

XRM.Multiselect Manual

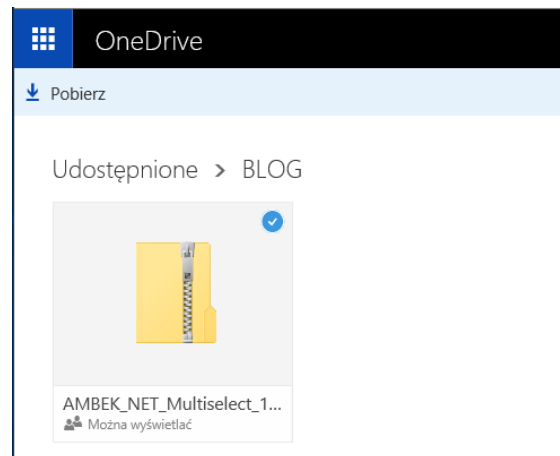
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Version	Date	Author
1.0.0.0	2015-08-03	ambek.net

Download solution:

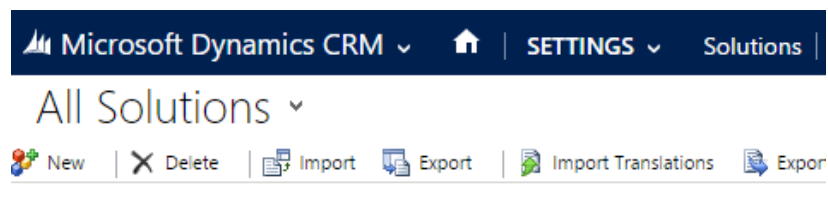
Click on link <http://1drv.ms/1g1dxU2>:



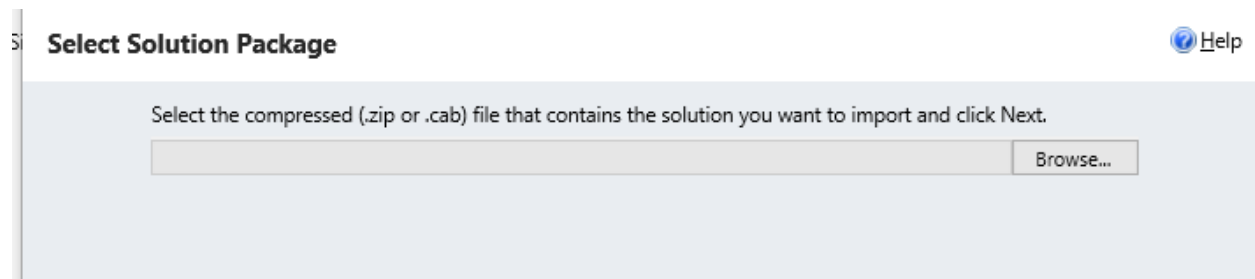
Click on: AMBEK_NET_Multiselect_1_0_0_0.zip, and download to local drive.

Upload solution to Dynamics CRM.

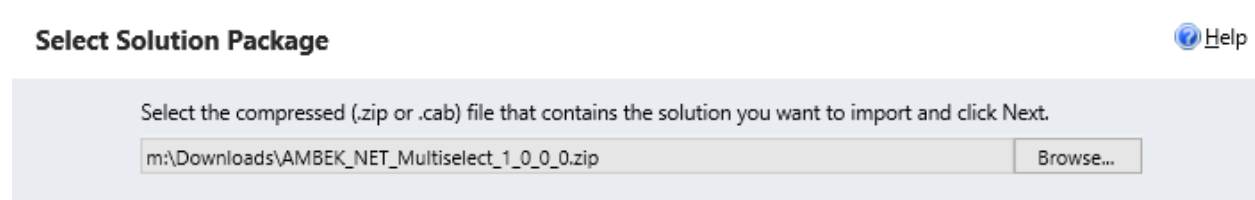
Open Dynamics webpage and navigate to Settings / Solutions, click Import:



