



Helping your business
grow faster

2IDENTIFY

January 2018

① Introduction

② Configuration

③ Practice



Install & Configuration



Security Roles



UIC - Unique Identifier Configuration



UIC - Key Tabs



UIC - Advanced Tabs



UI - View






Click on each icon or number to go directly to the respective area

Introduction

2IDENTIFY
By NOESIS

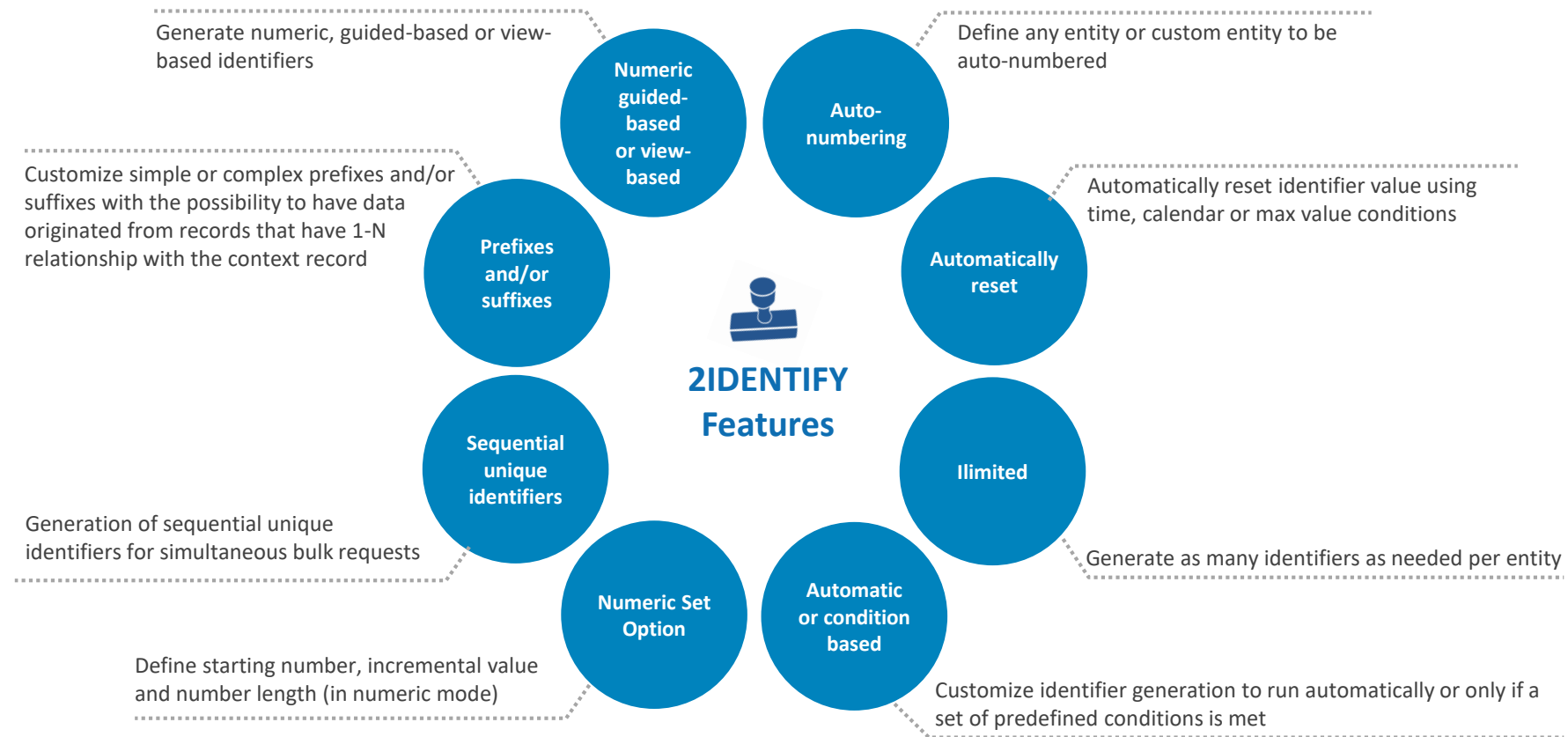
What is it?

What is 2IDENTIFY?

Definition	Goal	Usability
 2IDENTIFY is a product...	 ...to spot records and to insert identification fields into any entity within Dynamics 365	 ...it offers the capability to randomly create identifiers using different criteria and / or expression combinations to be applied into multiple fields on the selected entity



2IDENTIFY key features



Configuration

① Introduction

② Configuration

③ Practice



Install & Configuration



Security Roles



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UIC - Advanced Tabs



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Click on each icon or number to go directly to the respective area

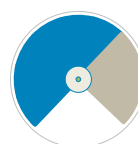
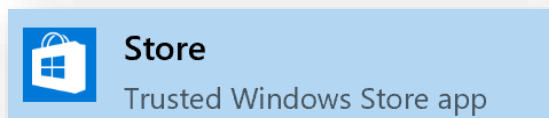
Install & Configuration

Installation in three steps



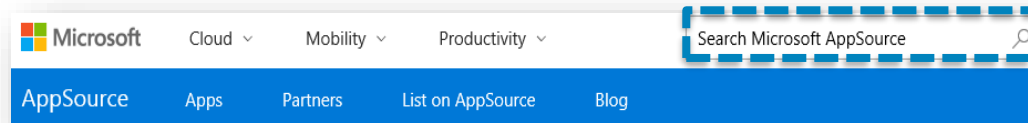
1

Go to Windows Store App
Or: <https://appsource.microsoft.com>



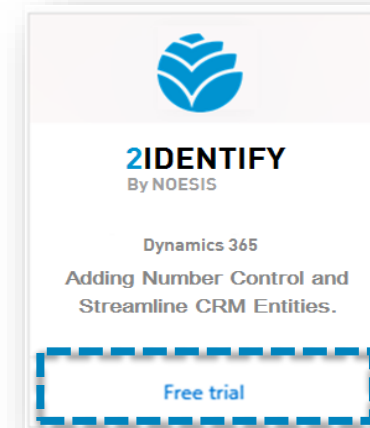
2

Search for "2IDENTIFY"






