



# CRM Innovation

**CRM 2011 Online AutoNumber Installation Manual V2.0**

**AutoNumber Managed Solution Code V1.0.1.1**



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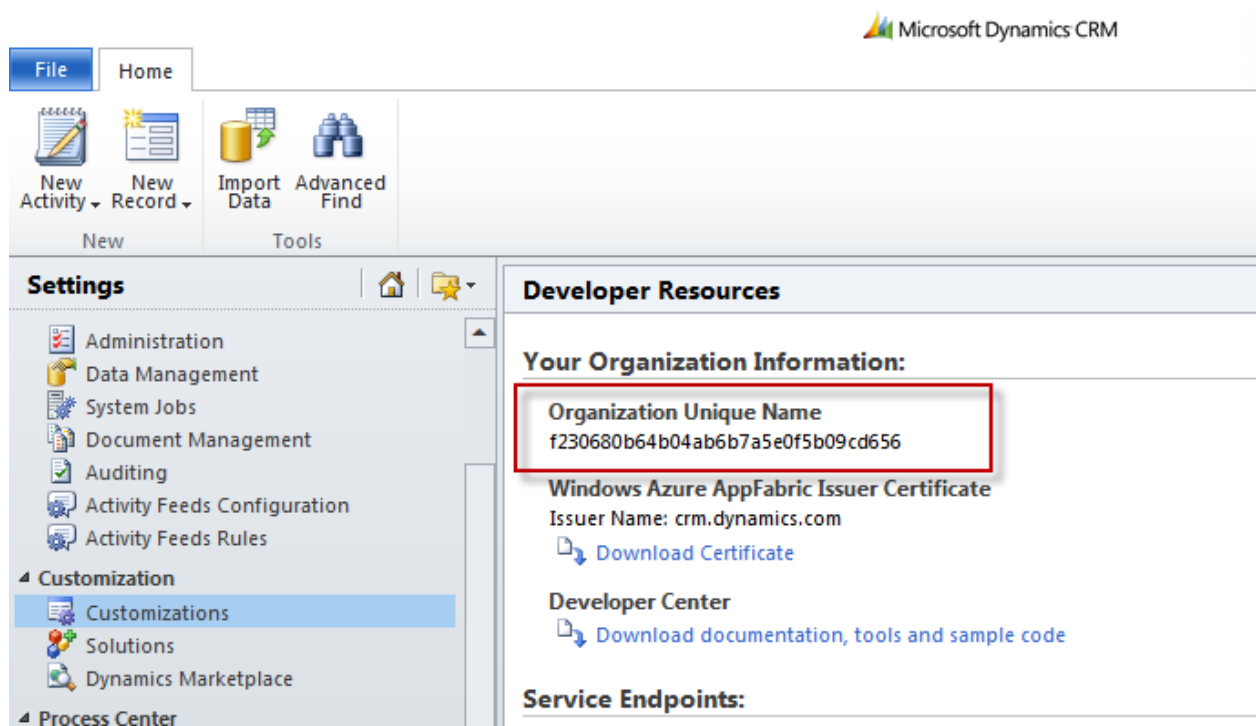
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## AutoNumber License Key Request

License keys are server name/organization specific. To issue a license key we need four items:

1. Number of enabled CRM users
2. CRM Server Name – If you are hosted by Microsoft, it would be: CRM, CRM4, or CRM5 depending on your data center. If you are CRM OnPremise then it would be the name of the CRM server, which you can retrieve from the Deployment manager.
3. CRM Unique Organization Name: This is found in Settings, Customization, Developer Resources as follows. It is the 32 digit Guid



4. CRM Friendly Organization Name: If you use CRM Online it would be the first part of the URL: <https://friendlyname.crm.dynamics.com> or if you use CRM OnPremise you can find it in the Deployment Manager.

## Solution File Installation

Login with a CRM administrator user account and in Microsoft Dynamics CRM 2011, go to the **Settings** area from navigation pane, and click on **Solutions** under the **Customization** group and click on the **Import** button.

