

# Mawens Auto Number Workflow Tool

Version 1.0.0.0

**Mawens Business Solutions** 

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#### Contents

Ι	W	'hat is a Workflow in Dynamics CRM?2
II	W	hat is Mawens Auto Number Workflow Tool?2
III		License2
IV		About Mawens Business Solutions
V	He	elp and Support3
VI		Security Role4
VII		Access to Auto Number Settings4
VIII		Rule Definitions
IX		Using Mawens Auto Number in Workflow7
х	He	ow to update existing records via Mawens Auto Number12
XI		Uninstall Mawens Auto Number Workflow Tool12



## I What is a Workflow in Dynamics CRM?

You can extend the functionality of Microsoft Dynamics CRM by creating workflows. You can use a workflow to model and automate real world business processes.

These processes can be configured to run in the background or in real time and can optionally require user input. Workflow processes can start automatically based on specified conditions or can be started manually by a user.

## II What is Mawens Auto Number Workflow Tool?

Mawens Auto Number Workflow allows you create configurable auto numbering rules in Dynamics CRM. These rules can be use any workflow in CRM.

## III License

When you installed Mawens Auto Number Workflow Tool solution, it will automatically create required entities. You can access them under Settings->Mawens Solutions menu items.



If you already have a valid license number, you can change License value. Trial version will not work after 30 days.



Dynamics 365	Settings ~ Mawe	ens Solutions > Mawer	ns Auto Numb	>		
See how the interactive se	rvice hub can make you more produ	ctive. Experience it now				
+ NEW 🔓 DEACTIVATE	💼 delete 🛛 🕫 Email a link	🔅 RUN WORKFLOW	START DIALOG	WORD TEMPLATES 🔻	RUN REPORT	▼ IB FORM EDITOR
Mawens solution : INFO Mawens A General	Auto Number	r Workflow	τΞ			
Name * Created On	Mawens Auto Number Work	flow			tifier ted By	 Mawens Admin
Mawens Solution	Name 🛧		Value	Secure Value	Created On	
Mawens Auto Nur	nber Workflow Licence		Trial		6/9/2017 10:	58 AM

## IV About Mawens Business Solutions

Mawens Business Solutions, with its expert team and history of successful large-scale projects in the constantly emerging IT sector, is offering its customers professional solutions using the latest technology. Its own vision, qualifications, experience and values it possesses, Mawens is committed to creating custom tailored solutions for the organization by integrating the dynamic processes taking place in Information Technology with the needs of the organisations.

Mawens is trying to change companies to "New Generation Organisation". Mawens aims to unleash the true potential of organisations to establishing software infrastructures works with the organisation ecosystem including a complete manner the entire process is allowing person in the team independently access to system without time and location. These are done via applying right "Business Model" and "Change Management" methodologies to including with accurate, fast and easy way to communicate for uncover the customer experience.

Mawens Business Solutions has delivered hundreds of projects in this regard has taken its place among the most trusted software companies, with offices in located in Turkey and United Kingdom. It is not just focusing to organisations' today also focusing to tomorrow on delivering nextgeneration solutions that will allow you to be ready.

For more information please visit: <u>http://www.mawens.co.uk</u>

## V Help and Support

If you need extra help about our products or you are looking for Dynamics 365-CRM Experts for successfully delivery your projects, please do not hesitate to contact us.

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You can find our help documents and support at http://mwns.co/manwhelp

## VI Security Role

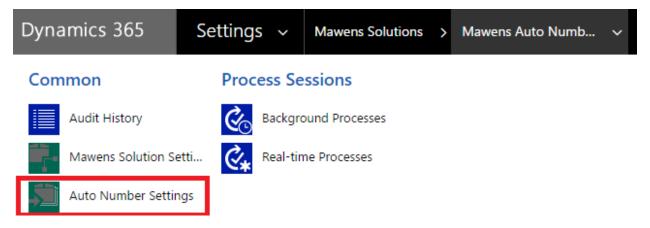
Users who you would like to have access to the "Mawens Auto Number" solution should be assigned the security role named "Mawens Auto Number User Role". If you would like users to be able to create new rule they should be assigned security role named the "Mawens Auto Number Admin Role".