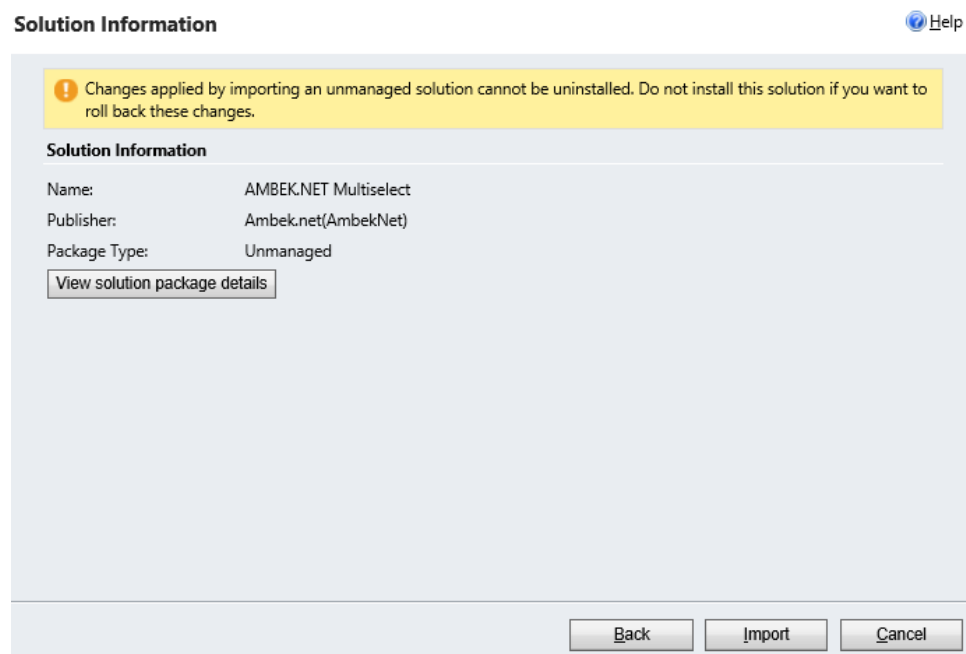
On dialog windows click Browse:



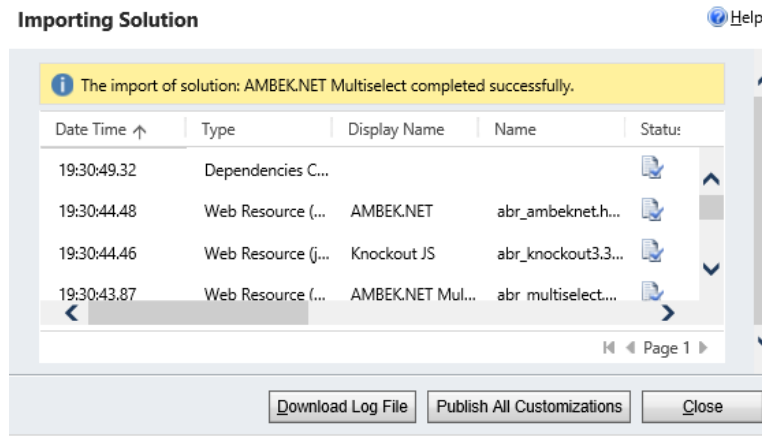
And select file with solution:



Click Next and Import:



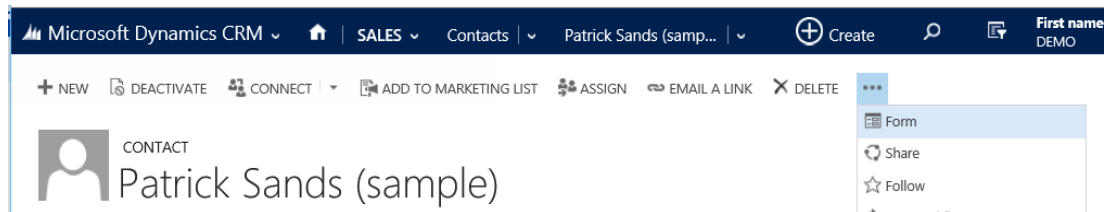
Then click Publish All Customizations and Close:



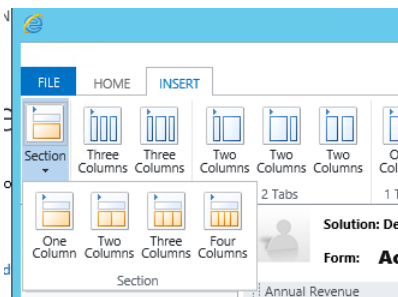
Customize your entity

Go to the form you want to customize.

