Protomator

User Guide

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What is Protomator?

Protomator (Process + Automation) is an add-on service for Microsoft Dynamics 365 CRM online/On-Premise. The app lets you gain more productivity simply by defining repetitive activities into templates within primary entities like Account, Contact, Lead and Opportunity. It breaks down the process of performing similar tasks repeatedly.

The app is designed & developed for all kinds of industries and is best suited to the businesses who are doing repetitive processes on daily basis. The app leverages the features of Dynamics 365 to automate such activities so you and your team can focus on high-reaping targets and generate more profits!

Get Started

To get started, first let's walk through what you can do in Protomator, and then give you a start at finding your way around.

Setup

For information on setting up Protomator product, see Set Up and Install Protomator.

What you can do?

With protomator, you can:

- Automatically create Cases, Tasks & Appointments from templates
- Case Templates with Workflow Execution
- Configure dynamic values in templates
- Run templates for multiple places
- Include Attachments in templates
- Clone existing template

Find your way for CRM

In dynamics 365, sign in to a CRM organization where protomator app installed and then:

- Click on Service Tab, and under Protomator, there are three entities available. See *Figure 1*

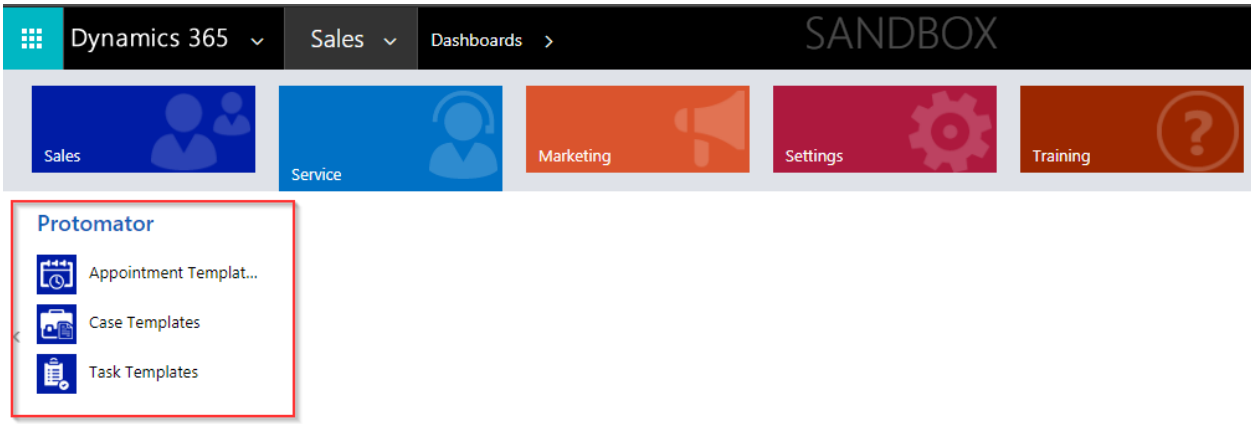


Figure 1

- To create appointment, case or task template just click on one you want.

How to create Templates?

Appointment Template

Appointment template usually used to create appointments in CRM which is occurring frequently in your business. See next on how to create appointment templates:

- To open appointment template , see below *figure 2*

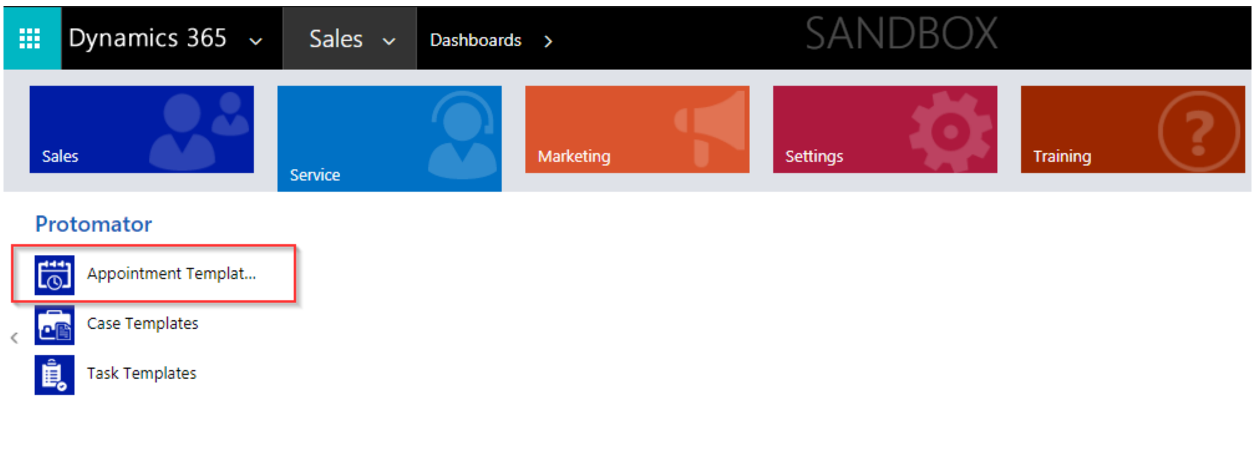


Figure 2

- From Command bar click on New , which allows you to create a new appointment template and looks like below *figure 3*