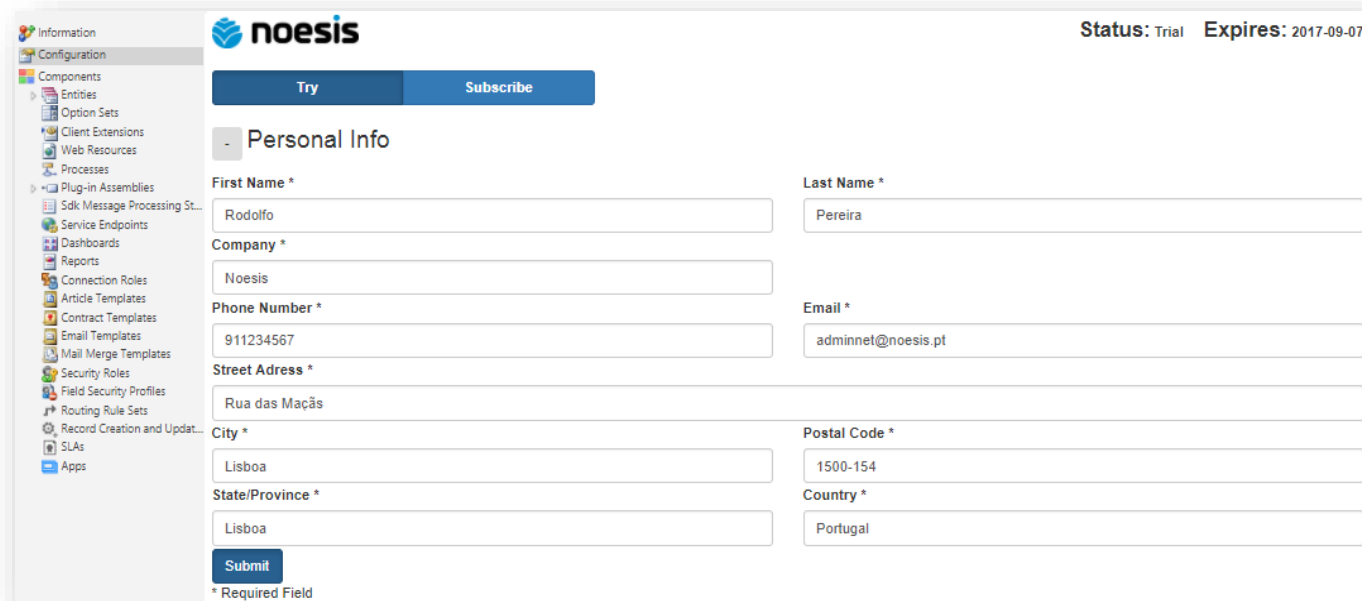
3

Press Free Trial



2IDENTIFY Configuration

-  Installation is done
-  Activate 2IDENTIFY in Configuration Page
-  To register it is possible to choose a Try or to Subscribe the 2IDENTIFY



The screenshot shows the Noesis 2IDENTIFY configuration interface. On the left is a sidebar with a tree view containing categories like Information, Configuration, Components, and various templates. The main area has the Noesis logo and a status bar indicating 'Status: Trial' and 'Expires: 2017-09-07'. Below this are 'Try' and 'Subscribe' buttons. The 'Personal Info' section contains several form fields: First Name (Rodolfo), Last Name (Pereira), Company (Noesis), Phone Number (911234567), Street Address (Rua das Maças), City (Lisboa), State/Province (Lisboa), Postal Code (1500-154), and Country (Portugal). A 'Submit' button is at the bottom, and an asterisk indicates required fields.

Personal Info	
First Name *	Rodolfo
Last Name *	Pereira
Company *	Noesis
Phone Number *	911234567
Street Address *	Rua das Maças
City *	Lisboa
State/Province *	Lisboa
Postal Code *	1500-154
Country *	Portugal

[Submit](#)

* Required Field

2IDENTIFY Configuration

 To **subscribe** in addition to personal info add the Billing and the Licensing Info.

Information

Configuration

Components

Entries

Option Sets

Client Extensions

Web Resources

Processes

Plug-in Assemblies

Sdk Message Processing St...

Service Endpoints

Dashboards

Reports

Connection Roles

Article Templates

Contract Templates

Email Templates

Mail Merge Templates

Security Roles


Field Security Profiles

Routing Rule Sets

Record Creation and Updat...

SLAs

Apps



Status: Trial Expires: 2017-09-07

TrySubscribe

+Personal Info

-Billing Info

Street Address *

Enter Address

City *

Enter City

Postal Code *

Enter Postal Code

State/Province *

Enter State or Province

Country *

Enter Country

VAT Number *

Enter VAT Number

PO Number *

Enter PO Number

Email *

Enter Email

Licensing Info

Number of licenses required*

License auto-renewal? ☐

Users

>><<

Unsubscribed

crm admin

crm user

Subscribed

Submit

* Required Field

Security Roles

What is a Security Role?

If you would like a user to be able to create new a 2IDENTIFY configuration they should be assigned the **Unique Identifier Configurator Security Role**. A Security Role defines how different users, such as salespeople, access different types of records. To control access to data, you can modify existing Security Roles, create new Security Roles, or change which Security Roles are assigned to each user. Each user can have multiple Security Roles.



The Unique Identifier
Configurator **Security Role...**



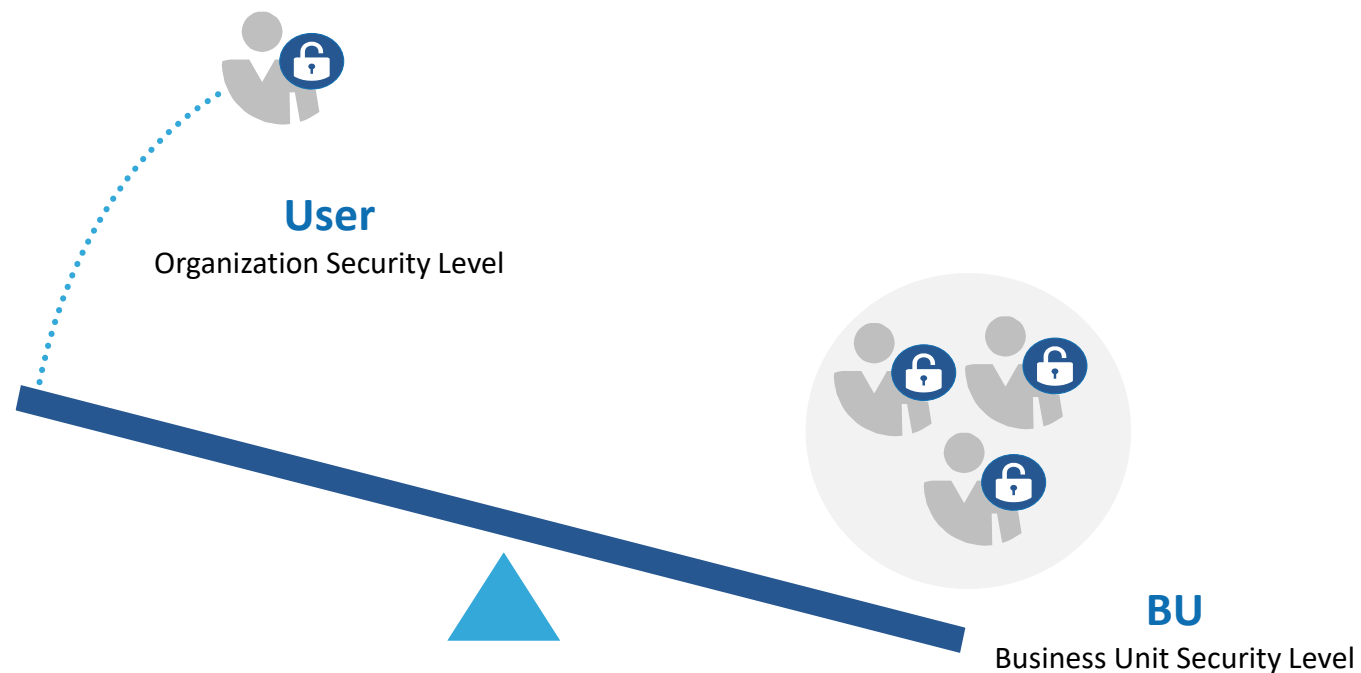
is the **permission** for a
user **to create...**