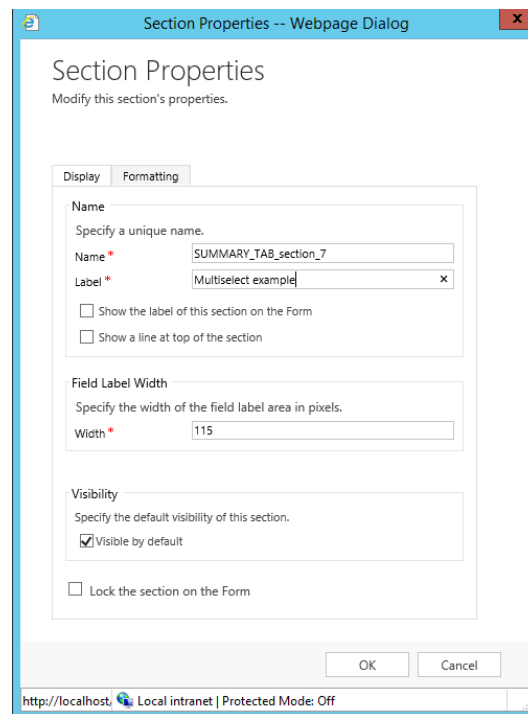
Click “...” button and then Form:



Add new selection (you can drag and drop section):



Write section name and make sure that checkbox Visible by default is checked:

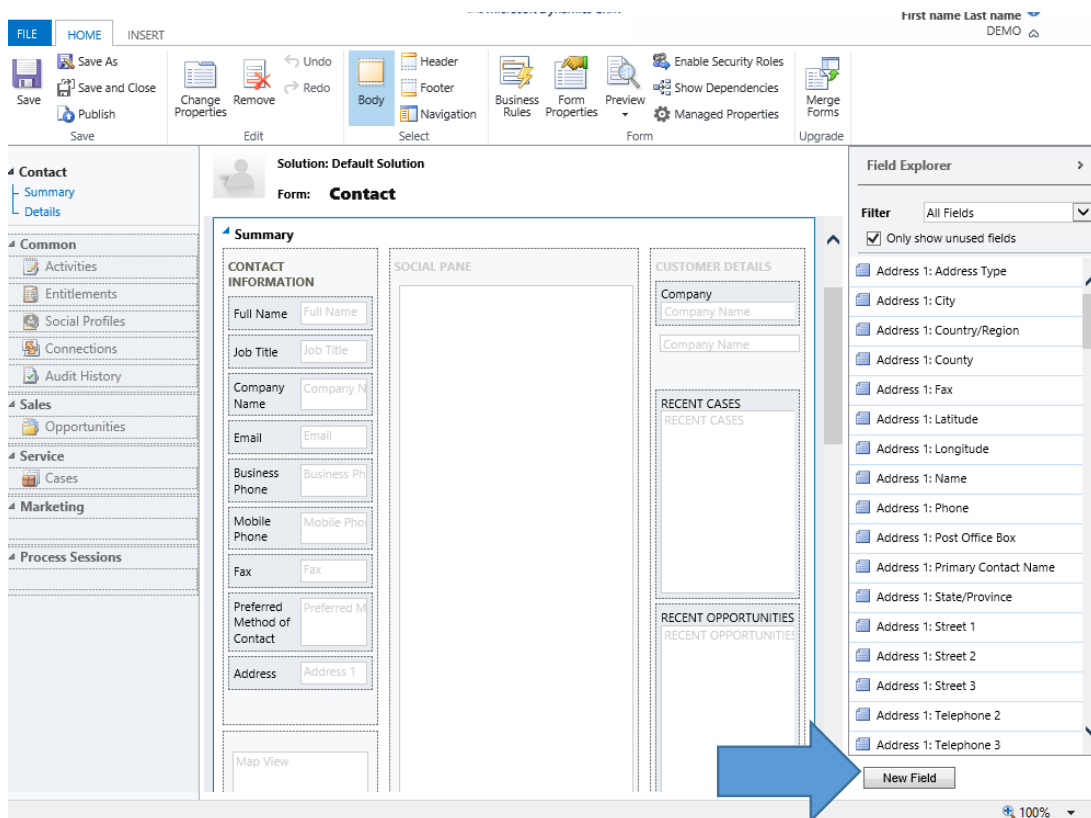


The image shows a 'Section Properties -- Webpage Dialog' window. It has two tabs: 'Display' and 'Formatting'. The 'Display' tab is active. It contains the following fields and options:

- Name:** 'Specify a unique name.' with a text box containing 'SUMMARY_TAB_section_7'.
- Label:** 'Multiselect example' with a text box and a clear button (X).
- ☐ Show the label of this section on the Form
- ☐ Show a line at top of the section
- Field Label Width:** 'Specify the width of the field label area in pixels.' with a text box containing '115'.
- Visibility:** 'Specify the default visibility of this section.'
- ☒ Visible by default
- ☐ Lock the section on the Form

At the bottom are 'OK' and 'Cancel' buttons. The status bar at the very bottom shows 'http://localhost/ Local intranet | Protected Mode: Off'.

Now you have to add fields to entity and you can do this directly from form editor:



The image shows the 'Form Editor' interface for a 'Contact' entity. The top ribbon includes 'FILE', 'HOME', and 'INSERT' tabs. The 'HOME' tab is active, showing various toolbars like 'Save', 'Edit', 'Select', 'Form', and 'Upgrade'. The main workspace shows a 'Summary' form for the 'Contact' entity, with sections for 'CONTACT INFORMATION', 'SOCIAL PANE', and 'CUSTOMER DETAILS'. On the right, the 'Field Explorer' pane is open, showing a list of fields for the 'Contact' entity. A blue arrow points from the 'Field Explorer' to the 'New Field' button at the bottom right of the workspace.

Field Explorer

Filter: All Fields

☒ Only show unused fields

- Address 1: Address Type
- Address 1: City
- Address 1: Country/Region
- Address 1: County
- Address 1: Fax
- Address 1: Latitude
- Address 1: Longitude
- Address 1: Name
- Address 1: Phone
- Address 1: Post Office Box
- Address 1: Primary Contact Name
- Address 1: State/Province
- Address 1: Street 1
- Address 1: Street 2
- Address 1: Street 3
- Address 1: Telephone 2
- Address 1: Telephone 3

New Field

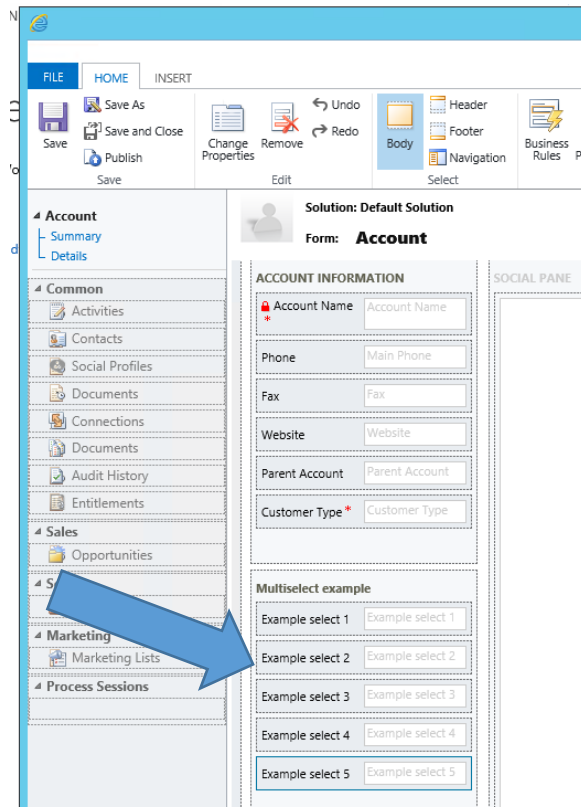
Field should be Two option:

The screenshot shows a 'Field: New for Account -- Webpage Dialog' window. The 'General' tab is active. The 'Schema' section includes 'Display Name' (Example select 1), 'Name' (abr_Exampleselect1), 'Field Requirement' (Optional), and 'Searchable' (Yes). 'Field Security' is set to 'Disable' and 'Auditing' is set to 'Enable'. The 'Description' field is empty, and a blue arrow points to it. The 'Type' section shows 'Data Type' as 'Two Options' and 'Field Type' as 'Simple'. At the bottom, there are 'Move Up', 'Move Down', and 'Edit' buttons.

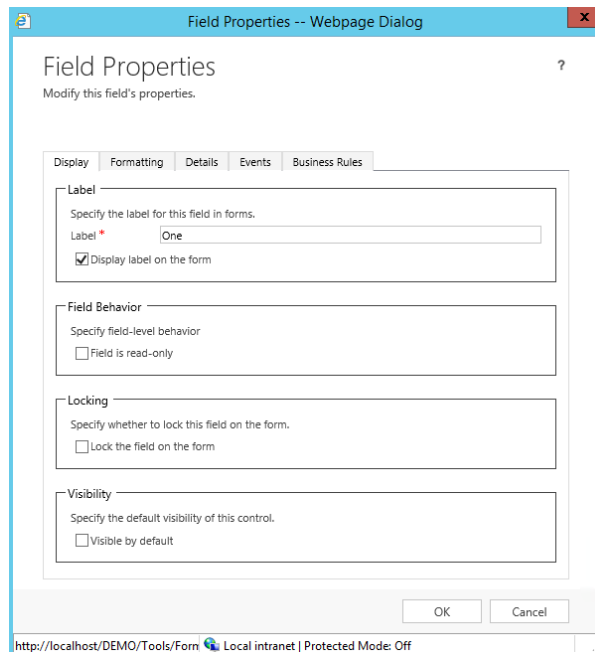
Note: use full name with the same prefix to see all this fields in advanced find together:

The screenshot shows an advanced find list for 'Accounts'. The 'Look for' dropdown is set to 'Accounts'. The list of fields includes: Credit Hold, Credit Limit, Credit Limit (Base), Currency, Customer Type, Description, Do not allow Emails, Do not allow Faxes, Do not allow Mails, Do not allow Phone Calls, Email, Email Address 2, Email Address 3, Example select 1, Example select 10, Example select 2, Example select 3, Example select 4, Example select 5, Example select 6, Example select 7, Example select 8, Example select 9, and Exchange Rate. A blue arrow points to 'Example select 10'.

Add new fields to new section on form:



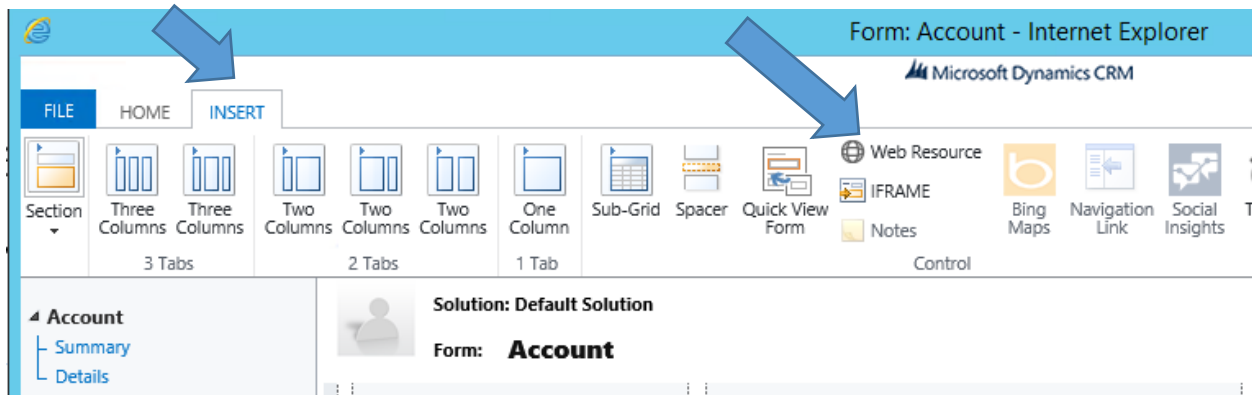
To change form labels and visibility double click on field:



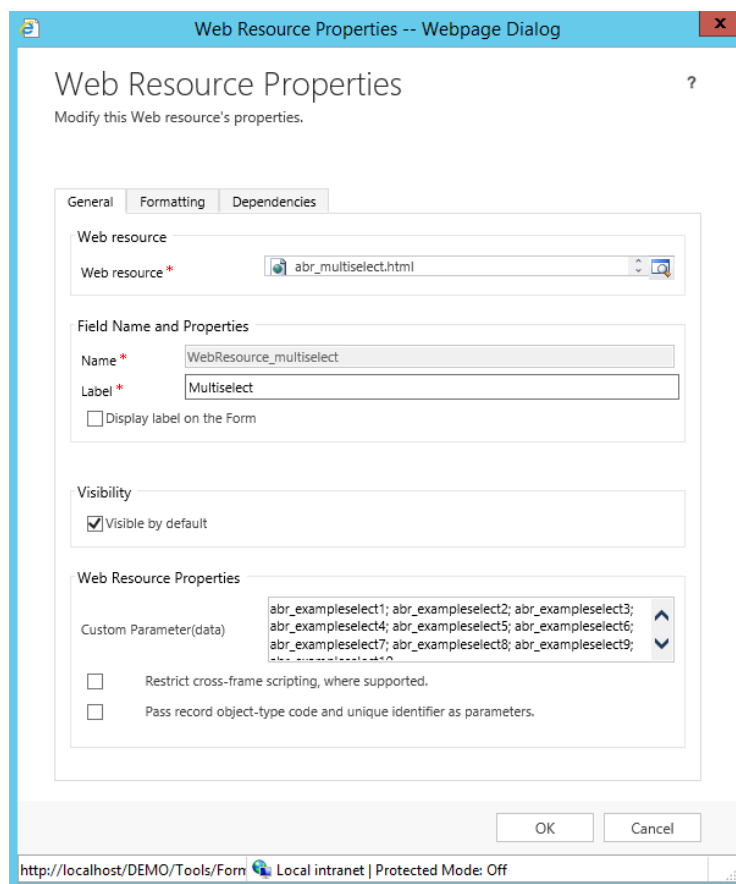
Note: label will be visible as button name.

Add and setup webresource

Add webresource to form (click Insert tab and Webresource):



Select abr_multiselect.html web resource and setup fields:



Use semicolon (“;”) to separate fields (spacebar will be ignored):

Web Resource Properties

Custom Parameter(data)

```
abr_exampleselect1; abr_exampleselect2; abr_exampleselect3;  
abr_exampleselect4; abr_exampleselect5; abr_exampleselect6;  
abr_exampleselect7; abr_exampleselect8; abr_exampleselect9;  
abr_exampleselect10
```

- ☐ Restrict cross-frame scripting, where supported.
- ☐ Pass record object-type code and unique identifier as parameters.

Fix default Dynamics formatting by clicking on Formatting tab:

The screenshot shows the 'Web Resource Properties' dialog box with the 'Formatting' tab selected. A blue arrow points to the 'Formatting' tab. Another blue arrow points to the 'Number of Rows' input field, which contains the value '2'. A blue speech bubble points to this field with the text 'Depending on the numbers of fields'. A third blue arrow points to the 'Display border' checkbox, which is unchecked.

Web Resource Properties
Modify this Web resource's properties.

General **Formatting** Dependencies

Layout
Select the number of columns the control occupies:

- ☒ One column
- ☐ Two columns
- ☐ Three columns
- ☐ Four columns

Row Layout
Select the number of rows the control occupies:

Number of Rows:

☐ Automatically expand to use available space.

