

# Site Assessment Survey

# Woodford Development Guide

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Microsoft Partner Gold Cloud Platform Gold Enter Resource Planning Gold Customer Relationship Management Gold Cloud Customer Relationship Management Gold Cloud Customer Relationship Management

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Install RESCO Mobile CRM Woodford in PC using following link

• Use Internet Explorer to download Woodford because it need Silverlight installed in the computer

https://resco.net/mobilecrm/woodfordhistory.html

- Click on Version 10.0.3.0
- Download standalone installation and it will install desktop client of RESCO Woodford

崖 Resco MobileC	CRM Woodford v10.0.3.0
Microsoft Dynamics CRM 202	11, 2013 & 2015 Integration
Download for 2011	
Download for 2013, 2015 & 2016	To integrate the MobileCRM Woodford application to the Microsoft Dynamics CRM environment, please download the
Standalone application Install	Please press the install button to install the MobileCRM Woodford application to your desktop computer.
Required minimal Mobile CRM version	10.0+
Please before installing the new versi	on of the Woodford make a backup of your current mobile project with the installed version.
Woodford Version History	

- Please verify the installed version of the Woodford solution in CRM is compatible with standalone application.
  - If Woodford standalone application is in version 10+ then Woodford solution in CRM should have the same 10+ version (not 9+ solution).

Name	Display Name	Version	Installed On $\downarrow$	Package Typ	Publisher	Description
CRMRESTBuilder	CRM REST Builder	2.5.0.0	8/28/2017	Managed	Jason Lattimer	https://github.com/jlattimer/CRMRESTBuilder v2.5.0.0 for
eBECSSiteSurvey	eBECS Site Survey	2.2.0	8/28/2017	Unmanaged	eBECS Survey Solution	2.2.0 - Implement licensing 2.1.4 - minor bug fixes 2.1.3
RibbonWorkbench2016	Ribbon Workbench 2016	3.0.25	7/7/2017	Managed	Develop 1 Ltd	3.0.25 LocLabels correctly displayed when base lcid is not
Woodford	Resco MobileCRM Woodf	10.1.0.0	6/5/2017	Managed	Resco spol. s r.o.	Customization tool for Resco MobileCRM.
SurveyUnlicensedCompon	Survey Unlicensed Compo	1.0	5/30/2017	Unmanaged	eBECS Survey Solution	-
eBECSSurvey	eBECS Survey	2.1.6	5/28/2017	Unmanaged	eBECS Survey Solution	2.1.6 - Bug fixes after removing XrmSvcToolKit references

• Otherwise install latest solution in CRM

崖 Resco MobileO	CRM Woodford v10.0.3.0
Microsoft Dynamics CRM 20	11, 2013 & 2015 Integration
Download for 2011	
Download for 2013, 2015 & 2016 Standalone application	o integrate the MobileCRM Woodford application to the Microsoft Dynamics CRM environment, please download the s
Install	Please press the install button to install the MobileCRM Woodford application to your desktop computer.
Required minimal Mobile CRM version	10.0+
Please before installing the new versi	ion of the Woodford make a backup of your current mobile project with the installed version.
Woodford Version History	

• Import latest solution of Site Assessment Survey in to target environment

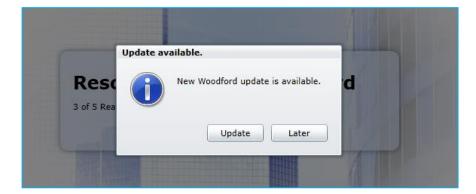
#### 1.1.1 Connectt to Dynamic 365 Solution

Open installed Woodford desktop client

Enter CRM environment details to connection wizard

Please log-in usin	g your organization credentials
URL	https://siteassessmenttst.ebecsdemo.com
Username	ebecsdemo\auxentadev
Password	
	Remember server
	Remember password
	OK

If Woodford solution proposed update solution you can skip it



### 1.1.2 Create New Mobile Solution

If there were no existing mobile project then create new mobile project.

Refer Woodford Guide for more details: <u>https://www.resco.net/downloads/Woodford\_Guide.pdf</u>

Click on New button to create new solution

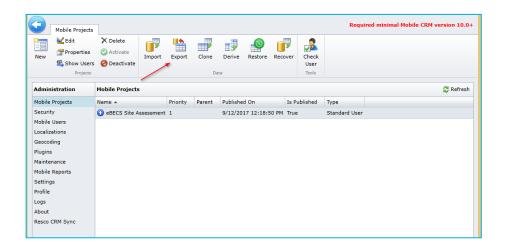
	Mobile Projects									
New	Edit	X Delete Activate Deactivate	Import	Export	Clone	Derive	Restore	Recover	Check User	T
	Projects				Da	ta			Tools	
Admin	istration	Mobile Projects	5							_
Mobile	Projects	Name 🔺		Priority	Parent	Publishe	d On	Is Put	olished	Ту

Add the name for project and select relevant security roles

Add Mobile Project
Туре
Standard User 🔹
Template
Default 🔹
Name
eBECS Site Assessment Survey
Priority (Any number; projects with higher priority are preferred)
0
Roles (CRM roles that can use this project)
CEO-Business Manager (SITE ASSESSMENT DEV)
CSR Manager (SITE ASSESSMENT DEV)
Customer Service Representative (SITE ASSESSMENT DEV)
Delegate (SITE ASSESSMENT DEV)
eBECS Survey Administrator (SITE ASSESSMENT DEV)
eBECS Survey Surveyor (SITE ASSESSMENT DEV)
Knowledge Manager (SITE ASSESSMENT DEV)
Marketing Manager (SITE ASSESSMENT DEV)
Marketing Professional (SITE ASSESSMENT DEV)
Sales Manager (SITE ASSESSMENT DEV)
Salesperson (SITE ASSESSMENT DEV)
Schedule Manager (SITE ASSESSMENT DEV)
Scheduler (SITE ASSESSMENT DEV)
System Administrator (SITE ASSESSMENT DEV)
System Customizer (SITE ASSESSMENT DEV)
Vice President of Marketing (SITE ASSESSMENT DEV)
OK Cancel

#### 1.1.3 Backup Existing Project

It should be mandatory action to backup existing solution before applying new changes. Using export button user can export the existing project easily.



