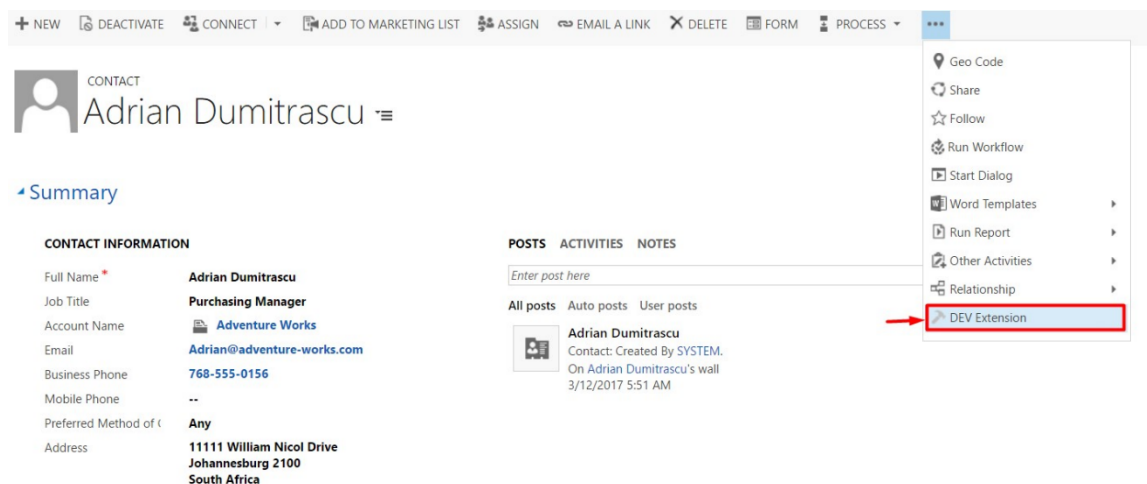
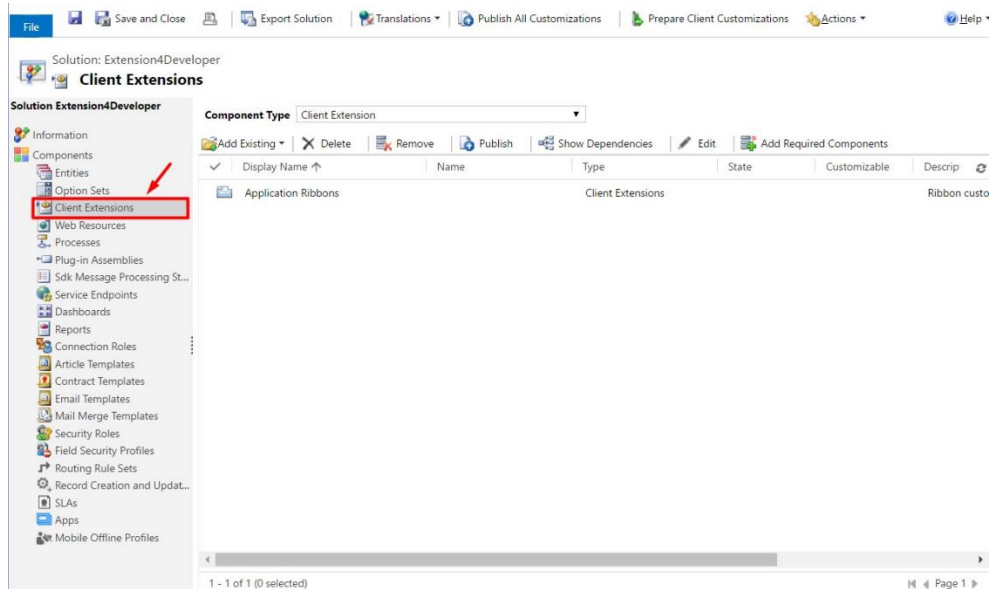