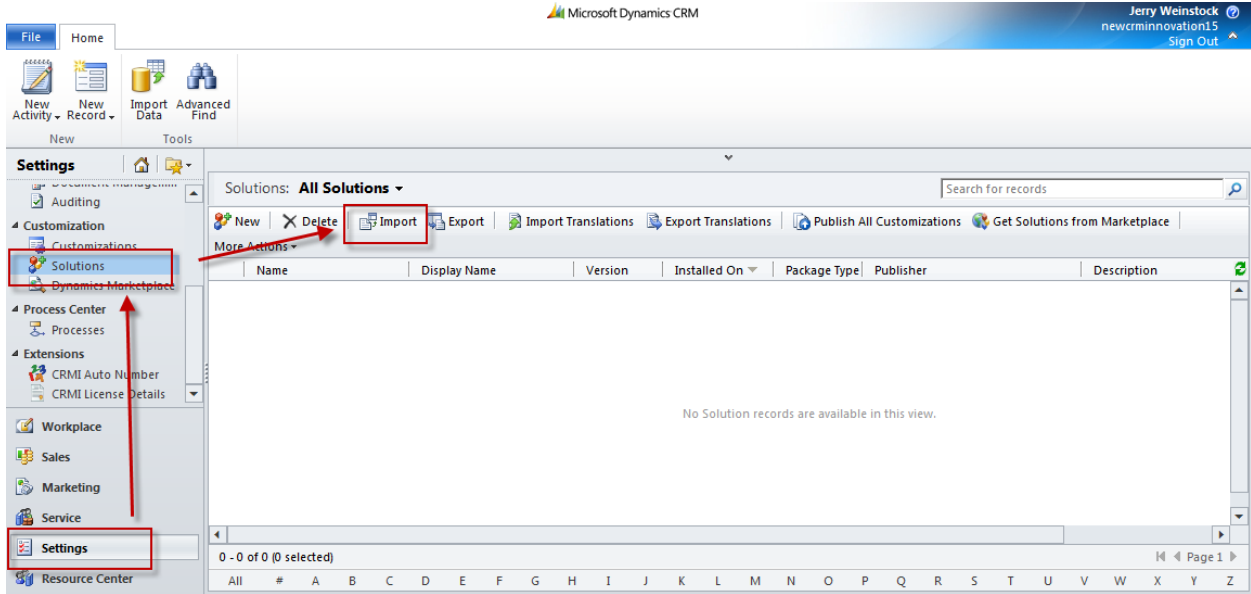


Figure -1 Import Solution

In Import Solutions wizard page, click on the browse button and select CRMI AutoNumber 2011 managed 1\_x\_x\_x solution package file and click on the Next button.

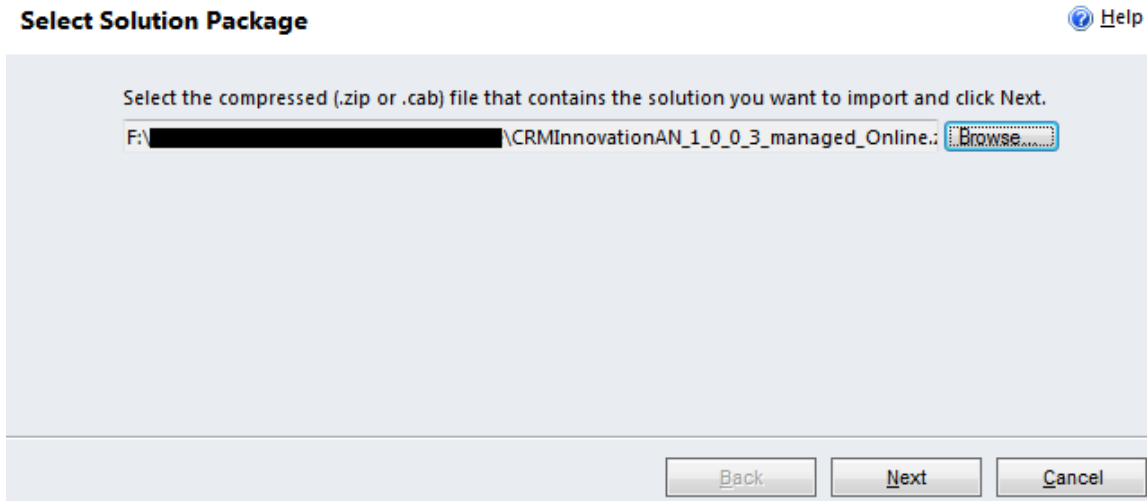


Figure -2 Select Solution Package Wizard Page

In the Solution Information wizard page click on Next button.

