# Mawens Auto Number Workflow Tool

Version 1.0.0.0

# Mawens Business Solutions

## Contents

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VAT registration number is 231 9033 36

# 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.
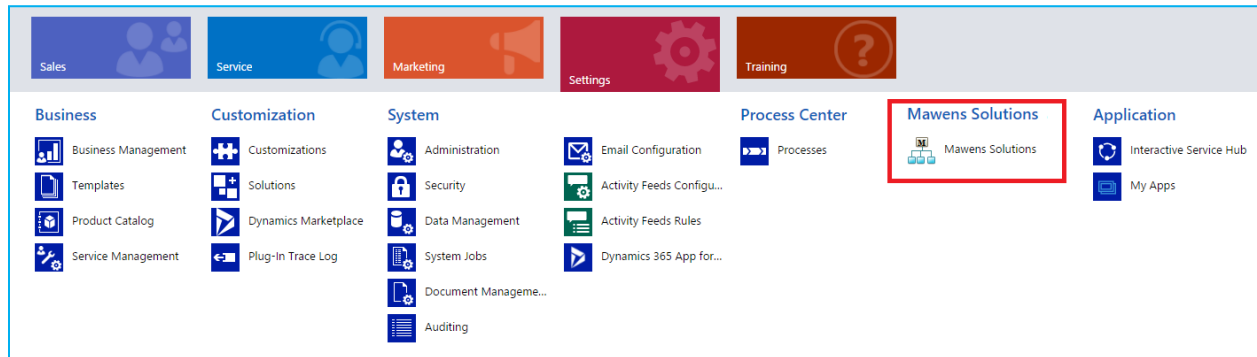


If you already have a valid license number, you can change License value. Trial version will not work after 30 days.

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## 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 next-generation solutions that will allow you to be ready.

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

## 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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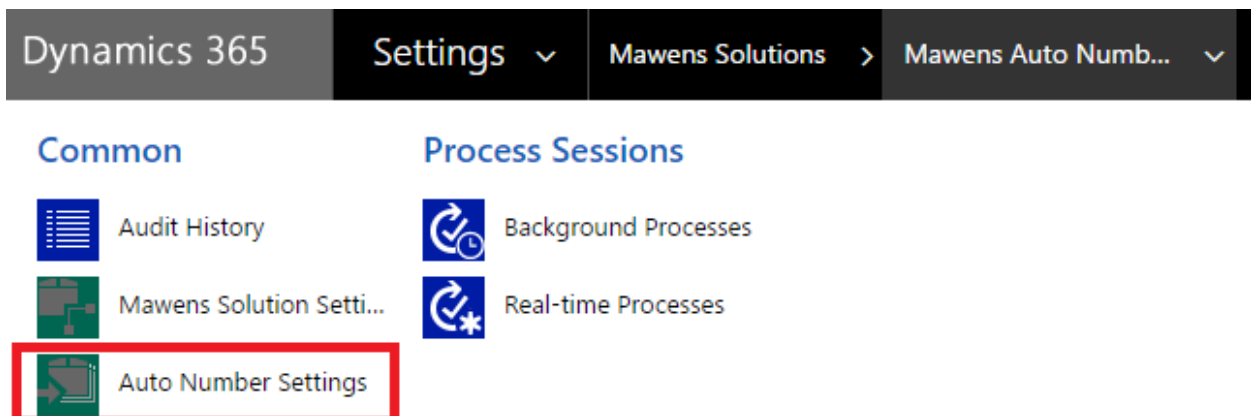VAT registration number is 231 9033 36

