

User Guide



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Solution Version: 365_052017_3_1



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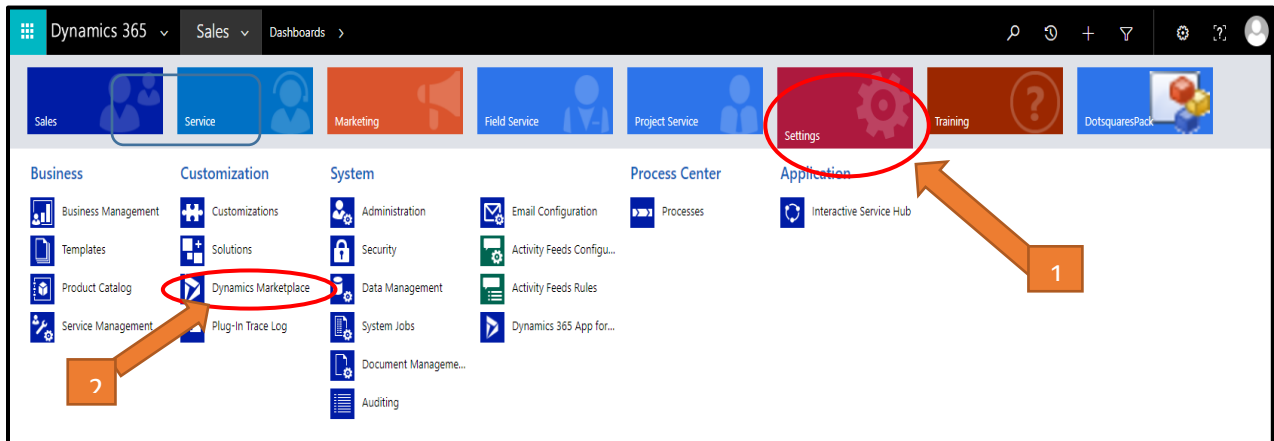
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How to Install Auto Number Solution in D365?

- To **Install** Auto Number Solution in your Dynamics 365 online instance, please follow the instructions given below.

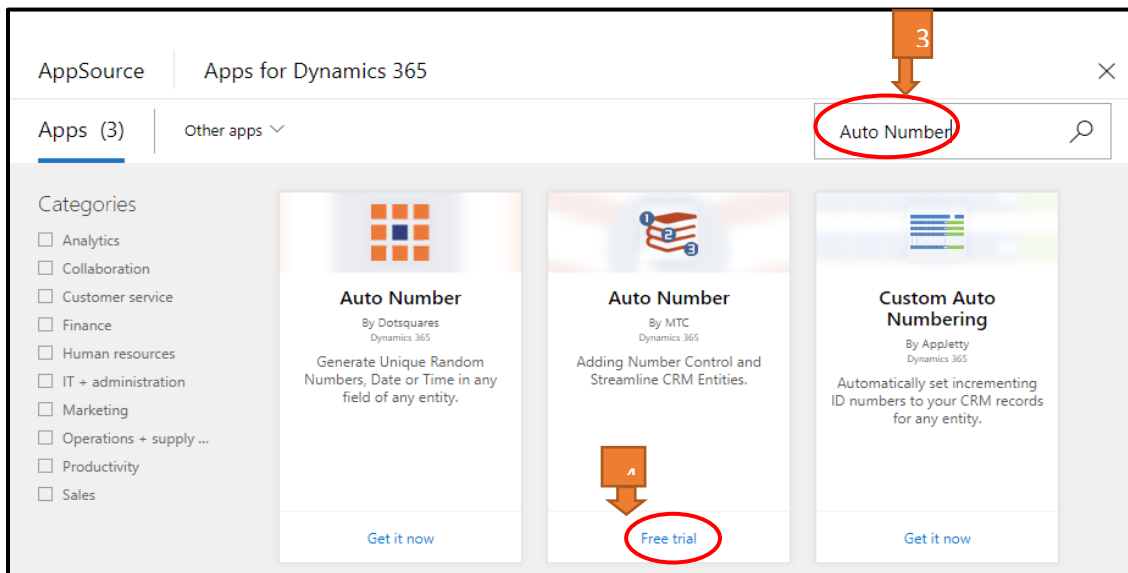
Step 1:

- Navigate to **Settings** and click on **Dynamics Marketplace**.



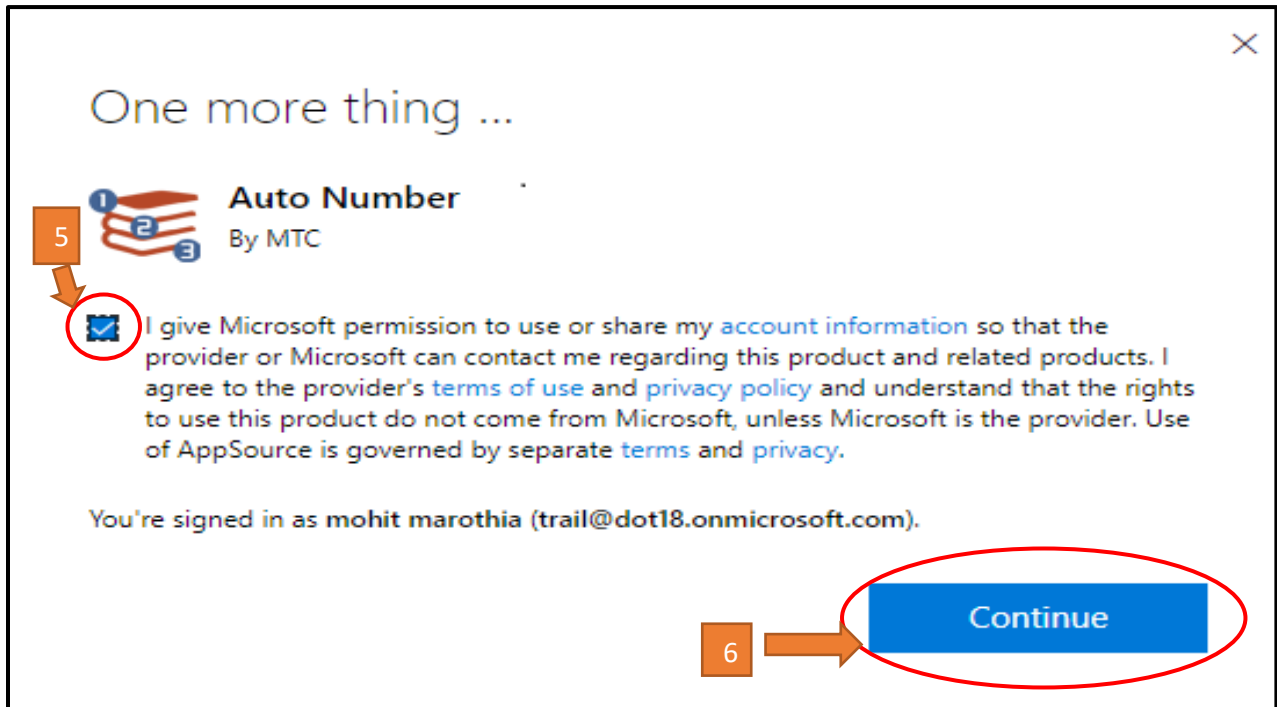
Step 2:

- In search box, search for **Auto Number by MTC** and click on **free trial**.



Step 3:

- Please tick the **Check Box** to give permissions and click on **Continue**.



One more thing ...

Auto Number
By MTC

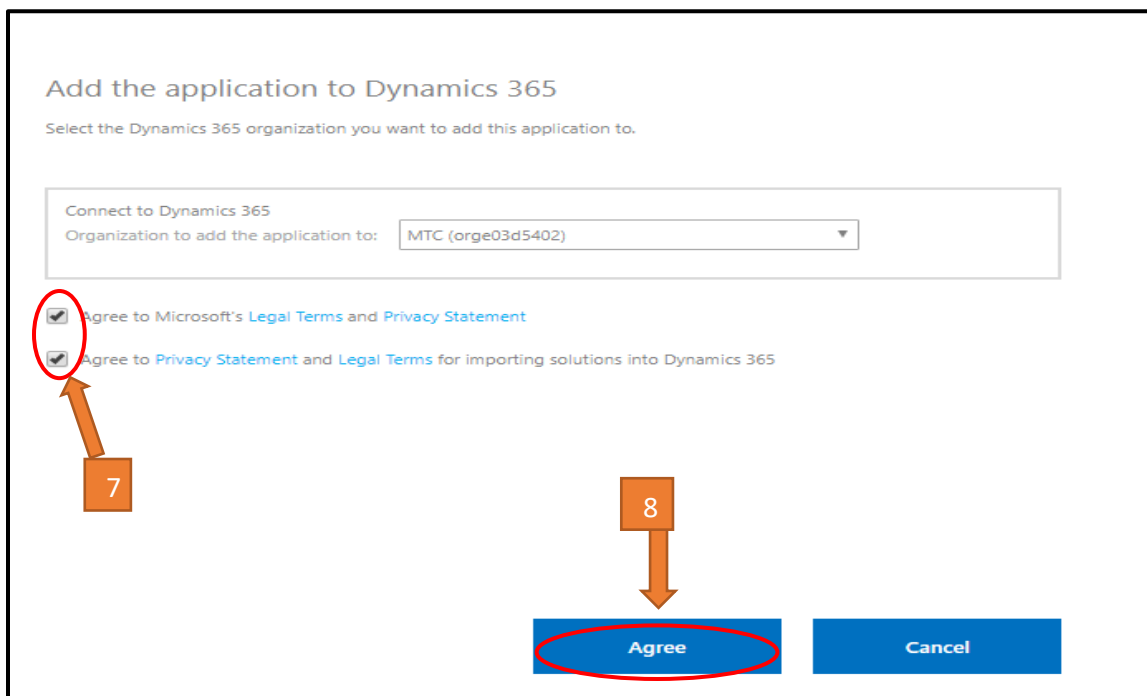
5 ☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as [mohit marothia \(trail@dot18.onmicrosoft.com\)](#).

6 **Continue**

Step 4:

- Please tick the check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.



Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365
Organization to add the application to: [MTC \(orge03d5402\)](#)

7 ☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

8 **Agree** **Cancel**

Step 5:

- After clicking on agree the **Installation Process Begins**.

Manage your solutions			
Select a preferred solution to manage on selected instance: MTC			
SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Live Assist for Microsoft D...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	1.0.0.0	1/1/2050	Not installed
MTC AutoNumber	365.62017.3.2	1/1/2050	Installation pending
Office 365 Groups	2.7.0.0	1/1/2050	Not installed
Project Service Automation	1.2.1.56	1/1/2050	Not installed
Voice of the Customer for ...	9.0.823.1	1/1/2050	Not installed

Step 6:

- After completing the installation, you will notice that **licensing solution** also installed along with **Auto Number Solution**.
- To get the free trial Click on licensing solution.

All Solutions ▾						
 New  Delete  Import  Export  Clone a Patch  Clone Solution  Apply Solution Upgrade  Import Translations  Export Translations  Publish All Customizations						
Name	Display Name	Version	Installed On ↓	Package Type	Publisher	Description
dsautonumber	Dotsquares Auto Number ...	1.0	8/10/2017	Managed	Dotsquares Ltd.	This solution was created by the Dotsquares in the Micros...
MTC_AutoNumber	MTC AutoNumber	365.062017....	8/10/2017	Managed	Management Technology Consulting	Auto numbering facility for any of the Entities like Accoun...
Licensing	Licensing	1.0.5.5	8/10/2017	Managed	Management Technology Consultanc...	MTC's Solution for Licensing
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	8/5/2017	Managed	Microsoft Dynamics	Demo plug-in that automatically moves work orders to th...

Step 7:

- Please fill up the **Account Information** and click on **submit**. “This will be a onetime activity.”

ACCOUNT INFORMATION

First Name*

Last Name*

Phone*

Company*

Website*

Email*

City*

State/Province*

Country*

Zip/Postal Code*

Submit

Step 8:

- After submitting the registration details, you can view all MTC products below Account Information section and you can find Auto Number as **Installed**.