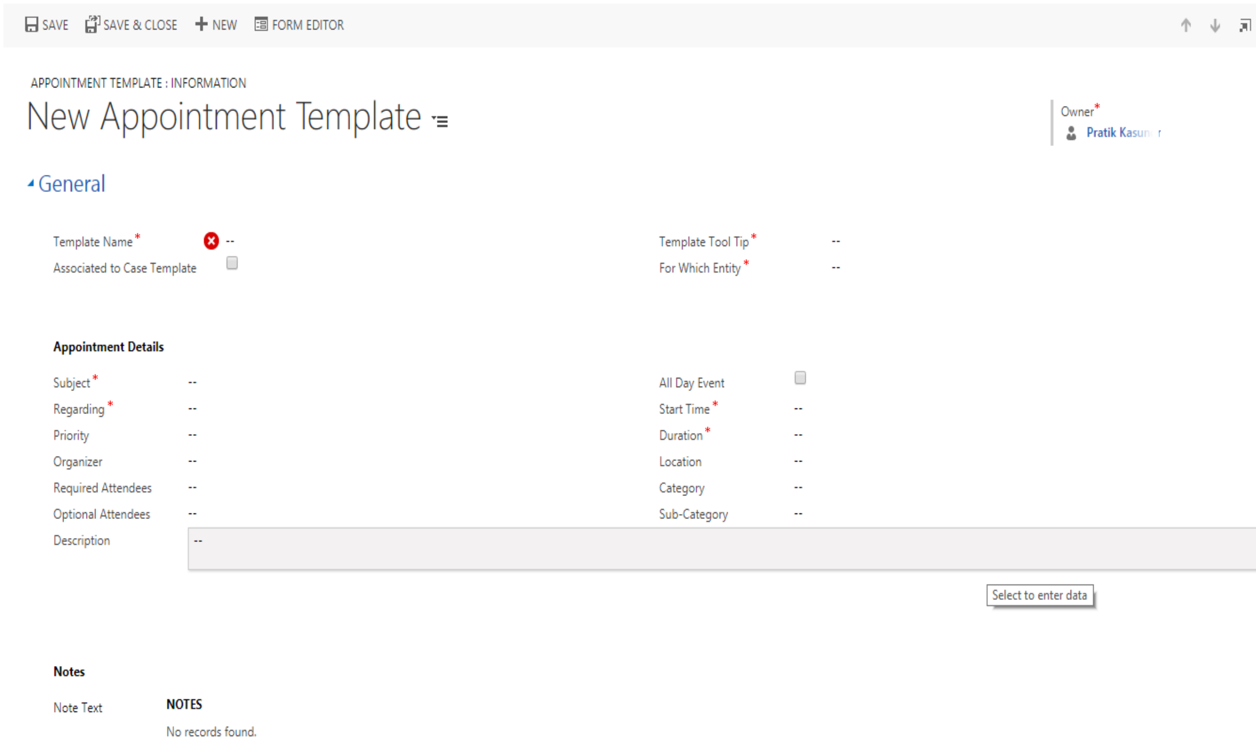


Figure 3

Below table gives us identification of each fields used in appointment templates:

Field Name	*Description*	*Sample Data*	*Required*
Template Name	***Name of the template***	***Final Meeting to Close Deal***	***Yes***
Template Tool-Tip	***This information will be displayed when we mouse hover on template name from Run Automation button. See here***	***Last meeting to close Deal***	***Yes***
Associated to Case Template	***If template is a part of case template or not.***		***No***
For Which Entity?	***For which entity , you want to run this template i.e. Account,Lead,contact,Opprotunity***	***Lead***	***Yes***
Subject	***Subject of appointment to be created when we run template***		***Yes***
All Day Event	***If Appointment is All day event***		***No***
Regarding	***Depending on which entity field, regarding field will be populated.***	***Parent Lead***	***Yes***

Start Time	*Start time of Appointment*	*{parent.createdon} {5} {12:10}*	*Yes*
Priority	*Priority of appointment i.e. Low,mediam ,High*	*Low*	*No*
Duration	*Duration of Appointments in minutes*	*20*	*Yes*
Organizer	*Who is organizer of appointment You can set Dynamic value here by {ownerid}- this means whoever is creator of primary record that person will be set as appointment organizer.*	*{ownerid}*	*No*
Location	*Location of appointment (Free text field)*	*Skype*	*No*
Required Attendees	*Who are required for this meeting? You can set user as attendees. {firstname lastname}*	*#John Smith#*	*No*
Optional Attendees	*Optional attendees you want to have for appointment*	*#William Prince#*	*No*
Category	*Category of appointment (Free text Field)*	*Sales*	*No*
Sub-Category	*Sub-Category of appointment (Free text Field)*	*New Lead*	*No*
Description	*Description of Appointment (Free text Field)*	*Final Meeting with prospect. Identify opportunity for this lead.*	*No*

Case Template

Case Template is very important and useful when you have a case & certain tasks/appointments behind that case. It consists of two more entities i.e. task & appointment. In Case template, you can specify which task & Appointment template you want to run once case is created through template. As well as you can trigger any custom workflow once case is created. So Case template is combination of:

- Task Template
- Case Template
- Custom workflow

To open Case template, see below *figure 4*

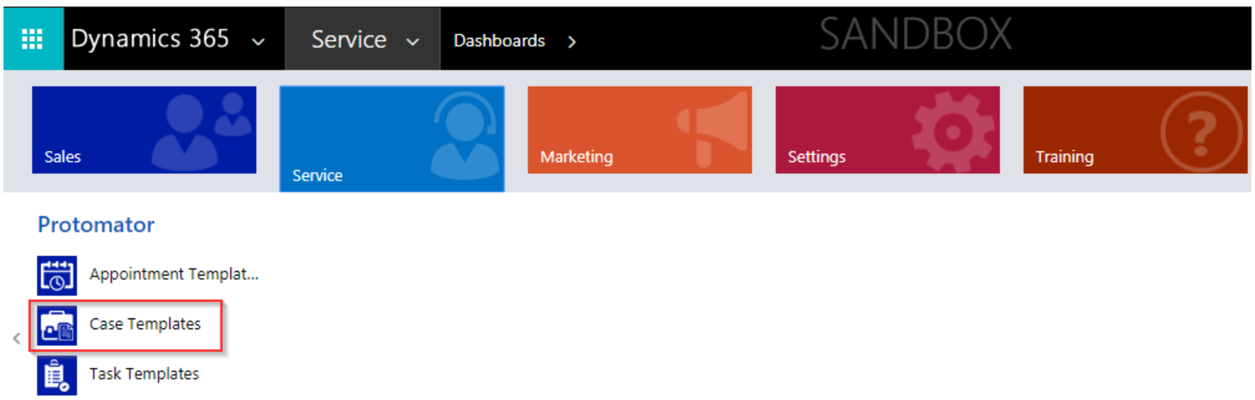


Figure 4

Click on New from Command Bar, this will show you Case template form, see below *figure 4*

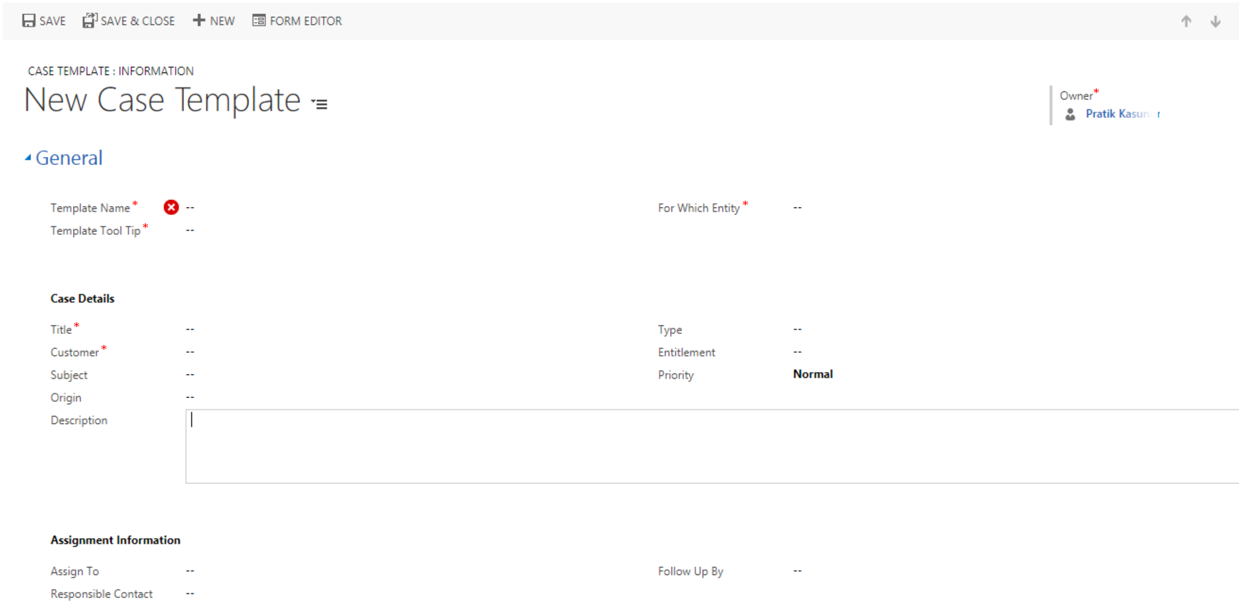


Figure 5

Field Name	***Description***	***Sample Data***	***Required***
Template Name	***Name of the template***	***Final Meeting to Close Deal***	***Yes***
Template Tool-Tip	***This information will be displayed when we mouse hover on template name from Run Automation button. See here***	***Last meeting to close Deal***	***Yes***
For Which Entity?	***For which entity , you want to run this template i.e. Account,Lead,contact,Opprotunity***	***Account***	***Yes***
Subject	***Subject of appointment to be created when we run template***	***New Case : Billing Discrepancy***	***Yes***
Type	***Type of case i.e. Problem,Request,Question***	***Problem***	***Yes***
Customer	***Customer look up***	***{contactid}***	***Yes***
Entitlements			***No***
Origin	***Origin of New case***	***Phone***	***No***
Priority	***Case Priority i.e. High,Medium,Low***	***High***	***No***