# CONFIGURATION FOR CRMT00L4DEV

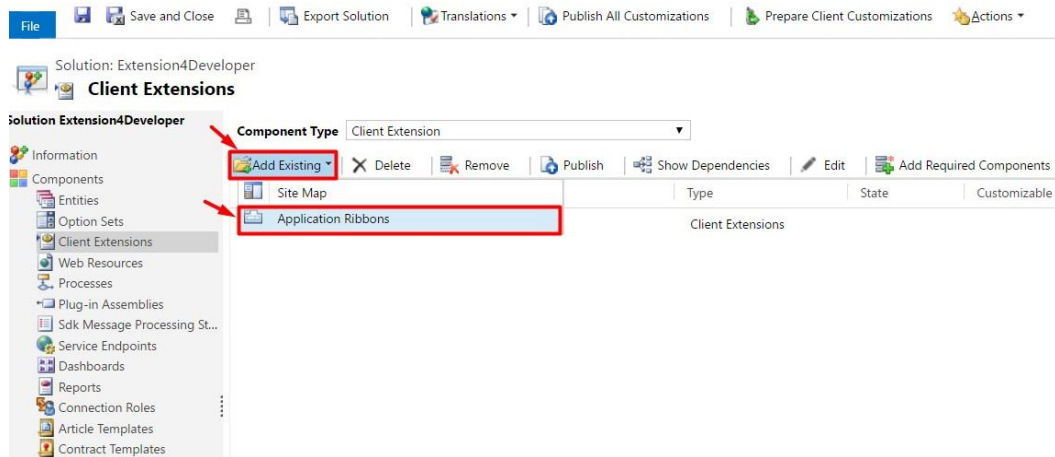
1. Import solution “**CRMT00L4Dev**” (base on your CRM version, select correct solution). You can refer to <https://support.microsoft.com/en-us/help/2925359/microsoft-dynamics-crm-online-releases> to know which solution can match with your CRM
2. Next, we will add button for using this tool. If you want to set up for all entity forms then you can follow **Step 6** to configure **Application Ribbon**. Otherwise you can move on to step 4 to set up for some particular entities



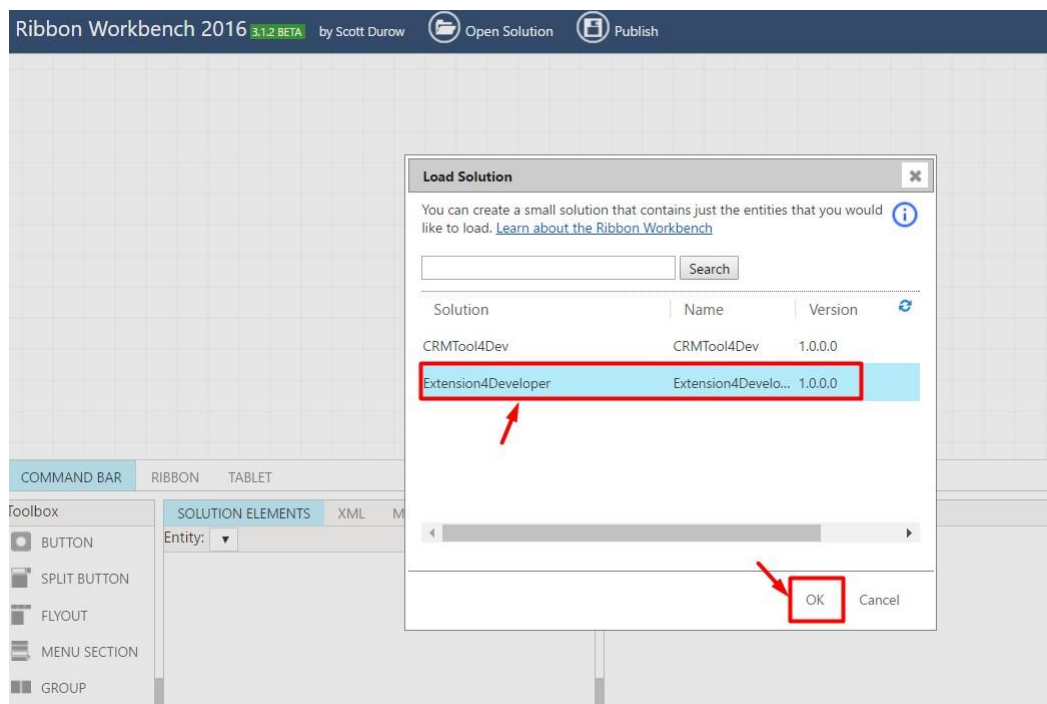
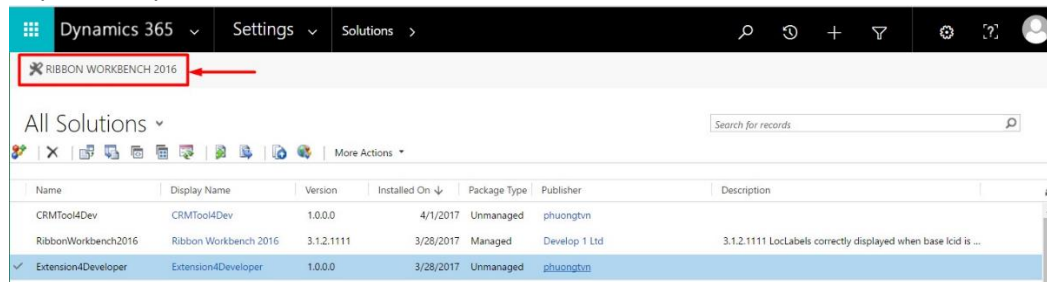
3. In your solution, click on **Client Extensions**