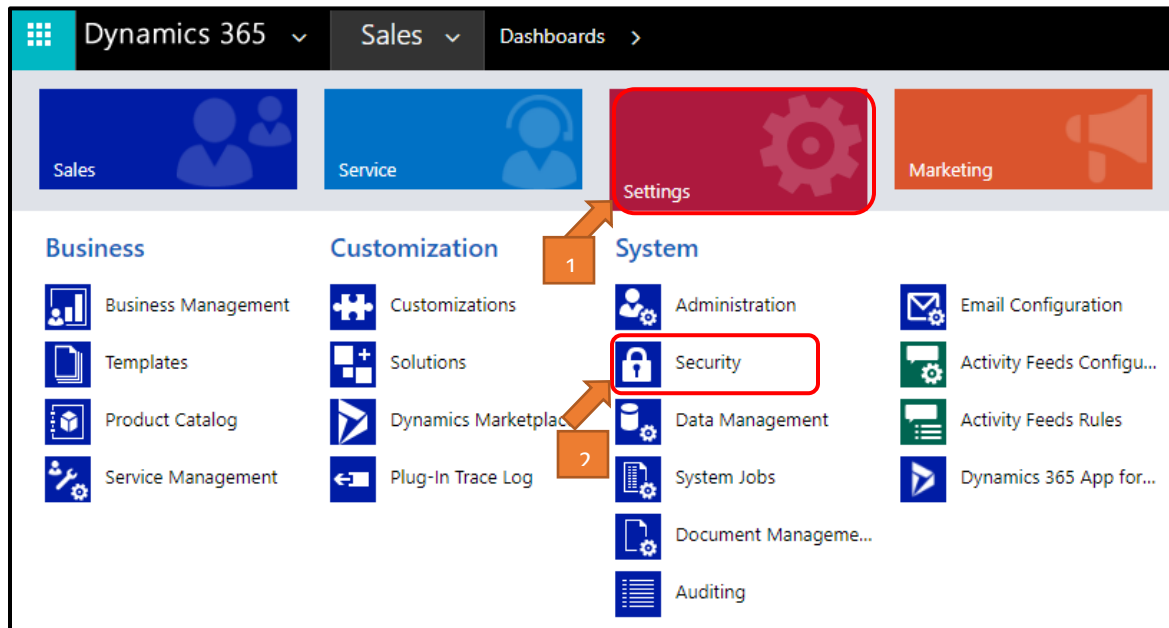
Products	Expiry Date	No of Users	
CRMStarterPack			
Activity Calendar			Get it Now
Alerts			Get it Now
CRM Picture			Get it Now
Report To PDF			Get it Now
Auto Number			Installed
Note Pro			Get it Now
ActivityToDoBundle			
Activity Calendar			Get it Now
Activity Timer			Get it Now
Alerts			Get it Now
My Calendar			Get it Now
MarketingBundle			

Security Roles for Auto Number Solution

Any user other than CRM Administrator must have Auto Number security roles to access the solution. Only a CRM Administrator can administer these security roles using the below procedure.

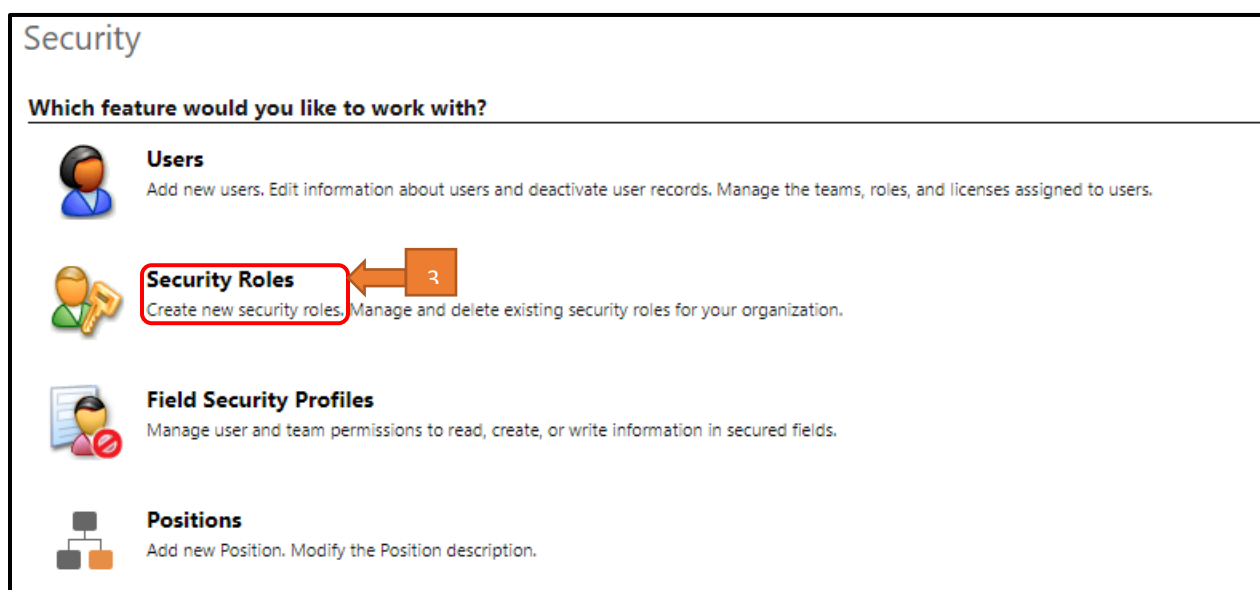
Step1:

- Navigate to **Settings** in your CRM and Click on **Security** under **System** menu.