a **New 2IDENTIFY
Configuration**

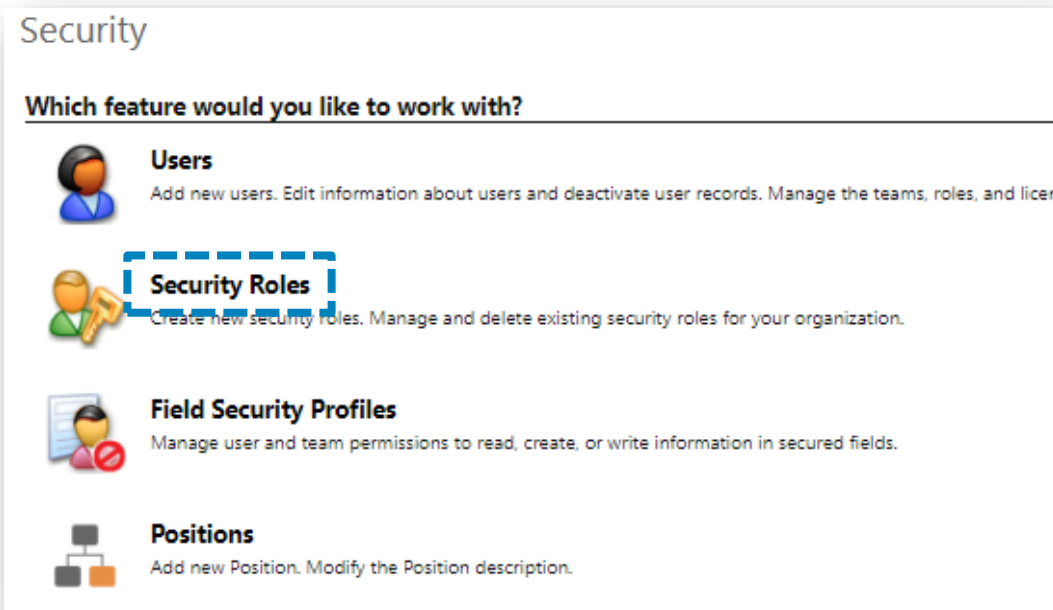
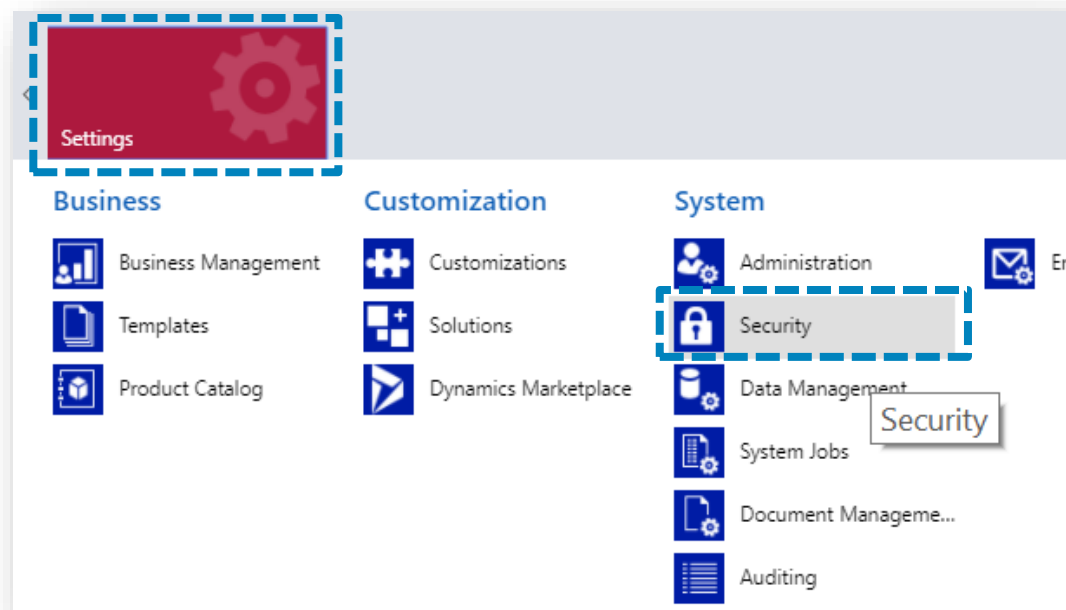
Types of Security Roles

Users who you would like to have access to the 2IDENTIFY solution should be assigned the 2IDENTIFY **Unique Identifier User** or **Unique Identifier User BU Security Role**



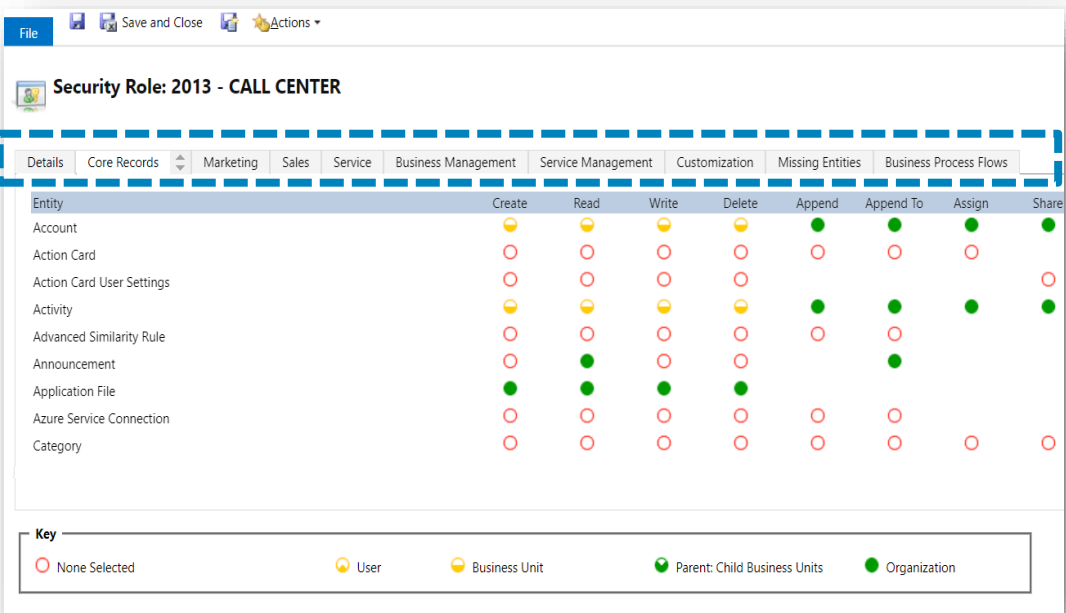
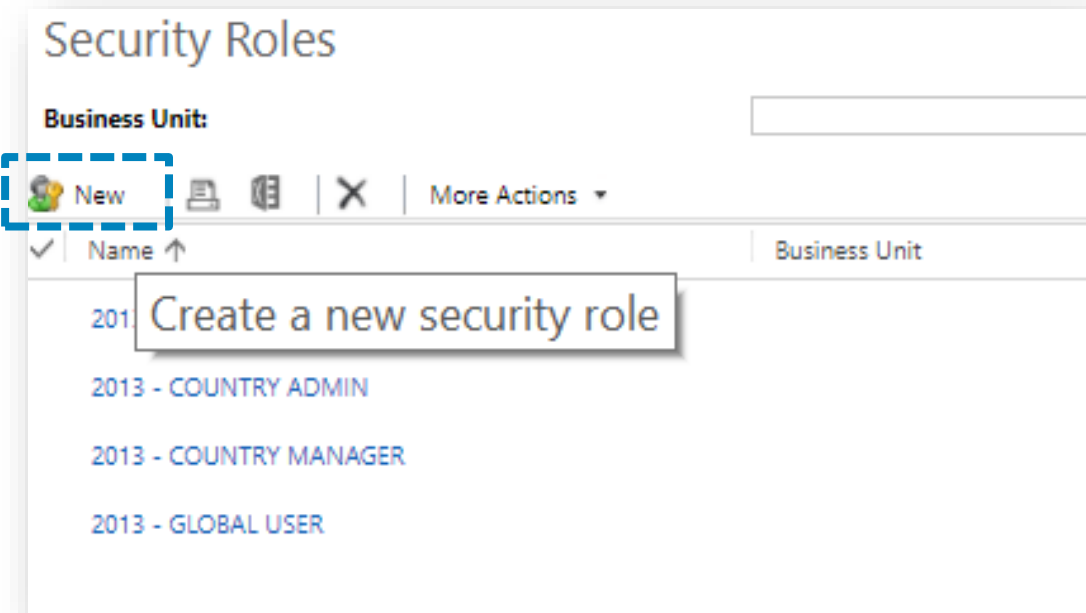
How to assign Security Roles