Before proceeding with customizations need to enable survey related entities in mobile project.

#### 2.1.1 Enable Entities

To enable entities, select the relevant entity and click on enable button then entity will be added to the solution.

🏴 Resco Woodford v10.0.3.0		
Project: eBECS Site Assessment	]	
	Enable Disable Save Sync Filter Entity	
	Entity	
Article lemplate	Display Name	Bookable Resource Booking
M Attachment	Name	BookableResourceBooking
E Bookable Resource	Permissions	✓ Read ✓ Write ✓ Create ✓ Delete
Bookable Resource Booking		
a bookable Resource booking	Mode	Online & Offline 🔻
Bookable Resource Booking F	Synchronization	Standard Sync 🔻 On Conflict: Server Wins 🔻
Bookable Resource Category     ■	Advanced	Include Lookup Labels Incremental Linked SyncFilter Project Default 💌

#### 2.1.2 Enable Entity Field

After enable entity need to add necessary fields of that entity to solution. After selecting relevant fields click on Save icon and it will save changes.

#### Warning:

Selecting fields and click on save button while system in saving mode, sometime will not save new changes.

Publish Publish All O'Validate Publish	Enabl Disab				
Artucle Iempiate  Artucle Iempiate  Attachment  Bookable Resource Booking  Bookable Resource Booking F   Bookable Resource Category  Bookable Resource Category	Na Per Mo Syr	play Name me missions	Conducted Survey ebecssvy_conductedsurvey ✓ Read ✓ Write ✓ Create ✓ Delet Online & Offline ▼ Standard Sync ▼ On Conflict: Serv Include Lookup Labels Incremental	rer Wins 🔻	ject Default 🔹
Bookable Resource Category     Bookable Resource Character     Bookable Resource Group     Bookable Resource Group     Booking Status	Field	ds Display Name ▲ Conducted Survey	Name ebecssvy_conductedsurveyId	Type Primary Key	Permissions RC-
避 Business Unit []a Campaign 17 Campaign Activity	<ul> <li>Image: A state</li> <li>Image: A state<td>Created By Created By (Delegate) Created On</td><td>CreatedBy CreatedOnBehalfBy CreatedOn</td><td>Lookup Lookup Date and Time</td><td>R R R</td></li></ul>	Created By Created By (Delegate) Created On	CreatedBy CreatedOnBehalfBy CreatedOn	Lookup Lookup Date and Time	R R R
Campaign Activity<->Sales L <sup>™</sup> √ Campaign Response Campaign<->Sales Literature	<ul> <li>Image: A state of the state of</li></ul>	Creator Date	ebecssvy_Creator ebecssvy_Date	Lookup Date and Time	RCU RCU
	<ul> <li>✓</li> <li>✓</li> </ul>	Date Completed FinalScore Import Sequence Numb	ebecssvy_DateCompleted ebecssvy_FinalScore er ImportSequenceNumber	Date and Time Decimal Number Whole Number	RCU RC-
الله Characteristic Cloud Document ک <sup>ی</sup> Competitor		Last Seen Survey Tab I Modified By Modified By (Delegate)	ndex ebecssvy_LastSeenSurveyTabInd ModifiedBy ModifiedOnBehalfBy	Lookup	RCU R R
Competitor<->Product Conducted Survey	√ √	Modified On Name	ModifiedOn ebecssvy_name	Date and Time Single Line of Text	R
Sconnection Role	✓	Order Owner	ebecssvy_Order OwnerId	Single Line of Text Owner	RCU RCU

# 2.1.3 Entity and Field Dictionary

Following entities and fields need to be enable.

# Entity: Conducted Survey

iele	ds			
	Display Name 🔺	Name	Туре	Permissions
√	Conducted Survey	ebecssvy_conductedsurveyId	Primary Key	RC-
√	Created By	CreatedBy	Lookup	R
√	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
1	Creator	ebecssvy_Creator	Lookup	RCU
√	Date	ebecssvy_Date	Date and Time	RCU
1	Date Completed	ebecssvy_DateCompleted	Date and Time	RCU
1	FinalScore	ebecssvy_FinalScore	Decimal Number	RCU
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
$\checkmark$	Last Seen Survey Tab Index	ebecssvy_LastSeenSurveyTabIndex	Whole Number	RCU
$\checkmark$	Modified By	ModifiedBy	Lookup	R
1	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
1	Order	ebecssvy_Order	Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
√	Owning Business Unit	OwningBusinessUnit	Lookup	R
√	Owning Team	OwningTeam	Lookup	R
√	Owning User	OwningUser	Lookup	R
√	Parent Conducted Survey	ebecssvy_ParentConductedSurvey	Lookup	RCU
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
√	Response GUID	ebecssvy_ResponseGUID	Single Line of Text	RCU
	SelectImageTab	ebecssvy_SelectImageTab	Two Options	RCU
	SelectSurveyTab	ebecssvy_SelectSurveyTab	Two Options	RCU
$\checkmark$	Status	StateCode	Status	R-U
$\checkmark$	Status Reason	StatusCode	Status Reason	RCU
$\checkmark$	SurveyTemplate	ebecssvy_SurveyTemplateId	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Designer Image

ielo	ds			
	Display Name 🔺	Name	Туре	Permissions
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
1	EntityImageId	EntityImageId	Unique Identifier	R
1	Frame	ebecssvy_Frame	Lookup	RCU
1	Image	EntityImage	Image	RCU
1	Image Reference	ebecssvy_ImageReference	Single Line of Text	RCU
$\checkmark$	Images	ebecssvy_imagesId	Primary Key	RC-
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
1	Is Global Image ?	ebecssvy_IsGlobalImage	Two Options	RCU
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Designer Response

el	ds			
	Display Name 🔺	Name	Туре	Permissions
1	Conducted Survey	ebecssvy_ConductedSurvey	Lookup	RCU
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
(	Created On	CreatedOn	Date and Time	R
(	Desiner Response	ebecssvy_desinerresponseId	Primary Key	RC-
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
(	Modified On	ModifiedOn	Date and Time	R
(	Name	ebecssvy_name	Single Line of Text	RCU
(	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
1	Survey Tab	ebecssvy_SurveyTab	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R
(	xml Response	ebecssvy xmlResponse	Multiple Lines of Text	DCU