## VII Access to Auto Number Settings

When you installed Mawens Workflow Helper Tool solution, it will automatically create required entities. You can access them under Settings->Mawens Solutions menu items.



You have to find and open "Mawens Auto Number Workflow Tool" record then you can access to "Auto Number Settings" under record menu item.



Using grid, you can create a new rule or you can amend existing one.



### MAWENS SOLUTION : INFORMATION Mawens Auto Number Workflow -=

## Auto Number Setting Associated View ~

+ ADD NEW AUTO NUMBER	🛱 BULK DELETE	CHART PANE 🔻	🖹 RUN REPORT 🔻	🛛 EXCEL TEMPLATES 🔻	💐 EXI
-----------------------	---------------	--------------	----------------	---------------------	-------

Formula
// df:yyyyMMdd  at  tf:hh:mm  ***  av:websiteurl  ***  rn:3 -+ rl:5 -+- sn:10
BS-[rl:5][rn:3]-[sn:5]
F- df:yyyyMMdd  rl:3 - sn:5
av:address1_city - rl:5  m:3  sn:5

#### Auto Number Setting form view.

AUTO NUMBER SETTING : INFORMATION BUSINESS Services =

#### ▲ General

Name \* Formula \* Last Number

Business Services BS-|rl:5||rn:3|-|sn:5| 3

Mawens Solution \*

Mawens Auto Number Workflow

## **VIII** Rule Definitions

Mawens Auto Number solution allows 6 different formula formats while creating auto number.

**df:** Date format which returns date value of now. It allows you choose your format such as */df:yyyyMMdd/* means *"20160612"*. For more information please visit: <u>http://mwns.co/dtfdoc</u>

**sn:** Sequential number returns numbers in an order which follows last number in Mawens Auto Number Setting and add 1 to last number. Usage is */sn:n/,* "n" means length of number. Example; if last number is *203* when you request */sn:6/,* "000204" will be returned.

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## Mawens Business Solutions

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**tf:** Time format is similar like df (Date Format) but it returns time of now. An example */tf:HHmm/* returns "*1256"*. For more information please visit: <u>http://mwns.co/dtfdoc</u>

**av:** Attribute value returns value of an attribute in record. If you run it in Account and if account have an attribute with "*mwns\_advisername*" schema name, *av:mwns\_advisername* returns value of this field in this record like "*Baris Kanlica*".

**rn:** Random number allows you generate a random number with your given length. Usage is */rn:n/,* "n" means length of number. */rn:5/* returns a 5-digit number like "*64269".* 

**rl:** Random letter (similar like rn) allows you generate random letters with your given length. Usage is */rl:n/,* "n" means length of number. */rn:4/* returns a 4-digit number like "*QFTE".* 

Format specifier	Description	Example Format	Result
df:	Date Format	df:yyyyMMdd	20170612
		df:Mmyyyy	062017
		df:MM yyyy,dd	06 2017,12
sn:	Squential Number	sn:3	005
		sn:6	000101
		sn:10	0000101235
tf:	Time Format	tf:HHmm	2138
		tf:HHmmss	213812
		tf:hhmm	0938
		tf:HH:mm:ss	21:38:12
av:	Attribute Value	av:addressline1_city	London
		av:name	Mawens Business Solutions
	·	av:companynumber	XYZ12345
rn:	Random Number	rn:3	AFH
		rn:5	WECVG
rl:	Random Letter	rl:3	256
		rl:5	49635



#### Some Examples

Example Rule	Last Number	Result
A df:yyyyMM - sn:5	202	A20160600203
A# df:MMyyyy - rl:5 - sn:4	2641	A#062016-ADHJK-2642
rl:5 - rn:3  sn:4	200	AWCRT-49300201
rl:3  tf:HHmm - rn:5		FGH1223-20963
av:address1_city - av:accountnumber - sn:5	1202	London-ABC12-01203

## IX Using Mawens Auto Number in Workflow

First you have to create a workflow. **Be careful, for successfully update last number field in** sequence numbers you have to create real-time workflow. If you create background workflow highly possible you should have duplicated numbers.

First you must login Dynamics CRM Web interface and navigate Settings->Processes from menu.