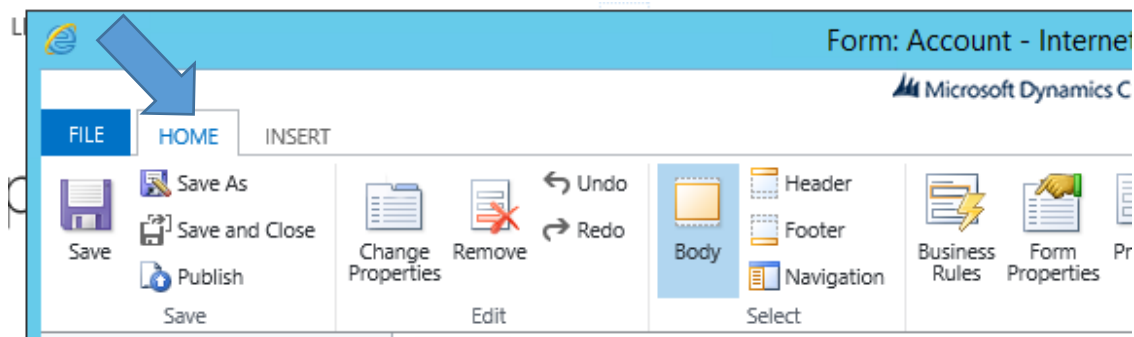
Scrolling
Select the scrolling type for the IFRAME.

Scrolling:

Border
Specify whether a border is displayed.

☐ Display border

Save and publish your changes by clicking Save on home tab and Publish:



Enjoy final effect:

+ NEW DEACTIVATE CONNECT | ▾ ADD TO MARKETING LIST ASSIGN EM

ACCOUNT
City Power & Light (sample)

Summary

ACCOUNT INFORMATION

Account Name *	City Power & Light (sample)
Phone	555-0155
Fax	--
Website	http://www.cpandl.com/
Parent Account	--
Customer Type *	Individual

Multiselect example

One

Two

Three

Four

Five

Six

Seven

Eight

Nine

Ten

ADDRESS

3397 Rancho View Drive
Redmond, WA 90000

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts

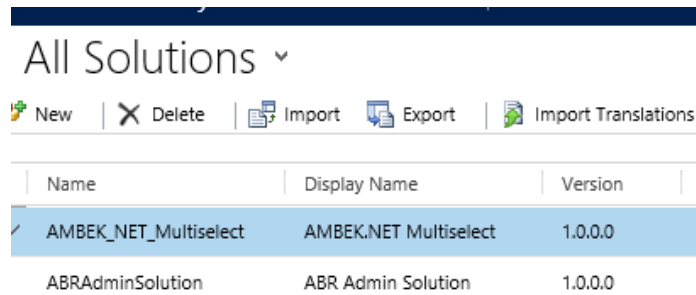
Defective item delivered (sample)
Case: Created by First name Last name won Opportunity & Light (sample).
On Defective item delivered (sample) wall
3/3/2015 7:16 AM

Very interested in our product (sample)
First name Last name won Opportunity & Light (sample); z\$40,201.49.
Co On Very interested in our product (sample)'s wall
3/3/2015 7:16 AM

Very interested in our product (sample)
Opportunity: Created by First name Last name won Opportunity & Light (sample).

