

MISSION: Auto Number Client Guide

MISSION: Auto Number enables user to create a range of sequencing rules that range from the simple to the complex. Include attribute values, add time stamps and concatenate values to create the identifier that suits your needs.

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Setup and Configuration

This section will detail how to initially import and load the MISSION: Account Number solution and successfully register it for first use.

Import the MISSION: Auto Number Solution

Instructions on how to import the MISSION: Auto Number solution into an existing Dynamics 365 instance. These instructions apply to both online and on-premises instances.

Note: These steps do not apply when applying the app via the Microsoft Dynamics 365 Marketplace. Skip to the registration step [here](#) if this is the case

Roles Required

To complete these steps, the user performing these actions must have:

- System administrator security role
- Be a global administrator (Only required when performing a Dynamics 365 online backup). You can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.

Introduction

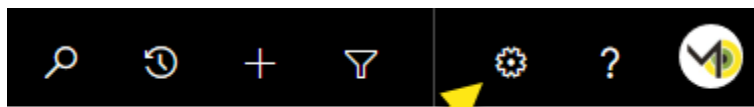
Prior to importing the MISSION: Auto Number solution, prepare your deployment checklist. Deploying a new solution into your environment can affect the existing components and solutions already installed. If you have a staging or test environment, load the solution and test your existing components prior to deploying to a production instance.

1. Verify you have a compatible MISSION: Auto Number Solution
2. Back up your instance
 - Follow [these](#) steps for Dynamics 365 online
 - Follow [these](#) steps for Dynamics 365 on-premises
3. Export your full solution
4. Export a separate sitemap solution if you have customized the default sitemap

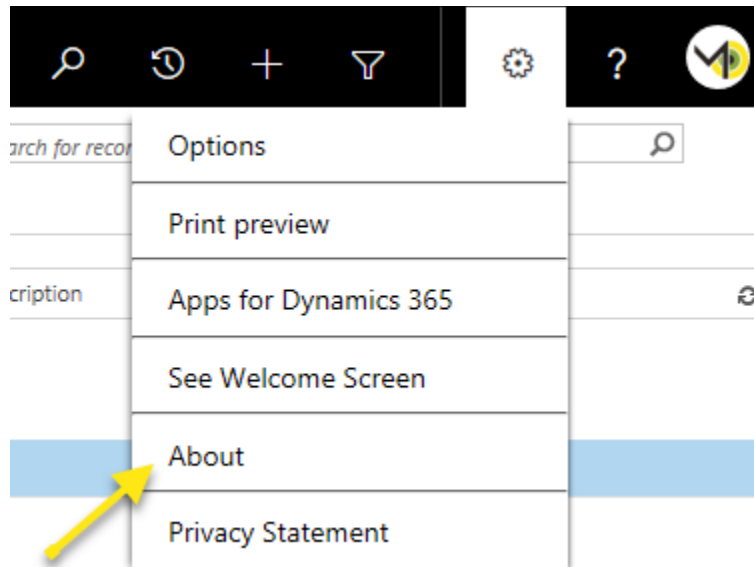
Verifying your version of Dynamics 365

To check the current version of your Dynamics 365 instance, open your dynamics 365 instance in a browser.

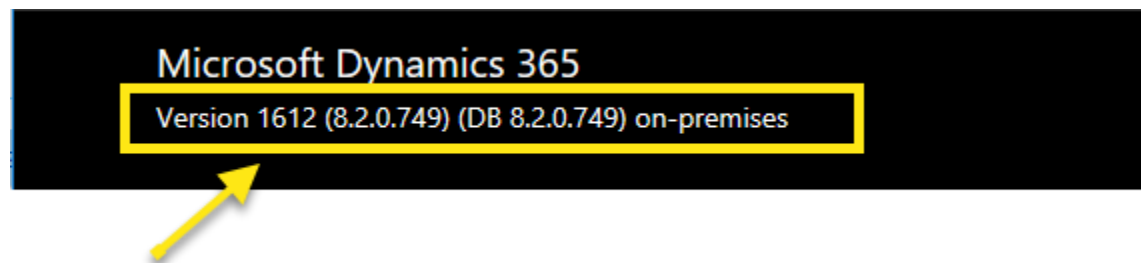
Select "Settings"



Select "About"

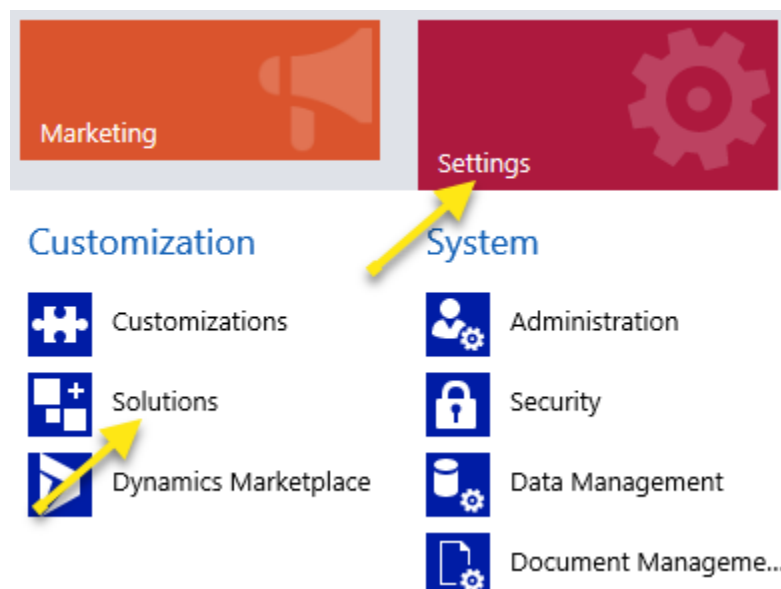


Make a note of the version of Dynamics 365 and whether it is "on-premises" or being hosted by Microsoft "online"

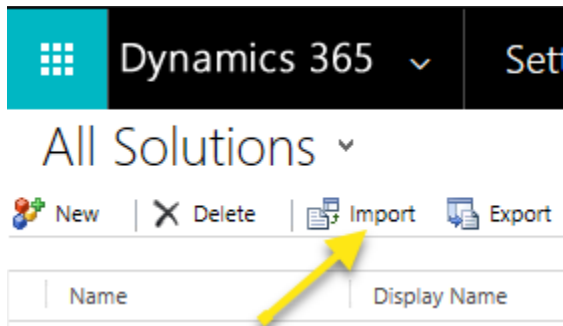


Loading the Solution

To load the solution, navigate to "Settings" and then select "Solutions"



Select the “Import” Icon



A wizard will now appear guiding you through the import process. Select “Browse” to locate the solution file that has been provided to you. Once selected, press “Next”

Select Solution Package

Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

C:\MISSION_Auto_Number_365_8_2_0.zip Browse...

Back Next

A warning may be shown if this solution is an update to an existing MISSION: Auto Number solution. If this is the case, simply ignore this warning and select “Import”. If no warning is received, continue to select “Import”

A notification will appear stating that the import has been successful. Please contact help@missioncrm.ca if any error messages appear and you are unable to complete these steps successfully.

30-Day Trial

A thirty-day trial is automatically applied upon first time registration of a solution.

Roles Required

To complete these steps, the user performing these actions must have:

- System administrator security role

Trial Eligibility

A 30-day trial is automatically granted during the registration process. One (1) 30-day trial is granted per organization, the license is updated automatically upon registration of the solution and uses your organization's "Unique Organization Name" to determine if a trial license has been previously granted.

If you have previously implemented this solution into your organization and want to extend your trial, please contact help@missioncrm.ca or create a case via <https://help.missioncrm.ca> requesting an extension. Only one 30-day trial and one 15-day extension can be granted per "Unique Organization Name"

When a License Has Already Been Purchased

If you have already purchased a license for your organization, simply complete the registration process and the license will automatically be applied to your organization.

If you have purchased a solution for your organization and want to change the "Unique Organization Name", please contact help@missioncrm.ca or create a case via <https://help.missioncrm.ca> requesting an organization name change. Only two (2) "Unique organization name" changes can occur per license.

Register the Solution

Follow the registration steps to enable the thirty-day trial or activate your purchased license.

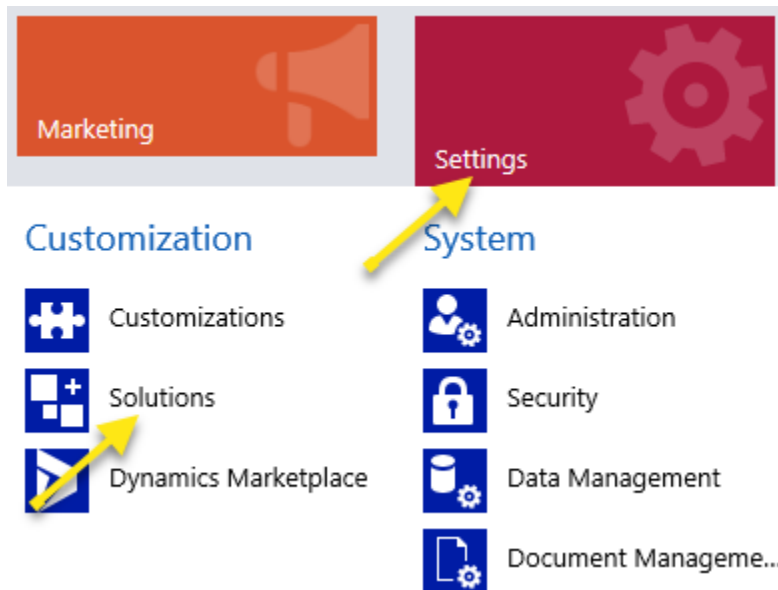
Roles Required

To complete these steps, the user performing these actions must have:

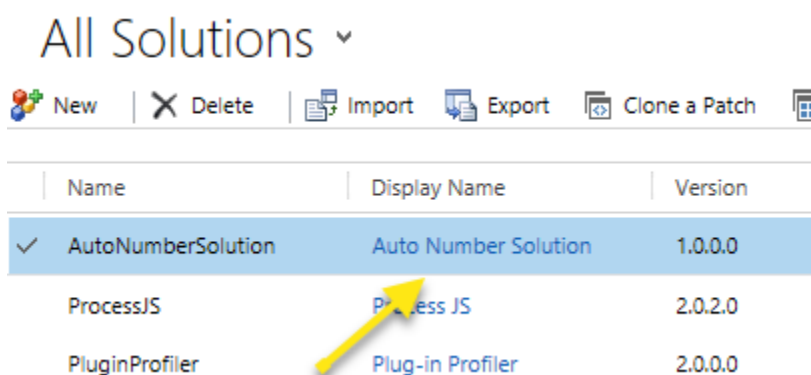
- System administrator security role

Completing the Registration Process

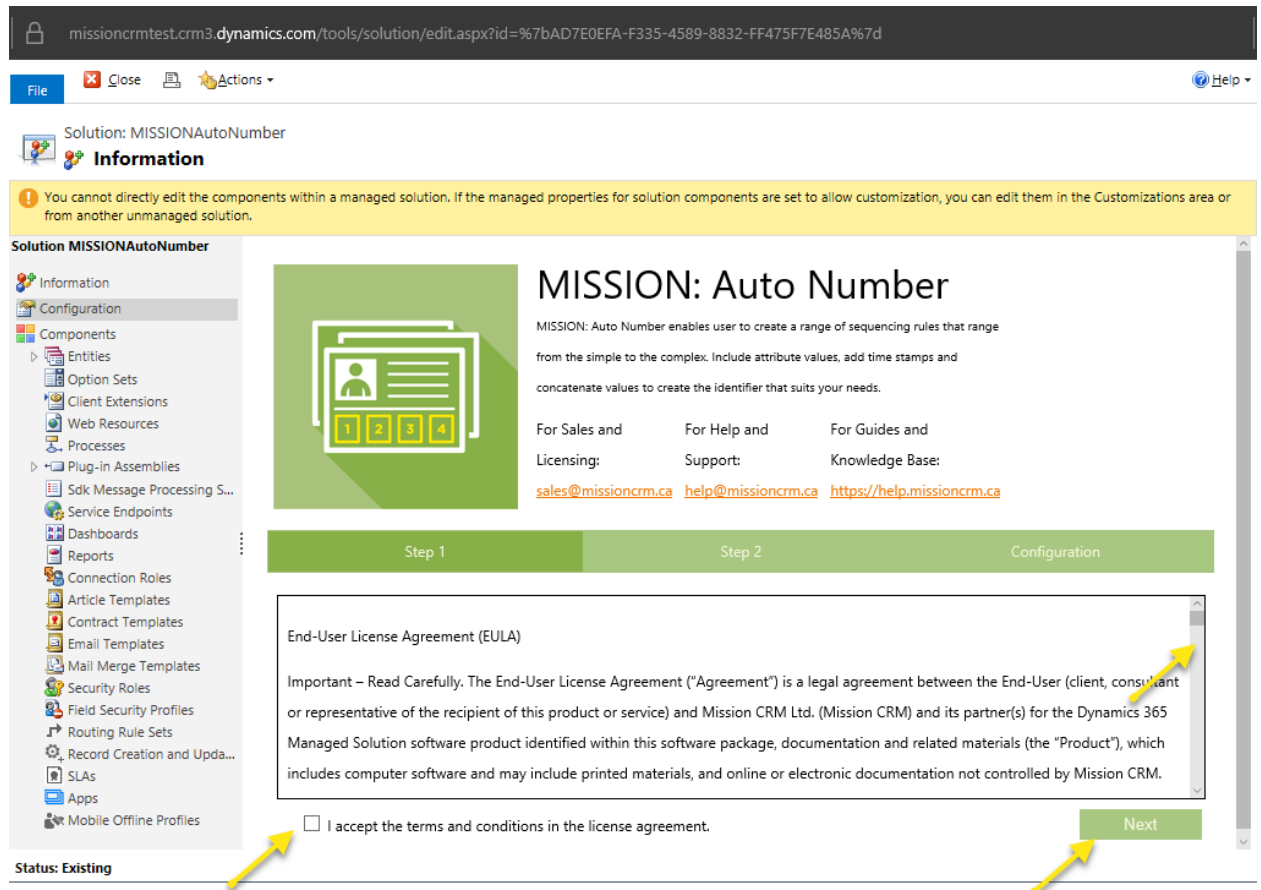
To register the solution, navigate to “Settings” and then select “Solutions”



Locate the MISSION Solution that requires registering and click on the “Display Name” to open the solution and complete the registration process



Review the user agreement, accept the terms and conditions by selecting the check box and then select “Next”



missioncrmtest.crm3.dynamics.com/tools/solution/edit.aspx?id=%7bAD7E0EFA-F335-4589-8832-FF475F7E485A%7d

File Close Actions Help

Solution: MISSIONAutoNumber

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution MISSIONAutoNumber

Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing S...
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 Upda...
SLAs
Apps
Mobile Offline Profiles

MISSION: Auto Number

MISSION: Auto Number enables user to create a range of sequencing rules that range from the simple to the complex. Include attribute values, add time stamps and concatenate values to create the identifier that suits your needs.

For Sales and Licensing: sales@missioncrm.ca
For Help and Support: help@missioncrm.ca
For Guides and Knowledge Base: <https://help.missioncrm.ca>

Step 1 Step 2 Configuration

End-User License Agreement (EULA)

Important – Read Carefully. The End-User License Agreement (“Agreement”) is a legal agreement between the End-User (client, consultant or representative of the recipient of this product or service) and Mission CRM Ltd. (Mission CRM) and its partner(s) for the Dynamics 365 Managed Solution software product identified within this software package, documentation and related materials (the “Product”), which includes computer software and may include printed materials, and online or electronic documentation not controlled by Mission CRM.

☐ I accept the terms and conditions in the license agreement.

Next

Status: Existing

Complete the registration information then select “Register”. The values that are mandatory are:

- Company
- First Name
- Last Name
- Email
- Telephone
- Line 1
- City
- State or Province
- Country



Step 1 Step 2 Configuration

Company * Mission CRM Ltd. Line 1 * 500 King Street West ZIP Code M5V1L9

First Name * Your First Name Line 2 Suite 300 Country * Canada

Last Name * Your Last Name Line 3

Email * help@missioncrm.ca City * Toronto

Telephone +1 647 829 8967 State Ontario

* Indicates Mandatory Fields

Register

Upon successful registration, an email will be sent to the email address listed in the registration process, upon confirming the email address the solution will be registered.

At this point the option to “Re-Register” is available. Please contact help@missioncrm.ca if any error messages appear and you are unable to register the solution.

Re-run the Registration Process

To re-run the registration process simply check the “Terms and Condition’s” check box and select, “re-run registration process”. The registration process will start again allowing you to update or amend the contact information and re-apply / update the latest license.

Trial Eligibility

A 30-day trial is automatically granted during the registration process. One (1) 30-day trial is granted per organization, the license is updated automatically upon registration of the solution and uses your organization’s “Unique Organization Name” to determine if a trial license has been previously granted.

If you have previously implemented this solution into your organization and want to extend your trial, please contact help@missioncrm.ca or create a case via <https://help.missioncrm.ca> requesting an extension. Only one 30-day trial and one 15-day extension can be granted per “Unique Organization Name”

When a License Has Already Been Purchased

If you have already purchased a license for your organization, simply complete the registration process and the license will automatically be applied to your organization.

If you have purchased a solution for your organization and want to change the “Unique Organization Name”, please contact help@missioncrm.ca or create a case via <https://help.missioncrm.ca> requesting an organization name change. Only two “Unique organization name” changes can occur per license.

Update the Solution

Instructions on how to update the MISSION: Auto Number solution into an existing Dynamics 365 instance. These instructions apply to both online and on-premises instances.

Roles Required

To complete these steps, the user performing these actions must have:

- System administrator security role
- Be a global administrator (Only required when performing a Dynamics 365 online backup). You can also sign in with Dynamics 365 System Administrator or Delegated Admin security roles.

Introduction

Prior to updating the MISSION: Auto Number solution, prepare your deployment checklist. Deploying a new solution into your environment can affect the existing components and solutions already installed. If you have a staging or test environment, load the solution and test your existing components prior to deploying to a production instance.

1. Verify you have a compatible MISSION: Auto Number Solution
2. Back up your instance
 - Follow [these](#) steps for Dynamics 365 online
 - Follow [these](#) steps for Dynamics 365 on-premises
3. Export your full solution
4. Export a separate sitemap solution if you have customized the default sitemap

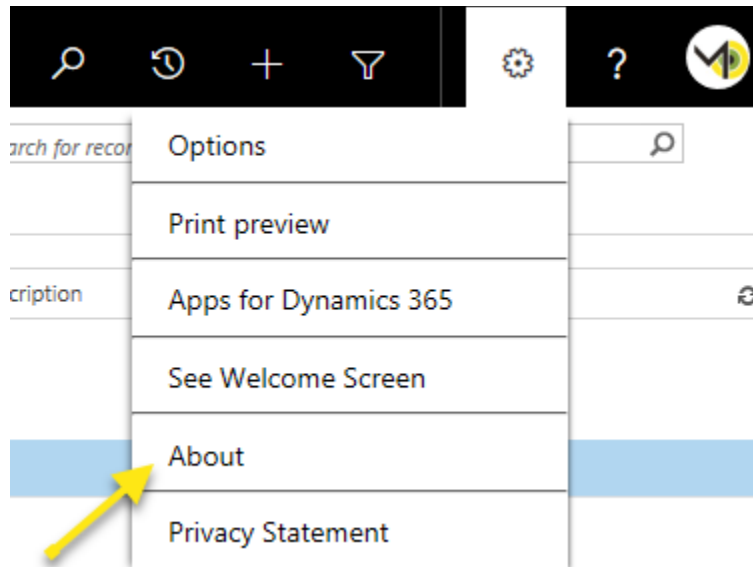
Verifying your version of Dynamics 365

To check the current version of your Dynamics 365 instance, open your dynamics 365 instance in a browser.