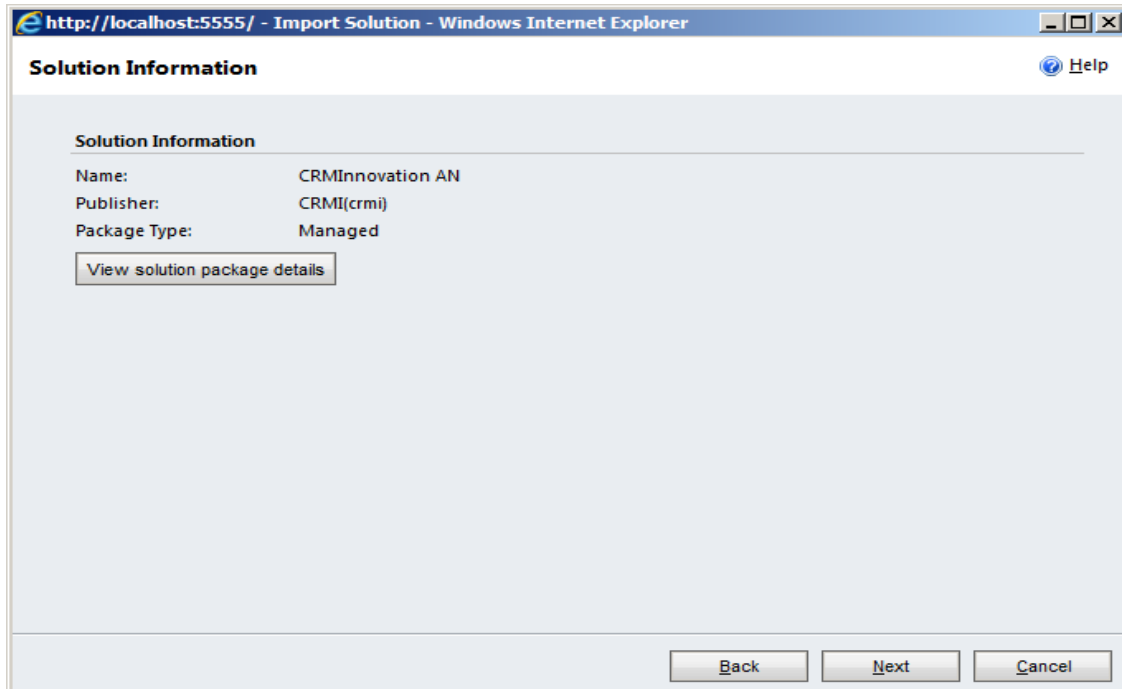


Figure -3 Solution Information Wizard Page

In **Import Options** wizard web page check option **Activate any processes and enable any SDK message processing steps included solution**. Click the Next button and then click on Close button. If you miss this step, it will be necessary to redo the import of the Solution.

