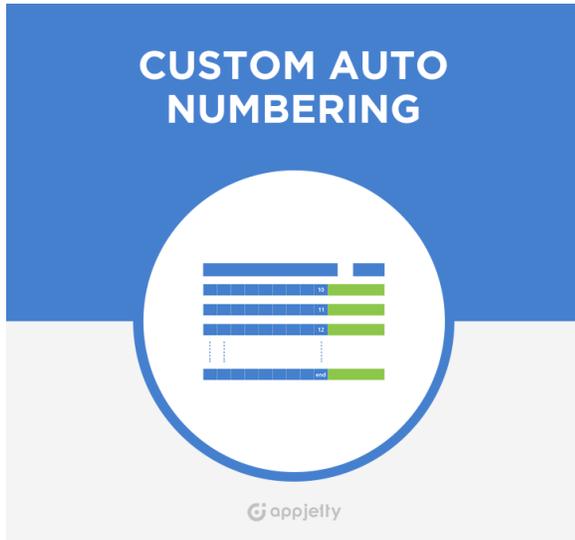


## USER MANUAL



# Custom Auto Numbering

**Version: 2.2**

**Compatibility:**

Microsoft Dynamics CRM 2016(v8.0) and above

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## Introduction

It is a proficient Dynamics CRM Plugin called “Custom Auto Numbering” which helps to auto increment numbers to CRM records for any entity easily. Custom Auto Numbering plug-in allows automatic generation of unique numbers for all entities across the CRM system. The format of the custom auto number can be customized to suit the business requirements.

## Benefits of Custom Auto Numbering

- It helps to auto increment numbers to CRM records for any entity easily.
- The format of Auto Numbering can customize according to business requirements.
- Here, there can be automatic generation of unique numbers for all entities across the System.

## Pre-requisites

Following points must be followed before starting the Plugin installation:

- You must be logged into Dynamics CRM Online.

# Installation and Configuration

## Installation Steps

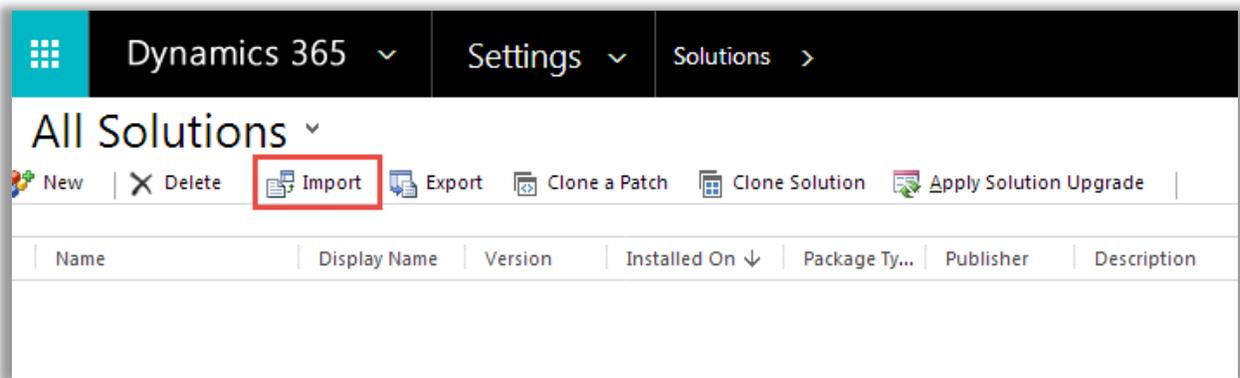
To install 'Custom Auto Numbering' plugin, the following steps has to be followed:

- On downloading the plugin, you will get a zip file named CustomAutoNumbering\_managed\_v2.0.zip.