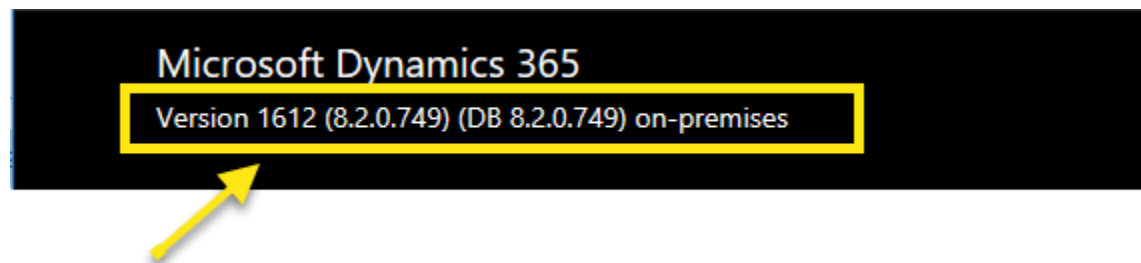
Select “Settings”



Select "About"

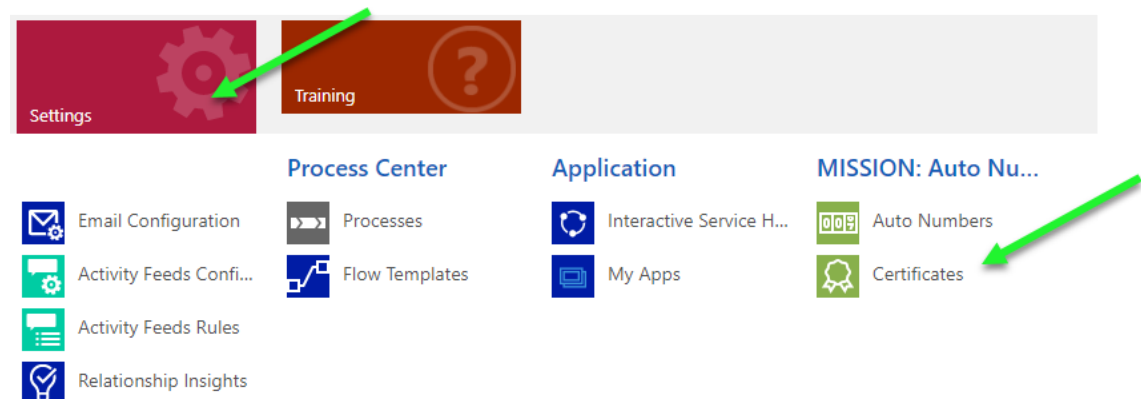


Make a note of the version of Dynamics 365 and whether it is "on-premises" or being hosted by Microsoft "online"

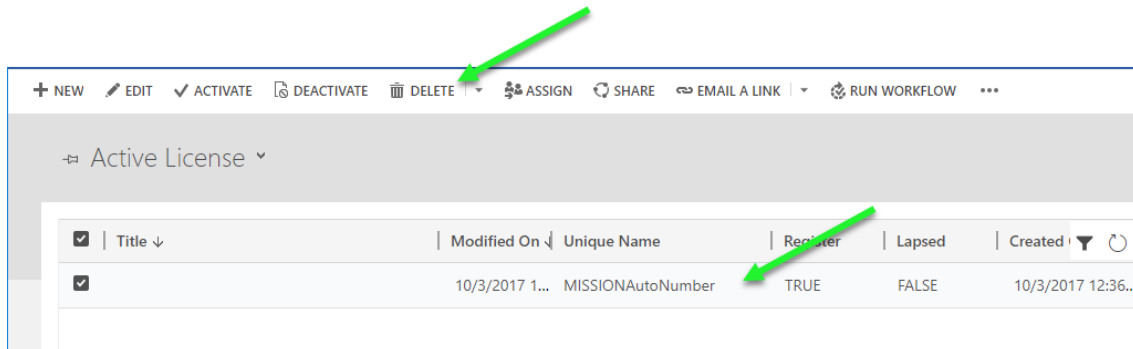


Delete the existing license record

As the licenses are tied to the version of the MISSION: Auto Number that you may be using, you must first delete the existing license record. To do so, navigate to "Settings" and Select "Certificates"

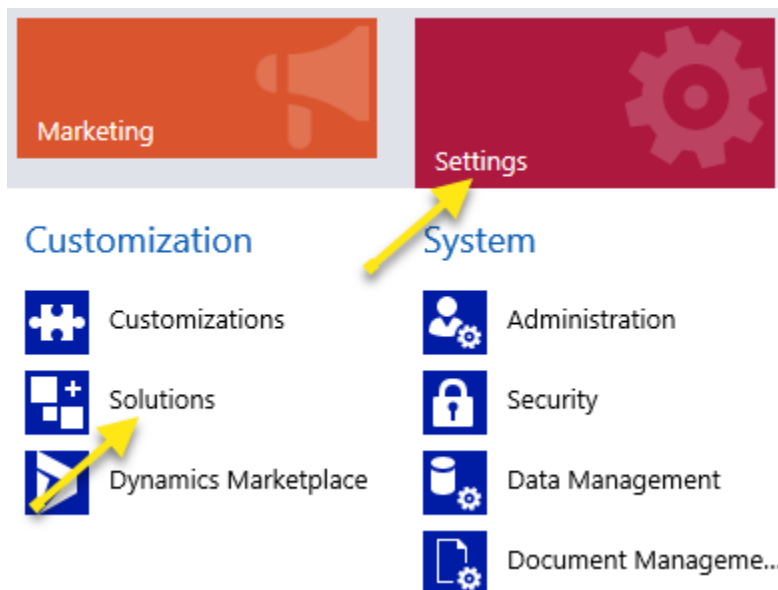


Within the “Certificates” view, select and highlight the certificate that has the value of the “Unique Name” set to “MISISONAutoNumber” and select “Delete”

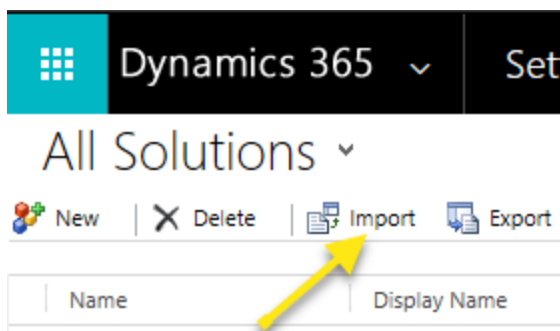


Loading the Solution

To load the solution, navigate to “Settings” and then select “Solutions”



Select the “Import” Icon



A wizard will now appear guiding you through the import process. Select “Browse” to locate the solution file that has been provided to you. Once selected, press “Next”

Select Solution Package

Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

C:\MISSION_Auto_Number_365_8_2_0.zip Browse...

Back Next

A warning may be shown if this solution is an update to an existing MISSION: Auto Number solution. If this is the case, simply ignore this warning and select “Import”. If no warning is received, continue to select “Import”.

You can also verify at this point the version of your solution, the notification should list your current and your target versions for the upgrade, verify the target version is what you are expecting.

Solution Information

! This solution package contains an update for a solution that is already installed.

Solution Information

Name:	MISSION: Auto Number
Current version installed:	8.2.1.003
Version contained in the update:	8.2.1.004
Publisher:	Mission CRM(missioncrm)
Package Type:	Managed

[View solution package details](#)

i By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

Back Next

Select “Next” and at the confirmation screen, ensure you have set the values “Overwrite customizations” and “Enable any SDK message processing steps included in the solution” to TRUE.

Import Options

[Help](#)

! This solution package contains an update for a solution that is already installed.

Upgrade Solution Action

☐ Stage for upgrade

Previous customizations on components included in this solution

☐ Maintain customizations (recommended)

Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.

☒ Overwrite customizations

Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.

Post Import Actions

☒ Enable any SDK message processing steps included in the solution

NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

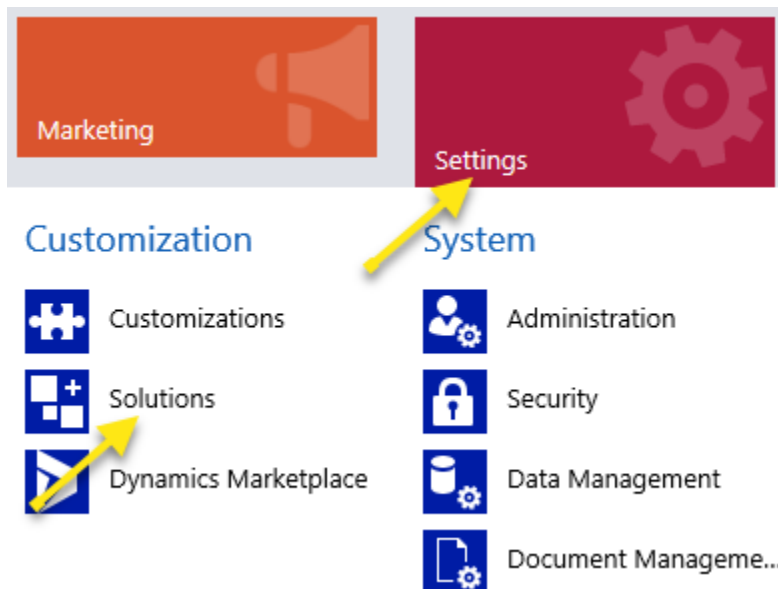
[Back](#)

[Import](#)

[Cancel](#)






Re-run the Registration Process

To register the solution, navigate to “Settings” and then select “Solutions”



Locate the MISSION Solution that requires registering and click on the “Display Name” to open the solution and complete the registration process

All Solutions ▾

 New
  Delete
  Import
  Export
  Clone a Patch

Name	Display Name	Version
✓ AutoNumberSolution	Auto Number Solution	1.0.0.0
ProcessJS	Process JS	2.0.2.0
PluginProfiler	Plug-in Profiler	2.0.0.0

Review the user agreement, accept the terms and conditions by selecting the check box and then select “Next”

missioncrmtest.crm3.dynamics.com/tools/solution/edit.aspx?id=%7bAD7E0EFA-F335-4589-8832-FF475F7E485A%7d

File
Close
Actions ▾
Help ▾

Solution: MISSIONAutoNumber

Information

! You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.