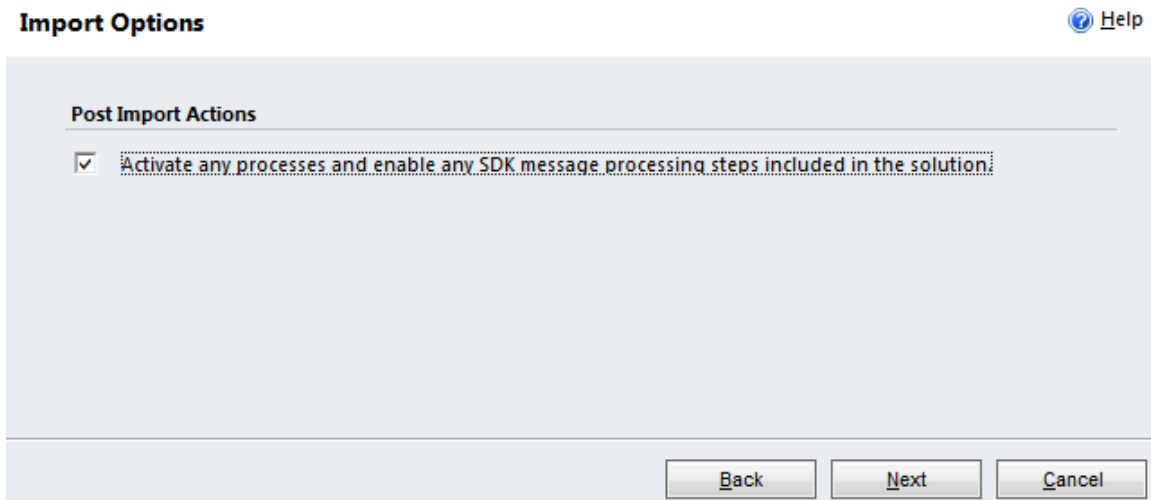


Figure -4 Import Options Wizard Page

After the Solution has been successfully imported, the following screen is displayed. At this point, click on Close.

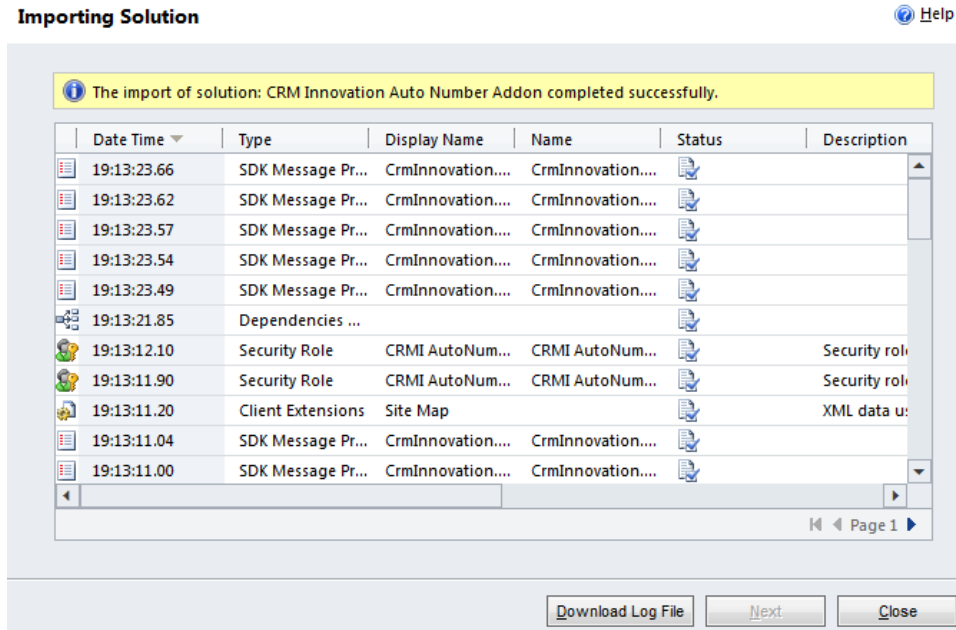


Figure -5 Import Solution Wizard Page

Go to **Settings** area from navigation pane, click on **Solutions** menu item under **Customization** group and click on **Publish All Customizations** button.