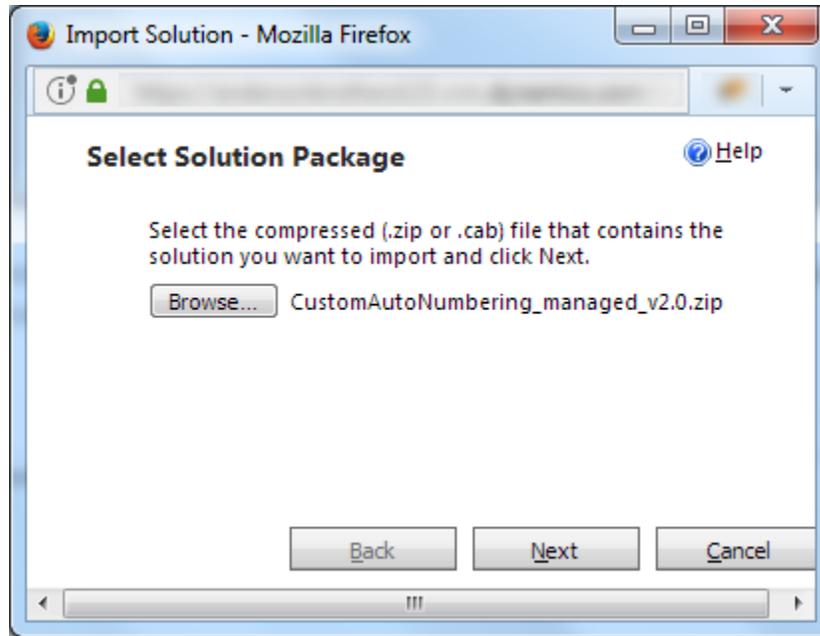


CustomAutoNumbering\_managed\_v2.0.zip

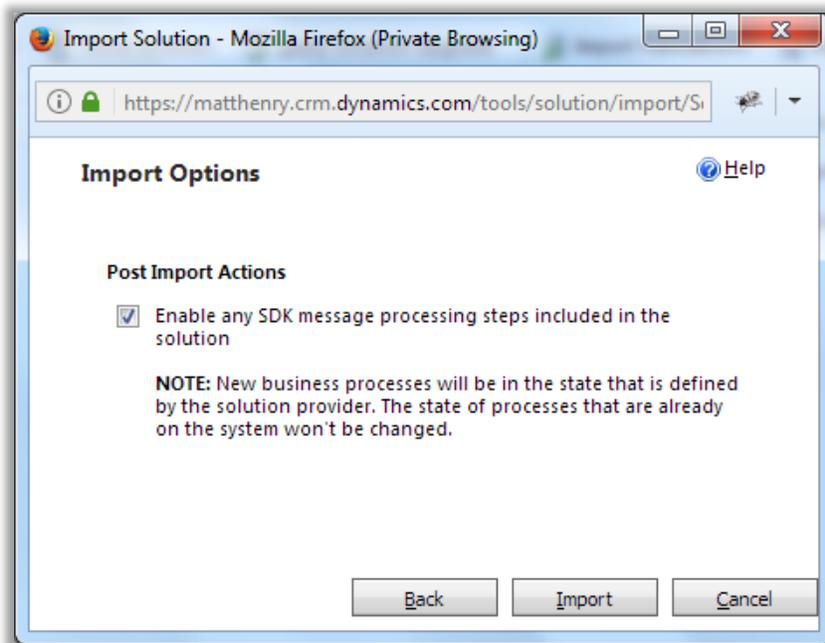
- Login to your CRM Account and click on **Settings ->solutions**



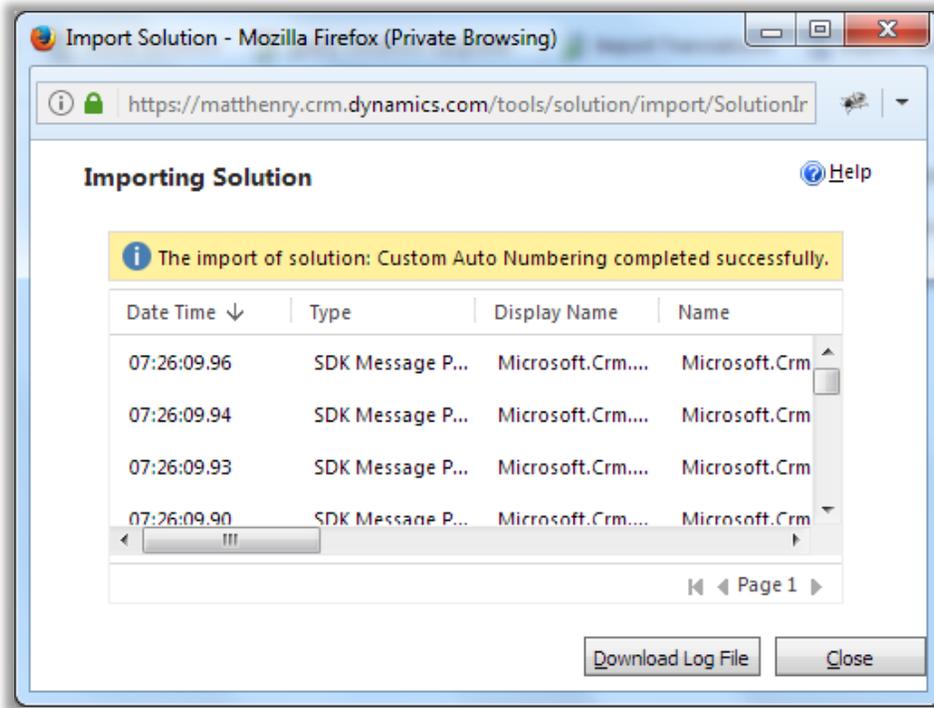
- Click on 'Import' to upload and install the Solution.
- Click on Browse button and choose the Package Zip File for Custom Auto Numbering from the Import Solution Window.



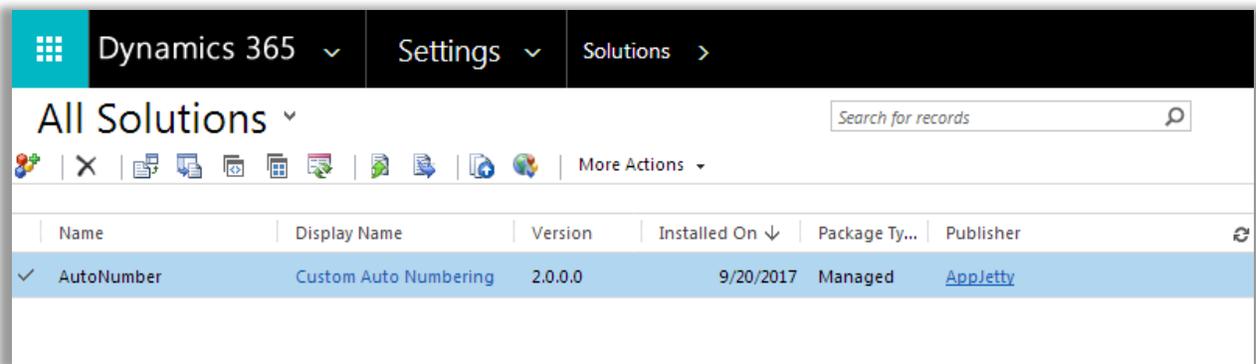
- Click on 'Next' for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution



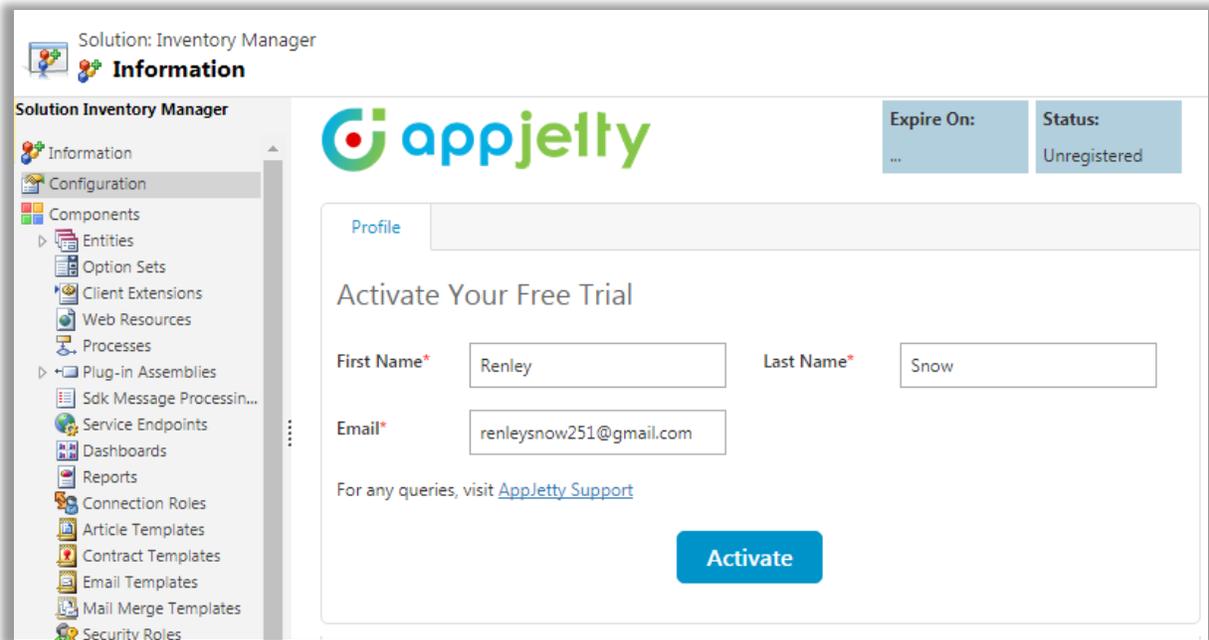
- Click on 'Close' after successful completion message is displayed



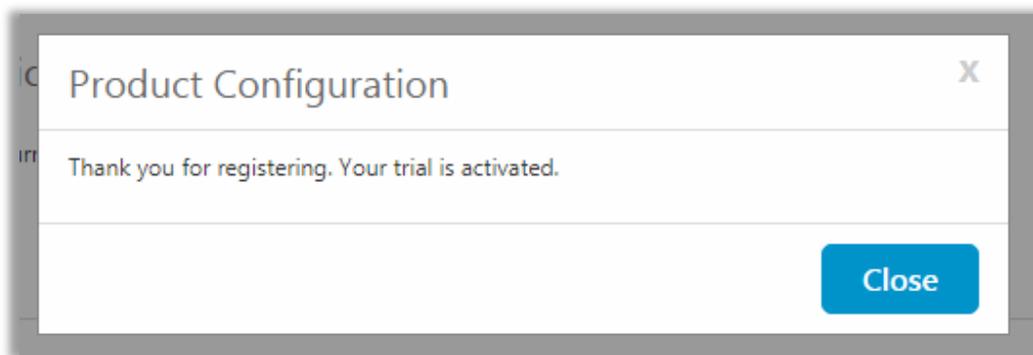
- Once you import the solution, it will be displayed in the solutions grid view.

## Configuration Steps

- Double click on 'Custom Auto Numbering' solution to configure the plugin with your license key
- This will open up a new window. Click on 'Configuration' from the options provided on the left side.



- You can activate your one-month free trial.
- To get a one-month free trial license key, fill out the details and click on 'Activate' button.



- Your trial will get activated and expiry date will be displayed on top.