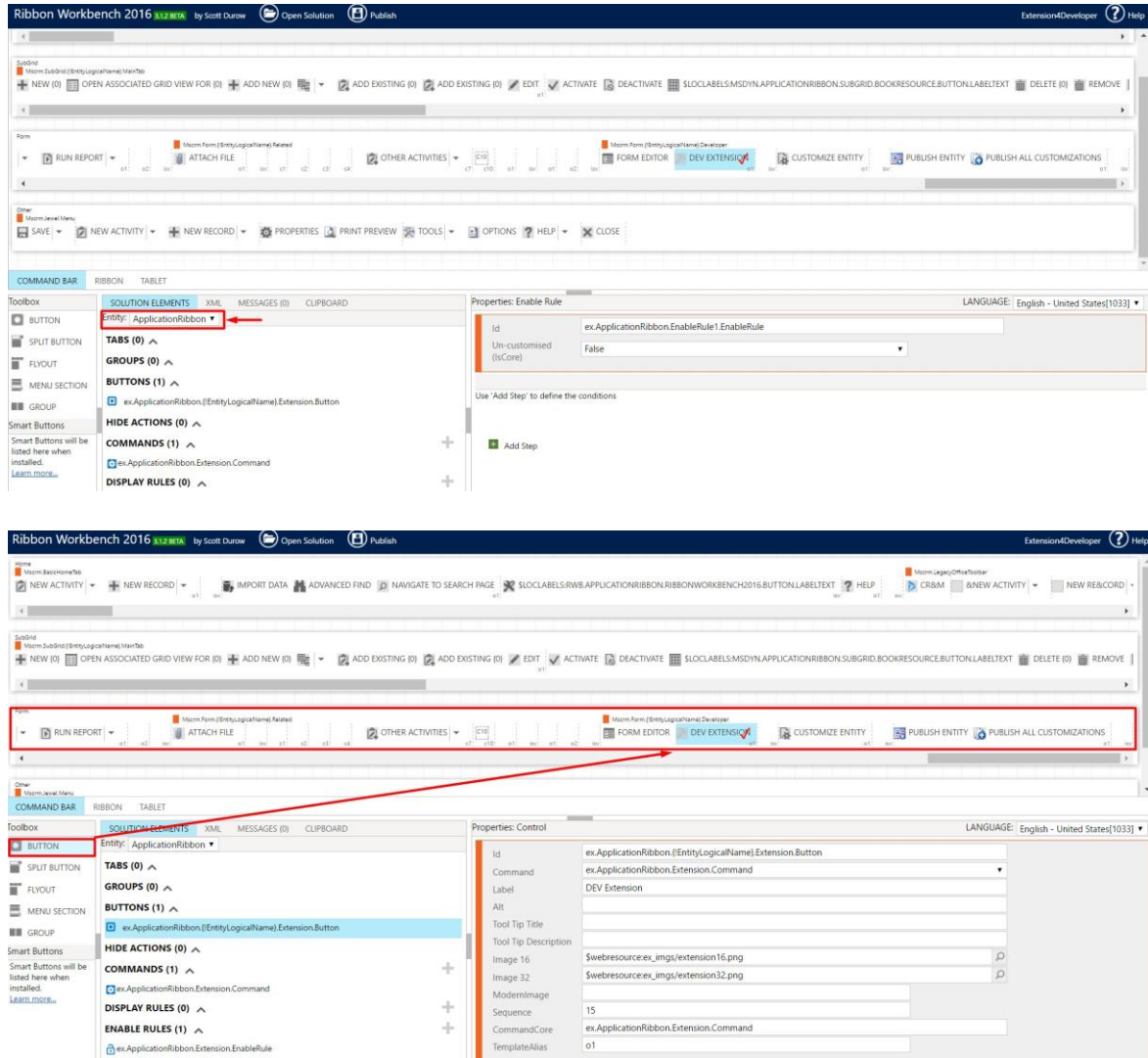
4. From Client Extensions, click **Add Existing** and select **Application Ribbons**



