Module 8 Lab B

Using Ribbon Workbench

Objective

Add buttons to the Account Entity Command Bar to integrate the add existing contact customisation created in the previous module.

Scenario

The command bar will be customised with a new button that will invoke an earlier customisation

Step 1: Adding the Webresources (Custom iconas for the UI)

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| 1 | Add the Account entity and all the associated assets to the Module 8 solution |
| 2 | Download the latest version of the Ribbon WorkBench from the shortcut in the starter folder. The ribbon workbench is dynamics app that can be imported as a solution . |
| 3 | When the download is complete import the solution into dynamics    Notice that the imported solution has added a link to the Ribbon Workbench app |
| 4 | Open the Ribbon workbench app and when prompted to load the solution for module 8. This is the solution that we will associate with the Command Bar customisations for the Account entity. It may some time to complete the download ! |
| 5 | We want to customise the Command Bar for the Account entity to select that entity from the solution elements drop down list. |
| 6 | Create a display rule Named DisplayWhenCountryIsValid        We will add steps to the rule so that any button associated with this rule will only appear if the Account is in one of the following countries USA, France, Germany, Turkey and New Zealand |
| 7 | And an OrRule using the Add Step button    Within the OrRule add steps that check the value of the of the address1\_country to see if they match one of the allowed countries.      Add additional ValueRules withing the OrRule for  Germany  USA  US  Turkey  New Zealand  Make sure you separate the entries with an "OR" between each one and set the default value to False. |
| 8 | Now create a command named AddExistingContactsCommand    The command will reference the ContactSelector.html  Click on the "Add Action" button in the Actions list and select Url Action    Configure the command to navigate to the ContactSelector.html webresource. Use the following Address  $webresource:new\_/html/ContactSelector.html  Make sure that Pass parameters is set to True and display the webresource as a modal dialog of size 300 x 500px. |
| 9 | Now associate the display rule that you created earlier with this command |
| 10 | Now drag a button from the toolbox    and place it on the Mscrm.Form.account.MainTab between the existing "Save & Close" and "New" Buttons .    Configure the properties of the button as follows.   |  |  | | --- | --- | | Id | AddExistingAccountButton | | Command | AddExistingContactsCommand | | Label | Add Existing Contacts | | CommandCore | AddExistingContactsCommand |   Feel free to add a Tool Tip info if you wish.    The button is now associated with the command you created earlier which in turn is associated with the custom display rule. |
| 9 | Publish your customisation (it may take a while)    Test it by opening an account. if the account is in one of the countries in the filter list, the button should be displayed and when clicked should navigate to the ContactSelector page.  If it isn't the change the Account Address to be in France, or Germany or other country in the filter list and save your change and the button should appear.  The other button on the form that was added in Module 7 Lab C is now redundant and can be removed from the form. |