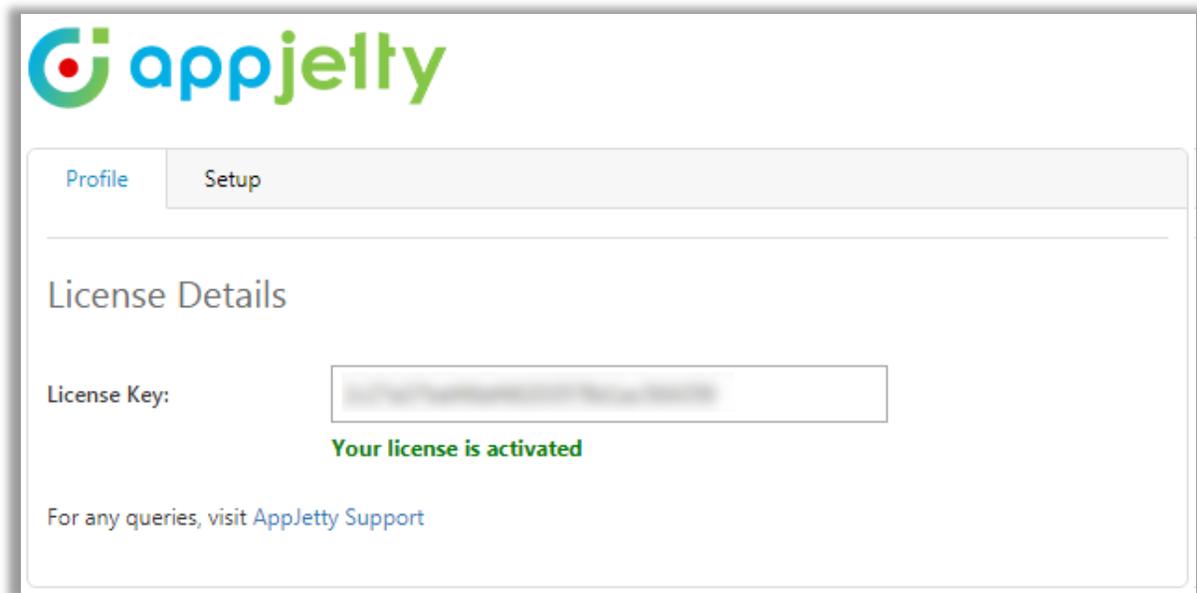
The screenshot shows the AppJetty user interface. At the top left is the AppJetty logo. On the top right, there are two status boxes: 'Expires On: 1/6/2018' and 'Status: Trial'. Below the logo, there are two tabs: 'Profile' and 'Setup'. The main heading is 'Purchase License'. Below this, a message states: 'Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.' A blue 'Buy Now' button is centered below the message. Underneath, there is a section titled 'License Details' with a 'License Key:' label and a text box containing a blurred license key. Below the text box, a green message reads: 'Your free trial will expire in 30 day(s)'. A note below that says: 'Note: This is not real time information and will be updated in the next 24 hours.' At the bottom, it says: 'For any queries, visit AppJetty Support'.

- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.

The screenshot shows the AppJetty user interface after the trial has expired. At the top left is the AppJetty logo. On the top right, there are two status boxes: 'Expires On: 12/5/2017' and 'Status: Trial-Expired'. Below the logo, there are two tabs: 'Profile' and 'Setup'. The main heading is 'Purchase License'. Below this, a message states: 'Your free trial is expired. You can purchase the plugin anytime by clicking on the below button.' A blue 'Buy Now' button is centered below the message. Underneath, there is a section titled 'License Details' with a 'License Key:' label and a text box containing a blurred license key. Below the text box, a red message reads: 'Your trial is expired.' At the bottom, it says: 'For any queries, visit AppJetty Support'.

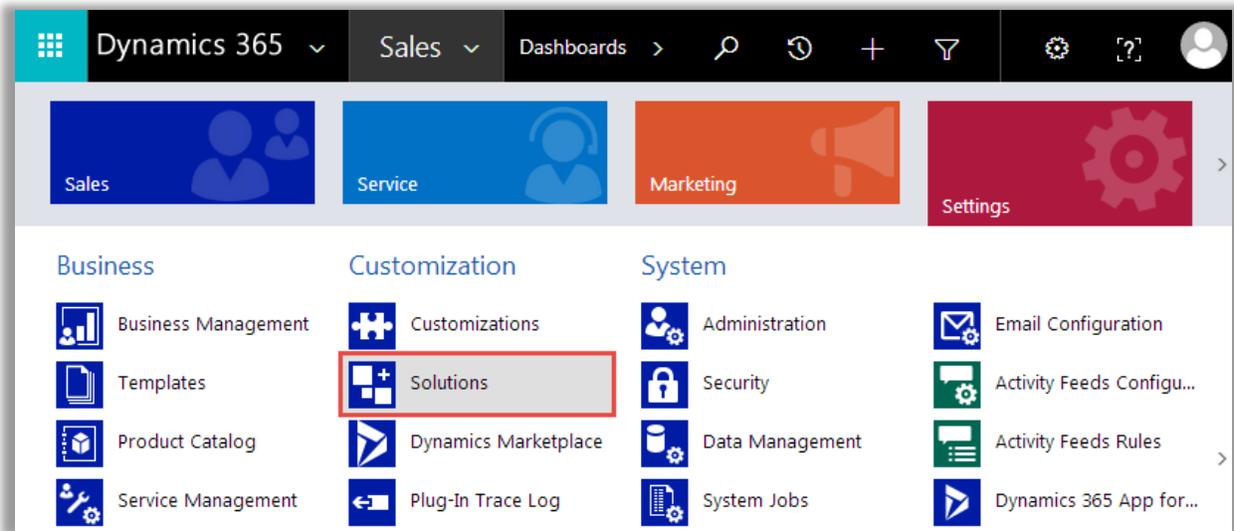


- Enter the New License key received on mail. This will enable the **'Activate'** button.
- Click on **'Activate'** button to activate your license.



