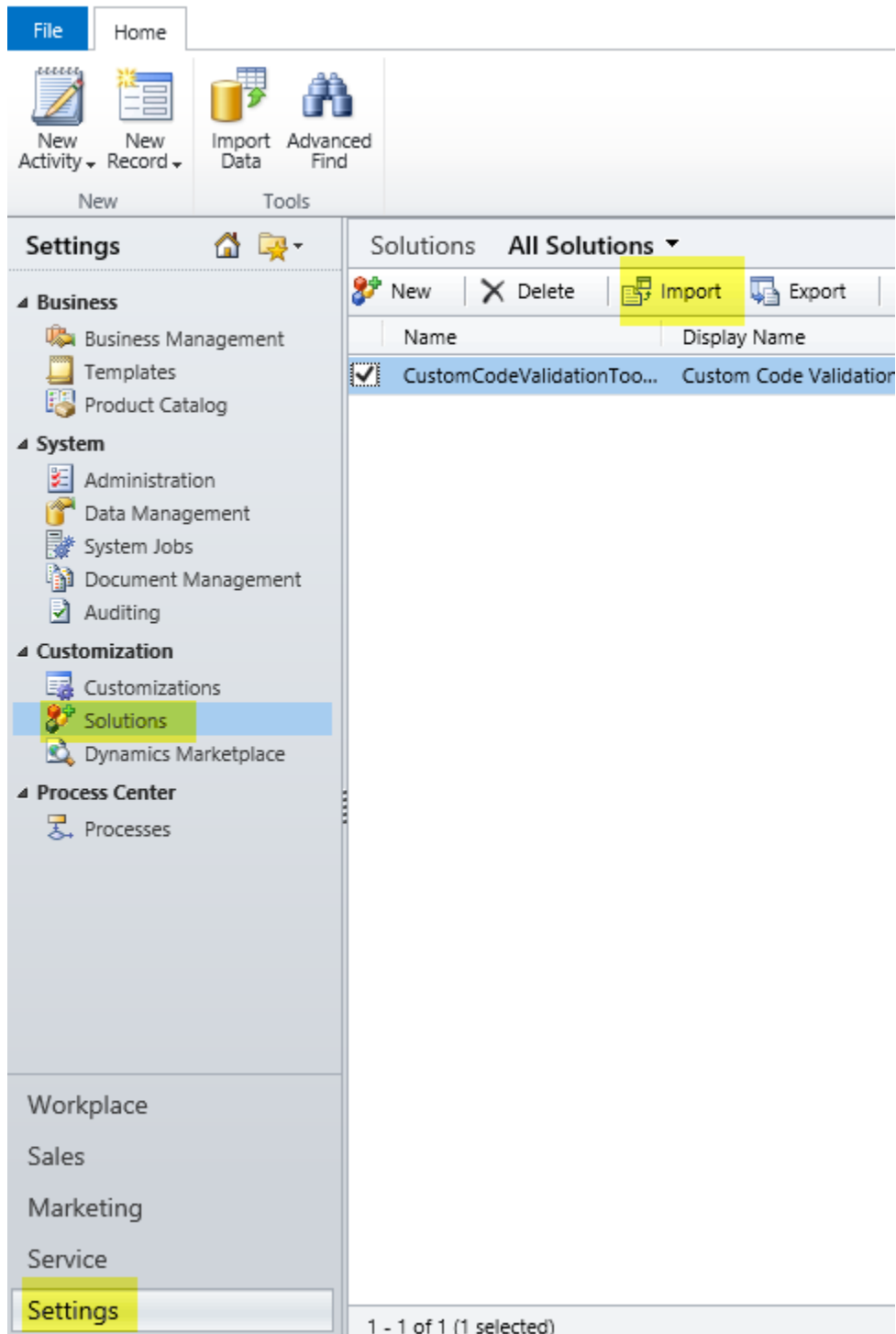


# Import Workflow & Case Entity Solution

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.

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.