Go to **Settings**, **Security** and click on **Security Roles**



How to assign Security Roles

Click on **New**. Then, there are tabs to insert the key security permissions wanted. The tabs to complete are: **Details**, **Core Records**, **Marketing**, **Sales**, **Service**, **Business Management**, **Service Management**, **Customization**, **Missing Entities**, **Business Process Flows** and **Custom Entities**. The permission levels available are: **None Selected**, **User**, **Business Unit**, **Parent: Child Business Units** and **Organization**. At the end of this chapter you will find further information regarding this matter if needed







Security Roles – for 2IDENTIFY

To allow a user create new a 2IDENTIFY configuration there’s a need to assign him a **Unique Identifier Configurator User** or **Unique Identifier User BU Security Role**. The two next slides explain how in detail

Security Roles

Business Unit: 2Identify

 New |  |  |  | More Actions ▾

✓ Name ↑	Business Unit
System Customizer	2Identify
Unique Identifier Configurator	2Identify
Unique Identifier User	2Identify
Unique Identifier User BU	2Identify

Unique Identifier User

Steps to assign a user with the **Unique Identifier Configurator User Security Role**:

1. Details tab: give the name **Unique Identifier User**
2. Customization tab: give Organization permission to read to Plug-in Assembly; Plug-in Type; Sdk Message, Sdk Message Processing Step, Sdk Message Processing Step Image


Security Role: Unique Identifier User

Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Missing Entities | Business Process Flows | Custom Entities

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
App	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Attribute Map	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Custom Control	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>				
Custom Control Default Config	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>				
Custom Control Resource	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>				
Customizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Entity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Entity Key	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Entity Map	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>		
Field	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Hierarchy Rule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Import Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Option Set	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Assembly	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Trace Log	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Type	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Process Session	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Publisher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Relationship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Image	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				

Unique Identifier User

3. Business Process Flows tab: give Organization permission to create, read, write, delete, append and append to, to all the list with exception of PO Receipt



Security Role: Unique Identifier User

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities				
Entity									Create	Read	Write	Delete	Append	Append To
Expired Process									●	●	●	●	●	●
PO Receipt									○	○	○	○	○	○
Lead To Opportunity Sales Process									●	●	●	●	●	●
New Process									●	●	●	●	●	●
Opportunity Sales Process									●	●	●	●	●	●
Phone To Case Process									●	●	●	●	●	●
Translation Process									●	●	●	●	●	●

Unique Identifier User

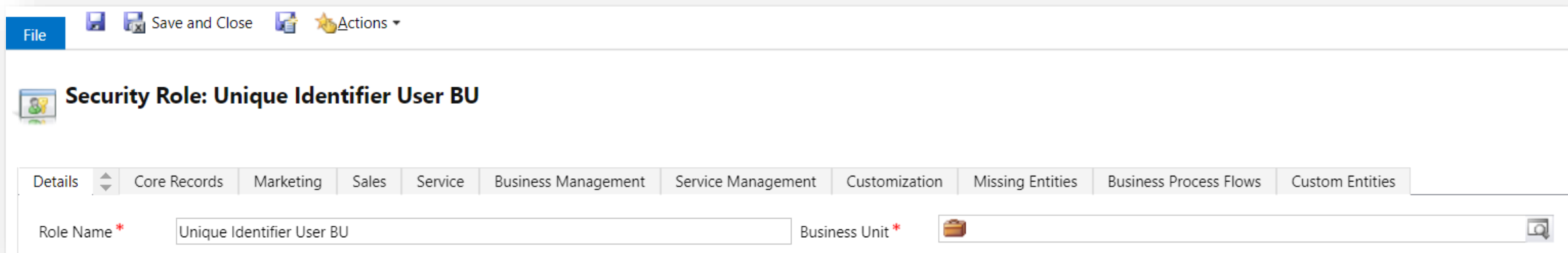
4. Custom Entities tab: give **Organization** permission to read and write of **Unique Identifier Configuration**

Security Role: Unique Identifier User														
Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities				
Reports Handler									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row Definition									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row Definition Header									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rule									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Tax Authority									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Tax Schedule									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Tax Transaction									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Select Checks									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selling Product									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sender									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SEPA									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service Calendar									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service Cost Contract									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service Cost Contract Detail									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service Measures									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service Measures Goal									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service SLA									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shipping Method									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stock									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stock Configuration									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stock Planning									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stock Position									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stringfy Settings									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stringfy Target									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supplier Contract									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Symptom									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Terms									<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unique Identifier Configuration									<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Unique Identifier User BU

Steps to assign a user with the **Unique Identifier Configurator User BU Security Role**:

1. Details tab: give the name **Unique Identifier User BU**
2. Customization tab: give Organization permission to read to Plug-in Assymby; Plug-in Type; Sdk Message, Sdk Message Processing Step, Sdk Message Processing Step Image
3. Business Process Flows tab: give Organization permission to create, read, write, delete, append and append to, to all the list with exception of PO Receipt
4. Custom Entities tab: give **Business Unit** permission to read and write of **Unique Identifier Configuration**





The screenshot shows a web application interface for configuring a security role. At the top, there is a menu bar with 'File', 'Save and Close', and 'Actions'. Below this, the title 'Security Role: Unique Identifier User BU' is displayed. A tabbed interface is shown with the following tabs: Details, Core Records, Marketing, Sales, Service, Business Management, Service Management, Customization, Missing Entities, Business Process Flows, and Custom Entities. The 'Details' tab is active. In the 'Details' tab, there are two input fields: 'Role Name *' with the value 'Unique Identifier User BU' and 'Business Unit *' with a dropdown menu showing a briefcase icon. A magnifying glass icon is visible on the right side of the 'Business Unit' field.