Solution MISSIONAutoNumber

Information

Configuration

Components

- Entities
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
- Sdk Message Processing S...
- 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 Upda...
- SLAs
- Apps
- Mobile Offline Profiles



MISSION: Auto Number

MISSION: Auto Number enables user to create a range of sequencing rules that range from the simple to the complex. Include attribute values, add time stamps and concatenate values to create the identifier that suits your needs.

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For Help and Support: help@missioncrm.ca

For Guides and Knowledge Base: <https://help.missioncrm.ca>

Step 1

Step 2

Configuration

End-User License Agreement (EULA)

Important – Read Carefully. The End-User License Agreement (“Agreement”) is a legal agreement between the End-User (client, consultant or representative of the recipient of this product or service) and Mission CRM Ltd. (Mission CRM) and its partner(s) for the Dynamics 365 Managed Solution software product identified within this software package, documentation and related materials (the “Product”), which includes computer software and may include printed materials, and online or electronic documentation not controlled by Mission CRM.

☐ I accept the terms and conditions in the license agreement.

Next

Status: Existing

Complete the registration information then select “Register”. The values that are mandatory are:

- Company
- First Name
- Last Name

- Email
- Telephone

- Line 1
- City
- State or Province
- Country

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Step 1		Step 2		Configuration	
Company *	<input type="text" value="Mission CRM Ltd."/>	Line 1 *	<input type="text" value="500 King Street West"/>	ZIP Code	<input type="text" value="M5V1L9"/>
First Name *	<input type="text" value="Your First Name"/>	Line 2	<input type="text" value="Suite 300"/>	Country *	<input type="text" value="Canada"/>
Last Name *	<input type="text" value="Your Last Name"/>	Line 3	<input type="text"/>		
Email *	<input type="text" value="help@missioncrm.ca"/>	City *	<input type="text" value="Toronto"/>		
Telephone	<input type="text" value="+1 647 829 8967"/>	State	<input type="text" value="Ontario"/>		

* Indicates Mandatory Fields



At this point the option to “Re-Register” is available. Please contact help@missioncrm.ca if any error messages appear and you are unable to register the solution.

Purchase a License

Instructions on how to purchase a valid MISSION: Auto Number License.

Purchasing a License

A credit card authorization form can be requested by emailing help@missioncrm.ca, methods of payment can be Credit Card, Cheque or Direct Deposit.

What Do You Get?

1. A single production license for a Dynamics 365 organization (on-premises or online).
2. A single non-production license for a Dynamics 365 organization (on-premises or online)
3. Unlimited support for the MISSION solution purchased as per the MISSION fair terms of use
4. Licenses are perpetual, unlike the competition no maintenance payments are required and users are automatically entitled to future versions of the solution.

What About the Maintenance or Per User Charges?

Unlike our competitors, there's no per user licenses, no ongoing maintenance required. Support is free and your licenses are perpetual meaning you have access to the latest versions of the same solution for as long we make the solution.

When a License Has Already Been Purchased

If you have already purchased a license for your organization, simply complete the registration process and the license will automatically be applied to your organization.

If you have purchased a solution for your organization and want to change the "Unique Organization Name", please contact help@missioncrm.ca or create a case via <https://help.missioncrm.ca> requesting an organization name change. Only two "Unique organization name" changes can occur per license.

Remove the Solution

Follow these steps to permanently remove the MISSION: Auto Number solution.

Roles Required

To complete these steps, the user performing these actions must have:

- System administrator security role

Introduction

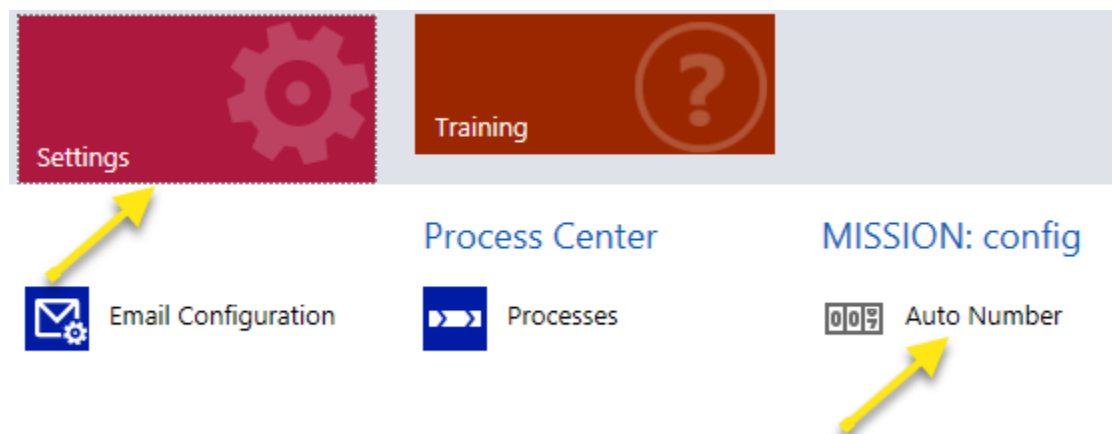
Prior to deleting the MISSION: Auto Number solution, prepare your solution removal checklist. Removing a solution from your environment can affect the existing components and solutions already installed. If you have a staging or test environment, test removing the solution from that organization and test your existing components prior to completing the steps on a production instance.

1. Back up your instance
 - Follow [these](#) steps for Dynamics 365 online
 - Follow [these](#) steps for Dynamics 365 on-premises
2. Export your full solution without the sitemap
3. Export a separate sitemap solution

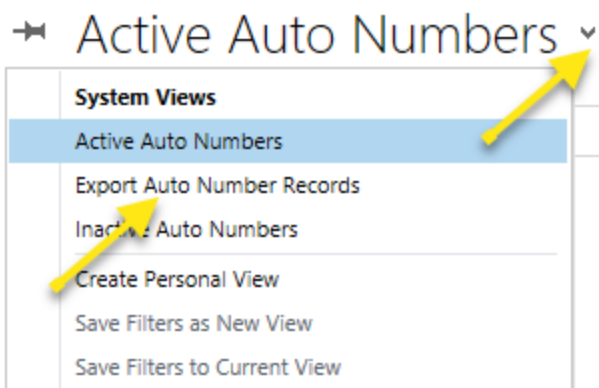
Note: deleting a managed solution from your Dynamics 365 organization will permanently remove and delete any data held in the records contained within the solution. Ensure you have backed up any data that you may later rely upon.

Exporting Your MISSION: Auto Number Rules

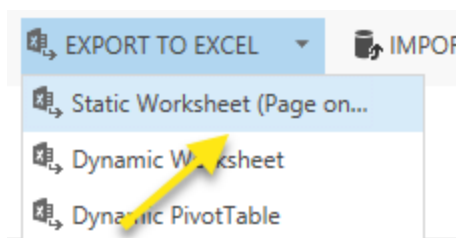
To export your rules, navigate to “Settings” and then select “Auto Number”



Change the view by selecting the down arrow to the right of the default “Active Auto Numbers View” and select “Export Auto Number Records”



Select "EXPORT TO EXCEL" and then select "Static Worksheet" or "Static Worksheet (Page only)"

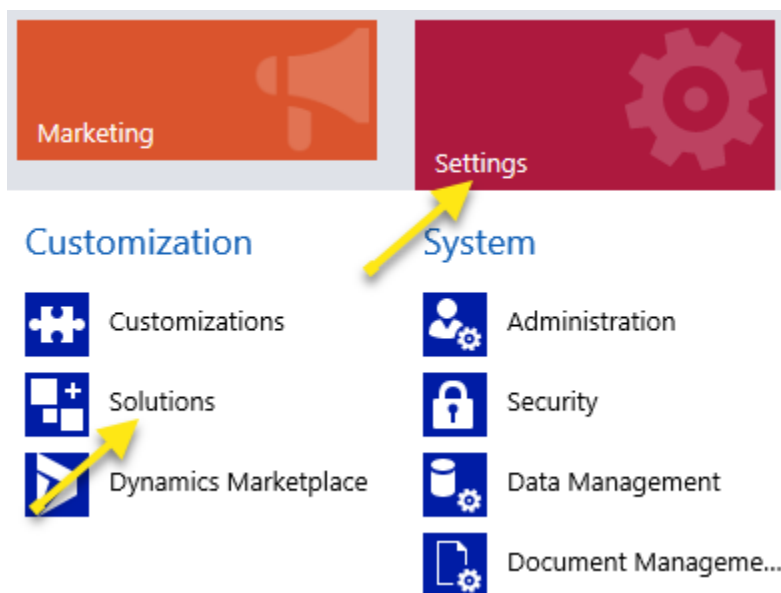


Note: "Static Worksheet" will export all records and is only visible if there is more than one page of records. "Static Worksheet (Page only)" will export only the records visible on the current page.

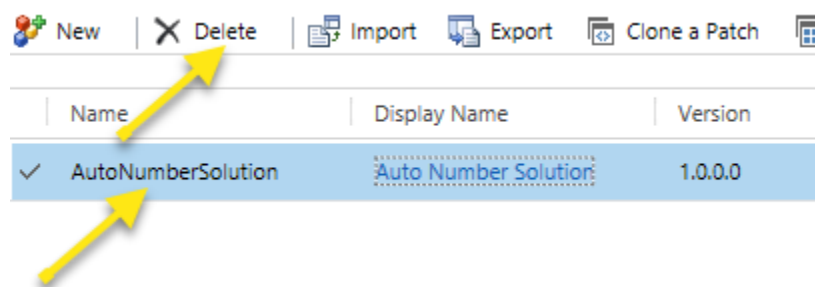
Save the records that are exported from Dynamics 365.