Microsoft Dynamics CRM

File Cases View Charts Add Customize

New Edit Delete Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Export to Excel Filter

Records Actions Collaborate Process Data

Service Cases Accounts Service Calendar Articles Contracts Products Services Goals Goal Metrics Rollup Queries

Workplace Sales Marketing Service

Cases Active Cases

Case Number	Priority	Created
AS-01000-Y8R8S1	Normal	
AS-01001-K9D9R2	High	
AS-01002-H7S9S7	Normal	
AS-01003-H7D7L4	Normal	
AS-01004-N0X9S5	Low	
AS-01005-F5J0B6	Low	1
AS-01007-D7F6K3	Normal	
AS-01032-W0H7R7	Normal	
AS-01008-P9F6F8	Low	
AS-01009-V2F4X0	Normal	
AS-01010-N1K7F6	High	
AS-01011-G0V3S8	Low	
AS-01012-K6N6V5	Normal	
AS-01013-C3S4G8	High	
AS-01014-J1G7S8	Low	
AS-01015-T3F2S0	Normal	
CAS-01016-Q7Z5K8	High	
CAS-01020-Y8C3C1	Low	
CAS-01022-G3K5D9	Normal	
CAS-01023-Z5Y0R6	Normal	
CAS-01027-X9K1B7	High	
CAS-01028-P8N3Q8	Low	
CAS-01029-Y4J5B9	High	
CAS-01030-C1C6N8	Normal	

3. Select all case records in the view.

The screenshot shows the Salesforce interface with the 'Cases' tab selected. The top navigation bar includes 'File', 'Cases', 'View', 'Charts', 'Add', and 'Customize'. Below this is a toolbar with icons for 'New', 'Edit', 'Delete', 'Resolve Case', 'Cancel Case', 'Send Direct E-mail', 'Connect', 'Add to Queue', 'Assign', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', and 'Start Dialog'. The main content area is divided into a left sidebar with a 'Service' section containing links to 'Cases', 'Accounts', 'Contacts', 'Service Calendar', 'Articles', 'Contracts', 'Products', 'Services', 'Goals', 'Goal Metrics', and 'Rollup Queries'. The central pane shows a table of cases in 'Workflow View'. All 14 case records are selected, indicated by checkmarks in the first column. The table has columns for 'Case Number', 'Title (Issue Overview)', and 'Subject'.

Case Number	Title (Issue Overview)	Subject
CAS-01000-Y8R8S1	Average order shipment time (sample)	<a href="#">Information</a>
CAS-01001-K9D9R2	Complete overhaul required (sample)	<a href="#">Service</a>
CAS-01002-H7S9S7	Contact information requested (sample)	<a href="#">Information</a>
CAS-01003-H7D7L4	Contact information required (sample)	<a href="#">Information</a>
CAS-01004-N0X9S5	Damaged during shipment (sample)	<a href="#">Delivery</a>
CAS-01005-F5J0B6	Defective item delivered (sample)	<a href="#">Delivery</a>
CAS-01006-L7D3K7	Delivery never arrived (sample)	<a href="#">Delivery</a>
CAS-01007-D7F6K3	Faulty product catalog (sample)	<a href="#">Products</a>
CAS-01008-P9F6F8	Information on the product (sample)	<a href="#">Information</a>
CAS-01009-V2F4X0	Item defective (sample)	<a href="#">Delivery</a>
CAS-01010-N1K7F6	Item defective on delivery (sample)	<a href="#">Delivery</a>
CAS-01011-G0V3S8	Maintenance information (sample)	<a href="#">Maintenance</a>
CAS-01012-K6N6V5	Maintenance required (sample)	<a href="#">Maintenance</a>
CAS-01013-C3S4G8	Maintenance time information required (sample)	<a href="#">Maintenance</a>
CAS-01014-J1G7S8	Missing parts (sample)	<a href="#">Delivery</a>

4. Click on Run Workflow button on the top.

The screenshot shows the same Salesforce interface as before, but with the 'Run Workflow' button in the top toolbar highlighted in yellow. Below the toolbar, the 'Cases' tab is still selected, and the table of cases is visible. A 'Run Workflow' dialog box is open on the right side of the screen, providing instructions on how to run a workflow for a case.

**Run Workflow**

Run a workflow for this Case.

View the status of workflows Workflow tab of this record.

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:   ☐ Show Only My Records

View:

Search:

	Process Name	Created On	Modified On	Status	Owner
<input checked="" type="checkbox"/>	Case Subject	12/13/2013 12:3...	12/16/2013 1:36...	Activated	<a href="#">First nam</a>

1 - 1 of 1 (1 selected) Page 1

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?**

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

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