CRM Rules

For Microsoft Dynamics 365

Make configurations in a fraction of the time without complicated coding or expensive customizations. Perfect for the System Analyst or CRM Admin. Spend your valuable time where it counts the most—designing solutions that work—not searching the internet for snippets of code to use.

Quotes

"It's so much more powerful than Microsoft's Business Rules."
Michael, Microsoft VAR

"CRM Rules is a very solid product that supplied me with the tools to easily apply Java Script through our entire CRM environment."
CRM Admin,
Seattle Seahawks

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Easily Configure Interactive, Dynamic Forms, Fields, and Tabs in Microsoft Dynamics 365

Stop Customizing and Start Configuring

Customizing is expensive and complicated. CRM Rules lets you easily configure form behavior by simply entering your criteria into the CRM Rules forms. CRM Rules takes Microsoft's Business Rules to a new level.

Save Time and Money

Configuration requests can now be handled by the System Administrator. Perfect for the CRM Admin and anyone else who is not familiar with JavaScript or advanced customizations. Complete user enhancement requests faster and create a better user experience. Simply enter your criteria into the CRM Rules form and we do the rest.

More Powerful than Microsoft Business Rules/ PBL

Business Rules is a great start, but is highly limited. CRM Rules has 'ELSE' and 'OR' statements and allows the user to reuse conditions or actions. With over 70 rule action types and hundreds of prebuilt conditions and actions, CRM Rules is more powerful, flexible, and advanced than Business Rules.

Technical

- Works online or on-premise
- Resides entirely within your CRM database as a managed solution.
- Built using OOB configuration of new entities and .net—no Silverlight forms required
- With over 70 rule action types and 70+ operators, combined with any customization functions the user adds, an unlimited number of rules can be created
- Preserve institutional knowledge by storing business logic in a searchable database for ease of maintenance
- VAR Site Developer License available

CRM Rules: The Business Rules Builder

VISIONARY
software consulting

CRM Rules

A Microsoft Dynamics 365 add-on

The Business Rules Configurator. Which version is right for you?

BASIC PACKAGE

- Show Field
- Hide Field
- Set Field Value
- Set Field to Other Field Value
- Set Field To Mathematical Formula
- Required Fields
- Alert
- Disable Field
- Enable Field

ADMIN SUITE
Includes everything in Basic, PLUS:

- Collapse Tab
- Expand Tab
- Set Field to Derived String Concatenation Value
- Hide Section
- Show Section
- Hide Tab
- Show Tab
- Set Option Set List
- Copy Field(s) from Lookup Entity
- Set to Null
- Set Field to Now
- Run RULE
- Set Focus
- Fire OnChange
- Set Field to Value From Other Entity
- Refresh
- Save

*All the above use IF/THEN/ELSE only

ADVANCED SUITE
Everything in Basic and Admin, PLUS:

- Set Section Focus
- Set Section Label
- Set Tab Focus
- Set Tab Label
- Disable All Fields
- Enable All Fields
- Format Phone Number
- Set Field Label
- Hide IFRAME
- Hide Nav Item
- Hide Subgrid
- Hide Web Resource Control
- Refresh Subgrid
- Set Data for Silverlight
- Set Focus to IFRAME
- Set Focus to Nav Item
- Set Focus to Subgrid
- Set Focus to Web Resource Control
- Set IFRAME Label
- Set IFRAME Source
- Set Nav Item Label
- Set Subgrid Label
- Set Web Resource Control Label
- Set Web Resource Control Source
- Show IFRAME
- Show Nav Item
- Show Subgrid
- Show Web Resource Control
- Custom JScript
- Invoke Process Dialog

ADVANCED SUITE continued

- Return Function Value
- Run Workflow
- Always Submit Field
- Set Field to Function Return Value
- Alert
- Set/Clear Field Notification
- Prompt
- Set/Clear Form Notification

Business Process Flow Actions:

- Set Active BPF
- Move Next / Previous Stage
- Show/ Hide BPF
- Collapse/ Expand BPF

Rule Types in Advanced Suite:

- IF/THEN/ELSE
- Custom JScript
- Aggregation (Count, Sum, Min, Max, & Average across Children)
- Clone
- Case
- Return Value
- Custom Function
- Filtered Lookup

REQUEST A FREE TRIAL

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