## Procedure

- In order to start numbering your entities you need to create Custom Auto Numbering Configuration record so that each time a new record is created, the field value which you have set increases by one.
- To configure Custom Auto Numbering, Go to **Settings ->Solutions**.

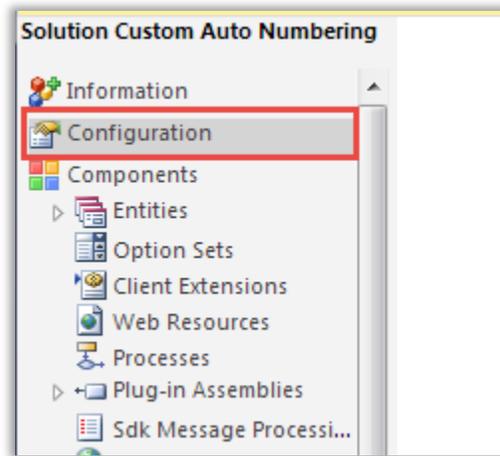


- Click on the Plug-in **Display Name** to configure the Plug-in and you will be redirected to the Configuration Page.

The screenshot shows the 'All Solutions' page in Dynamics 365. The page title is 'All Solutions' with a dropdown arrow. Below the title is a toolbar with various icons and a 'More Actions' dropdown. The main content is a table with the following columns: Name, Display Name, Version, Installed On, Package Ty..., and Publisher. The table contains one entry: 'AutoNumber' with a 'Display Name' of 'Custom Auto Numbering' (highlighted with a red box), 'Version' of '2.0.0.0', 'Installed On' of '9/15/2017', 'Package Ty...' of 'Managed', and 'Publisher' of 'AppJetty'.

Name	Display Name	Version	Installed On	Package Ty...	Publisher
AutoNumber	Custom Auto Numbering	2.0.0.0	9/15/2017	Managed	AppJetty

- Click on "Configuration" Tab on the Left Side Panel of the Page.



- There are 3 sections in configuration.
  1. General Settings
  2. Prefix Settings
  3. Suffix Settings

## General Settings

A screenshot of the 'General' settings form for custom auto numbering. The form has a title bar with a minus sign and the word 'General'. Below the title bar, there are several fields and controls:

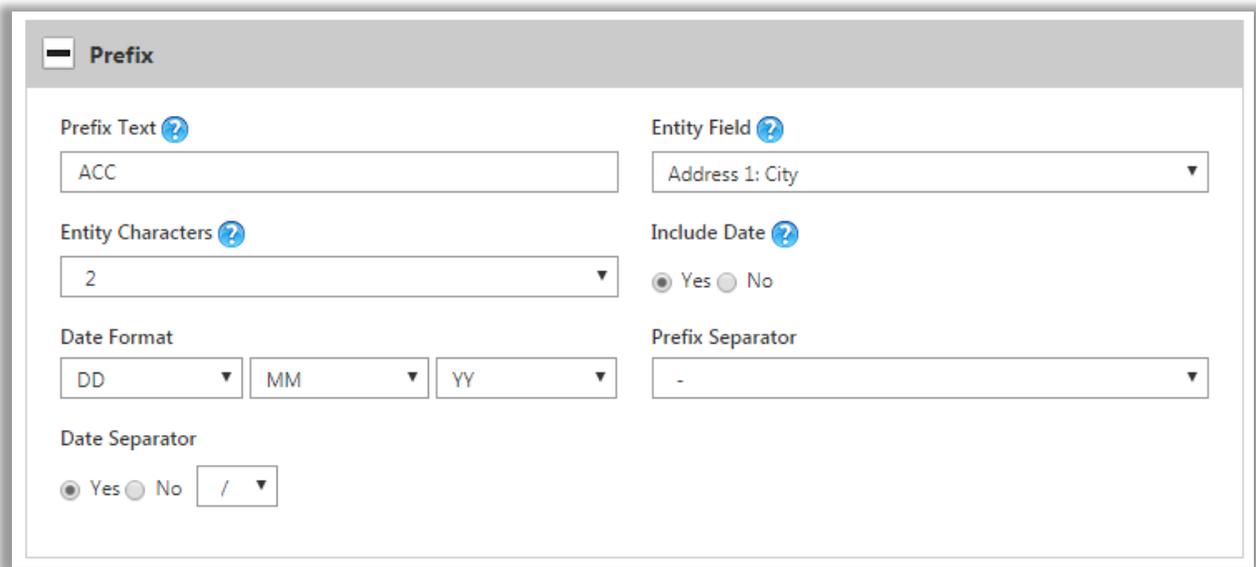
- Name \***: A text input field containing 'Auto Number for Account'.
- Entity \***: A dropdown menu with 'Account' selected.
- Entity Field \***: A dropdown menu with 'Account Number' selected.
- Start Position \***: A text input field containing '1'.
- Auto Increment By**: A text input field containing '2'.
- Current Position**: A text input field containing '--'.
- Separator**: A dropdown menu with 'Select' selected.
- Preview**: A text input field containing '1'.
- Max Length**: A text input field containing '20'.
- Is Active ?**: A checkbox that is currently unchecked.