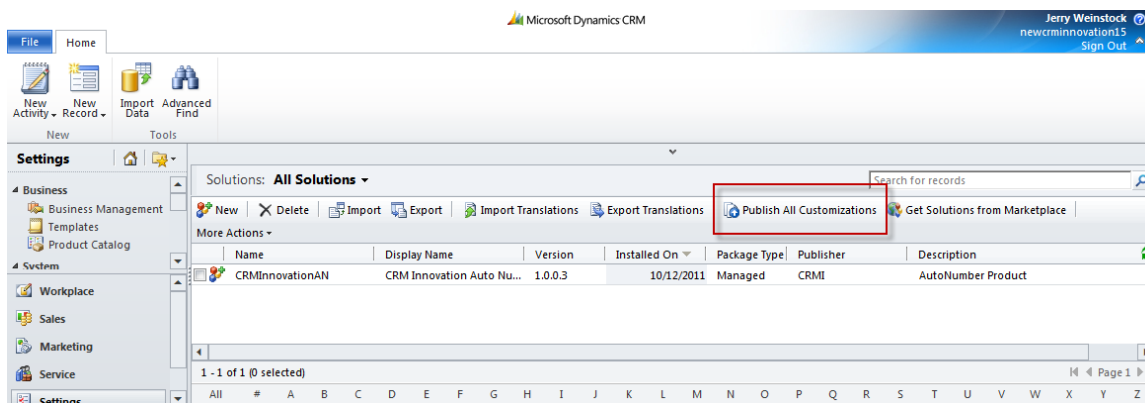
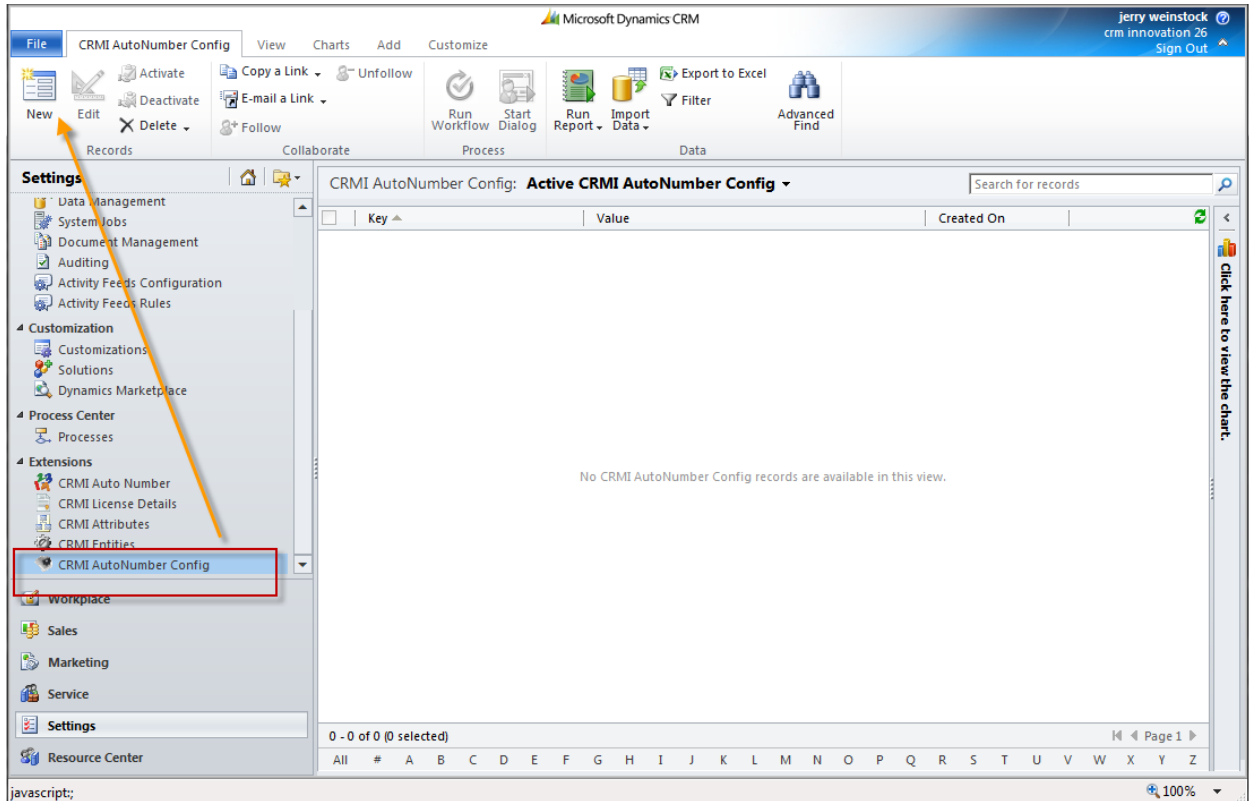