Delete the MISSION: Auto Number Solution

Navigate to "Settings" and then select "Solutions"



Highlight the MISSION: Auto Number solution, then select “Delete”



Note: The solution name depicted in this guide is an example. See the [MISSION: Auto Number Change Log](#) for a list of applicable solution names and versions.

Select OK to delete the solution. Please contact help@missioncrm.ca if any error messages appear and you are unable to delete the solution.

Configure an MISSION: Auto Number

This section will walk a user through setting up an example MISSION: Auto Number rule and details the list of rules that can be applied to a MISSION: Auto Number record.

MISSION: Auto Number Overview

An overview of the MISSION: Auto Number form.

Roles Required

To complete these steps, the user performing these actions must have:

- System administrator security role
or
- MISSION: Auto Number Administrator

Introduction

To create a MISSION: Auto Number sequence there are three values that must exist on the MISSION: Auto Number record to execute correctly. These attributes are:

- Entity
- Attribute
- Sequence

Overview of the MISSION: Auto Number Record

Auto Number Configuration

Title:	Account - Account Number - All		
Entity:	Account ▼	Attribute:	Account Number ▼
Update Null:	False ▼	Limit Function:	<input type="checkbox"/>
Status:	All ▼	Date:	Execution Date ▼
Start Sequence:	1	Current Sequence:	
Sequence:	[TEXT:ACT-]+[PAD:[UPPER:[LEFT:[TRIM:[A:name]],10]],10]+[N:5]+[TEXT:-]+[D:MMYY]		
Save			

Title: The title of the MISSION: Auto Number record, this is automatically created upon save or update of the record. This attribute is used for identification purpose and is read only.

Entity: A selection of system and custom entities in your Dynamics 365 organization. A user selects a value to dictate what entity the completed sequence value will be written to.

Attribute: A selection of system and custom attributes filtered by the selected entity in your Dynamics 365 organization. A user selects a value to dictate what attribute on the chosen entity the completed value will be written to.

Update Null: A flag that instructs the MISSION: Auto Number rule to also trigger on update of a record when no value exists in the target attribute.

Note: When a MISSION: Auto Number rule contains a NULL reference, no value is written to the target record. Set the “Update Null” to true so when the MISSION: Auto Number rule does contain the correct data the full value will be written to the target record.

Date: When utilizing the date and time functions within an MISSION: Auto Number rule, users can specify what date and time attribute to use from the target entity, or alternatively they can select the “Execution Date” which will then use the date and time of when the rule had been calculated. This is particularly useful when importing data into Dynamics 365 where the created-on date and time may differ from the execution date and time of the MISSION: Auto Number rule.

Start Sequence: When using the number functions, a value in the start sequence is required as a user can manipulate the starting sequence number e.g. 1020 instead of 20.

Current Sequence: This value represents the current numbering value that the MISSION: Auto Number rule has consumed when writing a number value to a record. Users may wish to change this value to a different value prior to importing historic data, this way a user can differentiate imported records from ongoing real time transactions.

Status: The status value allows users to specify what “Status” the target record needs to be in prior to a sequence value being generated and applied. This allows you to specify that a value only be generated when either a record is created in a certain status or updated to a certain status when combined with the “Update Null” option.

Sequence: Contains the functions used to calculate the MISSION: Auto Number rule value

Limit Functions (Increases Performance): When this flag is set to true, the functions allowed within the sequence attribute of the record are limited to:

- [TEXT:VALUE]
- [D:VALUE]
- [N:VALUE]
- [S:VALUE]
- The date selection is limited to “Execution Date”

Note: Beware of the character limitations of the target attribute prior to creating the sequence. Typically, system attributes used to contain identifying information are limited to twenty characters. Increase the value of the target attribute length prior to using combinations of functions that result in large values being written to the target record.

Referencing Empty or NULL Values

By design, functions in your MISSION: Auto Number record that reference NULL values will not be written to the target record. Use the “Update Null” flag on the MISSION: Auto Number to write the full value when the referenced attribute contains a value.

An example of this would be:

- You reference the address1_postalcode attribute on the account record in your MISSION: Auto Number rule
- An account record is created but no value is entered in the address1_postalcode attribute
- No MISSION: Auto Number value is written to the target record
- Later, a user corrects the missing data and enters a value in the address1_postalcode
- The MISSION: Auto Number is correctly calculated and the value written to the target record (If the flag “Update NULL” is set to true)

MISSION: Auto Number User Security

An overview of the MISSION: Auto Number roles and privileges required to create and utilize the MISSION: Auto Number features.

Create New MISSION: Auto Number Records

The default security role “MISSION: Auto Number User” contains the correct privileges to utilize (execute) the sequence rules.

The security role contains the following specific privileges:

Customization	
Plug-in Assembly	Global Read
Plug-in Type	Global Read
Sdk Message	Global Read
	Global Create
Sdk Message Processing Step	Global Read
	Global Create
Sdk Message Processing Step Image	Global Read
	Global Create
Custom Entities	
Auto Number	Global Read
	Global Write
	Global Create

Privileges Required to Execute a MISSION: Auto Number Rule

The default security role “MISSION: Auto Number User” contains the correct privileges to utilize (execute) the sequence rules.

The security role contains the following specific privileges:

Customization	
Plug-in Assembly	Global Read
Plug-in Type	Global Read
Sdk Message	Global Read
Sdk Message Processing Step	Global Read
Sdk Message Processing Step Image	Global Read
Custom Entities	
Auto Number	Global Read
	Global Write

Create a MISSION: Auto Number Example

Follow these steps to create an example MISSION: Auto Number rule for the Dynamics 365 Account entity.

Roles Required

To complete these steps, the user performing these actions must have:

- System administrator security role
or
- MISSION: Auto Number Administrator

Introduction

To create a MISSION: Auto Number sequence there are three values that must exist on the MISSION: Auto Number record to execute correctly. These attributes are:

- Entity
- Attribute
- Sequence

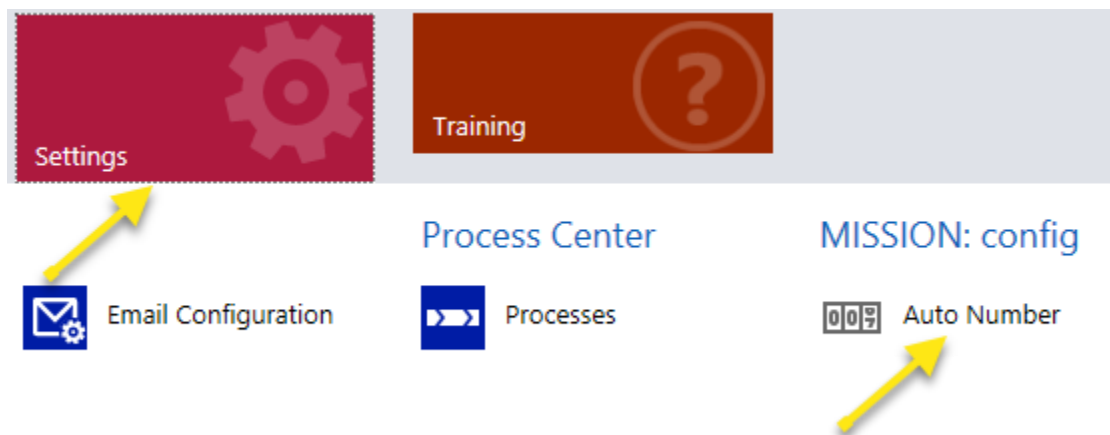
In this example, we will create a MISSION: Auto Number record that generates a value that abides by the following rules:

- Starts with the value “ACT-”
- Uses the first ten characters of the name with any white space removed such as “TheCompany” instead of “The Company Name”
- Has a number that increments to make the value unique, for example “01020”
- Add a month and year marker so users know when this record had been created such as “0517”
- Ensures all alphabetic values are in upper case

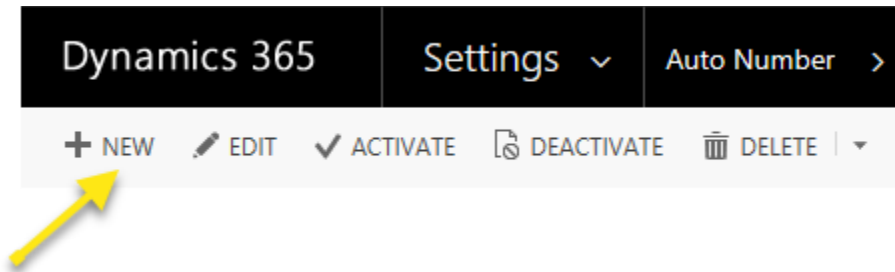
The result should look like: “ACT-THECOMPANY01020-0517”

Create the MISSION: Auto Number Record

To create a new MISSION: Auto Number rule, navigate to “Settings” and then select “Auto Number”



Select “New” to open the MISSION: Auto Number Form



Enter the following details:

Title: This is generated upon save of the record, no value is required and this attribute should be read only

Entity: From the drop-down list, select “Account”

Note: Your system administrator may have renamed the system entities and attributes

Attribute: Select “Account Number” and ensure that the maximum characters has been set to at least “40”. By default, this attribute is typically set to “20” characters

Update Null: Set to true

Date: Set to “Execution Date”

Start Sequence: Set to 1020

Current Sequence: This value should be left blank

Sequence: enter the value “[TEXT:ACT-]+[PAD:[UPPER:[LEFT:[TRIM:[A:name]],10]],10]+[N:5]+[TEXT:-]+[D:MMYY]” without the double quotes

Limit Functions (Increases Performance): Set to false

The completed record should look as so:

Auto Number Configuration

Title:	<input type="text" value="Account - Account Number - All"/>		
Entity:	<input type="text" value="Account"/>	Attribute:	<input type="text" value="Account Number"/>
Update Null:	<input type="text" value="False"/>	Limit Function:	<input type="checkbox"/>
Status:	<input type="text" value="All"/>	Date:	<input type="text" value="Execution Date"/>
Start Sequence:	<input type="text" value="1"/>	Current Sequence:	<input type="text"/>
Sequence:	<input type="text" value="[TEXT:ACT-]+[PAD:[UPPER:[LEFT:[TRIM:[A:name]],10]],10]+[N:5]+[TEXT:-]+[D:MMYY]"/>		
<input type="button" value="Save"/>			

Select “save” to save the record, enable the MISSION: Auto Number rule and return to the previous list view

Review the Sequence Rule

When using a combination of functions on a single value, it is important that you nest them correctly to get the desired result. In this example, we nested several functions around the [A:name] value to cater for potential whitespace, limit the characters being returned and to ensure the values are all upper case. Let’s breakdown this Sequence so we can understand the correct order of these functions:

[PAD: [UPPER: [LEFT: [TRIM: [A:name]],10]],10]

- **[A:name]** – With any sequence that has nested functions, we always start with the source data as the very first function, the nested functions will always be wrapped around this
- **[TRIM:]** – As our desired result for the sequence value is to remove any whitespace; our immediate step is to wrap the source value in the “TRIM” function which removes all white space before any other function utilizes this value
- **[LEFT:,10]** – As the “LEFT” function will count white space towards the number of characters to use, it sits outside of the “TRIM” function. For example
 - **[LEFT: [A:name] ,10]** would return: “The Compan” (Note the inclusion of the whitespace)
 - **[LEFT: [TRIM: [A:name]],10]** would return: “TheCompany” (Note the exclusion of the whitespace)
- **[UPPER:]** – With the end value manipulated, we can now nest the “UPPER” function to convert the value we have so far to upper case characters
- **[PAD:,10]** – As the original source value ([A:name]) is a variable, we want to ensure that whatever the source value at least ten characters are returned. For this reason, we complete the nesting with the final function, the “PAD” function. The “PAD” function will ensure that regardless the character length of the source value, at least ten characters will be returned by padding the value with “0”

Testing the Rule

Test the rule by creating a new or updating an existing account record. Please contact help@missioncrm.ca if any error messages appear or you receive unexpected results.

List of Functions and Examples

An itemized list of number, date and time, attribute and miscellaneous rules with their intended use and examples.

Number Functions

Function	Example	Example Start Sequence	Description
[N:0]	20	20	Returns an incremental number with no padding
[N:5]	00020	20	Returns an incremental number with padding up to five characters
[N:8]	00010020	10020	Returns an incremental number with padding up to eight characters

Examples

Functions	Example Output
[TEXT:ACCT-]+[A:name]+[TEXT: _]+[N:0]	ACCT-MISSION CRM Ltd 20
[TEXT:ACCT-]+[TRIM:[UPPER:[A:name]]]+[TEXT: _]+[N:5]	ACCT-MISSIONCRMLTD 00020

Suffix Functions

Function	Example	Description
[S:3]	YYZ	Returns three randomly generated characters (suffix) comprising of alphabetic characters only.
[S:4]	HJLQ	Returns four randomly generated characters (suffix) comprising of alphabetic characters only.
[S:5]	OPQRS	Returns five randomly generated characters (suffix) comprising of alphabetic characters only.

Examples

Functions	Example Output
[TEXT:ACCT-]+[A:name]+[S:4]	ACCT-MISSION CRM LtdHJLQ
[TEXT:ACCT-]+[TRIM:[UPPER:[A:name]]]+[TEXT: _]+[S:5]	ACCT-MISSIONCRMLTD OPQRS

Date Functions

Function	Example	Description
[D:DD]	19	Returns the numeric day of the month based on the selection in the "Date" attribute
[D:MM]	12	Returns the numeric month of the year based on the selection in the "Date" attribute
[D:YY]	16	Returns the partial numeric value of the year based on the selection in the "Date" attribute
[D:YYYY]	2016	Returns the full numeric value of the year based on the selection in the "Date" attribute
[D:MMDD]	1219	Returns the numeric value of the month and the numeric value of the day based on the selection in the "Date" attribute
[D:MMDDYY]	121916	Returns the numeric value of the date using the partial year based on the selection in the "Date" attribute
[D:MMDDYYYY]	12192016	Returns the numeric value of the date using the full year based on the selection in the "Date" attribute
[D:MM-DD]	12-19	Returns the numeric value of the month and the numeric value of the day based on the selection in the "Date" attribute separated with hyphens

[D:MM-DD-YY]	12-19-16	Returns the numeric value of the date using the partial year based on the selection in the “Date” attribute separated with hyphens
[D:MM-DD-YYYY]	12-19-2016	Returns the numeric value of the date using the full year based on the selection in the “Date” attribute separated with hyphens
[D:MM/DD]	12/19	Returns the numeric value of the month and the partial numeric value of the year based on the selection in the “Date” attribute separated with a stroke
[D:MM/DD/YY]	12/19/16	Returns the numeric value of the date using the partial year based on the selection in the “Date” attribute separated with a stroke
[D:MM/DD/YYYY]	12/19/2016	Returns the numeric value of the date using the full year based on the selection in the “Date” attribute separated with a stroke
[D:DD-MM]	19-12	Returns the numeric value of the day and the value of the month based on the selection in the “Date” attribute separated with hyphens
[D:DD-MM-YY]	19-12-16	Returns the numeric value of the date using the partial year based on the selection in the “Date” attribute separated with hyphens
[D:DD-MM-YYYY]	19-12-2016	Returns the numeric value of the date using the full year based on the selection in the “Date” attribute separated with hyphens
[D:DD/MM]	19/12	Returns the numeric value of the day and the value of the month based on the selection in the “Date” attribute separated with a stroke
[D:DD/MM/YY]	19/12/16	Returns the numeric value of the date using the partial year based on the selection in the “Date” attribute separated with a stroke
[D:DD/MM/YYYY]	19/12/2016	Returns the numeric value of the date using the full year based on the selection in the “Date” attribute separated with a stroke
[D:mmmm dd, yyyy]	December 19, 2016	Returns the full written date using the partial year based on the “Date” attribute
[D:mmmm dd]	December 19	Returns the full written date excluding the year based on the “Date” attribute
[D:mmmm]	December	Returns the full written month based on the “Date” attribute

Examples

Functions	Example Output
[TEXT:ACCT-]+[A:name]+[TEXT:_]+[D:MMDDYY]+[N:0]	ACCT-MISSION CRM Ltd 05251720
[TEXT:ACCT-]+[LEFT:[UPPER:[A:name]],7]+[D:MMDDYYYY]	ACCT-MISSION05252017

Time Functions

Function	Example	Description
[T:hh:mm tt]	04:16 PM	Returns the formatted hour and minute based on the 24-hour format with the AM or PM marker based on the “Date” attribute

[T:hh:mm:ss tt]	04:16:45 PM	Returns the formatted hour, minute and second based on the 24-hour format with the AM or PM marker based on the "Date" attribute
[T:hh:mm]	16:16	Returns the formatted hour and minute based on the 24-hour format based on the "Date" attribute
[T:hh:mm:ss]	16:16:45	Returns the formatted hour, minute and second based on the 24-hour format based on the "Date" attribute

Examples

Functions	Example Output
[TEXT:ACCT-]+[A:name]+[TEXT:_]+[T:hh:mm:ss tt]	ACCT-MISSION CRM Ltd 04:16:45 PM
[TEXT:ACCT-]+[LEFT:[UPPER:[A:name]],7]+[T:hh:mm:ss]	ACCT-MISSION16:16:45

Attribute Functions

Function	Example	Description
[A:address1_line1]	186 Smith Avenue	Returns the value of the attribute referenced in the function. The attribute must exist on the target entity
[A:fullname]	Jain Smith	Returns the value of the attribute referenced in the function. The attribute must exist on the target entity

Examples

Functions	Example Output
[LEFT:[UPPER:[TRIM:[A:address1]]],10]+[N:2]	186SMITHAV20
[LEFT:[UPPER:[TRIM:[A:name]]],5]+[A:address1_postalcode]	MISSI0L3Y9B2

Text Functions

Function	Example	Description
[TEXT:VALUE]	ACCT-	Allows users to enter plain text including special characters. The special Character "[" and "]" are always omitted from any text specified
[TEXT:VALUE_]	ACCT -	As by default white space is omitted from individual functions, use the underscore "_" to create spaces between functions and text
[LEFT:[VALUE],5]	186 S	Takes the left most characters from the value as specified in the function. Typically combined with the [A:] function.
[TRIM:[VALUE]]	186SmithAvenue	Removes any whitespace from the value specified in the function. Typically combined with the [A:] function.
[PAD:[VALUE],20]	186SmithAvenue000000	Will pad the value specified in the function with '0' values to ensure the total characters are that which have been specified in the function. Typically combined with the [A:] or [LEFT:] function
[UPPER:[VALUE]]	186 SMITH AVENUE	Converts all alpha characters to uppercase

Examples

Functions	Example Output
[PAD:[LEFT:[UPPER:[TRIM:[A:address1]]],16],16]	186SMITHAVENUE00
[PAD:[LEFT:[UPPER:[TRIM:[A:address1]]],16],16]+[N:5]	186SMITHAVENUE00000020

Lookup Functions

Function	Example	Description
[L:lookupattribute,entity,attribute]	Parent Company Name	Returns the value of the attribute referenced in the function. The attribute must exist on the target entity

Examples

Functions	Example Output
[L:parentcustomerid,account,name]	Parent Company Name
[LEFT:[UPPER:[TRIM:[L:parentcustomerid,account,name]]],10]	PARENCUST

Disable an Existing MISSION: Auto Number

Instructions on how to disable an existing active MISSION: Auto Number rule.