# Entity: Frames

Field	is			
	Display Name 🔺	Name	Туре	Permissions
√	Columns	ebecssvy_Columns	Whole Number	RCU
$\checkmark$	Container Type	ebecssvy_ContainerType	Option Set	RCU
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
1	Designer Xml	ebecssvy_DesignerXml	Multiple Lines of Text	RCU
√	EntityImageId	EntityImageId	Unique Identifier	R
√	Frame Image	EntityImage	Image	RCU
1	Frame Reference	ebecssvy_FrameReference	Single Line of Text	RCU
$\checkmark$	Frames	ebecssvy_framesId	Primary Key	RC-
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
1	Rows	ebecssvy_Rows	Whole Number	RCU
	Show Border	ebecssvy_ShowBorder	Two Options	RCU
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
1	Survey Question	ebecssvy_question	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU

# Entity: Picture

Fields				
	Display Name 🔺	Name	Туре	Permissions
✓	Conducted Survey	ebecssvy_ConductedSurvey	Lookup	RCU
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
$\checkmark$	Picture	ebecssvy_pictureId	Primary Key	RC-
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
$\checkmark$	Survey Question	ebecssvy_SurveyQuestionId	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Responses

Field	ds			
	Display Name 🔺	Name	Туре	Permissions
√	Conducted Survey	ebecssvy_ConductedSurveyId	Lookup	RCU
$\checkmark$	Contact	ebecssvy_ContactId	Lookup	RCU
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
$\checkmark$	Frame image data	ebecssvy_frameimagedata	Multiple Lines of Text	RCU
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
1	Lead	ebecssvy_LeadId	Lookup	RCU
$\checkmark$	Look Up Type	ebecssvy_LookUpType	Single Line of Text	RCU
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name ebecssvy_name Single Line of Text		Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
√	Response Score	ebecssvy_responsescore	Decimal Number	RCU
$\checkmark$	Responses	ebecssvy_responsesId	Primary Key	RC-
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
√	Survey Answer	ebecssvy_SurveyAnswer	Multiple Lines of Text	RCU
$\checkmark$	Survey Answer and Id	ebecssvy_SurveyAnswerandId	Single Line of Text	RCU
$\checkmark$	Survey Question	ebecssvy_SurveyQuestion	Multiple Lines of Text	RCU
√	Survey Question	ebecssvy_QuestionId	Lookup	RCU
√	Survey Template	ebecssvy_SurveyId	Lookup	RCU
	Target Attribute Status	ebecssvy_TargetAttributeStatus	Single Line of Text	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R
$\checkmark$	XML Response	ebecssvy_XMLResponse	Multiple Lines of Text	RCU

# Entity: Survey Action

	Display Name 🔺	Name	Туре	Permissions
1	Actions	ebecssvy_actionsId	Primary Key	RC-
1	Actions	ebecssvy_Actions	Option Set	RCU
1	Alert Message	ebecssvy_AlertMessage	Single Line of Text	RCU
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
1	Created On	CreatedOn	Date and Time	R
1	Custom Filter Condition ebecssvy_CustomFilterCondition Multiple Lines of Tex		RCU	
1	Custom Script ebecssvy_CustomScript Multiple Lines of Text		RCU	
1	Go To Next Question ebecssvy_GoToNextQuestion Lookup		RCU	
	Import Sequence Number ImportSequenceNumbe		Whole Number	RC-
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
√	Survey Answer	ebecssvy_SurveyAnswerId	Lookup	RCU
√	Survey Section	ebecssvy_SurveySection	Lookup	RCU
1	Tab	ebecssvy_Tab	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Survey Answer

Fields				
	Display Name 🔺	Name	Туре	Permissions
√	Answers	ebecssvy_answersId	Primary Key	RC-
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
1	EntityImageId	EntityImageId	Unique Identifier	R
1	Image	EntityImage	Image	RCU
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
1	Max	ebecssvy_Max	Decimal Number	RCU
1	Min	ebecssvy_Min	Decimal Number	RCU
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
√	Order	ebecssvy_Order	Whole Number	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
√	Score Value	ebecssvy_ScoreValue	Whole Number	RCU
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
√	Survey Question	ebecssvy_QuestionsId	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Survey Question

	Display Name 🔺	Name	Туре	Permissions
√	AttributeName	ebecssvy_AttributeName	Single Line of Text	RCU
•	Clone Question	ebecssvy_CloneQuestion	Two Options	RCU
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
1	Created On	CreatedOn	Date and Time	R
√ √	Disable Manual Entry	ebecssvy_DisableManualEntry	Two Options	RCU
<ul> <li>✓</li> </ul>	Display Image	ebecssvy_DisplayImage	Option Set	RCU
•	Enable Writing To Text Fields		Two Options	RCU
~		ebecssvy_ShowTextFields	Single Line of Text	RCU
_	Entity Name	ebecssvy_EntityName		RCU
<b>√</b>	Entity View Name	ebecssvy_EntityViewName	Single Line of Text	
<b>√</b>	Fetch Xml	ebecssvy_FetchXml	Multiple Lines of Text	
<b>√</b>	Image	ebecssvy_Image	Lookup	RCU
<b>√</b>	Image Height (Px)	ebecssvy_ImageHeightPx	Whole Number	RCU
1	Image Width (Px)	ebecssvy_ImageWidthPx	Whole Number	RCU
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
$\checkmark$	Input Code	ebecssvy_InputCode	Multiple Lines of Text	RCU
	Is Auto Populated	ebecssvy_IsAutoPopulated	Two Options	RCU
	Is Target Field String Type	ebecssvy_isTargetFieldStringType	Two Options	RCU
$\checkmark$	Lookup Entity Name	ebecssvy_LookupEntityName	Single Line of Text	RCU
	Lookup Entity Primary Name	ebecssvy_LookupEntityPrimaryName	Single Line of Text	RCU
$\checkmark$	Mandatory when visible	ebecssvy_Mandatorywhenvisible	Two Options	RCU
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
	Next Section	ebecssvy_NextSection	Option Set	RCU
1	Order	ebecssvy_QuestionOrder	Whole Number	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
$\checkmark$	Question	ebecssvy_name	Single Line of Text	RCU
√	Question Order For Section	ebecssvy_QuestionOrderInSection	Whole Number	RCU
$\checkmark$	Questions	ebecssvy_questionsId	Primary Key	RC-
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
1	Scoring	ebecssvy_Scoring	Two Options	RCU
	Show As Default	ebecssvy_ShowAsDefault	Two Options	RCU
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
~	Survey Section	ebecssvy_SectionName	Lookup	RCU
_	Survey Tab	ebecssvy_TabsId	Lookup	RCU
	Target Attribute Entity Name	ebecssvy_TargetAttributeEntityName		RCU
	Target RelatedAttribute	ebecssvy_TargetRelatedAttribute	Single Line of Text	RCU
	Time Zone Rule Version Number		Whole Number	
				RCU
√	Type	ebecssvy_AttributeType	Option Set	RCU
	UTC Conversion Time Zone Code Version Number		Whole Number	RCU
		VersionNumber	Version Number	R

