

# AUTOFILL FORMATTER

## MANUAL

This document contains the manual of the CRM solution CCP AutoFill.

# DOCUMENT HISTORY AND SIGNOFF

## DOCUMENT HISTORY

Date	Name	Version	Changes
30/05/2018	Bram Colpaert	8.0.0.0	
01/07/2018	Bram Colpaert	8.0.0.3	

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# DESCRIPTION

This solution prepopulates a chosen field when a new record from the chosen entity is created or updated.

Responsible: Bram Colpaert

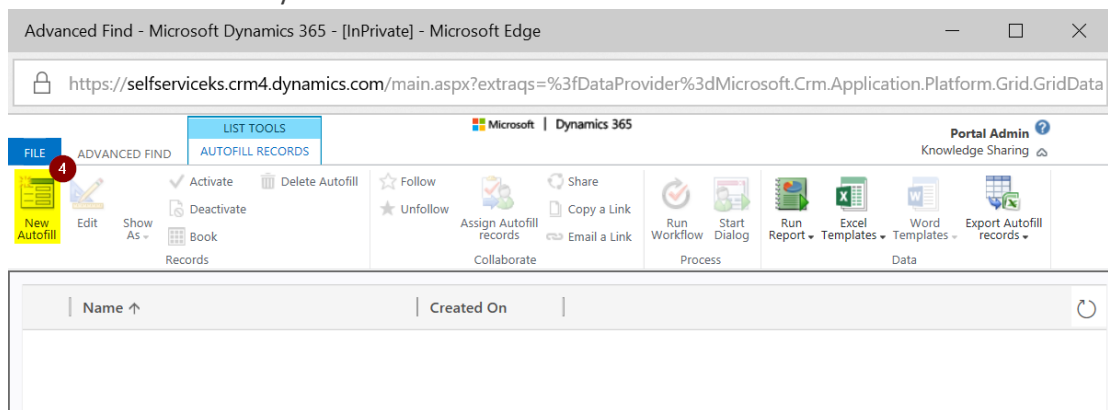
## MANUAL

### STEP 1: INSTALL THE SOLUTION

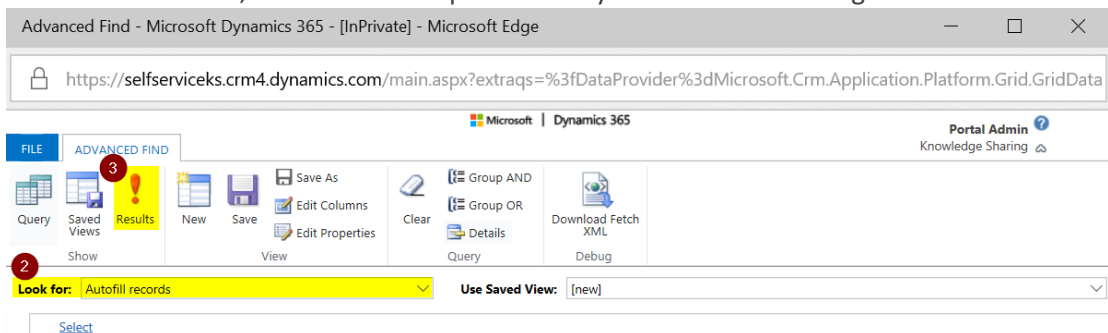
Import the latest version of the solution "CCPFrameworkPluginsAutoFill\_x\_x\_x\_x\_managed.zip" via Settings\Solutions

### STEP 2: CONFIGURE AUTOFILL FOR AN ENTITY

1. Go to the Autofill entity list or via advanced find



2. Choose "Autofill records" in look for and click "Results"
3. Click "New Autofill", a new window opens where you can add the configuration



4. Select the Entity Logical Name on which we want to apply the autofill
5. Select the attribute logical name of the target field
6. Fill in the format as described on [https://msdn.microsoft.com/en-us/library/system.string.format\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/system.string.format(v=vs.110).aspx)
7. Set a list of attribute logical names of the fields separated by ";" or ","