Figure -6 Publish All Customizations

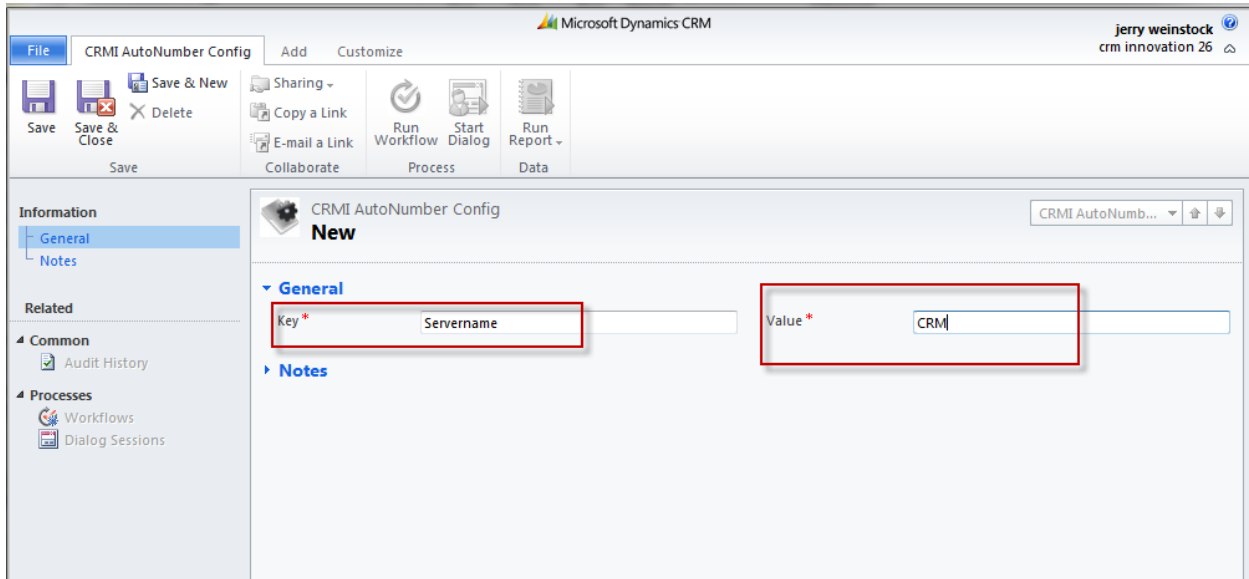
Press F5 key or click on the browser Refresh button to refresh the CRM sitemap.

## AutoNumber Configuration

Login with a CRM administrator user account and in Microsoft Dynamics CRM 2011, go to **Settings** area from navigation pane and click on **CRMI AutoNumber Config** and click on **New** button.



In the Key field, enter the word Servername. If you are familiar with the registry, think of this as creating the name of the key. In the Value field, enter the name of the CRM server. If you are using CRM Online, it would be: CRM, CRM4 or CRM5 depending on which data center your system is hosted. If you are using CRM OnPremise, it would be the name of the CRM server. For example: <http://yourserver:5555>, you would enter yourserver without the port number or http://. You can also get the name of the server from the Deployment Manager.



After entering the information just Save and Close the record.

## AutoNumber License Installation

Login with a CRM administrator user account and in Microsoft Dynamics CRM 2011, go to **Settings** area from navigation pane and click on **CRMI License Details** and click on **New** button.