# Entity: Survey Section

Field	is			
	Display Name 🔺	Name	Туре	Permissions
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
1	Section Order	ebecssvy_SectionOrder	Whole Number	RCU
1	Show As Default	ebecssvy_ShowAsDefault	Two Options	RCU
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
$\checkmark$	Survey sections	ebecssvy_surveysectionsId	Primary Key	RC-
$\checkmark$	Survey Tab	ebecssvy_Tabname	Lookup	RCU
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Survey Tab

Field	is			
	Display Name 🔺	Name	Туре	Permissions
	Created By	CreatedBy	Lookup	R
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R
$\checkmark$	Created On	CreatedOn	Date and Time	R
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
	Modified By	ModifiedBy	Lookup	R
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R
$\checkmark$	Modified On	ModifiedOn	Date and Time	R
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU
√	Order	ebecssvy_Order	Whole Number	RCU
$\checkmark$	Owner	OwnerId	Owner	RCU
	Owning Business Unit	OwningBusinessUnit	Lookup	R
	Owning Team	OwningTeam	Lookup	R
	Owning User	OwningUser	Lookup	R
	Record Created On	OverriddenCreatedOn	Date and Time	RC-
1	Scoring	ebecssvy_Scoring	Two Options	RCU
1	Scoring Rule	ebecssvy_ScoringRule	Option Set	RCU
1	Show Designer	ebecssvy_ShowDesigner	Two Options	RCU
1	Show Tab Score	ebecssvy_ShowTabScore	Two Options	RCU
	Status	StateCode	Status	R-U
	Status Reason	StatusCode	Status Reason	RCU
1	Survey Template	ebecssvy_SurveyId	Lookup	RCU
$\checkmark$	Tabs	ebecssvy_tabsId	Primary Key	RC-
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
	Version Number	VersionNumber	Version Number	R

# Entity: Survey Template

Field	Fields				
	Display Name 🔺	Name	Туре	Permissions	
	Created By	CreatedBy	Lookup	R	
	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R	
$\checkmark$	Created On	CreatedOn	Date and Time	R	
	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-	
	Is Survey Response Report	ebecssvy_IsSurveyResponseReport	Two Options	RCU	
	IsClone?	ebecssvy_IsClone	Two Options	RCU	
	Modified By	ModifiedBy	Lookup	R	
	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R	
$\checkmark$	Modified On	ModifiedOn	Date and Time	R	
$\checkmark$	Name	ebecssvy_name	Single Line of Text	RCU	
	Order	ebecssvy_Order	Single Line of Text	RCU	
$\checkmark$	Owner	OwnerId	Owner	RCU	
	Owning Business Unit	OwningBusinessUnit	Lookup	R	
	Owning Team	OwningTeam	Lookup	R	
	Owning User	OwningUser	Lookup	R	
	Record Created On	OverriddenCreatedOn	Date and Time	RC-	
	Score Divisor	ebecssvy_scoredivisor	Whole Number	RCU	
$\checkmark$	Scoring	ebecssvy_Scoring	Two Options	RCU	
$\checkmark$	Scoring Rule	ebecssvy_ScoringRule	Option Set	RCU	
$\checkmark$	Show Signature On Survey	ebecssvy_ShowSignatureOnSurvey	Two Options	RCU	
$\checkmark$	Status	StateCode	Status	R-U	
$\checkmark$	Status Reason	StatusCode	Status Reason	RCU	
$\checkmark$	Survey	ebecssvy_surveyId	Primary Key	RC-	
	${\it Survey Temp Duplicate Creation Plugin}$	$ebecssvy\_SurveyTempDuplicateCreationPlugin$	Two Options	RCU	
	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU	
	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU	
	Version Number	VersionNumber	Version Number	R	

### 2.1.4 Validate Customizations

After performing the customization user can validate performed customizations using inbuilt validate function.

	Project: e	eBECS Site Assessm	ent		
		Publish Version	📀 Enable		~
		Version 9.10 🔻	🙆 Disable		
Publish	Publish		000000	Save	Sync
	All	📀 Validate 🔍			Filter
	Pub	lish		Entity	

If all customizations are valid then it will show no error found message.

Project Va	Project Validation		
i	No errors found.		
	ОК		

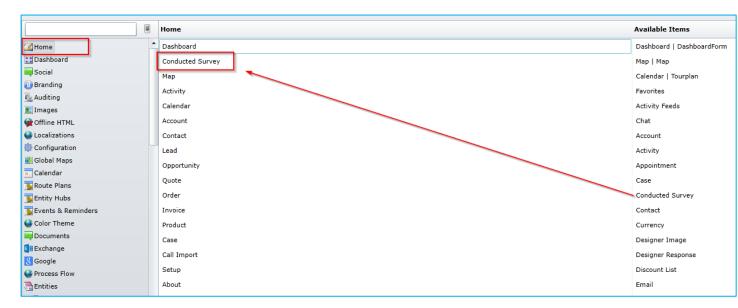
#### 2.1.5 Publish Customizations

After validating customizations then need to publish them.

