

# MS Dynamics CRM 365

Business Rules



# Lesson Objectives

- Business Rules Overview
- Business Rule Structure and Design
- Using Conditions and Actions



# Business Rules

- Client-side logic that can be built with no programming required
  - Can replace some simple JavaScripts
  
- Triggered when a record is opened or when a field is changed that is in the rule conditions
  - Ignored if fields referenced in the rule are not on the form, but no error is caused
  
- Field level rules only
  - Cannot interact with tabs or sections



# Business Rule Scope

- Single form(listed by name)
  - Applies to only the form specified
  - Rules will need to be created for each form it needs to execute on
- All Forms
  - Applies to every form on associated with that entity, including Quick Create
  - Only applies when interacting entity forms
- Entity
  - Runs both client and server side

Scope

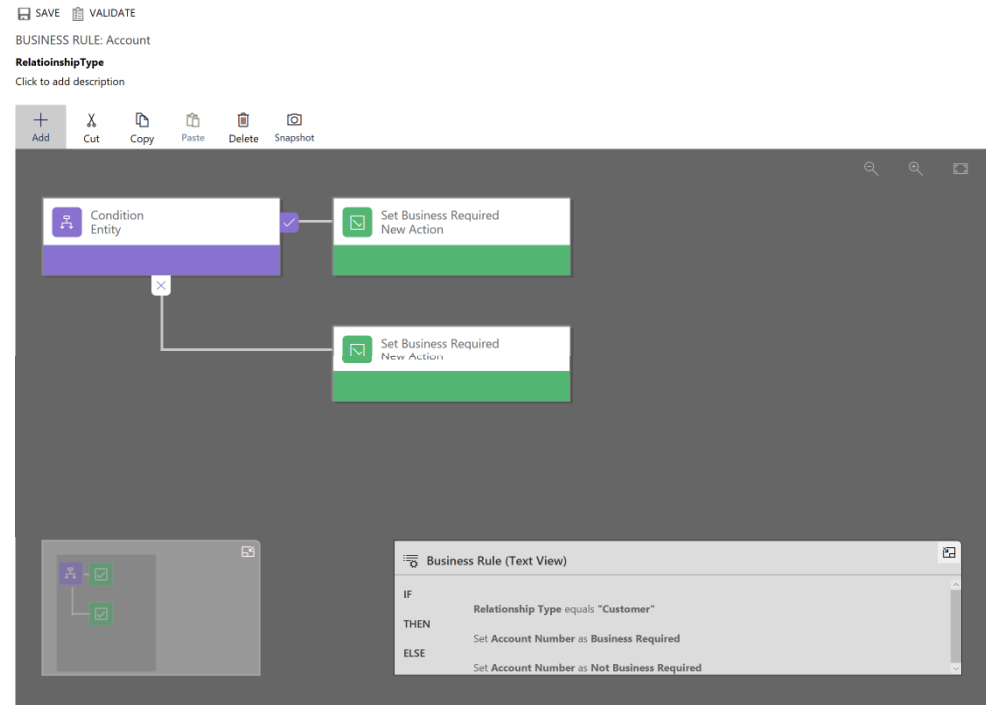
Entity
All Forms
Information
Account





# Rule Designer

- Drag and Drop Interface
  - Allows dragging and dropping of rule components
  - Text view displays the rule in text format
- Design Options
  - Add
  - Cut, Copy, Paste
  - Delete
  - Snapshot





# Conditions

- Rules execute an action when a condition is met
- Compares field values to another field, static values or formula
- Conditions are the triggers for the actions that follow
  - If/else
  - Otherwise
  - And/or
  - Comparisons

Components Properties

**Condition**

Display Name  
Entity

Entity  
Account

Rules [+ New](#)

Rule 1 [×](#)

Source  
Entity [▼](#)

Field  
Relationship Type [▼](#)

Operator  
Equals [▼](#)

Type  
Value [▼](#)

Value

- ☐ Competitor
- ☐ Consultant
- ☒ Customer
- ☐ Investor

[Apply](#) [Discard](#)



# if/else Conditions

- If/else functionality allows creation of alternate conditions if first condition not met
  - Nested If/Else condition are not available
- Default/"Otherwise" done by creating an Else with no conditions and at least one action
- "And" or "Or" can be used to group multiple lines in a condition
  - You can not use both in the same condition