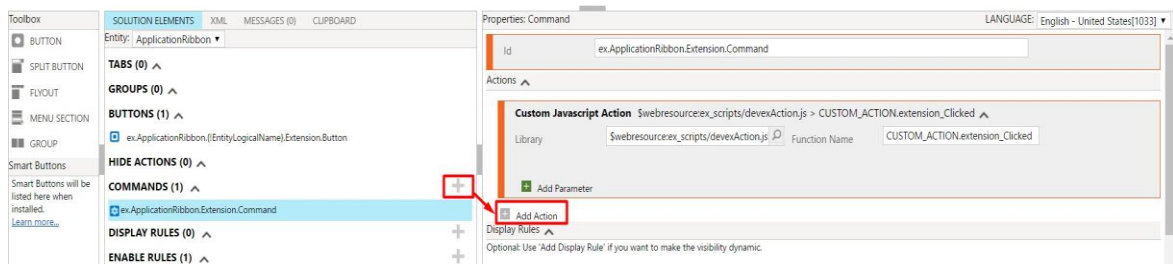
5. From solution list, open Ribbon Workbench add select your solution. If you haven't installed Ribbon Workbench, just follow this link <https://www.develop1.net/public/rwb/ribbonworkbench.aspx> to download solution file and import into your CRM



6. Under Form section, select entity and then add a button for our extension



7. Add command and configure action for the command. In my sample I added Custom Javascript Action



8. Add new enable rule for the command. In this case I recommend creating a new Custom Javascript Rule, so that we can configure this command to be displayed when it meet our condition (e.g. Only show if user has a specific security role)

The first screenshot shows the 'Properties: Enable Rule' window. The 'CustomRule' section is expanded, showing a 'FunctionName' of 'CUSTOM\_RULE.canEnable' and a 'Library' of '\$webresource:ex\_scripts/devexEnableRule.js'. A 'Crm Parameter' is defined with 'Name' as 'UserId' and 'Value' as 'UserId'. The 'Add Step' button is highlighted with a red box.

The second screenshot shows the 'Properties: Command' window. The 'Enable Rules' section is expanded, showing a list of rules. A new rule, 'ex.ApplicationRibbon.EnableRule1.EnableRule', is added and highlighted with a red box. The 'Add Enable Rule' button is also highlighted with a red box.

9. After publishing, back to our form and check

The screenshot shows the Dynamics 365 user interface. The top navigation bar includes 'Dynamics 365', 'Sales', 'Contacts', and 'Adrian Dumitrascu'. The main content area displays the contact record for 'Adrian Dumitrascu'. The 'Summary' tab is selected, showing contact information such as 'Full Name', 'Job Title', 'Account Name', 'Email', 'Business Phone', 'Mobile Phone', 'Preferred Method of Contact', and 'Address'. The 'Posts' tab is also visible, showing a post from 'Adrian Dumitrascu' created by the system on 3/12/2017 5:51 AM. The 'DEV Extension' button is highlighted with a red box.

https://phuongtvn6.crm5.dynamics.com/%7B636266591110000164%7D/WebResources/ex\_html/Extensi... Secure | https://phuongtvn6.crm5.dynamics.com/%7B636266591110000164%7D/WebResources/ex\_html/Extensi...























**INFO** ATTRIBUTES

Name	Value
Entity Name	contact
Form Type	Update
Record Url	<a href="https://phuongtvn6.crm5.dynamics.com/main.aspx?etn=contact&amp;pagetype=entityrecord&amp;id=%7B49A0E5B9-88DF-E311-B8E5-6C3BE5A8B200%7D">https://phuongtvn6.crm5.dynamics.com/main.aspx?etn=contact&amp;pagetype=entityrecord&amp;id=%7B49A0E5B9-88DF-E311-B8E5-6C3BE5A8B200%7D</a>
User ID	0D477B25-77A3-43B5-843E-1F3AB48CAA1F
User Name	tran phuong
User Roles	<b>System Administrator</b> {5b0fb70c-a206-e711-80f5-c4346bada684} <b>System Customizer</b> {be4eaf12-a206-e711-80f5-c4346bada684}

https://phuongtvn6.crm5.dynamics.com/%7B636266591110000164%7D/WebResources/ex\_html/Extensi... Secure | https://phuongtvn6.crm5.dynamics.com/%7B636266591110000164%7D/WebResources/ex\_html/Extensi...

**INFO** **ATTRIBUTES**

Input search value

Label	Name	Value	Field Type	Actions
Account Name	parentcustomerid	Name: <b>Adventure Works</b> ID: <b>A8A19CDD-88DF-E311-B8E5-6C3BE5A8B200</b> Entity: <b>account</b>	lookup	 
Address	address1_composite	1111 William Nicol Drive Johannesburg 2100 South Africa	memo	 
Anniversary	anniversary		datetime	 
Birthday	birthdate	Mon Feb 25 1985 00:00:00 GMT+0700 (SE Asia Standard Time)	datetime	 
Bulk Email	donotbulkemail	false	boolean	 
Business Phone	telephone1	768-555-0156	string	 
Credit Hold	creditonhold	false	boolean	 
Credit Limit	creditlimit		money	 
Currency	transactioncurrencyid		lookup	 
Description	description		memo	 
Email	donotemail	false	boolean	 
Email	emailaddress1	Adrian@adventure-works.com	string	