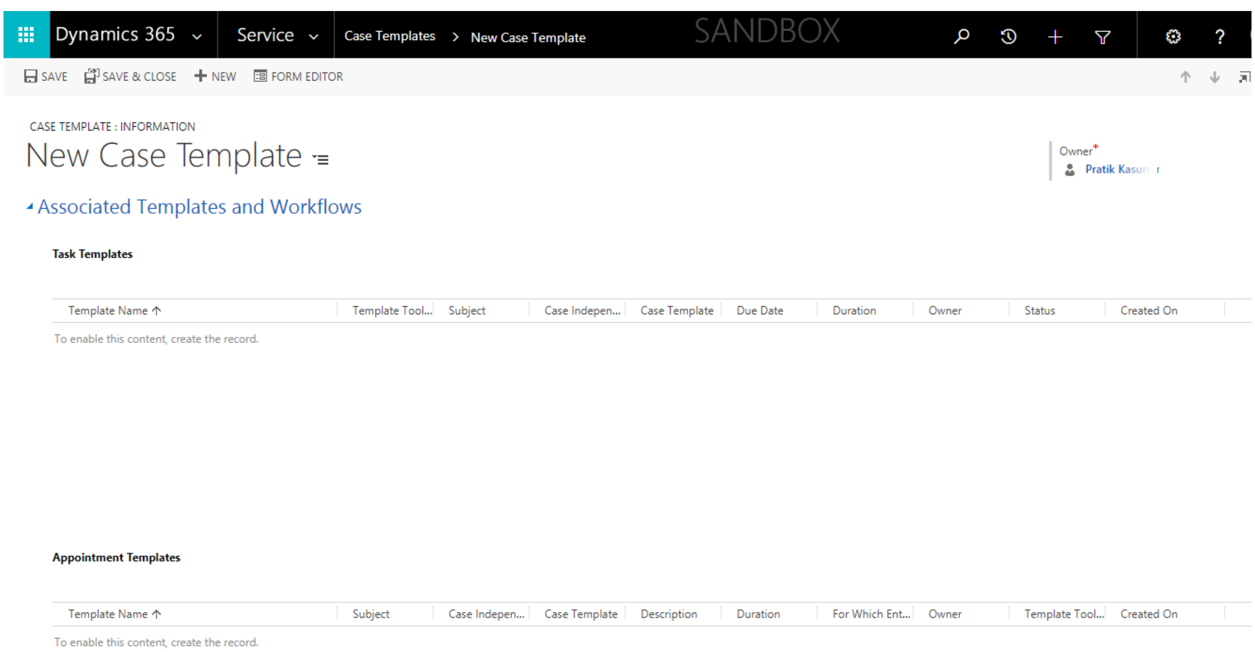
Description	*Description of Case*	*Billing Discrepancy issue with customer*	*No*
Assign To	*User whom case should be assigned. #FirstName LastName# -this would a assign a case to particular user.*	*#FirsNamet LastName#*	*No*
Follow up By	*A next date to follow up on this case. {2} – This will set up a date two days after case is created.*	*{parent.modifiedon} {2}*	*No*
Responsible Contact	*Look up of contact person*	*{parentcustomerid}*	*No*

Associate task & Appointment templates for Case Template

In case template, you have option to add task template & Appointment template which again gets executed after case is created.

Templates which are associated with case templates is not visible on Fly-out menu of Automation template.

You can easily associate task & appointment template with a case template. See below figure



Task Template

Task template is similar like appointment template. Task template used to create automatic task defined as per task template.