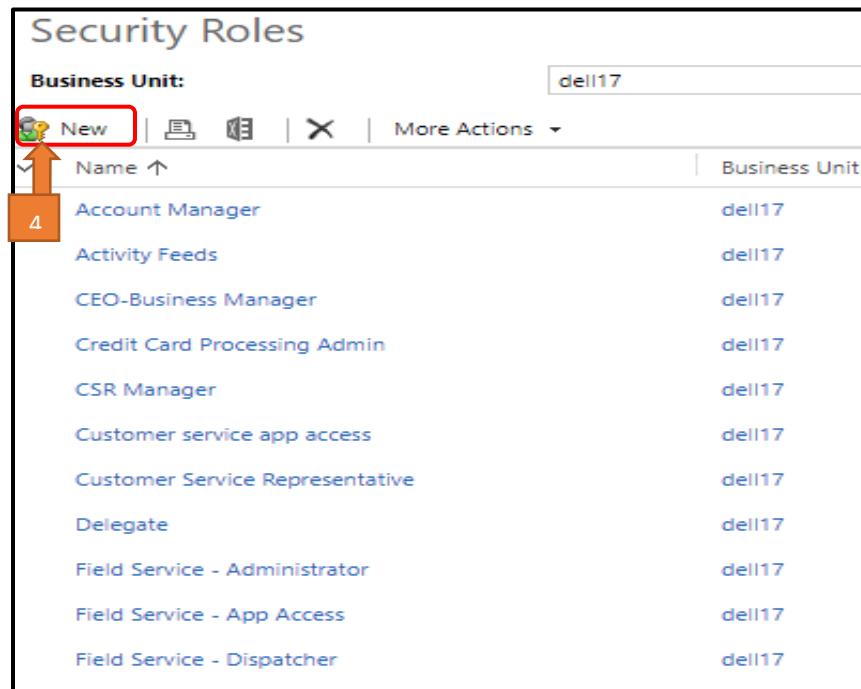
Step2:

- Security page appears as shown below.



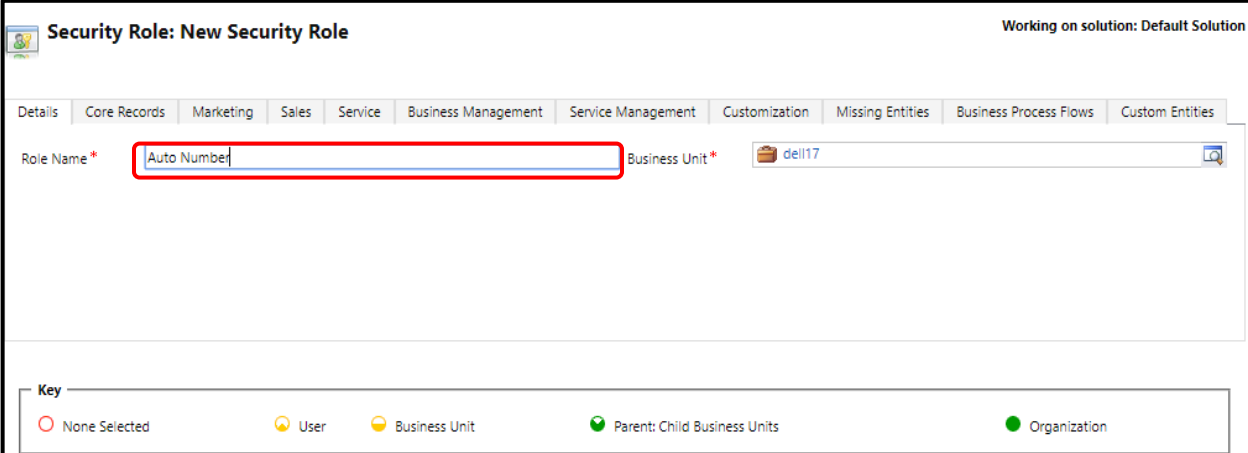
Step3:

- Click on **Security Roles**. All Security Roles available in your CRM will be displayed.



Step4:

- Click on **New** for creating a new security role i.e., Auto Number.
- Under Details in the Role Name, type text as **Auto Number**.



Security Role: New Security Role Working on solution: Default Solution

Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Missing Entities | Business Process Flows | Custom Entities

Role Name * Business Unit *

Key

☐ None Selected
 ☒ User
 ☐ Business Unit
 ☒ Parent: Child Business Units
 ☐ Organization

Step5:

- Now click on **Custom Entities** and select radio buttons for Auto Number Configuration as shown below.

Security Role: New Security Role Working on solution: Default Solution

Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Missing Entities | Business Process Flows | **Custom Entities**

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account Project Price List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actual Data Export (Deprecated)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Incident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Service Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Booking Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Invoice Date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Invoice Product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Invoice Setup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement Sub-Status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Auto Number Configuration	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Batch Job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Step6:

- Finally, click on **Save and Close**.
- Now Auto Number Security Role will be created in your CRM.

Security Roles

Business Unit:

New | | | More Actions ▾

✓ Name ↑	Business Unit
Account Manager	nasa17
Activity Feeds	nasa17
CEO-Business Manager	nasa17
CSR Manager	nasa17
Customer service app access	nasa17
Customer Service Representative	nasa17
Delegate	nasa17
Field Service - Administrator	nasa17
Field Service - App Access	nasa17
Field Service - Dispatcher	nasa17