	Project: (	BECS Site Assessm	ent					
		Publish Version		📑 Upload	🛋 Rename			
4 Publish	L Publish	Version 9.10 🔹	Save	💾 Download	哇 New Folder	Import	Export	Help
Fublish	All	🧭 Validate	Save	🕍 Edit	🕈 Delete	Import	Export	neip
	Pub	lish	Offline HTML	F	file	Dar	ta	Help

#### 2.1.6 Home Menu Customization

To show conducted survey in the RESCO Mobile CRM menu, need to add conducted survey entity to home. In the Home it shows all available entities and only thing need to do is drag and drop Conducted Survey item to correct place in the Home menu.



#### 2.1.7 Adding Views

To view existing conducted surveys, need to create filtered views for the conducted survey entity

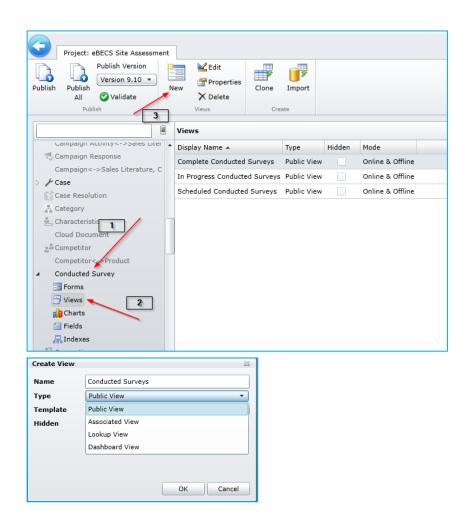
Following 3 views need to be created

- 1. Scheduled Conducted Surveys
- 2. In Progress Conducted Surveys
- 3. Completed Conducted Surveys

#### 2.1.8 How to create view

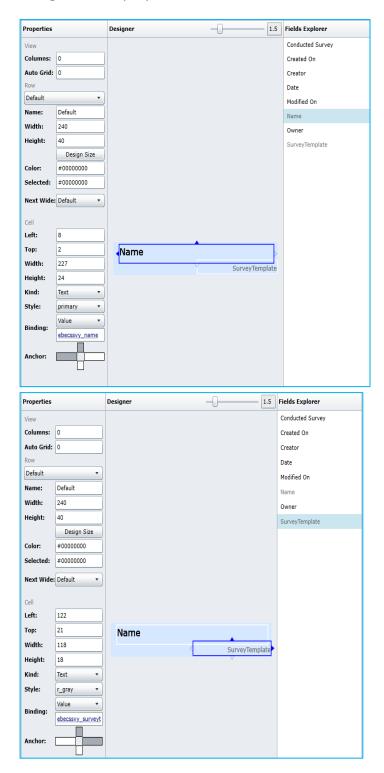
To create views, need to follow following steps

- 1. Navigate to entity
- 2. Click on views
- 3. Click on New
- 4. Give the name of the view and set Type to Public



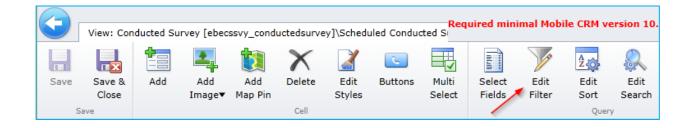
#### 2.1.9 Create Scheduled Conducted Surveys View

Any field available in the Fields Explorer can drag and drop in to the view. Using properties can change the text properties.



#### Adding Filter to the view

Click on the Filter Editor in the ribbon then it will appear the filter popup window. Using filter conditions can set the records which should be show in the view.

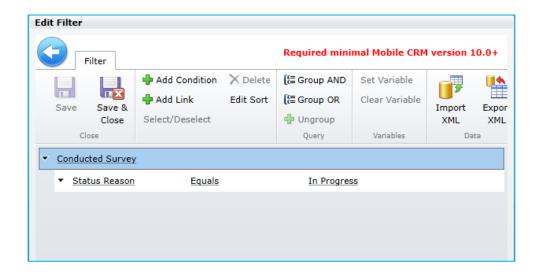


Using Group option can group multiple conditions together

Edit	t Filter							
	F	ilter			Required mini	mal Mobile CRM	l version 1	10.0+
			🕂 Add Condition	imes Delete	[{≣ Group AND	Set Variable		
	Save	□□⊠ Save &	🕂 Add Link	Edit Sort	[{≣ Group OR	Clear Variable	Import	Expor
	Jave	Close	Select/Deselect		🕂 Ungroup		XML	XML
	Clo	ose			Query	Variables	Da	ta
-	Conduc	ted Survey	!					
	• OR		s Reason	Equals	5	Scheduled		
	· UK		s Reason	Equals	<u>N</u>	lot started		

#### 2.1.10 Create In-Progress Conducted Surveys View

This view **use same fields like Scheduled Conducted Surveys View** but with different filter conditions.

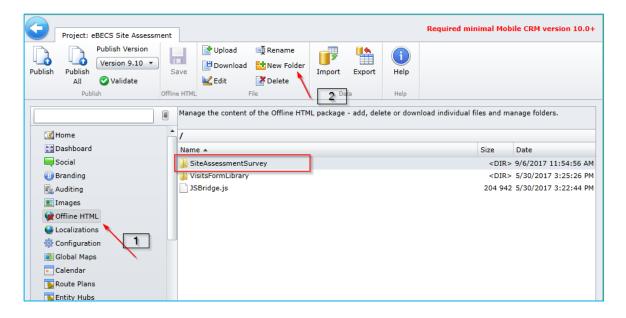


#### 2.1.11 Create Completed Conducted Surveys View

This view **use same fields like Scheduled Conducted Surveys View** but with different filter conditions.

3	Filter			Required mini	mal Mobile CRM	version 1	0.0+
		🕂 Add Condition	imes Delete	[E Group AND	Set Variable		
Save	Save &	🖶 Add Link	Edit Sort	[{≣ Group OR	Clear Variable	Import	Expo
Save	Close	Select/Deselect		🕂 Ungroup		XML	XML
C	ose			Query	Variables	Da	ta
<ul> <li><u>Condu</u></li> </ul>	cted Survey	:					
▼ Sta	tus Reason	Equals		Completed	<u>1</u>		

Go to Offline HTML then create folder name called "SiteAssessmentSurvey". Upload necessary components which taken from correct TFS branch.