To open task template, see below *Figure 6*

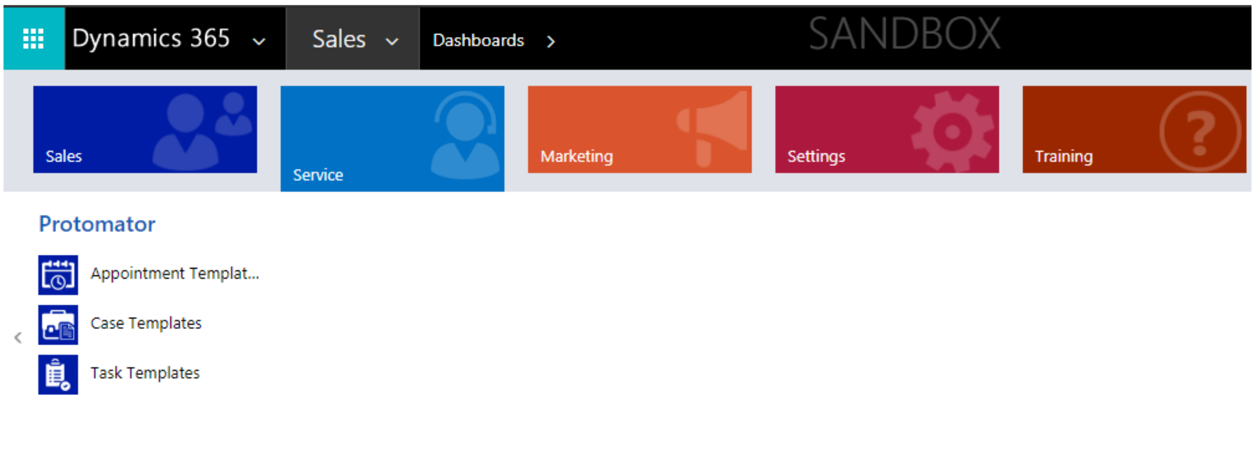


Figure 6

New Task Template form will look like as *Figure 7*

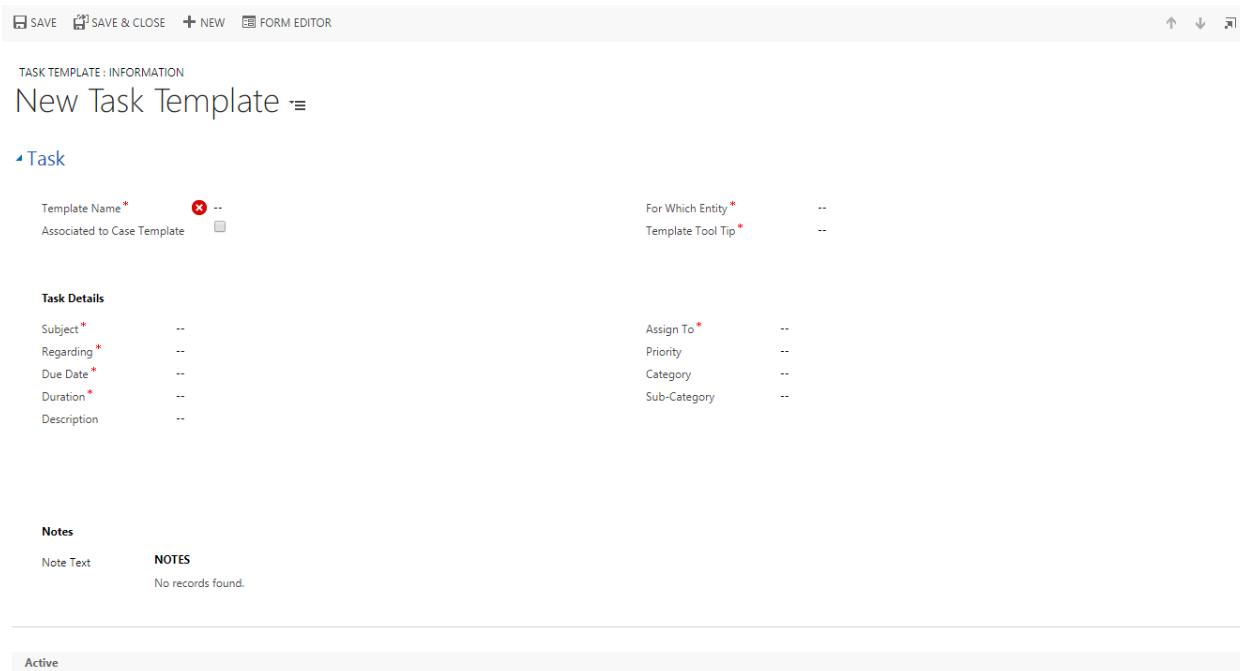


Figure 7

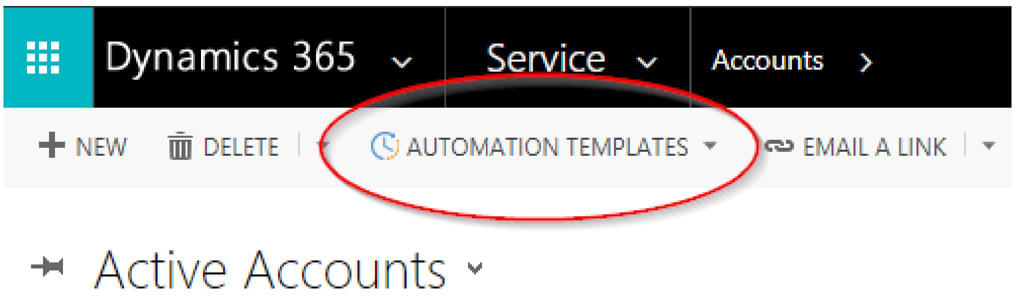
Field Name	*Description*	*Sample Data*	*Required*
Template Name	***Name of the template***	***Final Meeting to Close Deal***	***Yes***
Template Tool-Tip	***This information will be displayed when we mouse hover on template name from Run Automation button. See here***	***Last meeting to close Deal***	***Yes***
Associated to Case Template	***If template is a part of case template or not.***		***No***
For Which Entity?	***For which entity , you want to run this template i.e. Account,Lead,contact,Opprotunity***	***Lead***	***Yes***
Subject	***Subject of appointment to be created when we run template***	***Follow Up for New Lead***	***Yes***
Assigned To	***If Appointment is All day event***		***Yes***
Regarding	***Depending on which entity field, regarding field will be populated.***	***Parent Lead***	***Yes***
Due Date	***Start time of Appointment***	***{parent.createdon} {5} {12:10}***	***Yes***
Priority	***Priority of appointment i.e. Low,mediam ,High***	***Low***	***No***

Duration	***Duration of Appointments in minutes***	***20***	***Yes***
Category	***Category of appointment (Free text Field)***	***Sales***	***No***
Sub-Category	***Sub-Category of appointment (Free text Field)***	***New Lead***	***No***
Description	***Description of Appointment (Free text Field)***	***Final Meeting with prospect. Identify opportunity for this lead.***	***No***