Note: If the length of auto generated field exceeds maximum character limit of the chosen entity field then you need to increase the character limit of that field

- In general settings, User has to select **Entity** from list of entity and particular field related to that entity. Selected field will be updated with specific Prefix and Suffix.

- Auto number will be start from **Start Position** with Prefix and Suffix configured.
- Auto Increment By uses for auto number which is incremented by value specified in '**Auto Increment By**' field newly created record in CRM.
- **Current Position** shows the current position of auto number.
- Main **separator** will be used to separate auto number from Prefix and Suffix. It would appear after Prefix and before suffix.
- **Max Length** is the maximum value of entity field, if you want to extend the max length Go to **Settings -> Customization -> Entities** and select appropriate entity for which you want to change max length.
- If '**Is Active**' is selected then configuration would be updated in selected field of entity otherwise configuration would be saved.

## Prefix Settings



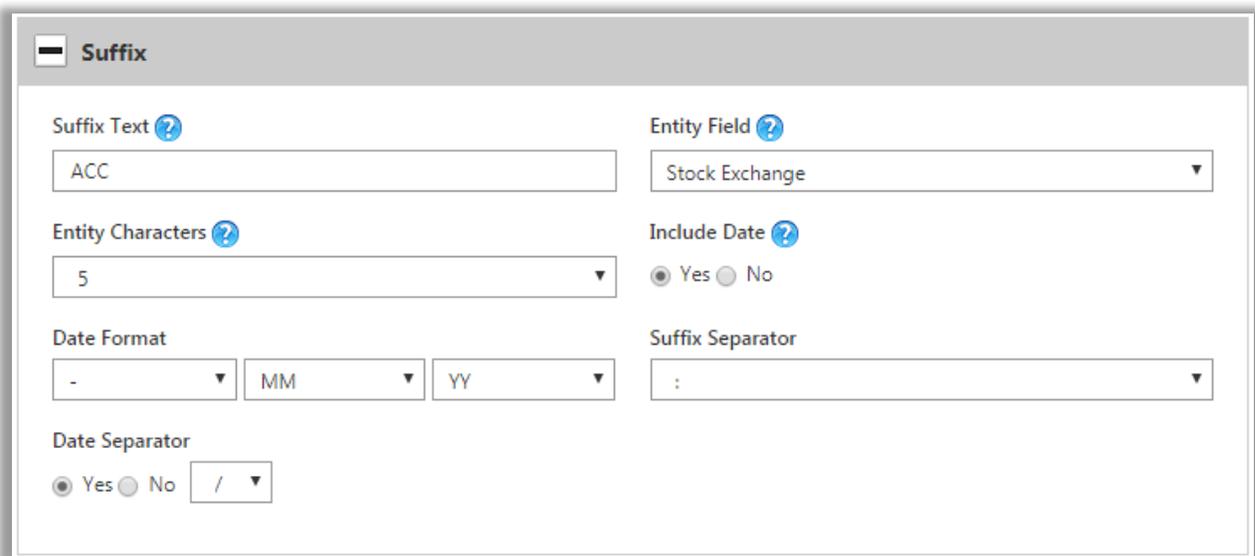
The screenshot shows the 'Prefix' configuration window. It contains the following fields and options:

- Prefix Text**: Text input field containing 'ACC'.
- Entity Field**: Dropdown menu showing 'Address 1: City'.
- Entity Characters**: Dropdown menu showing '2'.
- Include Date**: Radio buttons for 'Yes' (selected) and 'No'.
- Date Format**: Three dropdown menus for 'DD', 'MM', and 'YY'.
- Prefix Separator**: Dropdown menu showing '-'.
- Date Separator**: Radio buttons for 'Yes' (selected) and 'No', followed by a dropdown menu showing '/'.

- The **Prefix configuration** will be added before Auto Number.
- Value of prefix field will be added in starting of prefix portion.
- **Prefix Text** field value will be a static value added before the Auto Number and after the main separator.
- “**Entity Characters**” will define number of characters taken from value of prefix entity field.

- If user want to add date with prefix then select Yes from “**Include Date**” and user can select any combination of date format from dropdown.
- **Prefix Separator** comes after prefix field value and before prefix date. Only if added from prefix value and prefix date, Otherwise Prefix Separator will not be displayed.
- **Date Separator** will appear between date format i.e. between date, month, year.

## Suffix Settings



The screenshot shows the 'Suffix' configuration form. It contains the following fields and options:

- Suffix Text**: Text input field containing 'ACC'.
- Entity Field**: Dropdown menu showing 'Stock Exchange'.
- Entity Characters**: Dropdown menu showing '5'.
- Include Date**: Radio buttons for 'Yes' (selected) and 'No'.
- Date Format**: Three dropdown menus for date format, showing '-', 'MM', and 'YY'.
- Suffix Separator**: Dropdown menu showing ':'.
- Date Separator**: Radio buttons for 'Yes' (selected) and 'No', followed by a dropdown menu showing '/'.