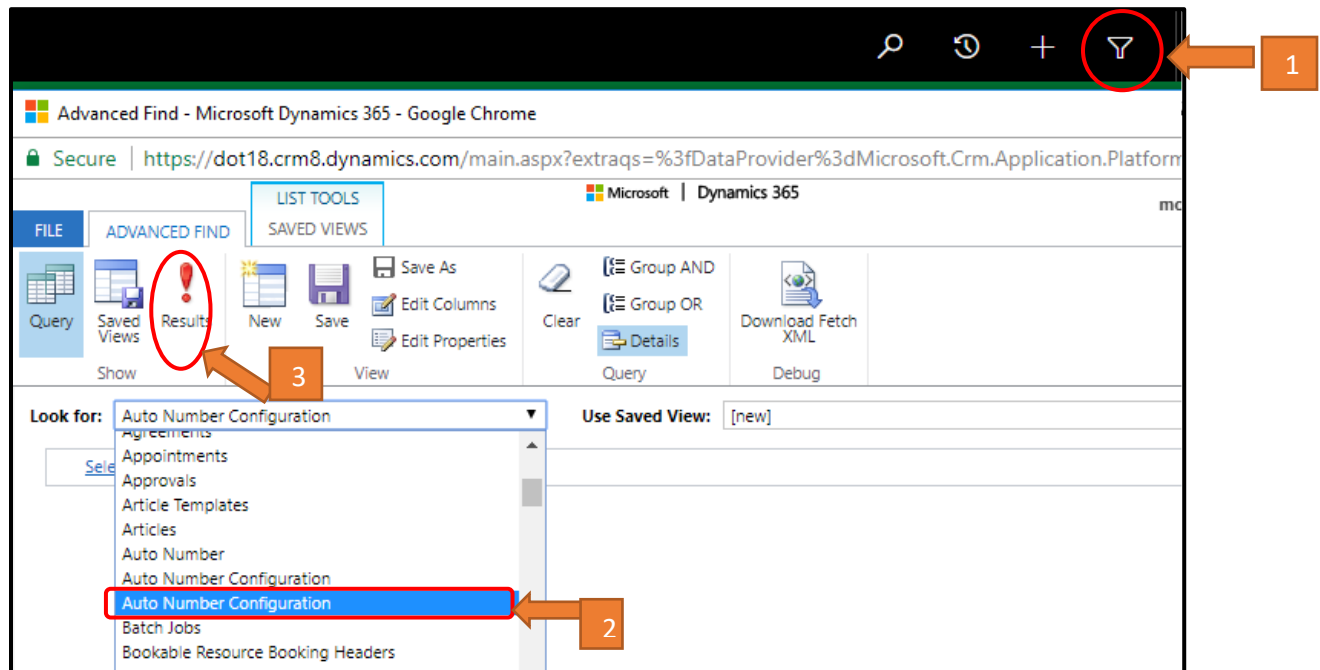
Step 7: Click on Users under security page and select the target users for assigning the just created Auto Number role and MTC License using Manage Roles button from the ribbon area.

Note: Create Auto Number security role following above procedure only if it is not readily available under security roles.

How to Configure Auto Number Solution in D365?

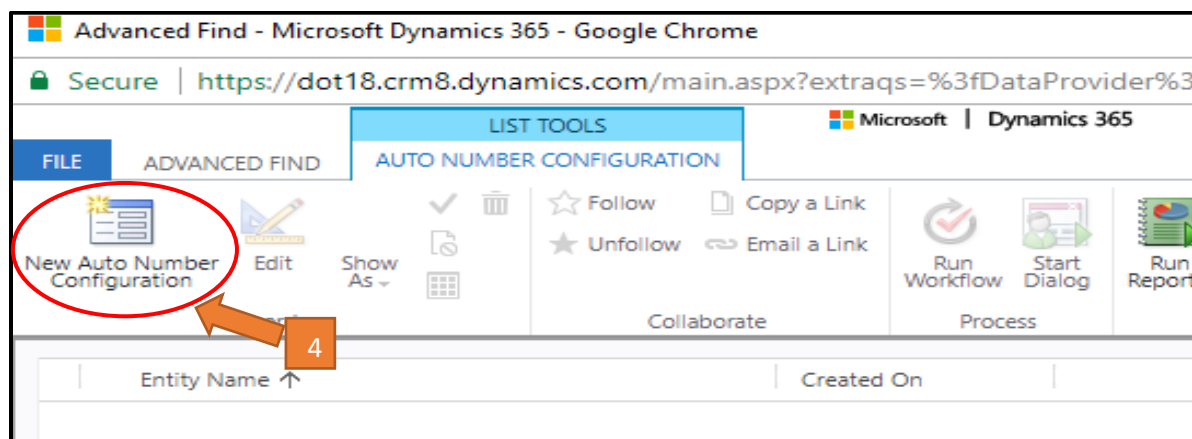
STEP1:

- In the Navigation bar click on **Advanced Find**.
- Click on **Look for Dropdown List** and select the second **Auto Number Configuration**, and click on **Results**.



Step 2:

- Click on **New Auto Number Configuration**.



Step 3:

- For example, let's create Auto Number configuration for **Account entity**."
- Select **Account** from **Select entity name** dropdown list.

The screenshot shows the 'New Auto Number Configuration' form in Dynamics 365. The 'General' tab is active. The 'Select entity name' dropdown is open, displaying a list of entities. The entity 'Account' is highlighted with a red box, and an orange arrow labeled '5' points to it. Other entities in the list include 'Account Project Price List', 'Activity Timer Settings', 'Actual', 'Actual Data Export (Deprecated)', 'Address', 'Agreement', 'Agreement Booking Date', 'Agreement Booking Incident', and 'Agreement Booking Product'.

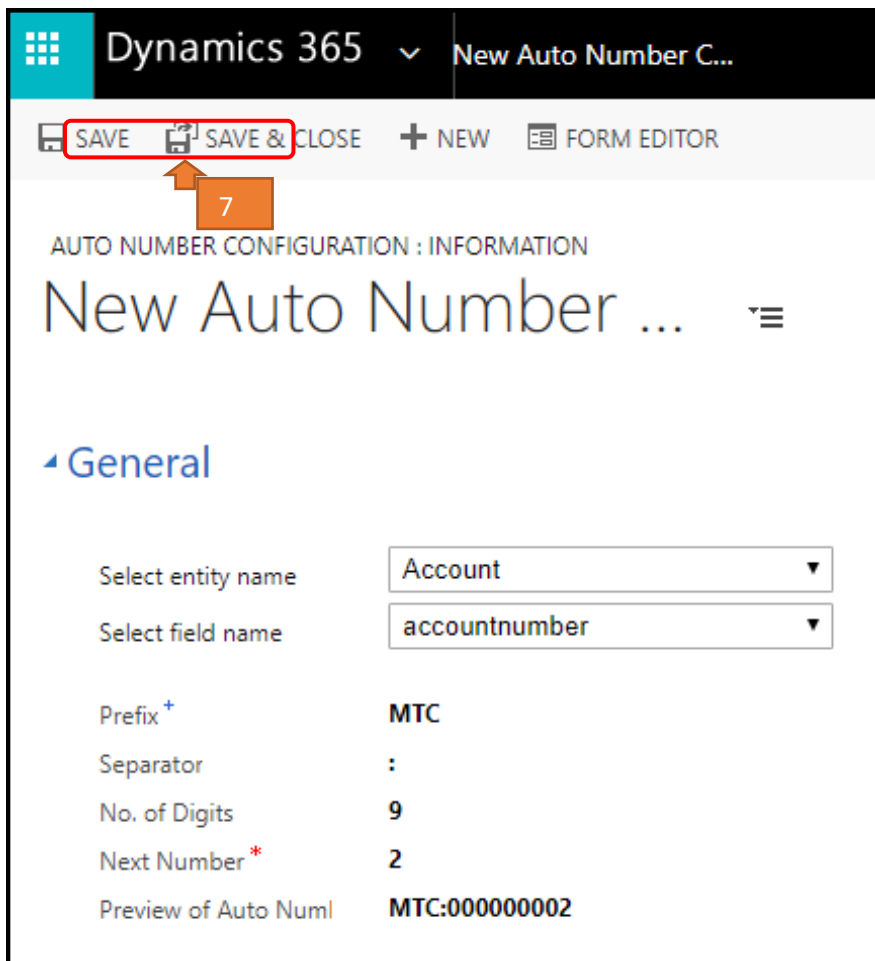
Step4:

- Select **accountnumber** from **Select field name** drop down list.

The screenshot shows the 'New Auto Number Configuration' form in Dynamics 365. The 'General' tab is active. The 'Select field name' dropdown is open, displaying a list of attributes. The attribute 'accountnumber' is highlighted with a red box, and an orange arrow labeled '6' points to it. Other attributes in the list include 'address1_city', 'address1_country', 'address1_county', 'address1_fax', 'address1_line1', 'address1_line2', and 'address1_line3'.

Step 5:

- **Prefix:** Prefix could be any Single line text. For instance consider Prefix as MTC. This will be constant for all Account records.
- **Separator:** Its separates the Prefix with other digits. It could be comma, colon, hyphen, etc.
- **No. of Digits:** Enter the No. of digits that you wish to add for length of the number.
- **Next Number:** Enter the Next Number that you wish to continue.
- **Preview of Auto Num:** Allows the user to check how the id is going to be generated for a particular entity.
- Click on **Save and Close**.



Dynamics 365 | New Auto Number C...

SAVE | **SAVE & CLOSE** | + NEW | FORM EDITOR

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AUTO NUMBER CONFIGURATION : INFORMATION

New Auto Number ...

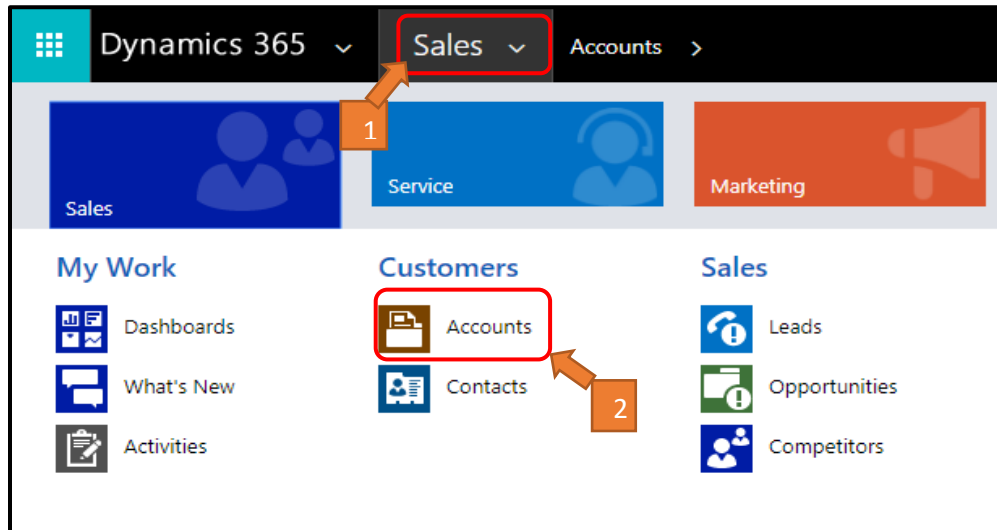
General

Select entity name	Account
Select field name	accountnumber
Prefix ⁺	MTC
Separator	:
No. of Digits	9
Next Number [*]	2
Preview of Auto Num	MTC:000000002

Auto Number Functionality

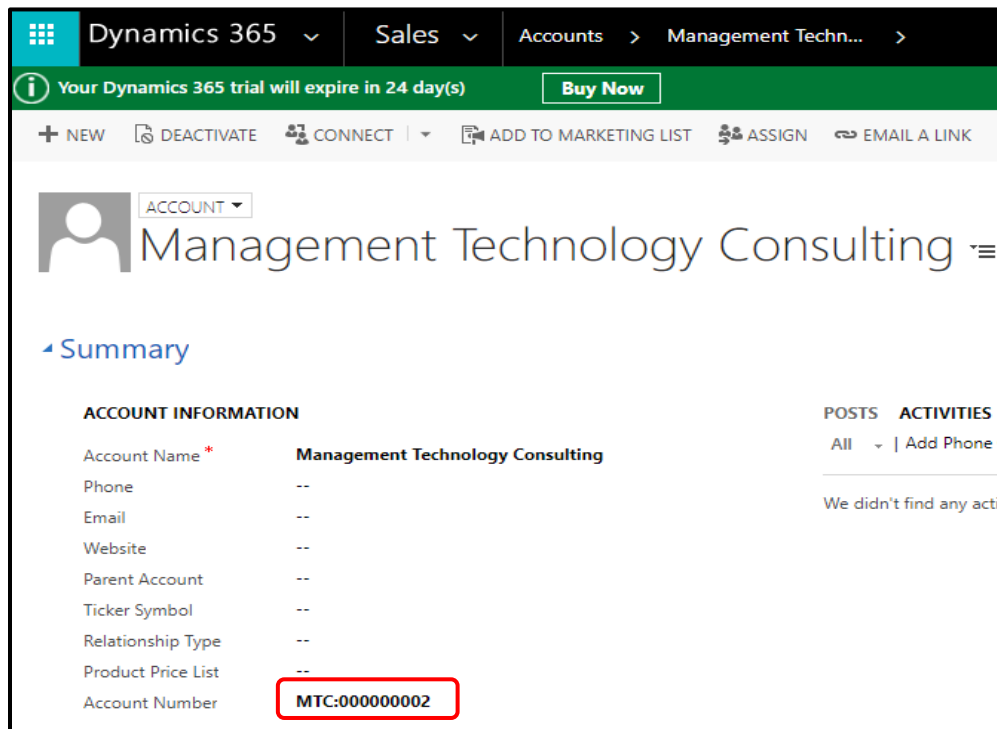
Step 1:

- Navigate to **Dynamics365**, click on **Sales** and select **Accounts**.