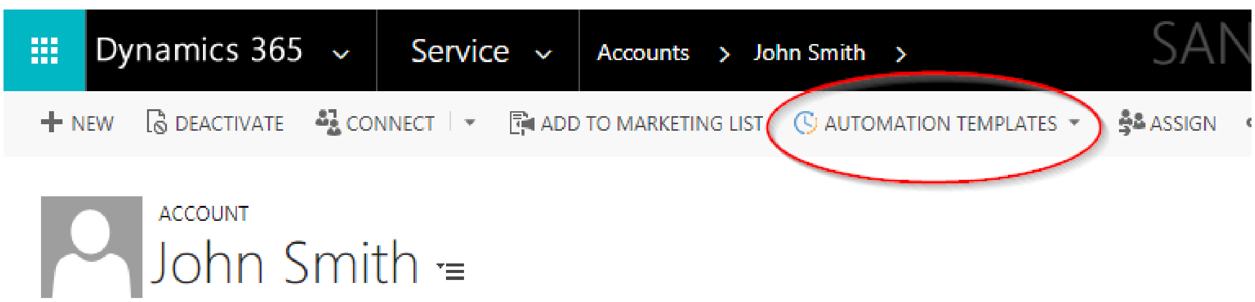
How to run Templates?

Once you define your templates, you can run/execute those templates using two different ways i.e.:

1. Record List Page



2. Individual Record Form



Entities Supported to run Templates

The app currently supports only four core entities of Dynamics CRM Sales. The entities are:

1) Account

2) Contact

3) Leads

4) Opportunity

Other Features

Attachments with Templates

Protomator app allows you to attach any documents within templates which again carried when automatic task/appointments/case is created.

Attachment feature is very similar to default CRM feature of notes & attachments. You can add multiple documents to a template. Size of attachments depends on your global settings implemented for your organization.

Please see below figure 8 on how to upload document:

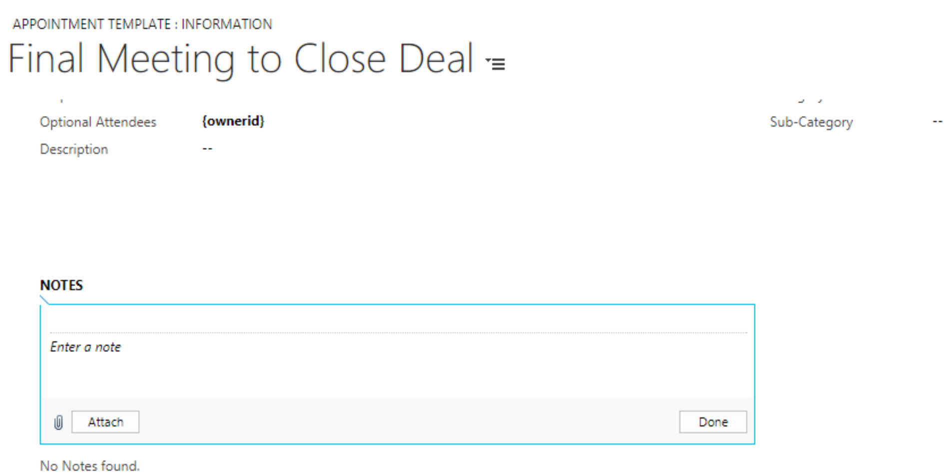


Figure 8

Clone Template

Clone template feature is useful to create a copy of existing template so that you can quickly define your template using existing template details.

To Clone a template, there is a button on command bar for Appointment, Case, and Task templates. See below *Figure 9*

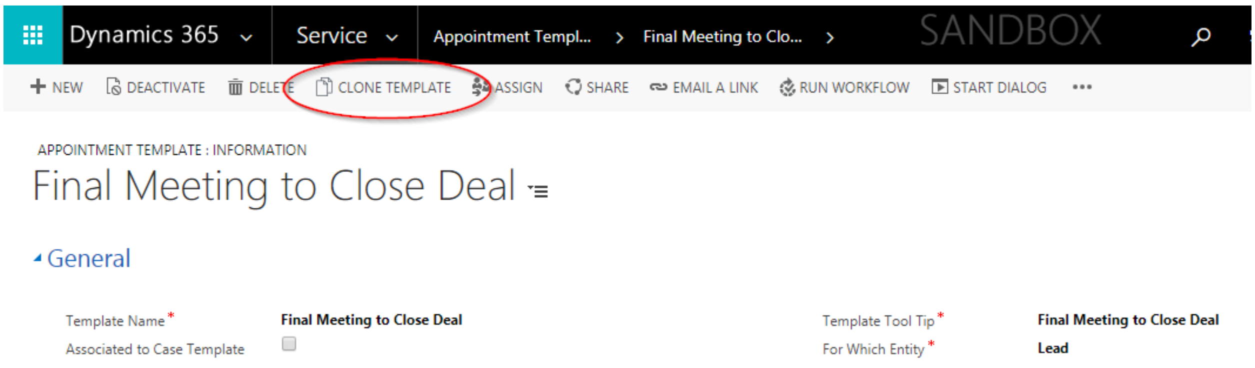


Figure 9

Troubleshooting

Appointment Validation Problems

1) Invalid date field for Start Time
   Resolution: Date field contain format like {parent.datefield} {days} {hh:mm}
   Example: {parent.createdon} {2} {10:10}