- The **Suffix configuration** will be added after Auto Number.
- Value of prefix field will be added in starting of suffix portion.
- **Suffix Text** field value will be a static value added after the Auto Number and before the main separator.
- “**Entity Characters**” will define number of characters taken from value of suffix entity field.
- If user want to add date with suffix then select Yes from “**Include Date**” and user can select any combination of date format from dropdown.
- **Suffix Separator** comes after prefix field value and before prefix date. Only if added from prefix value and prefix date, Otherwise Prefix Separator will not be displayed.
- **Date Separator** will appear between date format i.e. between date, month, year.
- Preview will display the format how Auto Number will be generated.

### General

Name \*  
Auto Number for Account

Entity \*  
Account

Entity Field \*  
Account Number

Start Position \*  
1

Auto Increment By  
2

Current Position  
--

Separator  
Select

Preview  
Ad-19/12/17ACC1ACCStock:12/17

Is Active ?

Max Length  
20

Note: If the length of auto generated field exceeds maximum character limit of the chosen entity field then you need to increase the character limit of that field

### Prefix

Prefix Text ?  
ACC

Entity Field ?  
Address 1: City

Entity Characters ?  
2

Include Date ?  
 Yes  No

Date Format  
DD MM YY

Prefix Separator  
-

Date Separator  
 Yes  No /

### Suffix

Suffix Text ?  
ACC

Entity Field ?  
Stock Exchange

Entity Characters ?  
5

Include Date ?  
 Yes  No

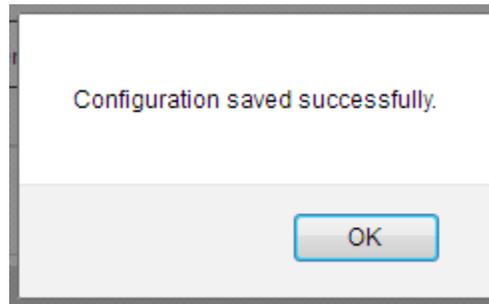
Date Format  
- MM YY

Suffix Separator  
:

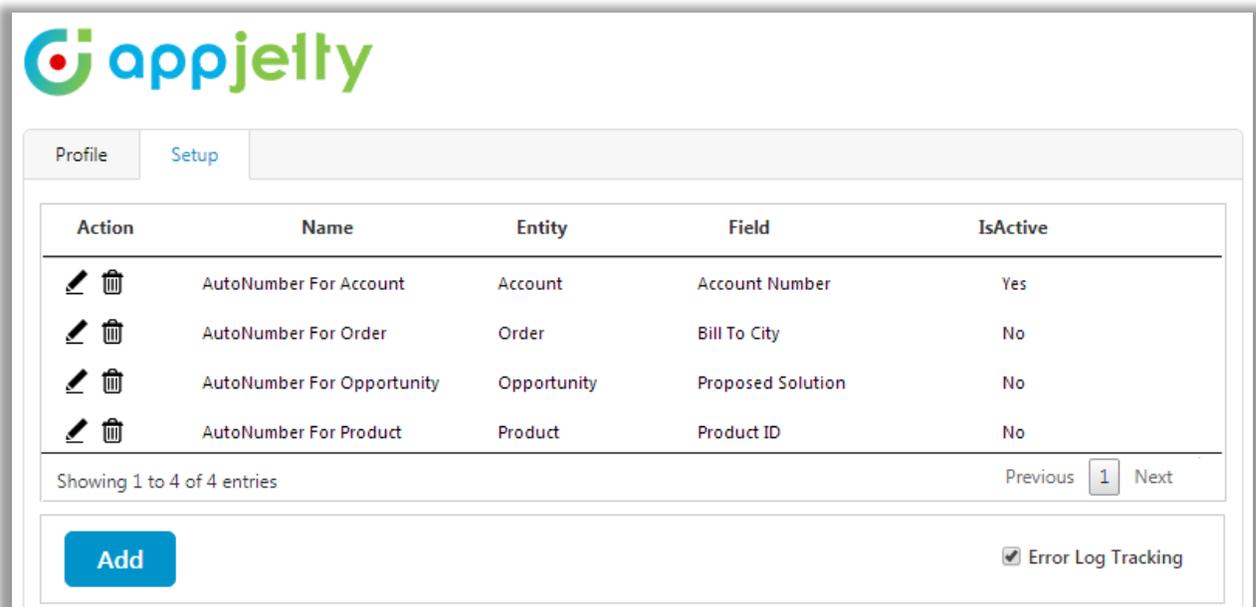
Date Separator  
 Yes  No /

Save Reset

- On clicking the 'Save' button a pop up will appear with confirmation message. Click on 'OK' and it will be added to configuration grid.



- The new record will be saved and listed as shown below. All the Configuration Records for Auto Numbering will get listed here.



The screenshot shows the Appjetty interface with the "Setup" tab selected. It displays a table of Auto Numbering configurations. The table has five columns: Action, Name, Entity, Field, and IsActive. Below the table, there is a pagination control showing "Showing 1 to 4 of 4 entries" and a "Previous 1 Next" indicator. At the bottom left, there is an "Add" button, and at the bottom right, there is a checkbox for "Error Log Tracking" which is checked.

Action	Name	Entity	Field	IsActive
 	AutoNumber For Account	Account	Account Number	Yes
 	AutoNumber For Order	Order	Bill To City	No
 	AutoNumber For Opportunity	Opportunity	Proposed Solution	No
 	AutoNumber For Product	Product	Product ID	No

- Click on 'Edit' option from action, it will redirect to detail view of a configured entity.
- To deactivate Auto Numbering Rule on an entity, uncheck 'Is Active' field. It will deactivate Auto Numbering Rule on that entity.