Additional information regarding Security Roles definition


- Security Role privileges are **cumulative**: having more than one Security Role gives a user every privilege available in every role.
- Each Security Role consists of record-level privileges and task-based privileges.
- Record-level privileges define which tasks a user with access to the record can do, such as **Read**, **Create**, **Delete**, **Write**, **Assign**, **Share**, **Append**, and **Append To**. Append means to attach another record, such as an activity or note, to a record. Append to means to be attached to a record. More information: Record-level privileges.
- Task-based privileges, at the bottom of the form, give a user privileges to perform specific tasks, such as publish articles or perform a mail merge.
- **The coloured circles on the Security Role settings page define the access level for that privilege.** Access levels determine how deep or high in the organizational business unit hierarchy the user can perform the specified privilege. The following table lists the levels of access in Microsoft Dynamics 365 and in the **next slide it is the description of each level.**


Key

 None Selected

 User

 Business Unit

 Parent: Child Business Units

 Organization

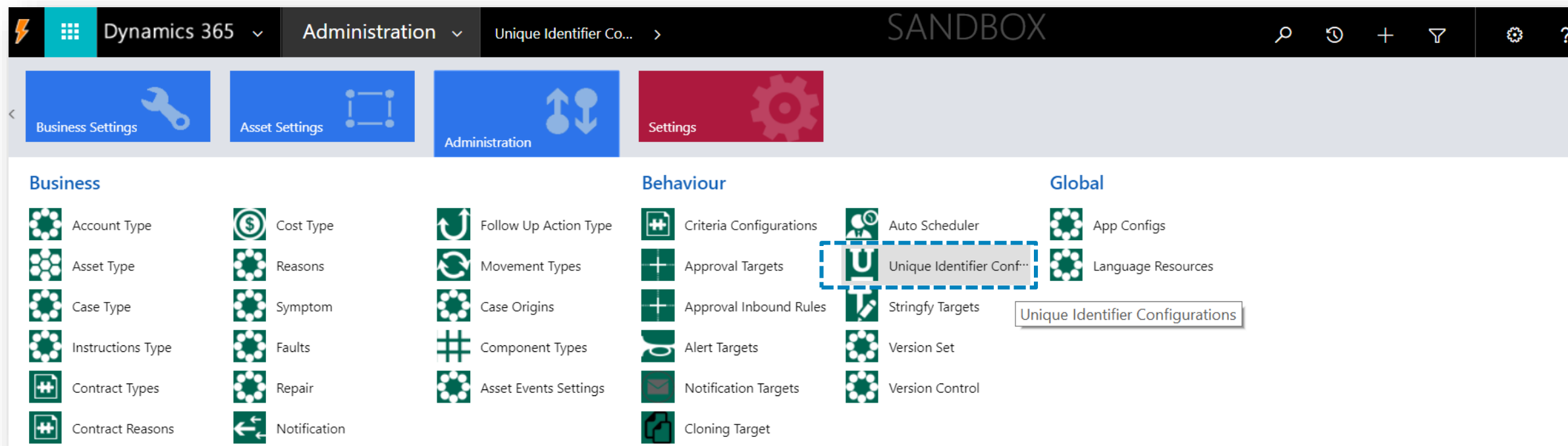
Additional information regarding Security Roles definition

●	<p>Global. This access level gives a user access to all records in the organization, regardless of the business unit hierarchical level that the instance or the user belongs to. Users who have Global access automatically have Deep, Local, and Basic access, also.</p> <p>Because this access level gives access to information throughout the organization, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the organization.</p> <p>The application refers to this access level as Organization.</p>
●	<p>Deep. This access level gives a user access to records in the user's business unit and all business units subordinate to the user's business unit.</p> <p>Users who have Deep access automatically have Local and Basic access, also.</p> <p>Because this access level gives access to information throughout the business unit and subordinate business units, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the business units.</p> <p>The application refers to this access level as Parent: Child Business Units.</p>
●	<p>Local. This access level gives a user access to records in the user's business unit.</p> <p>Users who have Local access automatically have Basic access, also.</p> <p>Because this access level gives access to information throughout the business unit, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the business unit.</p> <p>The application refers to this access level as Business Unit.</p>
●	<p>Basic.</p> <p>This access level gives a user access to records that the user owns, objects that are shared with the user, and objects that are shared with a team that the user is a member of.</p> <p>This is the typical level of access for sales and service representatives.</p> <p>The application refers to this access level as User.</p>
○	<p>None. No access is allowed.</p>

UIC – Unique Identifier Configuration

How to access UIC

Go to **Administration** and tap **Unique Identifier Configurations**



How to access UIC

There it is possible to verify all **Unique Identifier Configurations** already created and its features, such as:

- Sequence Type;
- Prefix;
- Suffix;
- What attribute and entity this setting will affect;
- Current Status Active or Draft

All Unique Identifier Configurations ▾

Search for records

Name	Sequence Type	Next Number	Increment By	Length	ZeroPad	Prefix	Suffix	Overwrite Origin...	Regarding Attrib...	Regarding Entity	Reset Mode	Status Reason
[Example] Invoice ID s...	View-Based Count	1	1		No			Yes	name	invoice	Off	Active
[Example] Case creati...	Numeric	10	1		No	{ToString(create...		Yes	title	incident	Reset by Minute...	Active
[Example] Account Id...	Guid			10	No			Yes	accountnumber	account	Off	Active

How to create an UIC

Click on the button + NEW to create a Unique Identifier Configuration

Dynamics 365

Noesis Apps

Unique Identifier Co...

+ NEW

DELETE

EMAIL A LINK

RUN REPORT

EXCEL TEMPLATES

EXPORT TO EXCEL

IMPORT DATA

CHART PANE

VIEW

UNIQUE IDENTIFIER CONFIGURATION : BASIC

New Unique Identifier Configuration

General

Name

Entity

Last Calc Date

Prefix

Reset Mode

Increment By

--

--

--

--

Off

1

Overwrite Original Val

Attribute

Status Reason

Suffix

Next Number

Yes

--

Draft

--

1

Criteria

Criteria Configuration

Criteria Validation

--

Matching Record

Name

Type

Status Reason...

Owner

Created On

To enable this content, create the record.

UIC – Key Tabs

UIC

Key Tabs

Advanced Tabs

UIC – Tabs Available

To create a New Unique Identifier Configuration there are **five tabs available**

- 1 ● GENERAL
- 2 ● PLUGIN INFO
- 3 ● GENERATOR OPTIONS
- 4 ● CRITERIAS
- 5 ● RESET OPTIONS

UNIQUE IDENTIFIER CONFIGURATION : INFORMATION ▼

New Unique Identifier Configuration

- ▶ General
- ▶ Plugin Info
- ▶ Generator Options
- ▶ Criterias
- ▶ Reset Options

UIC

Key Tabs

Advanced Tabs

UIC – Key Tabs

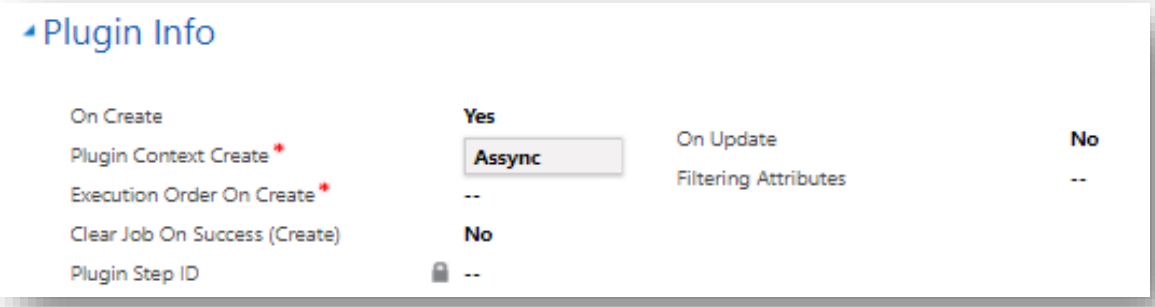
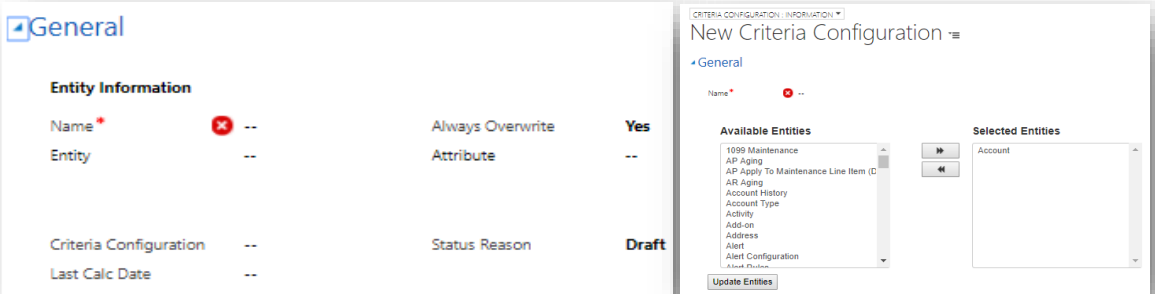
The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