   Invalid scenarios for 'Invalid start time format' error
   - {createdon} {2} {10:10}
   - {parent.fullname} {2} {10:10}
   - {parent.createdon} {2} {10}
   - {parent.createdon} {2} {25:10}

2) Invalid field for Organizer
   Resolution: Organizer field contain only {ownerid} or #User name#
   Example: #William Prince# or {ownerid}

3) Entity does not contain attribute with
   Resolution: Subject field accepts only fields from selected entity
   Example: For Account field -> Valid field: {name}, {parentaccountid}
   -> Invalid fields: {fullname}, {account id}

Note: Above resolution (Entity does not contain attribute with) applicable for all text fields of default Appointment, Case or Task

4) Invalid field for Required and Optional Attendees
   Resolution: These two fields contain lookup of account, contact, lead or user from selected selected entity. These two does not contain text fields of selected entity
   Example : For Account Entity -> Valid fields : {accountid} {primarycontactid} {ownerid}
   -> Invalid fields: {contactid} {parentcontactid}

Case Validation Problems

1) Invalid date field for Follow Up By
   Resolution: Date field accepts formats like {parent.datefield} or {parent.datefield} {days}
   Example: {parent.createdon} or {parent.createdon} {2}

   Invalid scenarios for 'Invalid start time format' error

- {createdon} {2}
- {parent.fullname} {2}
- {parent.createdon} {2} {10:10}

2) Invalid field for Customer
   Resolution: Customer fields accepts either contact or account fields from selected entity
   Example: For Account -> Valid Fields: {accountid} , {primarycontactid}
   -> Invalid Fields: {parentcontactid} , {contactid} , {Accountid}
3) Entity does not contain attribute with
   Resolution: Title field accepts only fields from selected entity
   Example: For Account fields -> Valid field: {name}, {parentaccountid}
   -> Invalid fields: {fullname}, {account id}

Task Validation Problems

1) Invalid date field for Due Date
   Resolution: Date field accepts format like {parent.datefield} {days} {hh:mm}
   Example: {parent.createdon} {2} {10:10}

   Invalid scenarios for 'Invalid start time format' error
   - {createdon} {2} {10:10}
   - {parent.fullname} {2} {10:10}
   - {parent.createdon} {2} {10}
   - {parent.createdon} {2} {25:10}

2) Invalid field for Assign To
   Resolution: Above field accepts only {ownerid} or #User Name#
   Example: {ownerid} or #William Prince#

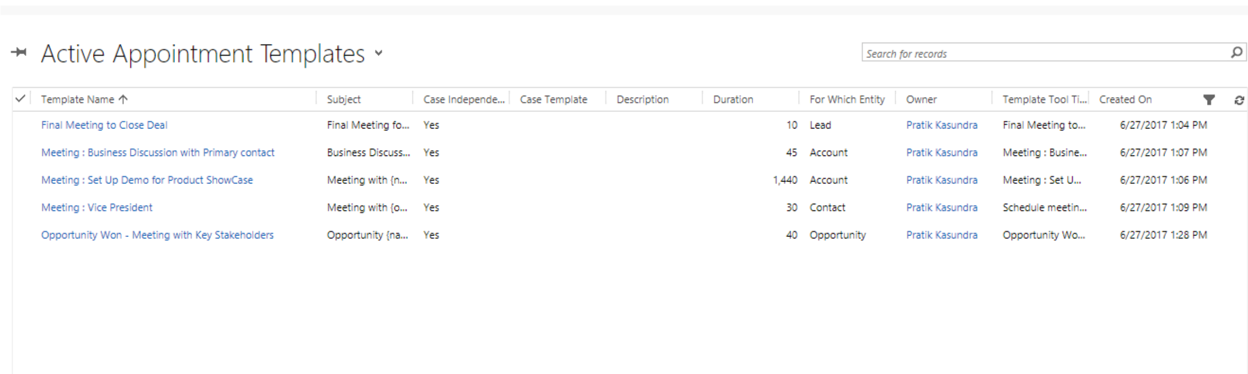
3) Entity does not contain attribute with
   Resolution: Subject field contain only fields from selected entity
   Example: For Account field -> Valid field: {name} , {parentaccountid}
   -> Invalid fields: {fullname}, {account id}

References

Sample Data

Protomator app comes up with sample data. This data will help you in creating your templates & identifying how to set dynamic values.

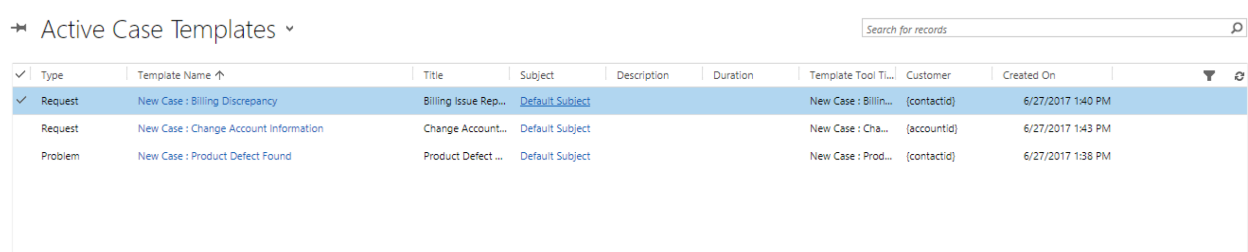
To see your sample data, please see figure 9, figure 10 & figure 11. To know more about sample data please visit our help & support page.