**General**

Name \*

Entity \*

Entity Field \*

Start Position \*

Auto Increment By

Current Position

Separator

Preview  
 Ad-19/12/17ACC1ACCSStock:12/17

Max Length  
 20

Note: If the length of auto generated field exceeds maximum character limit of the chosen entity field then you need to increase the character limit of that field

Is Active ?

- Now, after uncheck click on Save button to update the Is Active Field.
- To view an auto generated number for a configured entity, create a new record in that particular entity.
- For example, if you have configured Accounts in Service Module, then go to 'Accounts' and create a new account. On saving the account, custom auto number will be generated in the specified field.

### Summary

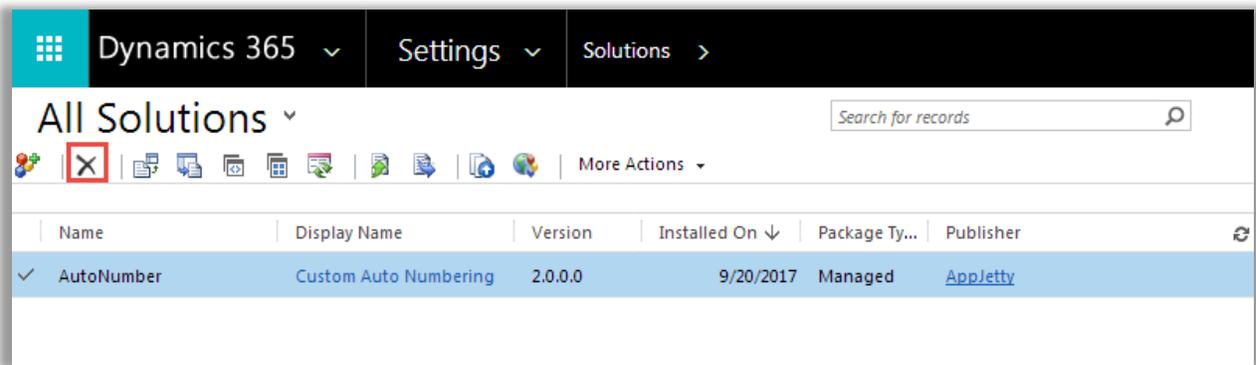
<p><b>ACCOUNT INFORMATION</b></p> <p>Account Name *     <b>Biztech</b></p> <p>Phone                     --</p> <p>Fax                         --</p> <p>Website                    --</p> <p>Parent Account          --</p> <p>Ticker Symbol            --</p> <p>Account Number         <b>Ahm:25-Sep-ABC19</b></p>	<p><b>POSTS</b>   <b>ACTIVITIES</b>   <b>NOTES</b></p> <p><input type="text" value="Enter post here"/>     <b>POST</b></p> <p><b>All posts</b>   <b>Auto posts</b>   <b>User posts</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p><b>Biztech</b>              Account: Created By Robin Anderson.              On Biztech's wall              Today</p> </div>
--	---

NOTE:

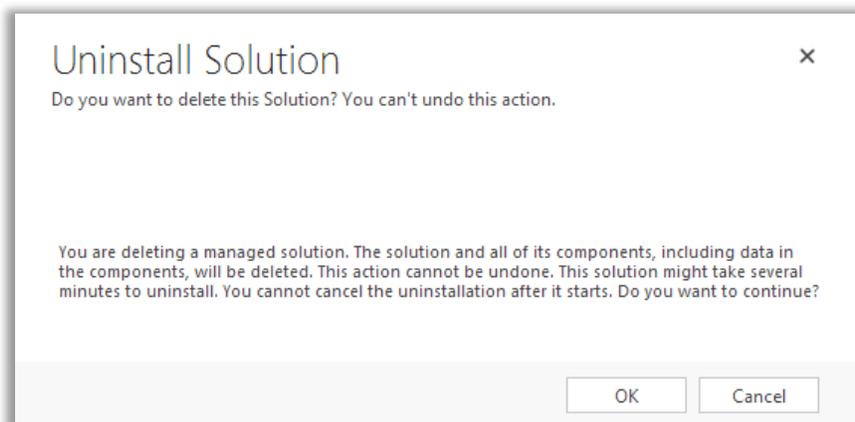
- The first record created after establishing the auto numbering rule will be assigned a number greater than the current position.
- In case the Minimum Number Length is bigger than the length of the number on the current position field, the specified field will start with zeros in order to bridge the gap.
- If the length of auto generated field exceeds maximum character limit of the chosen entity field, then you need to increase the character limit of that entity field by navigating to **Settings -> Customization -> Entities**.

## Un-installation Steps

- To uninstall the Solution, navigate to **Settings -> Solutions**
- Check on the Plugin Name and click on **'Delete'**



- Click on **'OK'** to Delete and uninstall the solution from CRM.



## Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



### Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/dynamicscrm-custom-auto-numbering.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@appjetty.com](mailto:support@appjetty.com) or you can login to your account @ [www.appjetty.com](http://www.appjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

### Customization:

If you would like to customize or discuss about additional features for **Dynamics CRM Custom Auto Numbering**, please write to [sales@appjetty.com](mailto:sales@appjetty.com)