Using "New" button you can access create a new workflow or you can select and open an existing workflow form the list.



Create Process				
Define a new proce actions, dialogs, and		sting template. You can create four ki	nds of processes: bus	iness process flows,
Process name: *	Mawens Auto Number V	Vorkflow Test		
Category: *	Workflow	▼ Entity: *	Account	•
Run this workfl	ow in the background (recon	nmended)		
Туре:	New blank process	existing template (select from list):		
		existing template (select non-nst).		
Template Nam	ne ↑	Primary Entity		Owner
		•		
		Loading Process records		
0 - 0 of 0 (0 select	ed)			📢 🖣 Page 1 🕨
Properties				
			ОК	Cancel

While creating a new workflow, you have to uncheck "Run this workflow in the background" this will create a real-time workflow for you.

If you would like to use existing workflow you have to convert a background workflow to a real-time workflow via "Convert to a real-time workflow" button on toolbar in existing workflow.



sfa/workflov	//edit.aspx?id=7004ca7	7b-56d2-4d82-baed-272	
C Activate	Convert to a real-ti	ime workflow	
flow Test			
Administratio	n Notes		
Process Proper	ties		
s Name* Mawens Auto Number Workflow Test			

If you would like to run this workflow on your existing records you can check "As an on-demand process" checkbox. With this way, you can access this workflow in workflow list of your entity in grid.

#### Available to Run

Run this workflow in the background (recommended)

- As an on-demand process
- As a child process

Options for Aut	Options for Automatic Processes				
Scope	User	Ψ.			
Start when:	After	Ψ.	Record is created		
	After	•	Record status changes		
			Record is assigned		
			Record fields change		
	Before		Record is deleted		
Execute as:	The owner of the w	orkflow			
	The user who made	changes to the red	cord		

Also another important point is you have to check "Record is created" checkbox if you would like to execute it when record created.

In workflow design screen, you can access to Mawens Auto Number Workflow Tool from bottom of "Add Step" menu any point of your workflow structure. Above screenshot demonstrate Auto Number workflow called every "if clause".



Seneral	Administration Notes				
📑 Ad	d Step -   ⊒+⊒Insert - 🗙 Delete this step.				
	Stage		]		
	Check Condition				
	Conditional Branch				
	Default Action		erator (F- df:yyyyMMdd  rl:3 - sn:5 )		
	Create Record		ber Generator Set Properties		
	Update Record				
	Assign Record		Set Properties		
	Send Email		/ices], then:		
	Start Child Workflow		tor (BS- rl:5  rn:3 - sn:5 )		
	Perform Action Change Status Stop Workflow		ber Generator Set Properties		
	Mawens Workflow Helper	•	Set Properties		
	Mawens Auto Number Workflow	►	Auto Number Generator		
	<b>k industry type of account</b>				
•	Call Finance Companies Auto Number Ger	nerat	tor (F- df:yyyyMMdd  rl:3 - sn:5 )		
	Mawens Auto Number Workflow:Auto Numb	er Ge	enerator View properties		
•	Update Record with result				
Othory	Update: Account View properties	cocl	then		
Otherv	wise, if Account:Industry equals [Business Servio Call Business Services Auto Number Gener	-			
	Mawens Auto Number Workflow:Auto Numb				
	Update Record with result				
Ť	Update: Account View properties				
Otherv					
	Call Others Auto Number Generator (av:a	ddre	ess1_city - rl:5  rn:3  sn:5 )		
	Mawens Auto Number Workflow:Auto Numb	er Ge	enerator View properties		

- Update Record with result
  - Update: Account View properties



Then you have to click View Properties button and select you Auto Number Setting to use in addressed point.

Process: Test of AutoNumber Multi

#### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Auto Number Setting	Lookup	Required	🖈 Finance Companies 🗖
Throw Exception	Two Options	Optional	🔵 False 💿 True

When you completed above steps you have to update your record with Auto Number result. An example if you have selected "account" entity and you would like to add generated auto number to "Account Number" field, you have to select "update" from "add step" menu and then using look for picklist you have to select "Auto Number Result" in "Account Number" field as shown below screenshot.