1 GENERAL

- **Name:** give a name to the Unique Identifier
- **Entity:** entity within which Unique Identifier will identify records
- **Always overwrite:** Yes/No
- **Attribute:** accordingly to the entity selected choose attributes to be identified
- **Criteria Configuration:** filters the views that will appear in Criteria (existing one or new)
- **Last Calc Date:** date and time of last calculation
- **Status Reason:** Draft (editing version)/ Active (closed version)

2 PLUGIN INFO

- **On Create:** always **yes** and it works as an extending trigger
- **Plugin Context Create:** choice between **Assync** (occurrence of events independently of the main program flow) or **Sync** (abbreviations of synchronization, coordination of events).
- **On Update:** Yes/No. If yes, it sets a new plugin, with plugin context update, execution order and filtering attributes
- **Execution Order On Create:** type a number that will prioritize the flow of steps (value between 1-100)
- **Filtering Attributes:** attributes of the filter
- **Clear Job On Success (Create):** Yes/No. If yes – deletes the system job. If no – no changes



UIC

Key Tabs

Advanced Tabs

UIC – Key Tabs

3 GENERATOR OPTIONS

The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

- **Sequence Type:**

Fetch XML Count - this tool allows to execute a Fetch request and see the result in XML

Or Numeric

or Guid

In case of choosing **Fetch XML Count** complete the following fields:

- **Lenght:** choose a numerical value between 1-9
- **Increment By:** choose a numerical value
- **ZeroPad:** Yes/No
- **View:** select an existing view or check the chapter UI – View to see how to create a new one.

Generator Options

Generator Information

Sequence Type	FetchXML Count
Length *	<input type="text" value="--"/>
Increment By *	<input type="text" value="--"/>
View	<input type="text" value=""/> <input type="button" value="🔍"/>

ZeroPad *

UIC

Key Tabs

Advanced Tabs

UIC – Key Tabs

The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

3 GENERATOR OPTIONS

- **Sequence Type:**
Fetch XML Count
Or **Numeric**
or Guid

In case of choosing **Numeric** complete the following fields:

- **Lenght:** choose a numerical value between 1-9
- **Increment By:** choose a numerical value
- **ZeroPad:** Yes/No
- **Next Number:** choose a numerical value
- **Numeric Style:** Choose between Base8, Base10 or Base16

Generator Options

Generator Information

Sequence Type	Numeric	Next Number *	--
Length *	 --		
Increment By *	--	ZeroPad *	No
Numeric Style	Base10		

UIC

Key Tabs

Advanced Tabs

UIC – Key Tabs

The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

3 GENERATOR OPTIONS

- **Sequence Type:**
Fetch XML Count
Or Numeric
or **Guid** – Global Unique Identifier

In case of choosing **Numeric** complete the following fields:

- **Lenght:** choose a numerical value between 1-9
- **Guid Style:** choose between 32 digits or 32 digits separated by hyphens
- **Case:** refers to the case of the letters, choose between Lower or Upper case.
Length Direction: choose between First X or Last X.

Generator Options

Generator Information

Sequence Type	Guid			
Length*	✖	--	Length Direction	First X
Guid Style		--		
Case		Lower		

UIC – Advanced Tabs

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

- 1 ● GENERAL ✓
- 2 ● PLUGIN INFO ✓
- 3 ● GENERATOR OPTIONS ✓
- 4 ● CRITERIAS
- 5 ● RESET OPTIONS

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

4 CRITERIAS

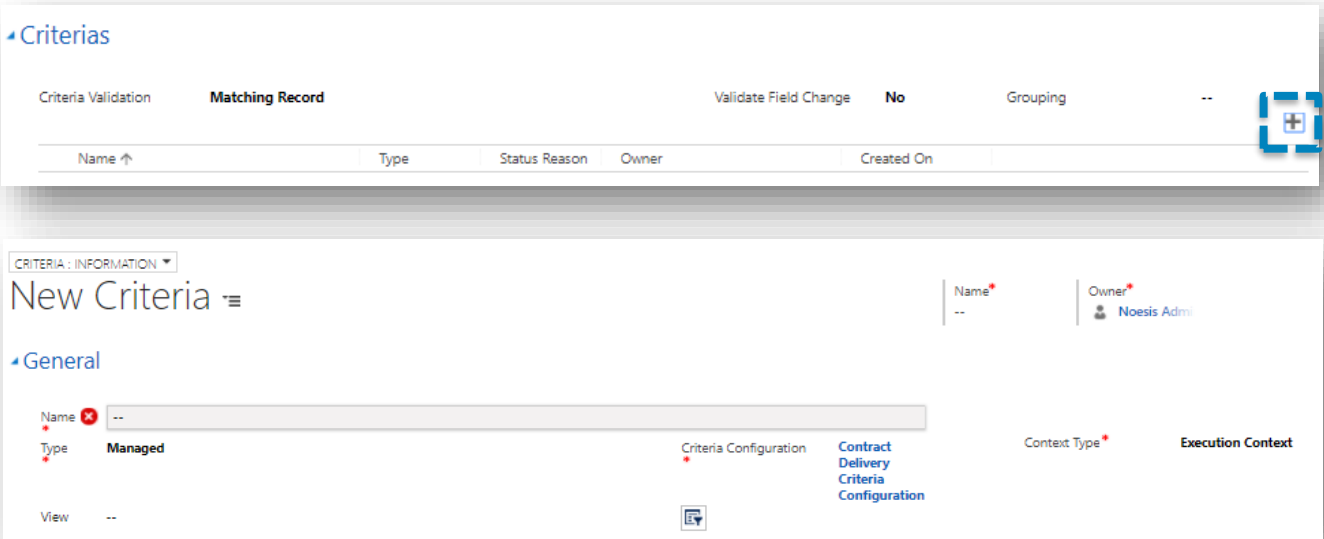
After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

First save the changes made before.

- **Criteria Validation:** Not Matching inverts the criteria's result. Matching Record searches for a defined attribute.
- **Validate Field Change:** Yes (track changes) No (don't track changes)
- **Grouping:** Or / And. E.g. Identify records that match multiple criteria or identify records that match one or another.

Tap the **+** sign to add a new Criteria.

- **Name:** indicates what the filter is about (usually reflects the view).
- **Type:** Simple (obsolete); Managed (uses a view to query) or Advanced (uses a fetch XML to query).
- **Criteria Configuration:** Choose one already created (in General tab).
- **View:** choose a view option.
- **Context Type:** No Context (executes the view/fetch as it is) or Executing Context (executes the view/fetch in the Regarding Entity) or Dynamic Context (processes a dynamic tag).
- **Context Placeholder:** it is replaced by the regarding entity ID.



The image shows two screenshots of the UIC application. The top screenshot is the 'Criterias' list screen, featuring a header with 'Criteria Validation' and 'Matching Record' tabs, and a table with columns: Name, Type, Status Reason, Owner, and Created On. The bottom screenshot is the 'New Criteria' form, showing fields for Name, Type (set to 'Managed'), Criteria Configuration (with a dropdown menu), Context Type, and Execution Context. A red 'x' icon is visible next to the Name field.