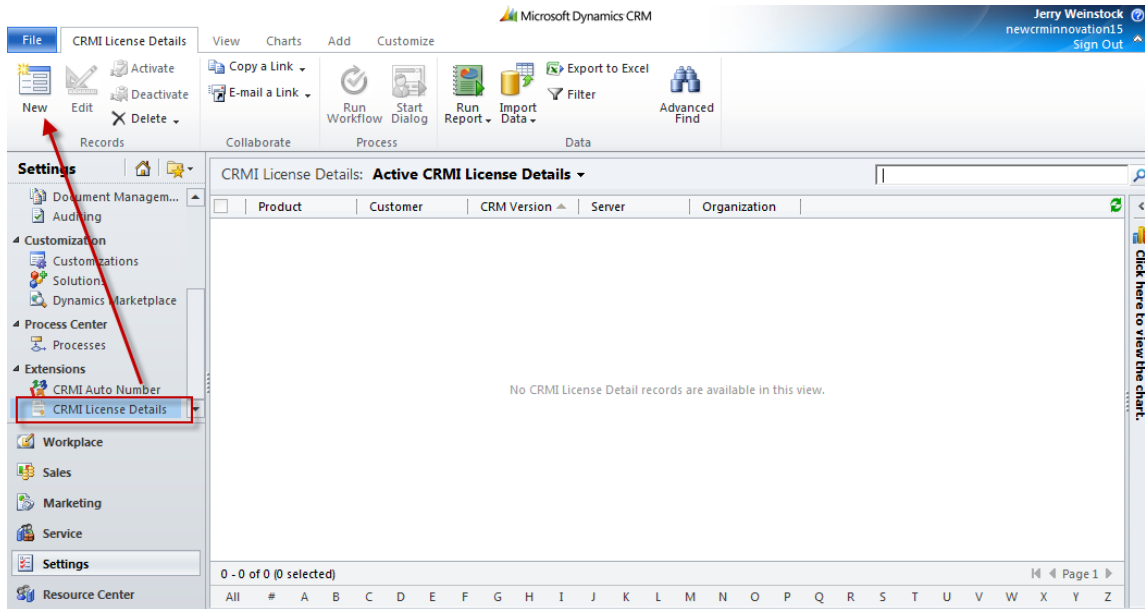


Figure -7 Create New CRM License Details

In the CRMI license details record, click on the **Browse** button, select the license file (.lic) and then click on the **Save** button after the data is pulled into the screen. Note: Microsoft Silverlight is used for this form.



The screenshot displays the 'CRMI License Detail' form in Microsoft Dynamics CRM 2011. The form is titled 'New' and is used for uploading and configuring a license file. The 'Upload License File' section shows the file name 'AutoNumber 2011.lic' and a 'Browse...' button, which is highlighted with a red box. The 'CRM Details' section includes fields for Organization (newcrminnovation15), CRM Version (5), and Server (crm). The 'License Details' section includes fields for Customer (House Account), License Start Date (8/25/2011), License Type (NFR), License ID (j275E1870-0CF5-E011-807A-003048C2DC7), Product (AutoNumber 2011), Maintenance Start Date (8/25/2011), User License (5), and Special Case (No). The 'Expiration Details' section includes fields for License End Date (8/22/2021), License Start Date (Plain) (2011-08-25T00:00:00-05:00), Maintenance Start Date (Plain) (2011-08-25T00:00:00-05:00), Maintenance End date (8/24/2012), License End Date (Plain) (2021-08-22T00:00:00-05:00), and Maintenance End Date (Plain) (2012-08-24T00:00:00-05:00). The status is 'Active'.

Figure -8 CRM License Details

## AutoNumber Configuration

In Microsoft Dynamics CRM 2011, go to **Settings** area from navigation pane and click on **CRMI License Details** and click on **New** button.

The screenshot displays the 'CRMI Auto Number' configuration interface for a 'Fax-Sub-Category'. The configuration is as follows:

- Configuration Name:** Fax-Sub-Category
- Created By:** Jerry Weinstock
- Entity and Attribute Information:**
  - Entity Name:** Fax
  - Attribute Field:** Sub-Category
- Auto Numbering Format:**
  - Prefix:** CRM
  - Use Delimiter:** -
  - Prefix:** (empty)
  - Use System Date:** (selected)
  - Reset Auto Number Counter / Day:** No
  - Pad Auto Number Length:** 2
  - Date Separator:** (empty)
  - Next Auto Number:** 1
- Use Entity Fields Value in Auto Number:**
  - Entity Field 1:** (empty)
  - Entity Field 2:** (empty)
  - Entity Field 3:** (empty)
  - Field Position:** (empty)
- Auto Number Preview:**
  - Preview:** CRM-01
  - Auto Number Length:** 6
- Status:** Active

Figure -9 CRM AutoNumber

Enter AutoNumber configuration as per required.

