

Intone Auto Number Add on

The solution is mainly developed for Generating Auto Number for the CRM records and works for both custom and system entites.

This Auto Number plugin is an ideal tool that solves the major challenge of managing the numbering system. The solution is end the need to write complex codes to manage your Unique Identifier of the customer accounts. Use this Auto Number Plugin and have a hassle free Auto Generated Number System.

This solution has configuration page where user can configure the settings record for the entity to which he/she wants to configure "Auto Numbering".

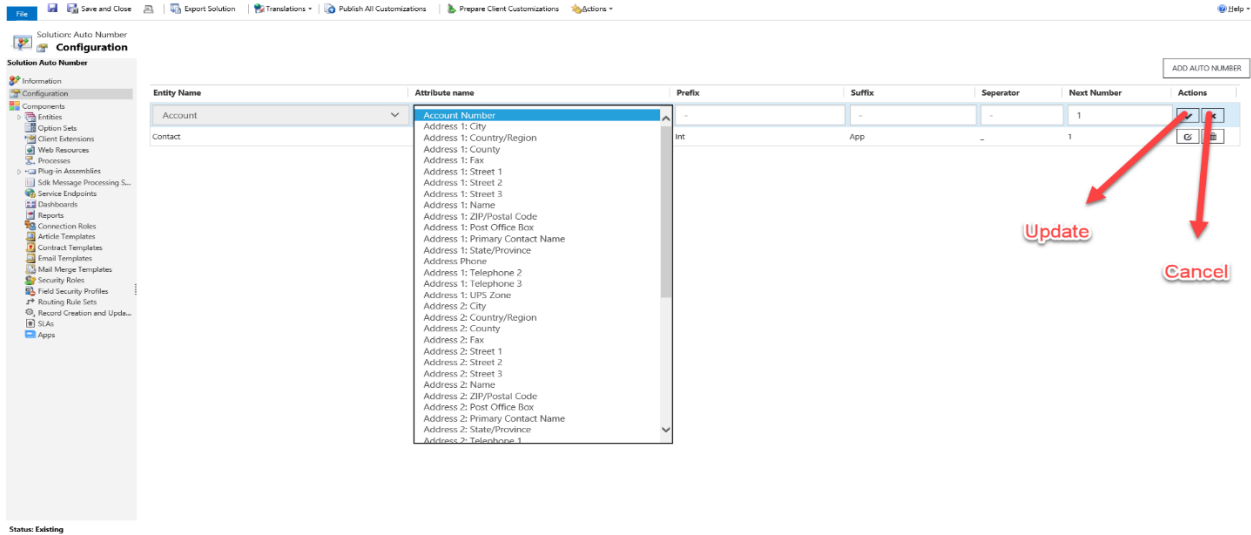
→Configuration page screen mentioned below