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Advanced Tabs

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5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

Reset Mode: the Unique Identifier Configuration can be set according to a defined time framework within the following options:

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- By Specific Sequence Value
- Never Reset

Reset Options

Reset Options

Reset Mode

Specific Sequence Value

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of choice of one of these Reset Options, the rest will be automatically adapt to the chosen one

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- By Specific Sequence Value
- Never Reset

Reset Options

Reset Mode	Reset by Year(s)	Reset Specific Condi	--	Edit	
		Reset Condition Matc	--	Edit	
Start of Sequence	--			Next Reset	--
Year					
Year Reset Mode	Month				
Month	February			Every	9
The	First	Day Of Week	Friday	Month	February
Start Time	29/12/2017 08:00				
Month					
Month Reset Mode	--				
Day Of	--			Every	9
The	First	Day Of Week	Friday	Every	9
Start Time	29/12/2017 08:00				
Weekday					
Monday	Yes	Saturday	No	Start Time	29/12/2017 08:00
Tuesday	Yes	Sunday	No		
Wednesday	Yes				
Thursday	Yes				
Friday	Yes				
Day					
Every	9			Start Time	29/12/2017 08:00
Hour					
Every	9			Start Time	29/12/2017 08:00
Minute					
Every	9			Start Time	29/12/2017 08:00

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions.

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition:** Set details by click in **edit** on **Reset Specific Conftion** and on **Reset Condition Match**
- By Specific Sequence Value
- Never Reset

Reset Options

Reset Options

Reset Mode

Specific Condition

Reset Specific Condi

--

Edit

Reset Condition Matd

--

Edit

Start of Sequence

--

Next Reset

--

Reset Options

Reset Mode

Specific Condition

Reset Specific Condi

Functions

Dynamic

Conditional

Default

Fixed

UIC

Key Tabs

Advanced Tabs

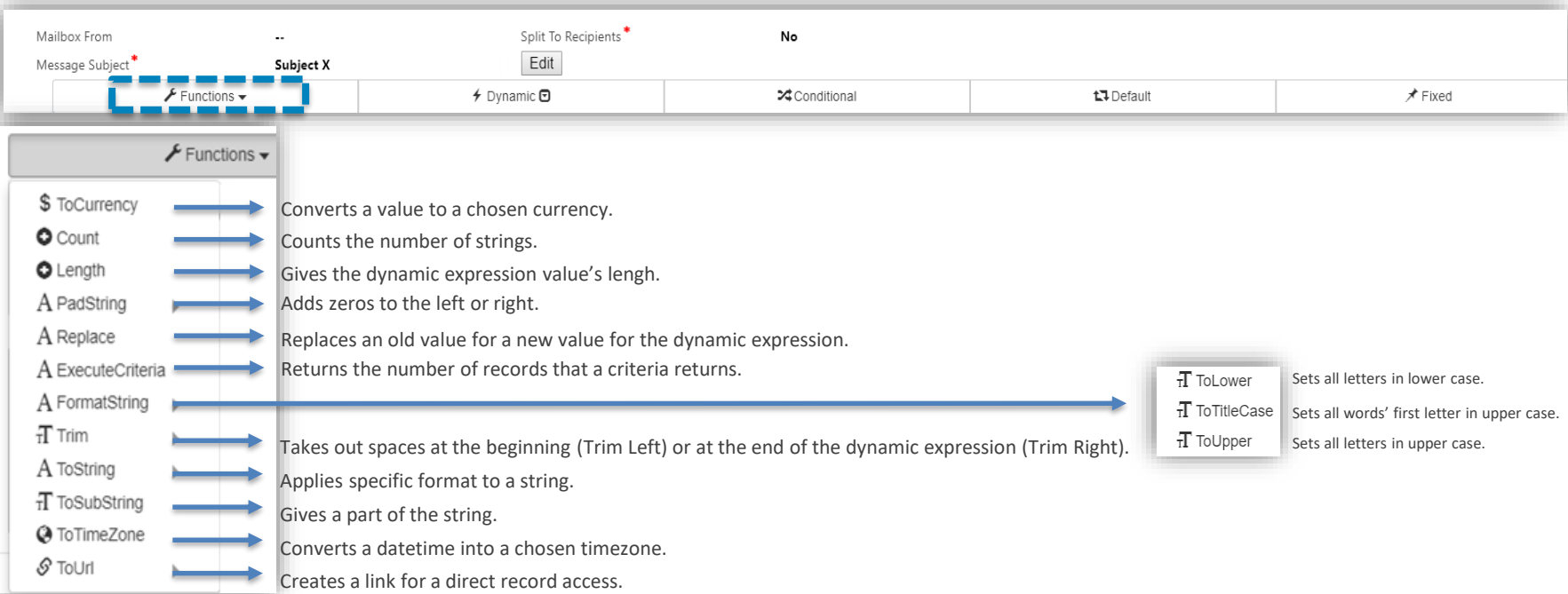
UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions for **Functions**.

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition**
- By Specific Sequence Value
- Never Reset



The screenshot shows the UIC Advanced Tabs interface. At the top, there are tabs for 'Mailbox From', 'Message Subject', and 'Subject X'. The 'Subject X' tab is selected. Below the tabs, there is a 'Functions' dropdown menu. The dropdown menu is open, showing a list of functions with their descriptions. A blue arrow points from the 'FormatString' function in the dropdown menu to a separate box on the right containing three case conversion functions: 'ToLower', 'ToTitleCase', and 'ToUpper'.

Function	Description
\$ ToCurrency	Converts a value to a chosen currency.
Count	Counts the number of strings.
Length	Gives the dynamic expression value's length.
A PadString	Adds zeros to the left or right.
A Replace	Replaces an old value for a new value for the dynamic expression.
A ExecuteCriteria	Returns the number of records that a criteria returns.
A FormatString	Takes out spaces at the beginning (Trim Left) or at the end of the dynamic expression (Trim Right).
Trim	Takes out spaces at the beginning (Trim Left) or at the end of the dynamic expression (Trim Right).
A ToString	Applies specific format to a string.
ToSubString	Gives a part of the string.
ToTimeZone	Converts a datetime into a chosen timezone.
ToUrl	Creates a link for a direct record access.

Function	Description
ToLower	Sets all letters in lower case.
ToTitleCase	Sets all words' first letter in upper case.
ToUpper	Sets all letters in upper case.

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions for **Dynamic** and **Conditional**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition**
- By Specific Sequence Value
- Never Reset

The screenshot displays the UIC Advanced Tabs interface. At the top, there are tabs for 'Mailbox From', 'Message Subject', and 'Subject X'. Below these, there are four main tabs: 'Functions', 'Dynamic', 'Conditional', and 'Fixed'. The 'Dynamic' tab is highlighted with a blue dashed box. A blue arrow points from the 'Dynamic' tab to a text box that says 'Allows the definition of an hierarchy of attributes based on a regarding entity.' Below this, the 'Conditional' tab is also highlighted with a blue dashed box. A blue arrow points from the 'Conditional' tab to a text box that says 'Allows the creation of conditional dynamic expressions. E.g. If the regarding entity is masculine write "caro", if the regarding entity if feminine write "cara".' Below the 'Conditional' tab, there is a text input field containing the expression: `(expression:matchValue?trueValue>falseValue)`.