# Actions Occur When Condition(s) True

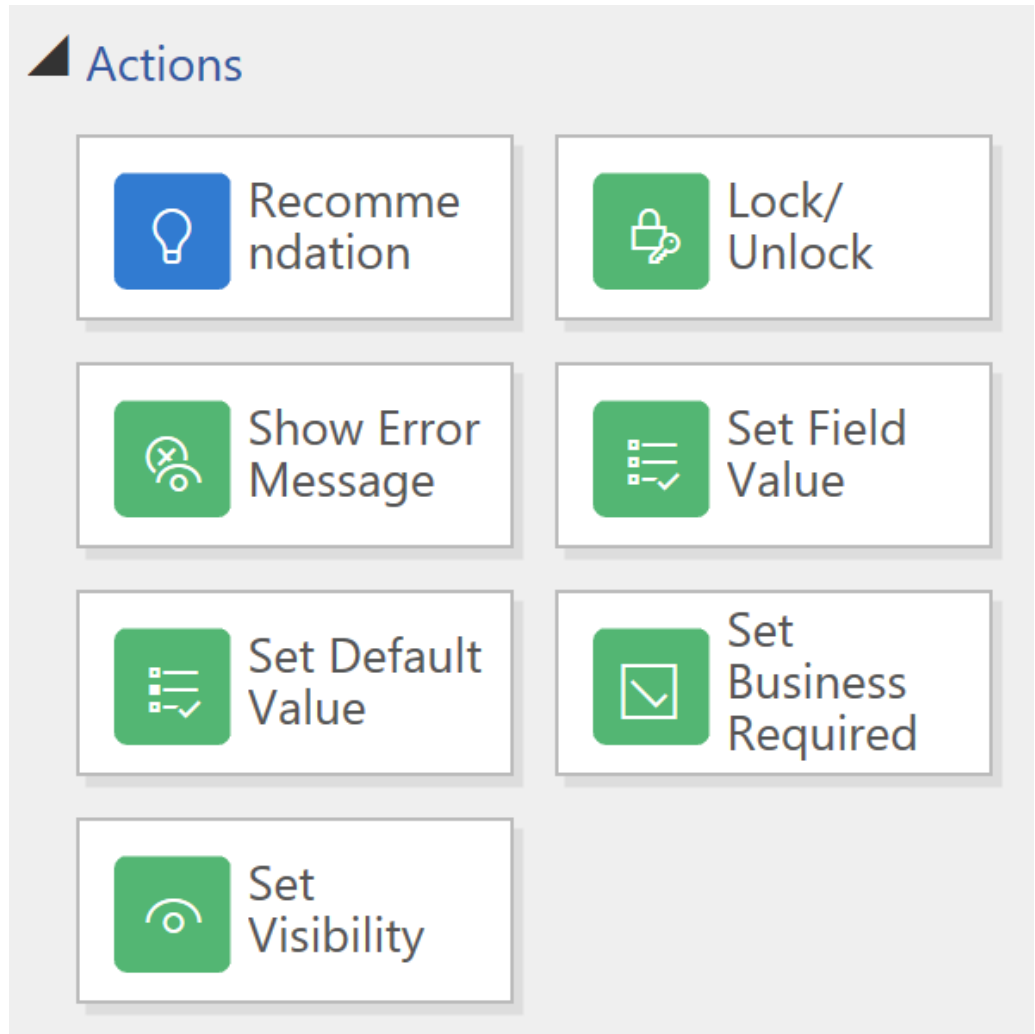
- Compare field values to another field, static values or formula
- Formula are simple calculations available for numeric and date fields
- Multiple conditions can be specified
- And / Or determines if all must be true or one must be true





# Available Actions

- Recommendation
- Show Error Message
- Set Field Value
  - Field
  - Value
  - Formula
  - Clear
- Set Business Required
- Set Visibility
- Set Default Value
- Lock or Unlock Field





# Formulas

- Simple calculations only
- Available for numeric and date fields
  - Addition
  - Subtraction
  - Multiplication
  - Division
  -

Entity

Account

Field Value

Field

Created On

Type

Formula

Field

Created On

Operator

+

Type

Value

Days

3



# Triggering Rules

- Rules trigger when a form loads (OnLoad)
  - Good for setting default values
  - Shows fields based on record contents
- Rules trigger “OnChange” of fields
- Entity rules execute server-side





# Module Review

- Business rules can allow creation of client-side logic with no programming required
- Rules can be created to run client side only or to server side
- Rules are best used when you have simple business requirements that can be met without getting over-complicated trying to fit within capabilities of rules



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