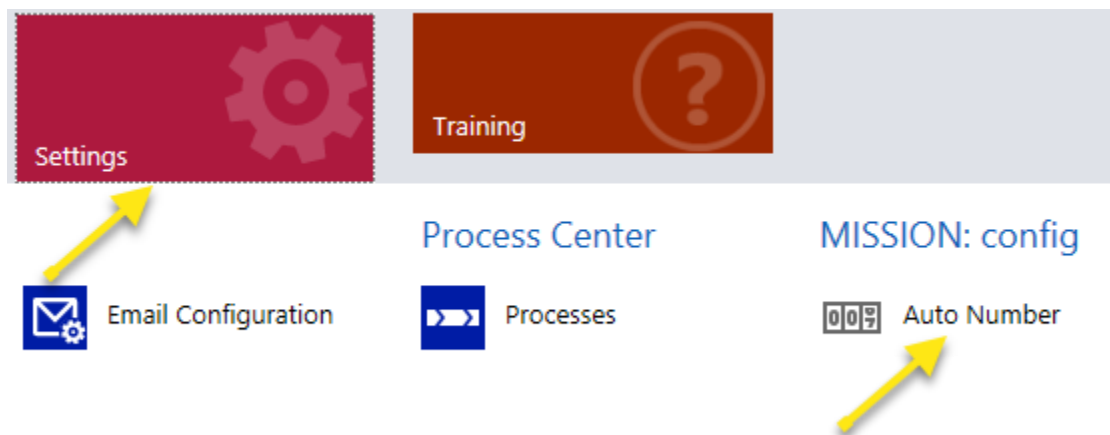
Roles Required

To complete these steps, the user performing these actions must have:

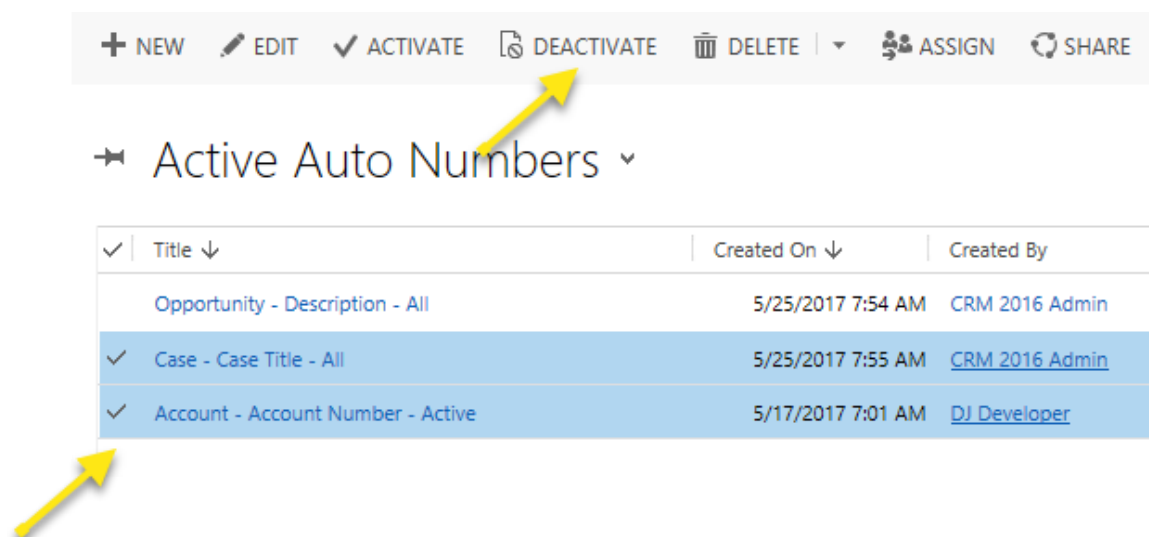
- System administrator security role
or
- MISSION: Auto Number Administrator

Disable the Rule

To disable a rule, navigate to “Settings” and then select “Auto Number”



Highlight the MISSION: Auto Number Rule(s) and then select disable to prevent the rules from processing new records on either create of a record or update of a record



Enable a Disabled Rule

To enable an existing disabled rule, simply locate the rule that needs to be enabled, select it and then select “Activate”. Disabled rules can be found under the “Inactive Auto Numbers View”

In Addition

This section contains miscellaneous rules, items to consider when using MISSION: Auto Number and current change log.

Importing Data

There are functions built into MISSION: Auto Number specifically for importing data.

MISSION: Auto Number has a specific function named “IGNORE”, which when used during the create or update of a record tells the sequence rule to skip processing the record and instead write a “NULL” value in lieu of the “IGNORE” value.

An example would be:

- A user wants to import a large amount of historic account records but does not want to trigger the sequence rule that will write a value to the “Account Number” attribute
- The user may want to do this instead of temporarily disabling the rule so that ongoing processing of accounts will continue to generate sequence rule values
- For the user to achieve this they simply enter the text value of “IGNORE” in the “Account Number” attribute.
- The sequence rule reads the value “IGNORE”, does not apply the rule to that record and instead replaces the “IGNORE” value with NULL when it is written to the account record

Using Special Characters

Information on how special characters are stripped from the MISSION: Auto Number rules.

Be sure to avoid using the “[” or “]” characters in your sequence, the MISSION: Auto Number utilizes these characters to process the value and therefore they are reserved exclusively. When referencing values from an attribute, all special characters are removed, only alpha numeric values are returned.

For example:

- Company Name (Subdivision)
Becomes:
- Company Name Subdivision

Referencing Empty or NULL Values

What to expect when using empty or NULL values during the execution of a MISSION: Auto Number rule.

By design, functions in your MISSION: Auto Number record that reference NULL values will not be written to the target record. Use the “Update Null” flag on the MISSION: Auto Number to write the full value when the referenced attribute contains a value.

An example of this would be:

- You reference the address1_postalcode attribute on the account record in your MISSION: Auto Number rule
- An account record is created but no value is entered in the address1_postalcode attribute
- No MISSION: Auto Number value is written to the target record
- Later, a user corrects the missing data and enters a value in the address1_postalcode
- The MISSION: Auto Number is correctly calculated and the value written to the target record (If the flag “Update NULL” is set to true)

Referencing System Attributes

What to expect when using a system attribute as the destination for your MISSION: Auto Number sequence value.

By design, certain “System” attributes in dynamics 365 have their own specific logic which changes dependent on the attribute, related entity and form design. Although MISSION: Auto Number allows you to write to these attributes, we cannot control or overcome how they react to being used, as such we offer this support as is.

Examples of how certain “system” attributes react:

- **Quote Number:** When you write a sequence value to the quote number, the MISSION: Auto Number will supersede the default Microsoft auto numbering allowing you to customize how your quote numbers are generated.
- **Order Number:** When you write a sequence value to the order number, the MISSION: Auto Number will supersede the default Microsoft auto numbering allowing you to customize how your order numbers are generated.
- **Invoice Number:** When you write a sequence value to the invoice number, the MISSION: Auto Number will supersede the default Microsoft auto numbering allowing you to customize how your invoice numbers are generated.

NOTE: Form logic exists on this attribute, if the attribute is on the form and set to editable, Dynamics 365 will not allow you to save the record without a value in this field. We recommend that you either remove the attribute from the form or set it to read only which will allow you to save the record with a null value in that attribute and allow the MISSION: Auto Number to generate a custom sequence for you.

- **Product Number:** The product number attribute requires a value regardless of the form design, however if you have set up a MISSION: Auto Number sequence to reference that attribute, any value you enter will be overwritten with the custom value.

Dynamics 365 Compatibility List

A list of compatible Dynamics 365 versions and there applicable MISISON: Auto Number solutions.

Article title	Version	MISSION: Auto Number
December 2016 update for Dynamics 365 (online and on-premises)	8.2.0.0749	8.2.x.x.x
Service Update 1 for Microsoft Dynamics 365 8.2	8.2.0.0773	8.2.x.x.x
Service Update 2 for Microsoft Dynamics 365 8.2	8.2.0.0774	8.2.x.x.x
Service Update 3 for Microsoft Dynamics 365 8.2	8.2.0.0780	8.2.x.x.x
Service Update 4 for Microsoft Dynamics 365 8.2	8.2.0.0781	8.2.x.x.x
Service Update 5 for Microsoft Dynamics 365 8.2	8.2.0.0788	8.2.x.x.x
Service Update 6 for Microsoft Dynamics 365 8.2	8.2.0.0792	8.2.x.x.x
Service Update 7 for Microsoft Dynamics 365 8.2	8.2.0.0795	8.2.x.x.x
Microsoft Dynamics 365 (online and on-premises) Update 2.1	8.2.1.0176	8.2.x.x.x
Service Update 1 for Microsoft Dynamics CRM 8.2.1	8.2.1.0178	8.2.x.x.x
Service Update 2 for Microsoft Dynamics CRM 8.2.1	8.2.1.0185	8.2.x.x.x
Dynamics 365 Spring Release	9.0.0.1103	8.2.x.x.x

MISSION: Auto Number Change Log

Information on performance impacts of utilizing MISSION: Auto Number can also be found in this article.

MISSION: Auto Number	Description	Solution Delivery	Information
8.2.1.002	Initial Production Release	Direct Solution	Select here for details
8.2.1.004	Updated Release	Microsoft App Store	Select here for details
8.2.1.104	Initial Production Release	Microsoft App Store	Select here for details

8.2.1.002

The initial production release via direct solution download

8.2.1.003

The initial production release via the Microsoft App Store download

8.2.1.004

This solution released on the 3rd of October contains fixes and additional functionality, the following has been resolved/added:

- **FIX:** Users may receive an error where by the auto number sequence fires inadvertently when an attribute used in the sequence is updated.
- **FIX:** License shows as expired despite having extended the solution expiry date. When this error occurs, the license required deleting and the registration process to be run again.
- **New Functionality:** The auto number can now accommodate attributes of type 'system', these include but are not limited to:
 - quote.quotenumber
 - salesorder.salesordernumber
 - invoice.invoicenumber

8.2.1.104

This solution released on the 22nd of January 2018 contains fixes and additional functionality, the following has been resolved/added:

- **FIX:** Unable to remove the solution due to a failure in the license check. The solution has now been updated to not check for a valid license when deleting existing Auto Number sequence records.
- **New Functionality:** An administrator can now create multiple 'Auto Number' sequence records for a single entity.
- **New Functionality:** A new sequence switch called 'Lookup Control' has been added. This allows administrators to reference attributes within a sequence that are located on a related entity. The structure of the new switch is: [L:lookupattribute,entity,attribute]

Terms and Conditions

End-User License Agreement (EULA)

Important – Read Carefully. The End-User License Agreement (“**Agreement**”) is a legal agreement between the End-User (client, consultant or representative of the recipient of this product or service) and Mission CRM Ltd. (**Mission CRM**) and its partner(s) for the Dynamics 365 Managed Solution software product identified within this software package, documentation and related materials (the “**Product**”), which includes computer software and may include printed materials, and online or electronic documentation not controlled by Mission CRM. By installing, configuring and executing the use of this Product, you agree to be bound by the terms of this Agreement and those of Mission CRM partner(s). If you, the End-User, do not agree to the terms of this Agreement, do not install or use this Product or consume any related services.