Summary	- Form Assistant
	Dynamic Values
Notes are not available within a workflow	Primary Contact Dynamic Values Dynamic Values
une line	
	Operator:
	Full Name En T
nt Account	The list of related records is not available when y Account a related record Modified By (Evternal Party) (Evternal Party)
eer Sumbol oount Number (Auto Number Result(Cell Oth URESS	a related recor       Modified By (User)         Modified By (User)       Originating Lead (Lead)         O - 0 of 0 (0       Originating Lead (Lead)         Owning Business Unit (Business Unit)       Owning Team (Team)         Owning User (User)       Preferred Facility/Equipment (Facility/Equipment)         Preferred Ser(User)       Preferred Ser(User)         Preferred Ser(User)       Preferred Ser(User)         Preferred User (User)       Preferred Ser(User)         Preferred User (User)       Preferred Stage (Process Stage)         SLA (SLA)       Ten list of rel         Call Others Auto Number Generator (FS-Infs]Im3LisnS)       Call Others Auto Number Generator (FS-Infs]Im3LisnS)         Call Others Auto Number Generator (FS-Infs]Im3LisnS)       Process         Status       Case Title       The list of related records is not available when yc



## X How to update existing records via Mawens Auto Number

When you ready with setup of Mawens Auto Number Workflow Tool then you can run it on your existing records.

When you select existing records via your view or advanced find, you have to click "Run Workflow" button on toolbar (if you do not see "Run Workflow" button on toolbar you should click ... to open menu. It will be shown in the menu.) Then you have to select your workflow and click "add" button. (Please note that, If you would like to run a workflow on your existing records you have to check "As an on-demand process" checkbox. With this way, you can access this workflow in workflow list of your entity in grid.) Workflow will be worked and update records.

FILE	ADVANCED FIND	LIST TOOLS ACCOUNTS		Hio	crosoft   Dynamic	365		Ma	wens Admin 🕜 DEMO 🔈	
New Accou	Edit Show	Sen E	LOOK U Enter your sea	Jp Record Irch criteria.	¥ 🗠 🤅	) a. m   9	×	Word Exp	oort unts ↓	
<ul> <li></li> <li></li> </ul>	Account Number F-20170616UHF-00007		Look for Look in	Process On Demand Workflow	vs VS	Show Only My Reco	rds	Vlain Phone 555-0152	Address 1: City Santa Cruz1	2 <u>Ni</u>
<ul> <li></li> <li></li> </ul>	F-20170616FAF-00008 F-20170616XVZ-00009		Search	Search for records	Q			555-0158 555-0157	Redmond Missoula	<u>Re</u> <u>Pa</u>
~	BS-EYMGT194-00007		Process	Name	Category	Created On	Mod 🤁	555-0154	Los Angeles	<u>Si</u>
~	BS-PQMKT564-00008		Test Of A	utoNumber	Workflow	6/9/2017 2:09 PM	6/9/2017 4	555-0155	Redmond	<u>Sc</u>
~	BS-MBTII407-00009		✓ Test of A	utoNumber Multi	Workflow	6/10/2017 3:09 P	6/16/2017			
~	-QPNQR655000015									
~	Phoenix-DVMIG184000	016						555-0159	Phoenix	<u>Jir</u>
~	Redmond-CTTVJ177000	0017						555-0156	Redmond	<u>Rc</u>
$\sim$	Lynnwood-PZSNX6970	00018						555-0153	Lynnwood	M
~	Renton-XDZPM919000	019						555-0150	Renton	<u>Yv</u>
~	Dallas-XBGCP80200002	10	1 - 2 of 2 (1 s	alactad)			+ Page 1 - b	55-0151	Dallas	<u>St</u>
~	-KHFUE322000021		1 - 2 of 2 (1 selected)  4  4 Page 1 ▶				07392220227			
					Add	<u>C</u> ancel Re	move Value			
•			_		_		_	_		•
1 - 13 of 13 (13 selected) [4] ◀ Page 1 ▶										

## XI Uninstall Mawens Auto Number Workflow Tool

To uninstall, first delete any Mawens Auto Number settings you have created. Then uninstall as usual, by deleting the solution under solutions list.

Thank you for your interest in Mawens Auto Number. Copyright © 2017 Mawens Business Solutions

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