Active Appointment Templates

Template Name	Subject	Case Independe...	Case Template	Description	Duration	For Which Entity	Owner	Template Tool Ti...	Created On
Final Meeting to Close Deal	Final Meeting fo...	Yes			10	Lead	Pratik Kasundra	Final Meeting to...	6/27/2017 1:04 PM
Meeting : Business Discussion with Primary contact	Business Discuss...	Yes			45	Account	Pratik Kasundra	Meeting : Busine...	6/27/2017 1:07 PM
Meeting : Set Up Demo for Product ShowCase	Meeting with {n...	Yes			1,440	Account	Pratik Kasundra	Meeting : Set U...	6/27/2017 1:06 PM
Meeting : Vice President	Meeting with {o...	Yes			30	Contact	Pratik Kasundra	Schedule meetin...	6/27/2017 1:09 PM
Opportunity Won - Meeting with Key Stakeholders	Opportunity {na...	Yes			40	Opportunity	Pratik Kasundra	Opportunity Wo...	6/27/2017 1:28 PM

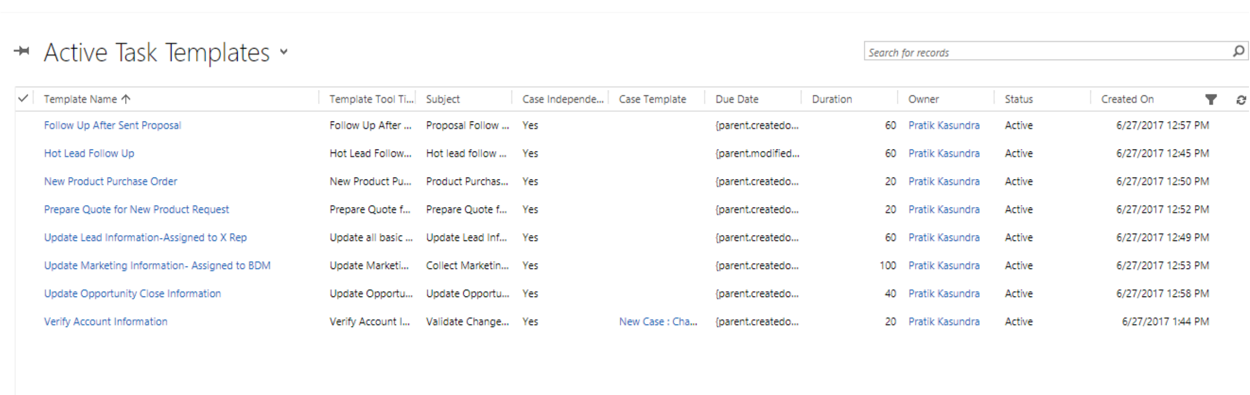
Figure 10



Active Case Templates

Type	Template Name	Title	Subject	Description	Duration	Template Tool Ti...	Customer	Created On
Request	New Case : Billing Discrepancy	Billing Issue Rep...	Default Subject			New Case : Billin...	{contactid}	6/27/2017 1:40 PM
Request	New Case : Change Account Information	Change Account...	Default Subject			New Case : Cha...	{accountid}	6/27/2017 1:43 PM
Problem	New Case : Product Defect Found	Product Defect ...	Default Subject			New Case : Prod...	{contactid}	6/27/2017 1:38 PM

Figure 11



Active Task Templates

Template Name	Template Tool Ti...	Subject	Case Independe...	Case Template	Due Date	Duration	Owner	Status	Created On
Follow Up After Sent Proposal	Follow Up After ...	Proposal Follow ...	Yes		{parent.createdo...	60	Pratik Kasundra	Active	6/27/2017 12:57 PM
Hot Lead Follow Up	Hot Lead Follow...	Hot lead follow ...	Yes		{parent.modified...	60	Pratik Kasundra	Active	6/27/2017 12:45 PM
New Product Purchase Order	New Product Pu...	Product Purchas...	Yes		{parent.createdo...	20	Pratik Kasundra	Active	6/27/2017 12:50 PM
Prepare Quote for New Product Request	Prepare Quote f...	Prepare Quote f...	Yes		{parent.createdo...	20	Pratik Kasundra	Active	6/27/2017 12:52 PM
Update Lead Information-Assigned to X Rep	Update all basic ...	Update Lead Inf...	Yes		{parent.createdo...	60	Pratik Kasundra	Active	6/27/2017 12:49 PM
Update Marketing Information- Assigned to BDM	Update Marketi...	Collect Marketin...	Yes		{parent.createdo...	100	Pratik Kasundra	Active	6/27/2017 12:53 PM
Update Opportunity Close Information	Update Opportu...	Update Opportu...	Yes		{parent.createdo...	40	Pratik Kasundra	Active	6/27/2017 12:58 PM
Verify Account Information	Verify Account I...	Validate Change...	Yes	New Case : Cha...	{parent.createdo...	20	Pratik Kasundra	Active	6/27/2017 1:44 PM

Figure 12