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IN THE EVENT OF LICENSE TERMINATION, ALL MATERIALS, DATABASES, AND DOCUMENTATION MUST BE IMMEDIATELY RETURNED TO MISSION CRM LTD. WITH THE ADDRESS LISTED AT THE END OF THIS AGREEMENT.

1. End-User represents and warrants that it is authorized and empowered to enter this Agreement. Represents and Warrants that it is authorized and empowered to grant the rights set forth in this end user license agreement.
2. Mission CRM Ltd. and its partner(s) hereby grants End-User a non-exclusive, non-transferable right to use the Product, subject to the use restrictions and limitations set forth in Section 5 and Section 6 below.
3. Mission CRM Ltd. shall provide the End-User with one (1) production instance and one (1) test instance of the product outlined in this document.
4. The End-User acknowledges that the Product is confidential, proprietary material owned and copyrighted by Mission CRM. The End-User agrees that Mission CRM and its partner(s) shall retain exclusive ownership of the Product, including all literary property rights, patents, copyrights, trademarks, trade secrets, trade names, or service marks, including goodwill and that Mission CRM may enforce such rights directly against the End-User in the event the terms of this agreement are violated.
5. The Product or Service is intended for use solely by End-User for their own internal purposes. The Product may only be used on the Dynamics 365 Organizational Unit licensed and paid for by End-User to the Mission CRM and that of a single test license (A test license must be on a Dynamics 365 organization marked as a "Sandbox Instance". The End-User agrees not to copy, modify, sub-license, assign, transfer or resell the Product, in whole or in part without the prior written permission of Mission CRM Ltd. The End-User agrees not to translate, reverse engineer, decompile, disassemble, or make any attempt to discover the source code of the Product (except and only to the extent applicable law prohibits such restrictions). The End-User further agrees not to download/upload the Product, in whole or in part, or to establish a network, place data on the Internet, or offer a service bureau utilizing the Product. The End-User agrees to restrict access to the Product to designated employees and to use its best efforts to prevent violation of these restrictions by agents, employees and others, taking such steps and reasonable security precautions as may be necessary. The End-User shall permit Mission CRM Ltd. to send licensing information and registrations details on an ongoing basis from the End-Users Dynamics 365 organization for the purpose of ensuring licensing is correct and this agreement is being adhered to.
6. This license authorizes use of the Product on a single Dynamics 365 Production Organizational Unit (where Microsoft have specified the instance as a "Production" instance), and a single Dynamics 365 Test Organizational Unit (where Microsoft have specified the instance as a "Sandbox" instance). This license covers unlimited users that belong directly

to the Dynamics 365 organizations that have been licensed, this license does not cover users or user access to organizations not specified in the license regardless of the number of organizations a user is associated to.

7. This Agreement shall remain in force as long as the End-User using the Product is paying the applicable Mission CRM Ltd. "Fees" (including licensing fees, subscription fees, consulting fees for services, and third-party product fees). Failure to pay these Fees will cause the agreement to expire. Mission CRM or the End-User may terminate use of the Product or service and this Agreement by written notice, at least thirty (30) days prior to the termination. Within thirty (30) days after expiration or notice of termination of the Agreement, End-User shall return to Mission CRM, postage prepaid all copies of the Product, Documentation and any Custom Collateral or Products created during the lifespan of this agreement. Continued use of the Product or any information contained therein or supplied under this Agreement after termination, or expiration of this Agreement is expressly prohibited. Note that individual products are exempt from ongoing Fees and may be under a perpetual license, for a list of these products and services please contact Mission CRM Ltd. Using the contact information within this agreement.

8. All UPDATES provided by Mission CRM and its partners shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, the End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If the End-User does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.

9. The End-User agrees that Mission CRM and its partners may collect and use technical information from the End-User provided as a part of support services, consulting, product deployment or the ongoing operations related to the Product or service.

10. The End-User acknowledges that the Dynamics 365 Managed Solution "Product" or "Service" is of Canadian origin and agrees to comply with all applicable international and national laws that apply to the Product or service, including the Global Affairs Canada Regulations, as well as end-user, end-use and destination restrictions issued by Canada and other governments. For more information, visit <http://www.international.gc.ca> to review any applicable import regulations.

11. Mission CRM Ltd. represents that the product does not violate or infringe any patent, trademark, trade secret, copyright, or similar right. In the event the product is held to infringe the rights of any third party, Mission CRM shall have the option either to procure the right for the End-User to continue using the product, to replace or modify the product so that it becomes non-infringing. Mission CRM and its partner(s) make no other warranty, express or implied, including, but not limited to, the accuracy of the product, the merchantability and fitness of the product for a particular purpose. Further, Mission CRM Ltd. does not warrant the compatibility of the product with End-User's computer hardware, software system or any third-party systems or business processes.

12. Under no circumstances shall Mission CRM or its Partner(s) be liable to the End-User or any other person for any indirect, special or consequential damages of any kind, including but not limited to, damages for loss of goodwill, work stoppage, computer failure or malfunction or all other commercial damages or losses. Mission CRM will not be liable for issues or damages that arise from third party services or business processes that rely on Mission CRM a product or service.

13. Mission CRM may cancel this license at any time if the End-User fails to comply with the terms and conditions of this Agreement; and Mission CRM Ltd. may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights or those of their partner(s).

14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.

15. No term or provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute consent to, waiver of, or excuse for any other different or subsequent breach.

Confidentiality Notice

The information contained in this document is confidential and proprietary. The End-User hereby covenants and agrees that, from and after the date of acceptance of this agreement, the End-User will not, either alone or in conjunction with any individual, firm, corporation, association or other entity, whether as principal, agent, shareholder or in any other capacity whatsoever:

- (a) divulge to any person, firm or corporation any confidential information contained in this agreement or delivered to the end-user pursuant to the terms of this agreement and the transaction contemplated herein.

Injunctive Relief

The End-User hereby covenants and agrees that any breach or violation of the provisions of this agreement or specifically the Confidentiality Notice provision of this Agreement hereof will not be susceptible to adequate relief by way of monetary damages only, and Mission CRM, in addition to any other remedies enjoyed by it under the terms hereof or at law, shall be entitled to obtain injunctive relief against the End-User in any court of competent jurisdiction.

This document is to be used with the understanding that it will be held in strict confidence and not used for reasons unrelated directly to the specific purpose of this document. No part of the document may be circulated or reproduced for distribution outside the Client organization without prior written permission from Mission CRM Ltd.

Limitation of Liability

In no event, will Mission CRM or its partner(s) be liable for any damages, including loss of data, lost profits, cost of cover, or other special, incidental, consequential, or indirect damages arising from the use of the program (including the thirty-day trial) or accompanying documentation, however caused and on any theory of liability. This limitation will apply even if Mission CRM Ltd. has been advised of the possibility of such damage. The End-User acknowledges that the license fee reflects this allocation of risk.

Independent Legal Advice

The End-User further acknowledges that the End-User has been told to obtain independent legal advice with respect to this agreement and the End-User has had the opportunity to obtain independent legal advice and has declined it. The End-User further:

- (i) understand their respective rights and obligations under this Agreement and its nature and consequences;
- (ii) acknowledge that this Agreement is fair and reasonable;
- (iii) acknowledge that they are not under any undue influence or duress; and
- (iv) acknowledge that all parties are signing this Agreement voluntarily.

General

This Agreement is the entire agreement between Mission CRM and the End-User concerning the Product or Service and supersedes any other communications or advertising with respect to the program and accompanying documentation be them written, verbal or otherwise. If any provision of the Agreement is held invalid, the remainder of the Agreement shall continue in full force and effect. If you have any questions, please contact in writing:

Mission CRM Ltd.
Licensing Department
500 King Street West
Suite 300
Toronto
M5V 1L9
Ontario, Canada

Warranty Disclaimer

Mission CRM Ltd. disclaims any warranty regarding the Product and or content or examples contained in this documentation and the Dynamics 365 Managed Solution software product, including the warranties of merchantability and fitness for a particular purpose.

Limitation of Liability

The content of this Client Guide is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Mission CRM Ltd. Mission CRM Ltd. assumes no responsibility or liability for any errors or inaccuracies that may appear in this Client Guide, help file or content derived from this Client Guide. Neither Mission CRM Ltd, nor their partner(s) or any third-party organization or service who has been involved in the creation, production or delivery of this documentation shall be liable for any indirect, incidental, special, exemplary or consequential damages, including but not limited to any loss of anticipated profit or benefits, resulting from the use of this documentation or sample code.

Severability

If any covenant or provision, or portion thereof, of this Agreement is determined to be void or unenforceable in any jurisdiction such void or unenforceable covenant or provision, or portion thereof, is hereby conceded to be severable from the balance of this Agreement in that jurisdiction only; such a determination shall not, in any event, affect or impair the validity of the balance of the covenant or provision, nor shall it affect or impair the validity of any other covenant or provision herein contained.

Binding Effect

This Agreement and everything contained herein shall extend to, ensure to the benefit and be binding upon the parties hereto and their respective heirs, executors, administrators, successors, assigns and legal representatives.

Governing Law

This Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario, where it is made.