Step 2:

- Create a new **Account** and click on **Save** and you can see that the **Auto Numbering Configuration – MTC-000000002**

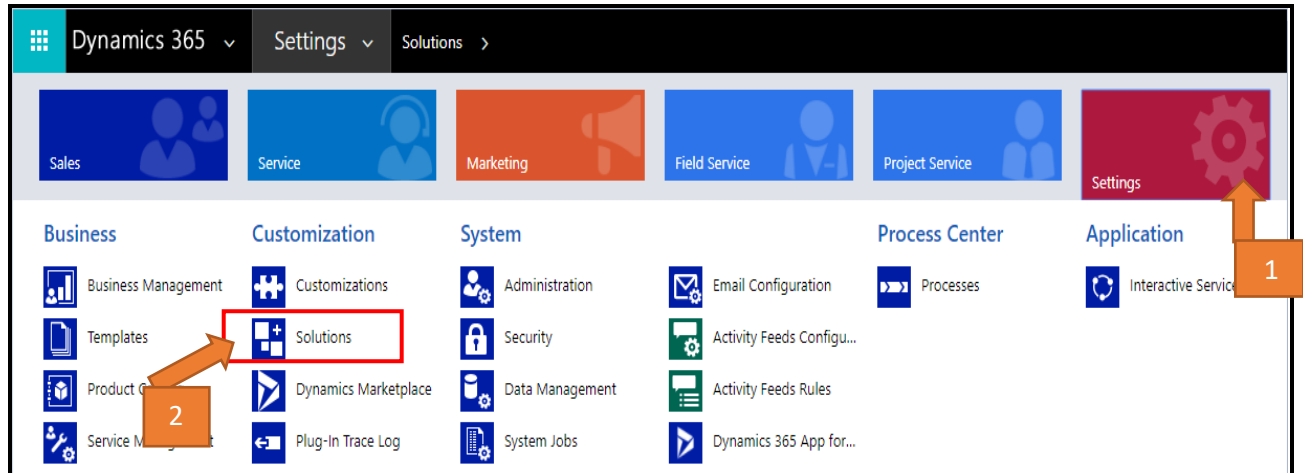


Note: Similarly, you can configure Auto Number for other CRM entities as well.

How to uninstall Auto Number Solution?

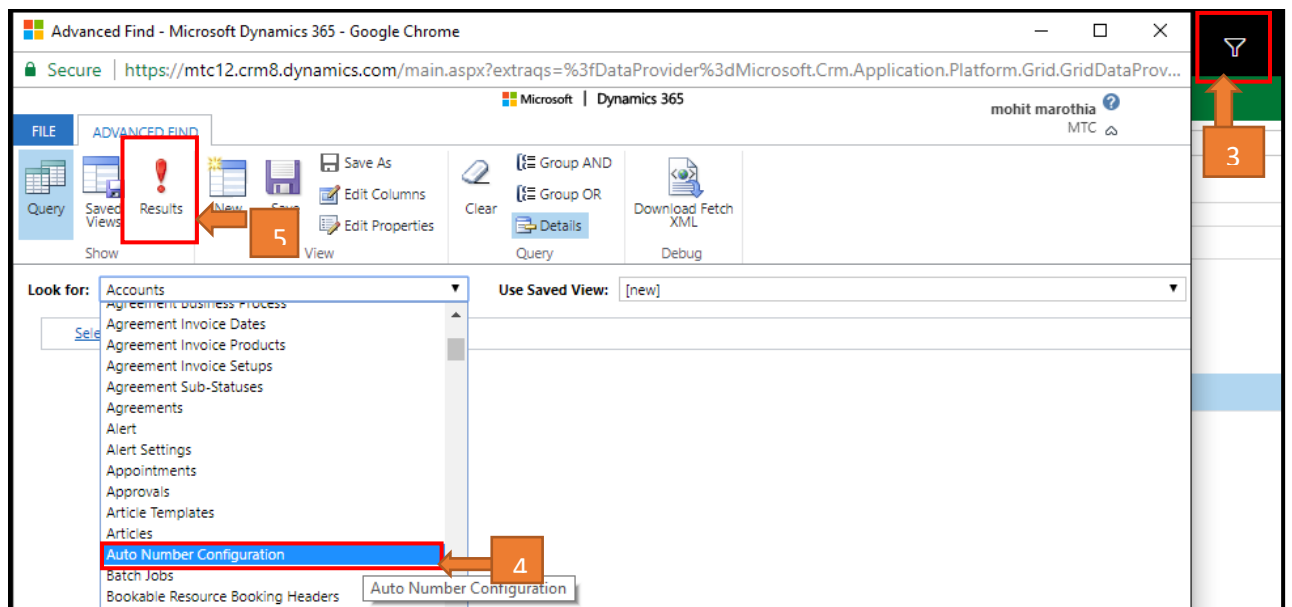
Step 1:

- Navigate to **Dynamics 365**, click on **settings**, and select **solutions**.