#### Entity and Attribute Information:

1. In **Entity Name** field, select entity for which the AutoNumber is to be configured.
2. In **Attribute Field**, select attribute of the entity.

#### AutoNumbering Format:

1. In **Prefix** field, enter AutoNumber prefix value if required.
2. In **Suffix Field**, enter AutoNumber suffix value if required.
3. In **Pad AutoNumber length** field, enter AutoNumber auto incremented field length.
4. In **Use Delimiter** list choose the required AutoNumber values separator.
5. In **Use System Date** field selection to use the current date in the AutoNumber value.
6. In **Date Separator** list choose the date format separator.

7. In **Date Position** list choose the AutoNumber date value position.
8. In **Reset AutoNumber Counter / Day** field, if using **System Date** in AutoNumber then can choose this option to Reset AutoNumber increment automatically at the end of the day.
9. In **Next AutoNumber** field, specify the increment initial value of AutoNumber sequence

**Use Entity Fields Value in AutoNumbering:**

10. In **Entity Field 1** field, choose entity attribute field value to be used in the AutoNumber
11. In **Field Position**, choose the entity field 1 attribute value position in the AutoNumber
12. In **Entity Field 2** field, choose entity attribute field value to be used in the AutoNumber
13. In **Field Position**, choose the entity field 2 attribute value position in the AutoNumber
14. In **Entity Field 3** field, choose entity attribute field value to be used in the AutoNumber
15. In **Field Position**, choose the entity field 3 attribute value position in the AutoNumber

## Security Roles

The solution automatically creates two custom security roles.

CRMI AutoNumber Entity Reader (Minimal Required Role for AN) – all users must have this role added to their profile if they are going to be creating any CRM records that use Auto Numbers.

CRMI AutoNumber Generator (Admin User) – any user that needs to be able to create, edit, delete a CRMI Auto Number record must have this role.

If the user is already a CRM Administrator, they already have all the necessary privileges.

The screenshot displays the Microsoft Dynamics CRM Security Roles management interface. The 'Security Roles' window is open, showing a list of roles for Business Unit 'newcrminnovation15'. Two roles are selected: 'CRMI AutoNumber Entity Reader (Minimal Required Role For AN)' and 'CRMI AutoNumber Generator (Admin User)'. The interface includes a navigation pane on the left with categories like Business, System, Customization, Process Center, Extensions, Workplace, Sales, Marketing, Service, Settings, and Resource Center. The top right shows the user 'Jerry Weinstock' and a 'Sign Out' button.

Name	Business Unit
CFQ-Business Manager	newcrminnovation15
<input checked="" type="checkbox"/> CRMI AutoNumber Entity Reader (Minimal Required Role For AN)	newcrminnovation15
<input checked="" type="checkbox"/> CRMI AutoNumber Generator (Admin User)	newcrminnovation15
CSR Manager	newcrminnovation15
Customer Service Representative	newcrminnovation15
Delegate	newcrminnovation15
Marketing Manager	newcrminnovation15
Marketing Professional	newcrminnovation15
Sales Manager	newcrminnovation15
Salesperson	newcrminnovation15
Schedule Manager	newcrminnovation15
Scheduler	newcrminnovation15
System Administrator	newcrminnovation15
System Customizer	newcrminnovation15
Vice President of Marketing	newcrminnovation15
Vice President of Sales	newcrminnovation15

## Custom Entities

If you create a custom entity or add custom attributes after you install the Solution they will automatically be available in the AutoNumber Record form to use with the application once you have published the new entity or attribute.

## Uninstalling the Solution

To uninstall the solution do the following:

1. Delete all CRMI Auto Number records
2. Delete the CRM License Details record.
3. Delete the CRMInnovationAN Solution