Double click on the newly created folder and open it. Then upload the following content taken from TFS. Finally save the modifications.

blish Publish All Version Version 9.10 •	Save Edit Downbad New Folder Import Export	
Publish 2	Offline HTML 1 File Data Help Manage the content of the Offline HTML package - add, delete or download in	- dividual film and second films
	Manage the content of the Offline HIML package - add, delete of download in	idividual files and manage folders.
🕜 Home	SiteAssessmentSurvey	
🔡 Dashboard	Name 🔺	Size Date
Social	<b>☆</b>	<dir> 1/1/0001 12:00:00</dir>
🚯 Branding	📔 Material	<dir> 9/6/2017 3:07:44</dir>
🕵 Auditing	le textures	<dir> 9/6/2017 3:08:00</dir>
🖭 Images	GreenIndicator.png	17 233 9/6/2017 11:54:56
🙀 Offline HTML	ImageSurvey_Client.html	44 719 9/6/2017 11:55:00
Localizations	ImageSurvey_CSurvey.html	45 309 9/6/2017 11:55:34
Configuration	jquery_1.9.1.min.js	100 890 9/6/2017 11:55:38
Global Maps	JSBridge.js	204 942 9/6/2017 11:55:42
Calendar	kendo.coll.min.js	1 731 301 9/6/2017 11:55:44 295 907 9/6/2017 11:55:48
Route Plans	kendo.common-material.min.css	295 907 9/6/2017 11:55:48 182 127 9/6/2017 11:55:50
Sentity Hubs	kendo.default.min.css	36 173 9/6/2017 11:55:54
Sevents & Reminders	kendo.material.min.css	79 143 9/6/2017 11:55:56
Color Theme	progress.gif	25 871 9/6/2017 11:56:00
Documents	RedIndicator.gif	75 780 9/6/2017 11:56:02
Es Exchange	ScheduledSurvey.htm	347 301 9/14/2017 4:38:46
S Google	sprite.png	16 750 9/6/2017 11:56:08
Process Flow		

#### 4.1.1 Create Survey Form

Follow following steps to create Conducted Survey form

- 1. Click on Conducted Survey and open the Menu
- 2. Click on Forms
- 3. Click on New
- 4. Set "Default" as name of the view

Project: eBECS Site Assessment	Requir
Publish Version Kaller	
Publish Publish Publish	ties
All 🧭 Validate 🤺 🗙 Delete	
Publish Forms	
Forms	
Display Name 🔺	Туре
Characteristic Default	Edit Form
Cloud Document	
2 <sup>th</sup> Competitor	$\mathbf{X}$
Competitor<->Product	$\mathbf{X}$
Conducted Survey	
Forms	3
🔄 Views	
() Charts	
🗐 Fields	
Connection	
Sconnection Role	
> 🔚 Contact	
Contact<->Contract	

To complete Survey form need to perform following tasks

- 1. Create tab with survey details
- 2. Create iFrame tab for Take Survey
- 3. Create iFrame tab Image Survey
- 4. Create Signature tab (Media Tab)
- 5. Create List tab for Responses

For more details how to create iFrame tab, Media Tab and Detail List refer the Woodford reference guide.

This is how completed form looks like

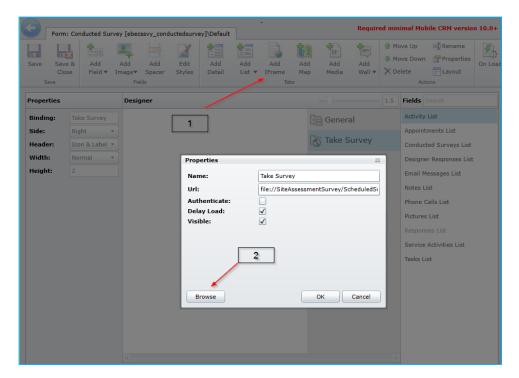
	Form: Co	nducted Sur	vey [ebecss	vy_conductedsum	vey]\Default			-				Requi	red min	imal Mobile	CRM versi	on 10.0+
Save Sa	Save & Close	Add Field ▼	Add Image▼ S Fields	Add Edit Spacer Styles	Add Detail	Add List ▼		Add Map	Add Media	Add Wall ▼	<ul> <li>Move Up</li> <li>Move Down</li> <li>Delete</li> <li>Action</li> </ul>	E Layout	On Lo	ad On Change Rules	On Save	Edit Commands
Proper	ties		Designe	er							-	]	1.5	Fields Sear	rch	
Bindin Side: Heade	Le	ft •		Name			ssvy_na			Gene				Activity List Appointmer Conducted	nts List	
Width: Height	: No	rmal •		SurveyTe Contact	emplate			urveyte ontactid		🐻 Imag	je Survey			Designer Re Email Mess	esponses Li	
				Creator		ebec	ssvy_cr	eator		[ि Sign □ □ Resp	ature oonses List			Notes List Phone Calls		
				Date		ebec	ssvy_da	ate						Pictures Lis Responses		
				Account		ebec	ssvy_a	ccountio	t					Service Act	ivities List	
				Lead		ebec	ssvy_le	adid						Tasks List		

#### 4.1.2 Create Tab with Survey Details

To add fields to general tab select the general tab and click on Add Field button. Then user can add the field to the tab. If user need to delete the field from the tab, select the field first then click on delete. If user need to re arrange the order of the fields, select relevant field then drag and drop to new position.