## 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.
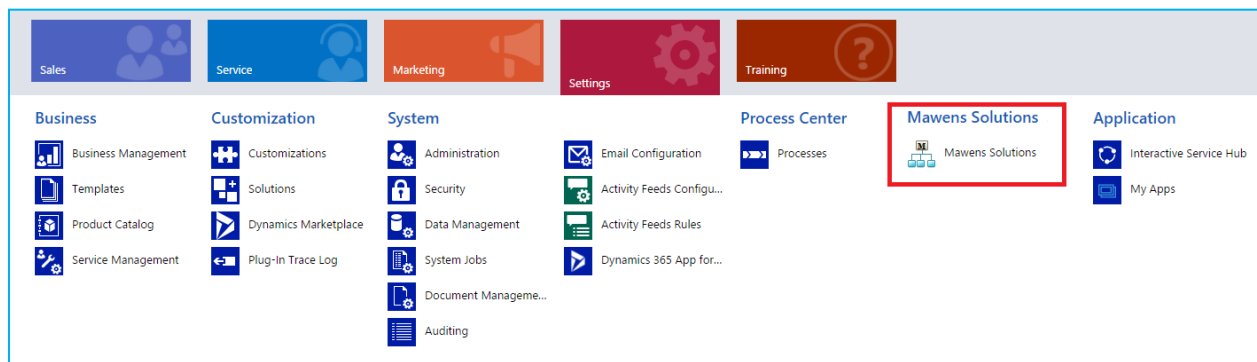


You have to find and open "Mawens Auto Number Workflow Tool" record then you can access to "Auto Number Settings" under record menu item.



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

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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

| ✓ | Name ↑ | Formula |
|---|--------|---------|
| | Account Number | //|df:yyyyMMdd| at |tf:hh:mm| *** |av:websiteurl| *** |rn:3|-+|rl:5|-+-|sn:10| |
| | Business Services | BS-|rl:5||rn:3|-|sn:5| |
| | Finance Companies | F-|df:yyyyMMdd||rl:3|-|sn:5| |
| | Others | |av:address1_city|-|rl:5||rn:3||sn:5| |

Auto Number Setting form view.

AUTO NUMBER SETTING : INFORMATION

# Business Services ▾≡

### ◢ General

| | | | | |
|---|---|---|---|---|
| Name * | **Business Services** | | | |
| Formula * | **BS-|rl:5||rn:3|-|sn:5|** | | | |
| Last Number | **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: http://mwns.co/dtfdoc

**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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**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: http://mwns.co/dtfdoc

**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 |

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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.

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**Create Process**

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *     Mawens Auto Number Workflow Test

Category: *    Workflow ▼     Entity: *    Account ▼

☐ Run this workflow in the background (recommended)

Type:    ⦿ New blank process
       ◯ New process from an existing template (select from list):

| Template Name ↑ | Primary Entity | Owner |
| --- | --- | --- |
| | | |

Loading Process records...

0 - 0 of 0 (0 selected)       ◁◀ Page 1 ▶

Properties

OK    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.

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sfa/workflow/edit.aspx?id=7004ca7b-56d2-4d82-baed-272

| Activate | Convert to a real-time workflow | Show D

flow Test

| Administration | Notes |

**Process Properties**

s Name* | Mawens Auto Number Workflow Test |
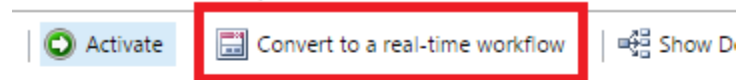
If you would like to run this workflow on your existing records you can check "As an on-demand process" checkbox. With this way, you can access this workflow in workflow list of your entity in grid.

**Available to Run**

☐ Run this workflow in the background (recommended)

☑ As an on-demand process

☐ As a child process

**Options for Automatic Processes**

Scope | User ▼

Start when: | After ▼ | ☑ Record is created

| After ▼ | ☐ Record status changes

| ☐ Record is assigned

| ☐ Record fields change

| Before ▼ | ☐ Record is deleted

Execute as: | ○ The owner of the workflow

| ● The user who made changes to the record

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".

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General   Administration   Notes

Add Step ▾  |  ⇱Insert ▾  ✕ Delete this step.

Stage

Check Condition

Conditional Branch

Default Action

Create Record

Update Record

Assign Record

Send Email

Start Child Workflow

Perform Action

Change Status

Stop Workflow

Mawens Workflow Helper          ▶

Mawens Auto Number Workflow     ▶

erator (F-|df:yyyyMMdd||rl:3|-|sn:5|)

ber Generator   Set Properties

Set Properties

ices], then:

ator (BS-|rl:5||rn:3|-|sn:5|)

ber Generator   Set Properties

Set Properties

Auto Number Generator

▾ **Check industry type of account**

If Account:Industry equals [Financial], then:

● **Call Finance Companies Auto Number Generator (F-|df:yyyyMMdd||rl:3|-|sn:5|)**

Mawens Auto Number Workflow:Auto Number Generator  View properties

● **Update Record with result**

Update:  Account  View properties

Otherwise, if Account:Industry equals [Business Services], then:

● **Call Business Services Auto Number Generator (BS-|rl:5||rn:3|-|sn:5|)**

Mawens Auto Number Workflow:Auto Number Generator  View properties

● **Update Record with result**

Update:  Account  View properties

Otherwise:

● **Call Others Auto Number Generator (|av:address1_city|-|rl:5||rn:3||sn:5|)**

Mawens Auto Number Workflow:Auto Number Generator  View properties

● **Update Record with result**

Update:  Account  View properties

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



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.

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## 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.
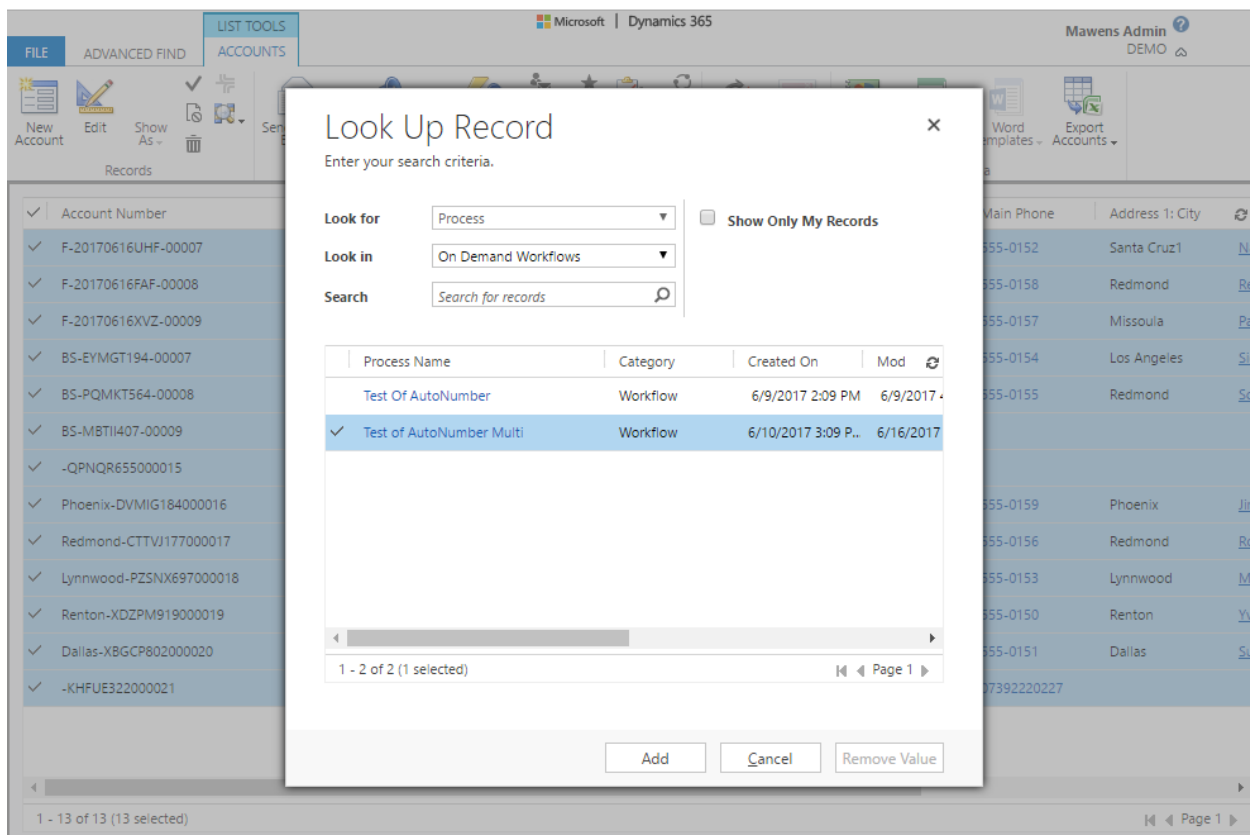


## XI Uninstall Mawens Auto Number Workflow Tool

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