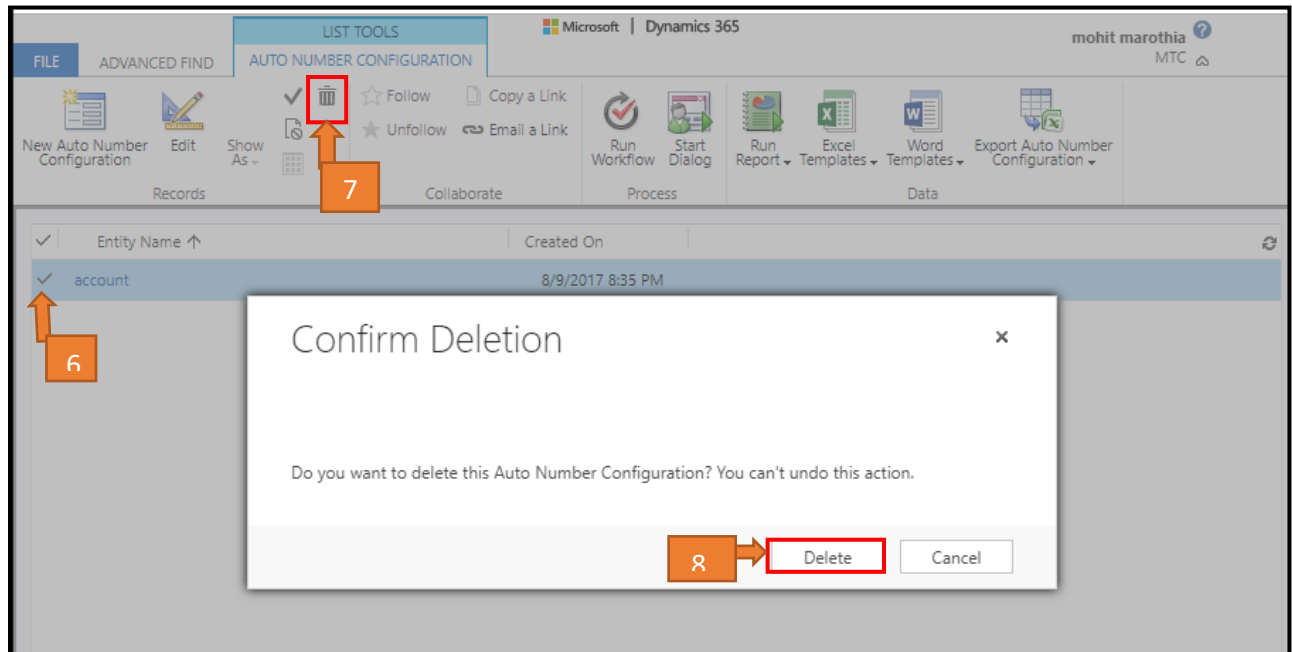
Step 2:

- Click on **advance find**, click on **look for** drop down list and select **Auto Number Configuration** and click on results.



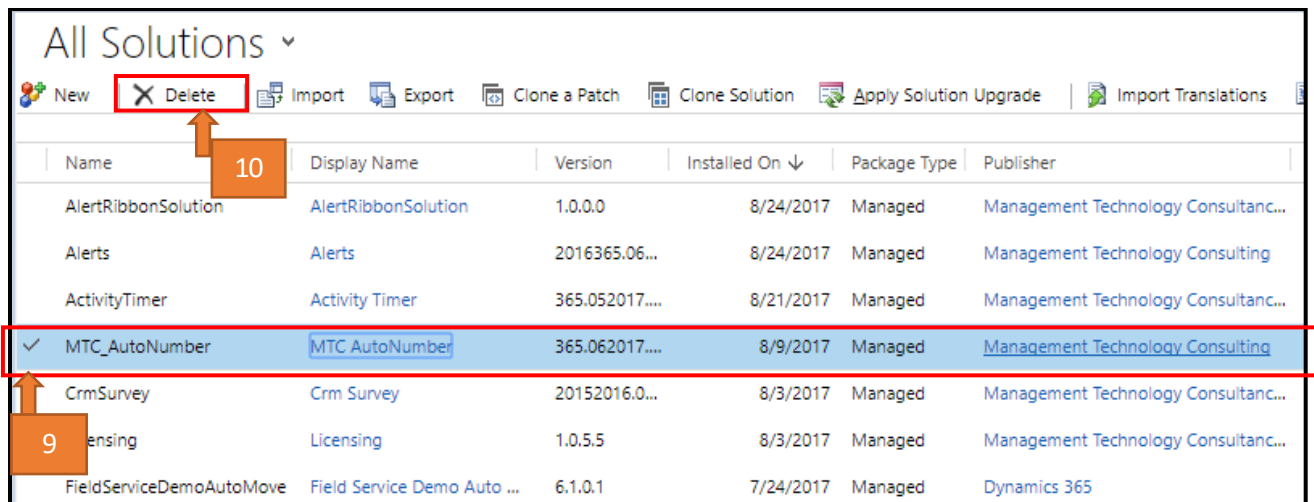
Step 3:

- Click on **accounts** and select **delete** icons and click on **delete**.



Step 4:

- Click on **MTC_AutoNumber** and click on **delete** to uninstall the **Auto Number** solution.



Step 5:

- Click on **licensing**. You can see that **Auto Number** solutions has been changed to **Get It Now** from **Installed**. But the expiry date will be as usual.

All Solutions ▾

New | Delete | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations | Export Translations | Publish All Customizations | Get Solution

Name	Display Name	Version
Licensing	Licensing	1.0.5.5
FieldServiceDemoAuto...	Field Service Demo Auto ...	6.1.0.1
ResourceSchedulingDem...	Resource Scheduling Dem...	1.0.0.4
ProjectServiceDemoD...	Project Service Demo Data	1.0.1.4
SiteMapCustomization	Initial Site Map Customization	1.8
FreeTrialBaseSolution2	Trial Base Solution	2.1.0.0
FieldService_trial	Trial for Field Service	6.2.0.342
FieldServiceAppModule	Field Service App Module	6.2.0.0
FieldService	Field Service	6.2.0.342
ProjectService_Trial	Trial of Microsoft Dynamic...	1.2.0.69
ProjectServiceAppModule	Project Service Automatio...	1.0

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Solution: Licensing - Microsoft Dynamics 365 - Google Chrome

Secure | https://om17.crm8.dynamics.com/tools/solution/edit.aspx?id=%7b72864DF4-305C-4639-8613-27F21F41EA

File | Close | Actions ▾

Solution: Licensing

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 the components in the Customizations area or from another unmanaged solution.

Solution Licensing				CRMStarterPack	Bundle
Information	Configuration	Components	Entities	Option Sets	Client Extensions
Auto Number	9/10/2017	0	Get it Now		
Note Pro			Get it Now		
Alerts	9/10/2017	0	Get it Now		