Form		ucted Survey [ebecssvy_condu				-	nimal Mobile CRM version 1
ave Save	e &	Add Add Add Field V ImageV Spacer	Edit Add	Add Add Add Add List V IFrame Map Media Tabs	Add Wall V Delete Delayout Actions	On Load C	On On Save Edit hange Rules Commands
roperties	1	Case				1.5	Fields Search
operates		Conducted Survey				1.5	]
inding:	Gen	Contact	Name	ebecssvy_name	General		Activity List
ide: 🦊	Left	Created By					Appointments List
leader:	Icor	Created By (Delegate)	GurveyTemplate	ebecssvy_surveytempla	🐻 Take Survey		Conducted Surveys List
Vidth:	Non	Created On			🔚 Image Survey		Designer Responses List
leight:	2	Creator	Contact	ebecssvy_contactid			Email Messages List
		Date			🙀 Signature		Notes List
		Date Completed	Creator	ebecssvy_creator	P Deserve List		Phone Calls List
		FinalScore			Responses List		
		Last Seen Survey Tab Index	Date	ebecssvy_date			Pictures List
		Lead					Responses List
		Modified By	Account	ebecssvy_accountid			Service Activities List
		Modified By (Delegate)					Tasks List
		Modified On	ead	ebecssvy_leadid			
		Name					
		Order					
		Owner					
		Owning Business Unit					
		Owning Team					
		Owning User					
		Parent Conducted Survey					
		Response GUID					
		Status					
		Status Reason					
		SurveyTemplate					
		Shared.ShowSurveyTab					
		Shared.ShowImageTab					

#### 4.1.3 Adding Take Survey iFrame



#### 4.1.4 Adding Image Survey iFrame

Click on Add iFrame button and link "ImageSurvey\_CSurvey.html" file using browser action.

Properties	X
Name:	Image Survey
Url:	mentSurvey/ImageSurvey_CSurvey.html
Authenticate:	
Delay Load:	
Visible:	
Browse	OK Cancel

#### 4.1.5 Adding Signature Tab

Click on Add media tab, then it will show up property window then fill it with following setting

Sive Sive Add </th <th></th> <th>Form</th> <th>: Condu</th> <th>cted Sur</th> <th>vev lebec</th> <th>ssvy cond</th> <th>uctedsurv</th> <th>ey]\Default</th> <th></th> <th>-</th> <th></th> <th></th> <th>Require</th> <th>ed min</th> <th>nimal Mob</th> <th>oile CRM versio</th> <th>n 10.0+</th>		Form	: Condu	cted Sur	vev lebec	ssvy cond	uctedsurv	ey]\Default		-			Require	ed min	nimal Mob	oile CRM versio	n 10.0+
Binding: Signature   Side: Right •   Header: Icon & Label •   Width: Nomel •   Height: Z     Configure Media Tab   Name: Signature   Required for Status: ••••   Entity: Note   Title Equals: Captured_Signature   Activity List   Appointments List   Configure Media Tab   Vidth: Width:   Vidth: Name:   Signature   Required for Status:   Entity:   Note   Title Equals:   Capture Apointments   Capture Photo   Select File   Service Activities List   Record Audio   Record Video   Load File From   View   Open External   Copy   Paste   Print   ResizeImage   Email		Save	×	Add	Add Image•	Add Spacer	Edit	Add	Add	IFrame	Map	Add	Add	₩ M	ove Down elete	Properties	Line .
Side: Right   Header: Icon & Label *   Width: Normal *   Width: Normal *   Height: 2     Configure Media Tab   Name: Signature   Signature Email Messages List   Required for Status:	Prop	erties			Desig	gner								1.5	Fields		
	Bind Side Head Widt	ing: : ler: h:	Right Icon 8 Norma	Label 1		-	N R E T	ame: equired fo ntity: itle Equals	r Status:	Note Captu ✓ Cap Cap Seld Seld Rec Cop Ope Cop Pass Prin Res	ture red_Signa ar iture Signi iture Photo ect File ord Audio ord Video d File Fron w an Externa it tit izeImage	n I	Survey		Activity Appoints Conduct Designe Email M Notes Li Phone C Pictures Respons Service	List ments List ed Surveys List r Responses List essages List calls List List ues List Activities List	

### 4.1.6 Create Response List Tab

There are lists available for Conducted Survey entity based on the relationship. Use list pane to drag and drop list to the form.

Designer		1.5	Fields Search
	General		Activity List
	Take Survey		Appointments List
	-		Conducted Surveys List
	🐻 Image Survey		Designer Responses List
	🖟 Signature		Email Messages List
			Notes List Phone Calls List
	Responses List		Pictures List
			Responses List
	Drag and Drop		Service Activities List
	Didg did Diop		Tasks List

#### 4.1.7 Configuring On-Load, On-Change and On-Save events for Take Survey

To view already configured tabs based on the status of the survey, need to configure on load, on change and on save events.

#### 4.1.8 How to Add Condition

To add condition click on Add Condition button and setup if condition like following.

Rule	e: OnSave	Search						Required minimal Mo	obile CRM	version 10
		ntax version	1	🔊 Undo		📋 Paste	🖶 Add Step	🖶 Add Variable	-	
	Save &	atest 🔹	Disable	( <sup>24</sup> Redo	Сору		Add Condition	if Add If/Otherwise	Export	Import
		Syntax Check	Rule	Deselect	🐻 Cut		🐈 Add Say Text	💠 Set GPS Position	XML	XML
	C	llose				Click	5	iteps	х	ml
Shared	Variables					anan				
<ul> <li>Step:</li> </ul>	Entity.ebec	ssvy_responseg	uid <u>Clear</u>							
Branch	Enter D	escription								
				_						

#### 4.1.9 Configure If statement

Click on condition already added by Woodford and it will pop up a window which can configure IF condition based on user preference.

Rules			Required minimal Mobile CRM version 10.0+
🕂 Add Condition	[E Group AND	🖹 Сору	
Deselect	[E Group OR	🚮 Cut	
🗙 Delete	🕂 Ungroup	🛅 Paste	
	Condition	Clipboard	
<ul> <li>Entity.statuscode</li> </ul>		Equals 🔻	Active • [X]

#### 4.1.10 Add Step

After configure the IF condition user can add Step which contains the action which execute after meet the criteria of IF condition.