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions for **Default** and **Fixed**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- By Specific Sequence Value
- Never Reset

Mailbox From	--	Split To Recipients *	No
Message Subject *	Subject X	Edit	
Functions ▾	Dynamic	Conditional	Default
			Fixed

Allows the insertion of a value when the dynamic expression is null.

Mailbox From	--	Split To Recipients *	No
Message Subject *	Subject X	Edit	
Functions ▾	Dynamic	Conditional	Default
			Fixed
(expression:matchValue>trueValue>falseValue)			

Fixed allows the insertion of a defined fixed value.

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of choice of **Specific Sequence Value** choose a number for the **Start of Sequence**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- **By Specific Sequence Value**
- Never Reset

Reset Options

Reset Options

Reset Mode

Specific Sequence Value

Start of Sequence 2

UIC

Key Tabs

Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of not wanting a timeframe definition, choose **Never Reset**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- By Specific Sequence Value
- **Never Reset**

UI – View

UIC

Key Tabs

Advanced Tabs

Follow these steps to create a Unique Identifier view

● GENERATOR OPTIONS: View

Go to Generator Options and choose de Sequence Type **Fetch XML Count**.

In the **View** area, click on the **+ New** icon and add a new one.

Complete the fields:

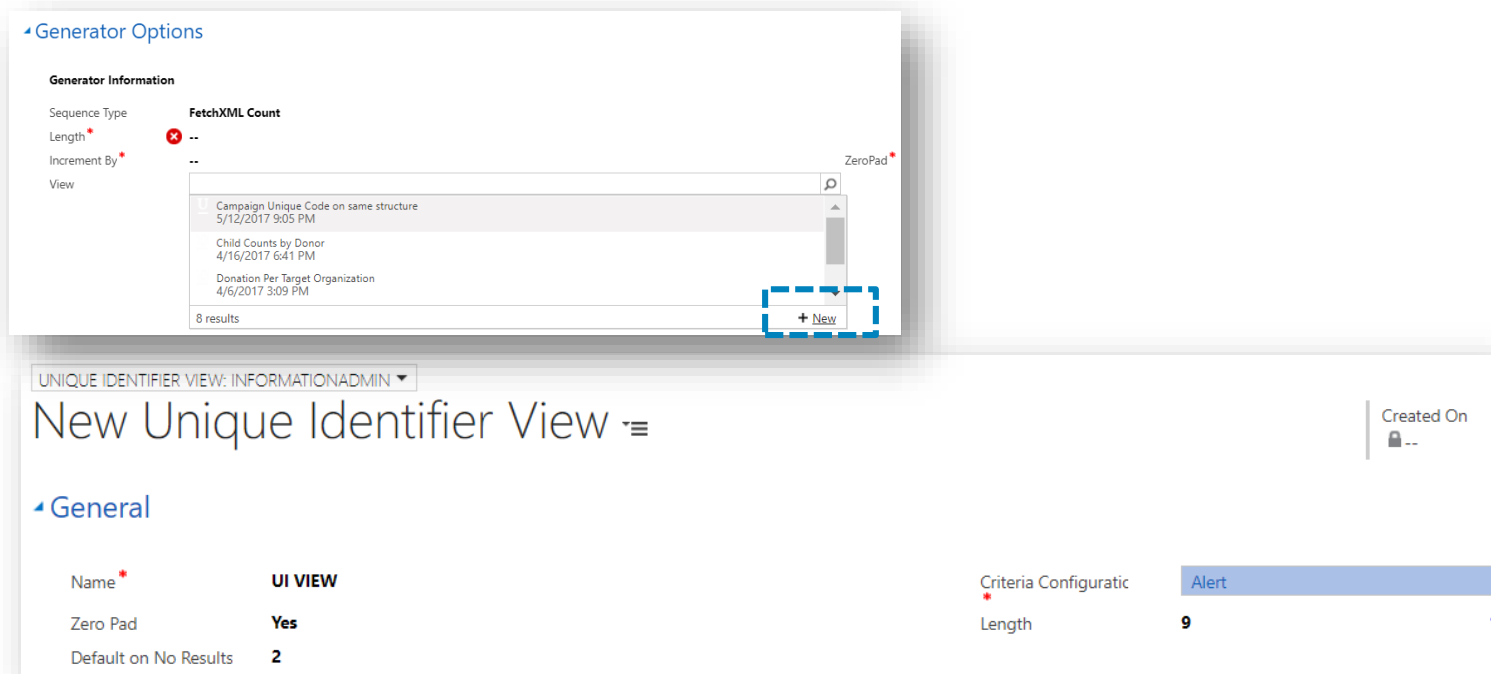
Name: text free to choose a name

Zero Pad: Yes/No

Default on No Results: choose a numerical value

Criteria Configuration: choose an existing one or go to General Tab to create a new one

Length: choose a numerical value between 1-9



Generator Options

Generator Information

Sequence Type: **FetchXML Count**

Length: **--**

Increment By: **--**

View: **ZeroPad**

View list:

- Campaign Unique Code on same structure 5/12/2017 9:05 PM
- Child Counts by Donor 4/16/2017 6:41 PM
- Donation Per Target Organization 4/6/2017 3:09 PM

8 results

+ New

UNIQUE IDENTIFIER VIEW: INFORMATIONADMIN

New Unique Identifier View

Created On: --

General

Name	UI VIEW
Zero Pad	Yes
Default on No Results	2

Criteria Configuratic: **Alert**

Length: **9**

Practice

Using 2IDENTIFY- Accounts


Below, you can see in “Account Name” how some of the tests are done.
First we created the configuration, UIC, we wanted and then created the accounts

➔ My Active Accounts ▾

✓	Account Name	Account Number ↓	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
	Maria	ACC-1/2017				
	tozé					
	tozé com telefone000000002		2105689			
	ACC-2/2017					
	ACC-3Manuel/2017					
	ACC-4Jaquim/2017					

Using 2IDENTIFY- Invoices

Below, you can see in “Invoice ID” how some of the tests are done.
First we created the configuration, UIC, we wanted and then created the invoices

 All Invoices ▾

✓	Invoice ID	Name ↑	Status Reason	Total Amount	Customer	Email (Customer)
	INV-01001-Y2S7Z9	New Asset	New	€0.00	ACC-3Manuel/2017	
	INV-01000-B0D4B3	SA21	New	€0.00	ACC-3Manuel/2017	

NOESIS Lisbon (headquarters)

Centro Empresarial Torres de Lisboa
Rua Tomás da Fonseca
Torre E – 14º andar
1600-209 Lisboa
Tel: +351 21 423 54 30

NOESIS Brussels

City Centre
Stephanie Square Centre
Avenue Louise 65, box 11
1050 Belgium
Tel: +32 472 839 721

NOESIS Rotterdam

Weena Zuild 130
3012 NC Rotterdam
Netherlands
Tel: +31 010 799 7315

NOESIS OPorto

Aviz Trade Center
Rua Engº Ferreira Dias, 924
Piso 0, E9
4100-246 OPorto
Tel: +351 22 400 47 13

NOESIS São Paulo

Rua Guararapes
78-93
04561-000 Brooklin
São Paulo
Tel: +55 21 98000 3086

NOESIS Coimbra

Instituto Pedro Nunes
Edifício D, Sala 2.08
Rua Pedro Nunes
3030-190 Coimbra
Tel: +351 23 909 08 72

NOESIS Ireland

28-32 Upper Pembroke St,
Dublin 2
Ireland
Tel: +353 (1) 608 7763