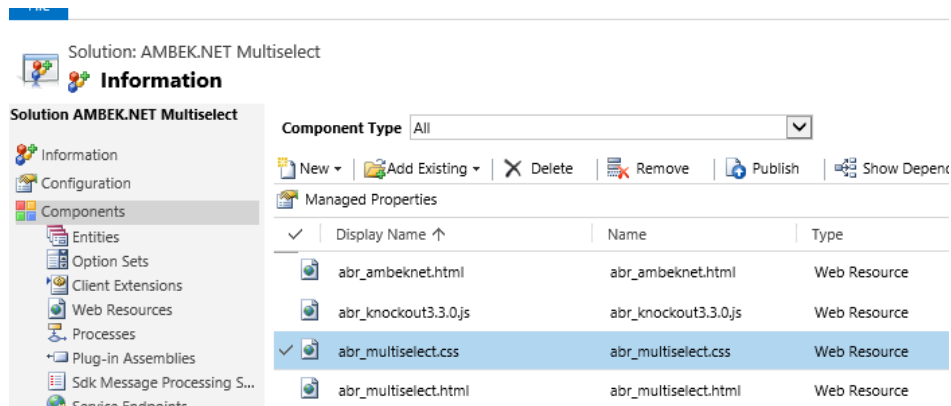
Appendix

If you are using Dynamics 2015 update 1 you may want to change color of buttons. In this case go to solution (Settings/Solutions) and double click on AMBEK_NET_Multiselect:



Name	Display Name	Version
AMBEK_NET_Multiselect	AMBEK.NET Multiselect	1.0.0.0
ABRAAdminSolution	ABR Admin Solution	1.0.0.0

Double-click on abr_multiselect.css:



Solution: AMBEK.NET Multiselect

Information

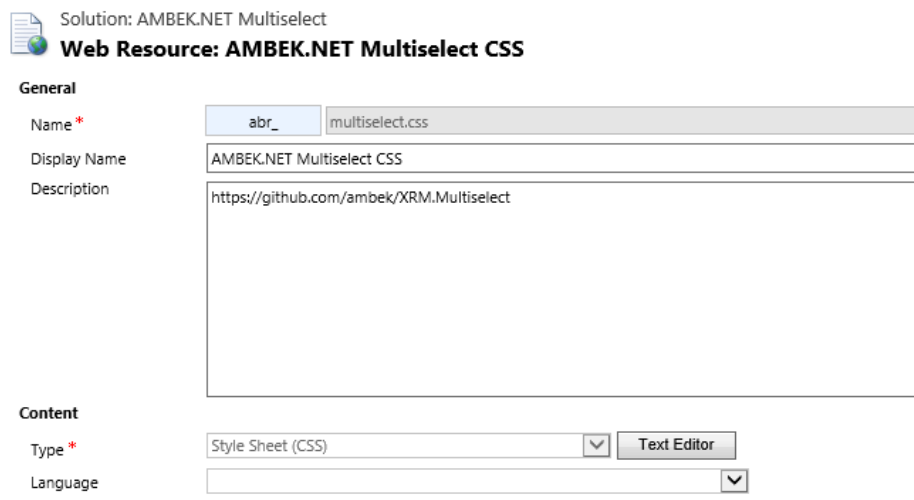
Solution AMBEK.NET Multiselect

Component Type: All

Managed Properties

✓	Display Name ↑	Name	Type
✓	abr_ambeknet.html	abr_ambeknet.html	Web Resource
✓	abr_knockout3.3.0.js	abr_knockout3.3.0.js	Web Resource
✓	abr_multiselect.css	abr_multiselect.css	Web Resource
✓	abr_multiselect.html	abr_multiselect.html	Web Resource

Then click on Text Editor:



Solution: AMBEK.NET Multiselect

Web Resource: AMBEK.NET Multiselect CSS

General

Name * abr_multiselect.css

Display Name AMBEK.NET Multiselect CSS

Description https://github.com/ambek/XRM.Multiselect

Content

Type * Style Sheet (CSS) Text Editor

Language

Change this two values:

```
Source

body {
  margin:0px;
  width:300px;
}
button {
  font-family:'Segoe UI', Tahoma, Geneva, Verdana, sans-serif;
  font-size:11px;
  border:none;
  margin:1px;
}
.clicked {
  background-color:#a307e0;
  color:white;
}
.unclicked {
  background-color:#a681b5;
  color:black;
}
```

Click OK on the bottom, then Save and Publish:

+ NEW DEACTIVATE CONNECT | AI



ACCOUNT

A. Datum Corp

Summary

ACCOUNT INFORMATION

Account Name *	A. Datum Corporation (sam :
Phone	+48 78 9456 123
Fax	--
Website	http://www.adatum.com/
Parent Account	--
Customer Type *	Other

Multiselect example

One	Two	Three	Four	Five	Six
Seven	Eight	Nine	Ten		