Save	Rule: OnSav International Save & Close	Ve Search Syntax version Latest • Syntax Check Close	Disable Rule	Undo Redo	X Delete	Paste	Add Condition	Required minimal Mo	bile CRM version 10.0+
<ul> <li>Step</li> <li>A Step</li> </ul>	nch: Ente	s becssvy_responsegu r Description atuscode Equals Ac		]	~		Action to exec tab if	ute (Show Image record is active)	s Survey
	Step: Ta	bs.Image Survey.Is oolean Tabs • Image Survey • IsVisible •		ssign er	nter value 🗨				

# 4.1.11 Add If/Otherwise

To add Otherwise if need to select exiting If condition or Otherwise if condition. Then click on Add If/Otherwise and it will add otherwise condition to the rule edition. Use can configure the otherwise if condition like If condition or leave it like an else condition.

Rules Editor							23
Rule: OnSave Search					Required minimal Mo	obile CRM version	10.0+
Save & Syntax version Save & Close Syntax Check Close	Redo	X Delete	Paste	🕂 Add Say Text	<ul> <li>♣ Add Variable</li> <li>if<sub>4</sub> Add If/Otherwise</li> <li>♣ Set GPS Position</li> <li>Steps</li> </ul>	Export Impor XML XML Xml	t
Shared Variables				2			
<ul> <li>Step: <u>Entity.ebecssvy_responseguid</u> <u>Clear</u></li> </ul>			1				
Branch: Enter Description			•				
▲ ▼ if <u>Entity.statuscode Equals Active</u>							
Step: <u>Tabs.Image Survey.IsVisible</u> <u>A</u> otherwise if <u>Entity.ebecssvy_name Con</u>		r Value		3			

#### 4.1.12 Adding Shared Variables

Woodford projects allow users to create shared variables and use them among any events in the form. Can configure shared variables like following.

/	Rule: OnSa	ve Search						Required minimal Mo		
		Syntax version	4	📉 Undo	🗙 Delete	📑 Paste	🕂 Add Step	🖶 Add Variable		-
Save	Save &	Latest 🔹	Z© Disable	(PRedo	Сору		Add Condition	if <sub>ជ្ជា</sub> Add If/Otherwise	Export	Import
Save	Close	Syntax Check	Rule	Deselect	🐻 Cut		🕂 Add Say Text	🕂 Set GPS Position	XML	XML
		Close					S	teps	Xr	nl
🖌 Sha	red Variable	es								
•	Boolean	ShowSurveyTa	b							
•	<u>Boolean</u>	ShowImageTab								
_	p: Entity.e	becssvy_responsegu								

Note:

- Make sure to save after modify any of steps, condition and etc.
- Configure events after do all entity fields configurations and upload offline resources.
- Entity refer the entity record which open through the form

# 4.1.13 Configure On Load Event

Using conditions, steps and otherwise steps configure on load event like following.

Rule: OnLoad Search		Require	d minimal Mobile CRM version 1
Image: Syntax version       Syntax version       Image: Syntax versi       Image: Syntax versi	Add Step     Add Variable       Add Condition     if Add If/Otherwise       Add Say Text     Set GPS Position       Steps     Steps	Export XML Xml	
Branch:       Hide tabs if status is completed         ✓       if Entity.statuscode Equals Completed         ✓       Step:       Tabs.Image Survey.IsVisible Assign       False       ✓         ✓       Step:       Tabs.Take Survey.IsVisible Assign       False       ✓         ✓       otherwise if Entity.statuscode Equals Scheduled         ✓       Step:       Tabs.Take Survey.IsVisible Assign       True       ✓			
Branch:       Enable template is there is no data in it <ul> <li>if</li> <li>Entity.ebecssvy_surveytemplateid_Does_Not_Contain_Data</li> </ul> <ul> <li>Step:</li> <li>Form.ebecssvy_surveytemplateid.IsEnabled_Assign</li></ul>	• X		
Branch:       Hide survey tab when record type is new         •       if         Entity.IsNew Equals True         •       Step:         Tabs.Take Survey.IsVisible       Assign         False       •			

# 4.1.14 Configure On Change Event

Add two Boolean shared variables like following

Эг	Rule: OnCl	nange Search								Req
		Syntax version		🔄 Undo	imes Delete	📋 Paste	🖶 Add Step	🕂 Add Variable		3
Save	Save &	Latest 🔹	Disable	Redo	Сору		Add Condition	if Add If/Otherwise		
Save	Close	Syntax Check	Rule	Deselect	🐻 Cut		🖶 Add Say Text	🕂 Set GPS Position	Export XML	Impo XML
		Close					9	Steps	Xr	nl

Using conditions, steps and otherwise steps configure on change event like following.

<b>у</b> Р	Rule: OnChar	ige Se	earch							Require	d minimal Mo	bile CRM version 1
Save	Save & Close	yntax versio Latest Syntax C Close	Disat	ole (=Redo	Сору	e 📔 Paste	🕂 Add Say Text	dd Variable if <sub>th</sub> Add If/Otherwise <b>슈</b> Set GPS Position iteps	Export XML	Import XML		
⊳ Shar	red Variables											
▼ Bran	Step: <u>Tabs</u> ch: Enter	s.Take Surv Description	Tab Equals Tru ey.IsSelected i ab Equals Tru	Assign	True	• 🗵						
• Bran			rvey.IsSelecte	ed <u>Assign</u>	True	▼ [X]						
4 -	if Entity.ebe	cssvy_date	ecompleted Co	ontains Data								
•	Step: Tabs	.(ebecssvy	_responses.e	becssvy_condu	ctedsurveyid.	ebecssvy_cor	nductedsurvey).IsVis	ible Assign True	, ,	[X]		
4 -	otherwise if											
								ible Assign Fals		[x]		

# 4.1.15 Configure On Save Event

Configure on save event like following,

Ðr	Rule: OnSa	ve Search								Re
		Syntax version	1	🔄 Undo	imes Delete	📋 Paste	🕂 Add Step	🕂 Add Variable		
Save	Save &	Latest 🔹	Lisable	Redo	🝙 Сору		Add Condition	if Add If/Otherwise	Export	Imp
Save	Close	🜏 Syntax Check	Rule	Deselect	🚮 Cut		🕂 Add Say Text	🕂 Set GPS Position	XML	XM
		Close					S	Steps	Xr	nl

After completing all the customizations, make sure to publish the project. Without publishing solution it won't affect the changes.