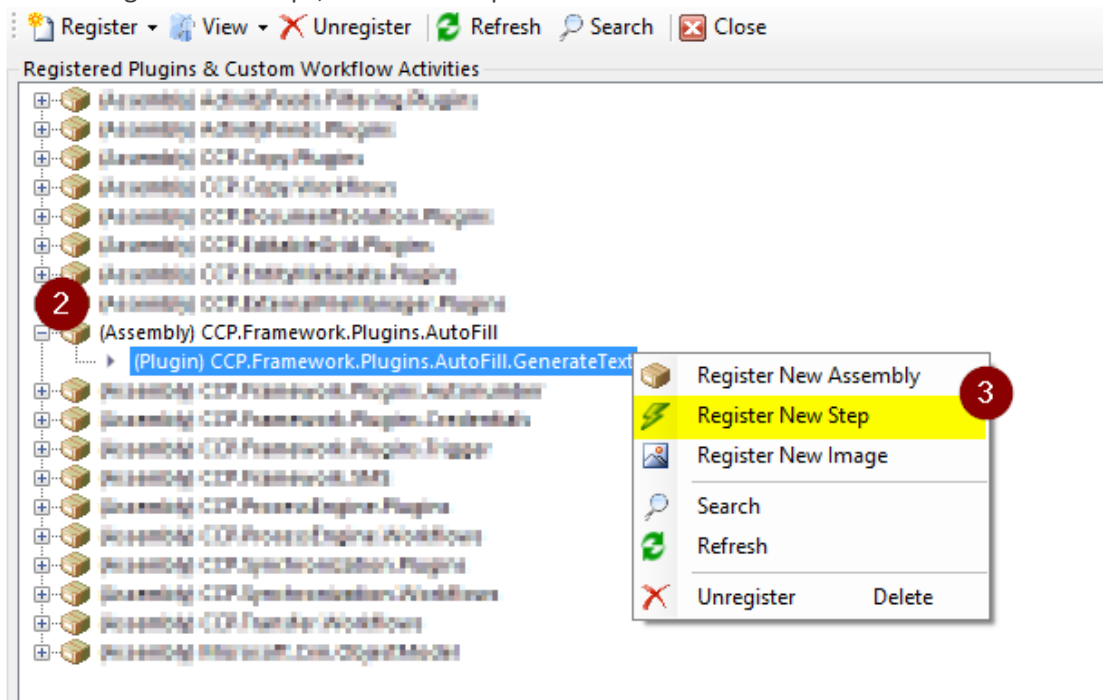
### STEP 3: USE THE FUNCTIONALITY

There are 2 possibilities to use the autofill feature:

- Via a plugin step: step 3.1
- Via a custom workflow activity: step 3.1

### STEP 3.1: REGISTER PLUGIN STEPS

1. Open the "Plugin Registration Tool"
2. Expand the assembly "CCP.Framework.Plugins.AutoFill" and right click the step "CCP.Framework.Plugins.AutoFill.GenerateText"
3. Select "Register new step", a new form opens



4. Select the message on which the logic executes (eg. "Create" or "Update")
5. Select the entity logical name of the related entity
6. Only applicable when selected "Update" in step 4: select the used attributes as the "Filtering Attributes"
7. Set the plugin stage as "Pre-operation"

8. Click "Register New Step"

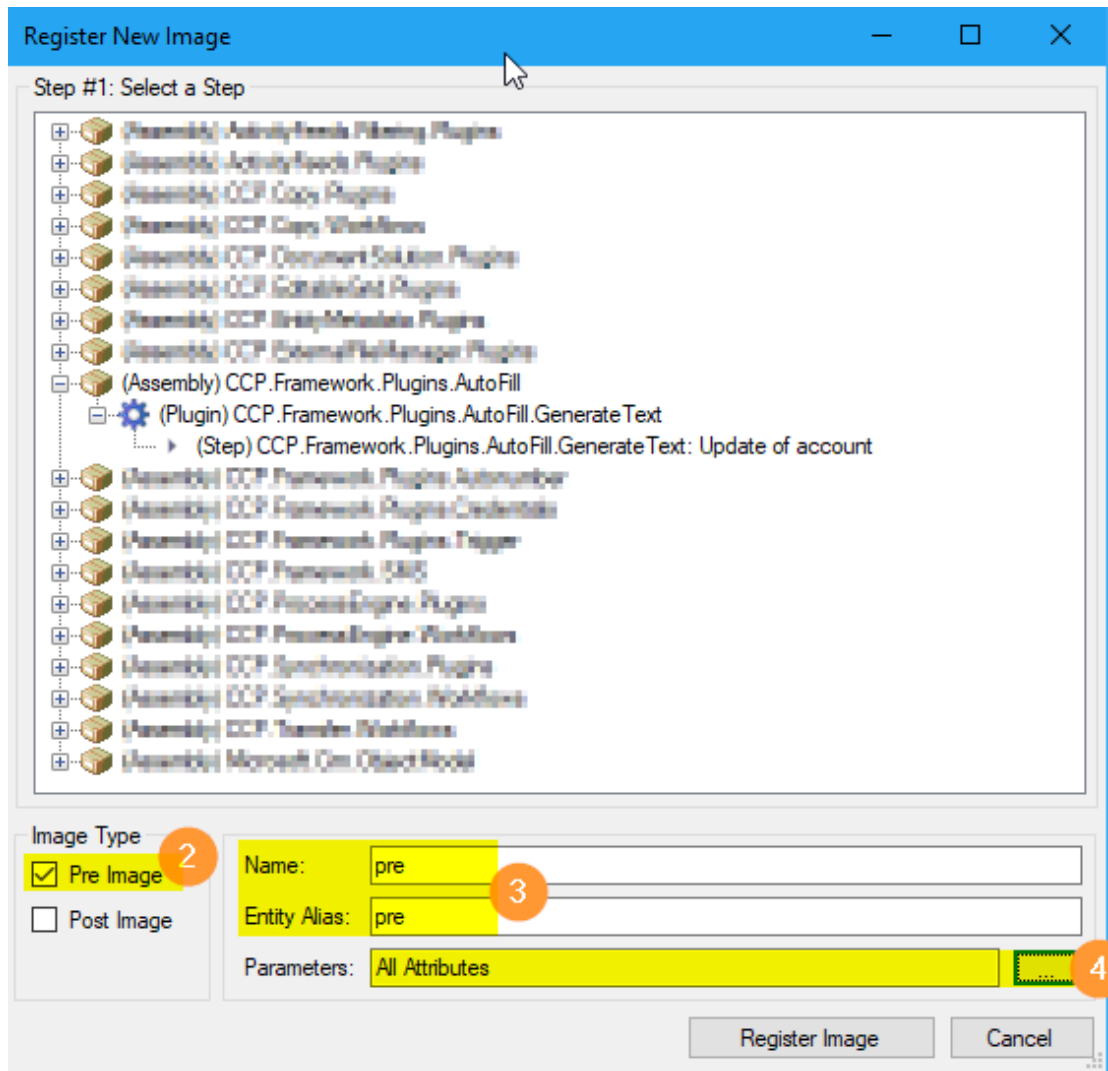
9. Only applicable when selected "Update" in step 4:

10. right click the created step and select "Register new image"

11. Select "Pre Image"

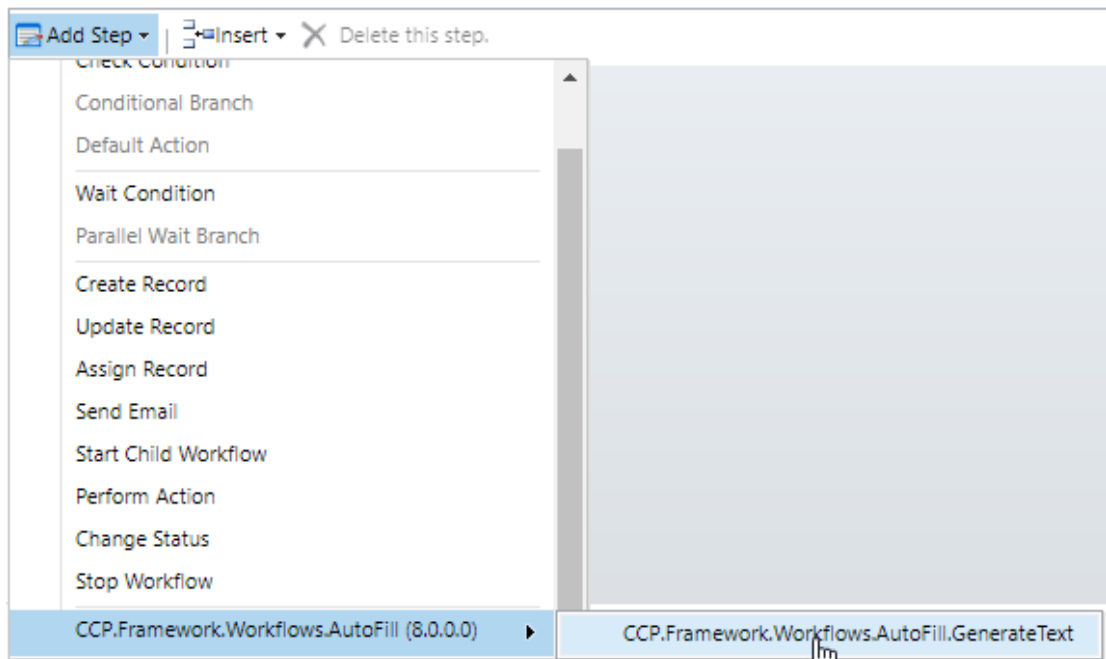
12. Set "Name" and "Entity Alias" to "pre"

13. Select the used attributes as the "Parameters"



### STEP 3.2: USE THE CUSTOM WORKFLOW ACTIVITY

1. Open an existing workflow or create a new workflow
2. Click "Add Step" and choose the AutoFill assembly CCP.Framework.Workflows.Autofill (x.x.x.x). Select the step "CCP.Framework.Workflows.Autofill.GenerateText"



3. Click "Set properties" and fill in the required parameters:
  - RecordUrl: the dynamic url of the record
  - Configuration: the Autofill configuration record created in the previous steps

File Save and Close

Process: Update account description

### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
RecordUrl	Single Line of Text	Required	<input type="text" value="{Record URL(Dynamic)(Account)}"/>
Configuration	Lookup	Required	<input type="text" value="account"/>

4. Click "Save and Close"
5. Activate the workflow