Entities List→

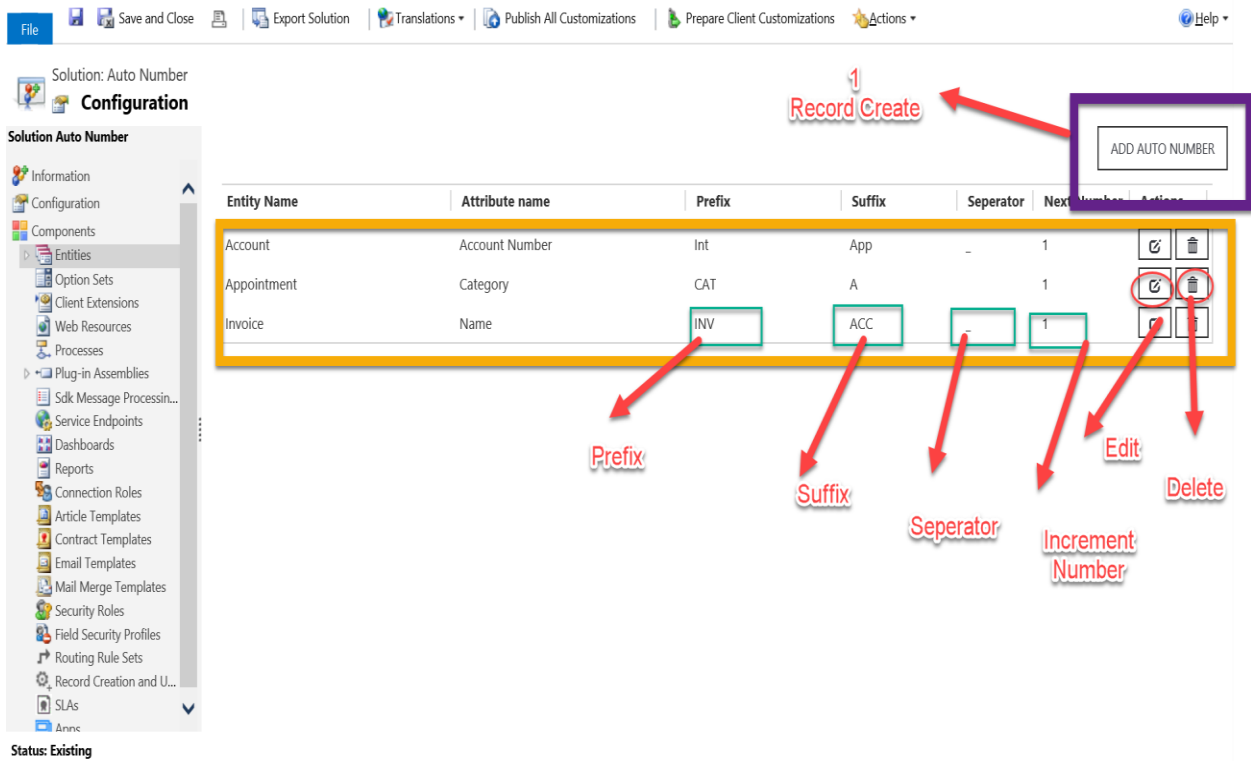
The screenshot displays the configuration interface for the Intone Auto Number plugin. The top navigation bar includes options like File, Save and Close, Export Solution, Translations, Publish All Customizations, Prepare Client Customizations, and Actions. The main header shows 'Solution: Auto Number' and 'Configuration'. A message states 'No Requirement Contract Items records are available in this view.' The left sidebar lists various configuration categories, with 'Entities' selected. The main area features a table with columns: Entity Name, Attribute name, Prefix, Suffix, Seperator, Next Number, and Actions. A dropdown menu is open under 'Entity Name', listing numerous system and custom entities. A purple arrow points to an 'ADD AUTO NUMBER' button in the top right corner, with a red '1' above it.

Entity Name	Attribute name	Prefix	Suffix	Seperator	Next Number	Actions
Activity						+ x
Appointment						
System Job						
Bookable Resource						
Bookable Resource Booking						
Bookable Resource Booking Header						
Bookable Resource Category						
Bookable Resource Category Assn						
Bookable Resource Characteristic						
Bookable Resource Group						
Booking Status						
Business Unit						
Campaign						
Campaign Activity						
Campaign Response						
Category						
Channel Access Profile						
Channel Access Profile Rule						
Channel Access Profile Rule Item						
Channel Property						
Channel Property Group						
Characteristic						
Competitor						
Connection						
Connection Role						
Contact						
Contract						
Contract Line						
Contract Template						

Attributes List



Configuration page in detail.



Auto Number Applied to Invoice record as per the configuration.

The screenshot shows the Dynamics 365 interface for the 'Invoices' entity. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Invoices'. Below the navigation bar, there are several action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', and 'VIEW'. The main content area is titled 'My Invoices' and contains a search bar and a table of records. The table has columns for 'Name', 'Status Reason', 'Total Amount', 'Customer', and 'Email (Customer)'. A single record is displayed with the name 'INV_001_ACC', status 'New', total amount '\$0.00', and customer 'Int_001_App'. A purple box highlights the 'Name' column, and a red arrow points from it to the text 'Generated Auto Number' below the table. The bottom of the screen shows a status bar with '1 - 1 of 1 (0 selected)' and a keyboard navigation bar with letters A through Z.

Name	Status Reason	Total Amount	Customer	Email (Customer)
INV_001_ACC	New	\$0.00	Int_001_App	

Generated Auto Number

And the Auto numbering will be applied to the selected filed while creating record.

- Easy, Accurate plugin integration for Custom Auto Number Generation
- Auto Number Plugin enables you to add legible numbers by generating auto-number to your CRM records.
- You can easily define and control starting position of the auto numbering series for different set of business verticals and catalogue types.
- It supports all entities as well as custom entities.
- Define your preferred prefix and suffix.

You can activate or deactivate auto numbering for all entities across your CRM system