



PowerStages User Guidance

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Introduction

PowerStages is a vertical solution for Dynamics 365 Customer Engagement (Legacy Name: Microsoft CRM) to implement operational rules and conditions to custom entities.

User can define submit, approve, reject operations per user or team with notifications and displaying fields through PowerStages. The solution sends document over given flows for verification or processing.

Stages can be built up only through Status Reason (StatusCode) of the custom entity so in order to send the document from Stage A to Stage B, Stage A and Stage B must be defined in Status Reason (StatusCode) of selected entity.

This document intends to help user to configure PowerStages properly.



A User which has System Administrator Role at the tenant must import the PowerStages solution

Staged Entity

Main entity for the PowerStages. Staged Entity keeps custom entities to be used by PowerStages for form operations.



Custom Entity must be configured for “Business process flows”, “Activities” and “Queues” from Entity Information Form as seen Figure 4 below

Form of the custom entity must contain State Code (StateCode) and Status Reason (StatusCode) fields so Please add them to the custom entity from beforehand.

Tip: You can consider adding those fields to Header or Footer of the form.

Custom Entity must be configured as described in “Custom Entity Configuration” section below.

1. Open Dynamics 365 organization where PowerStages is installed
2. Click Power Stages from Area section in the menu left.

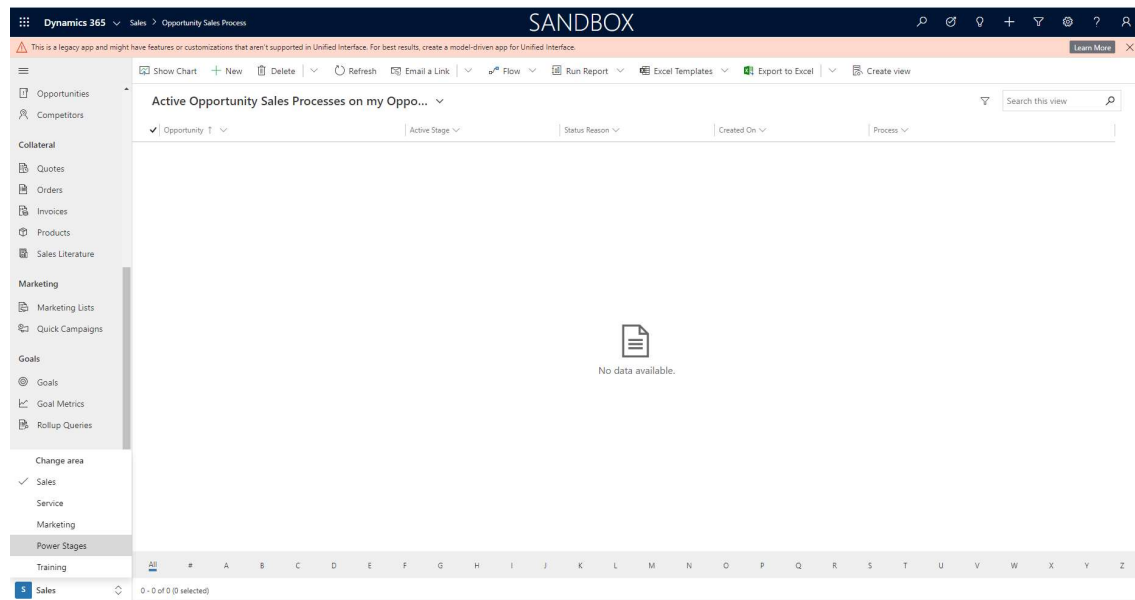


Figure 1- Changing area to Power Stages

3. Click “+ New” button from the menu top of the page

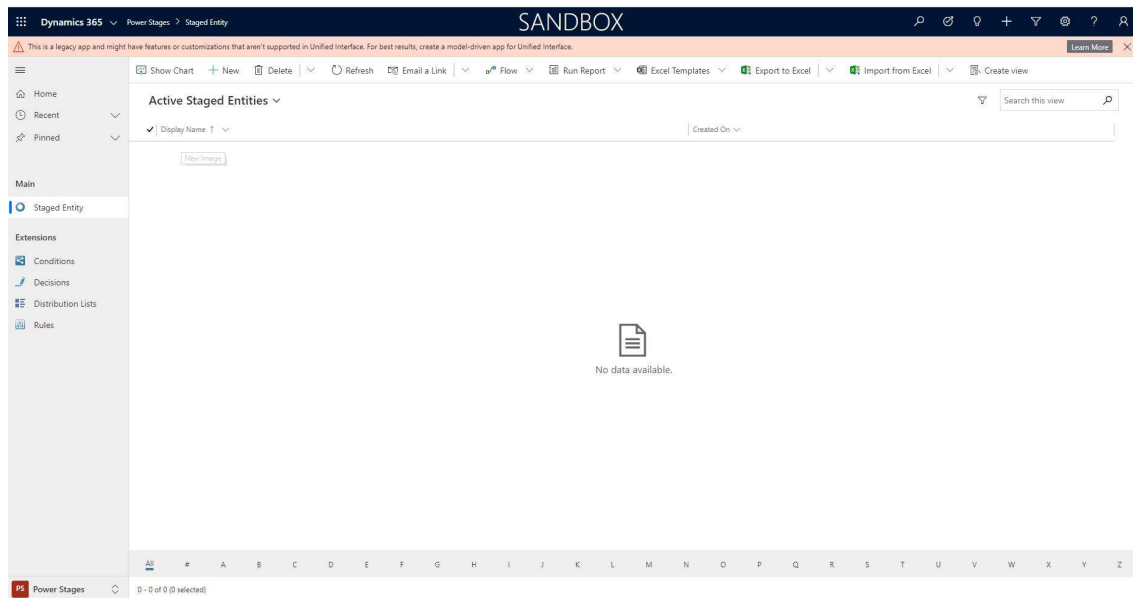


Figure 2- Opening New Staged Entity from the Menu

4. Choose the custom entity from entity lists which you want to convert into a form.
PowerStages fills necessary fields to complete all configurations.

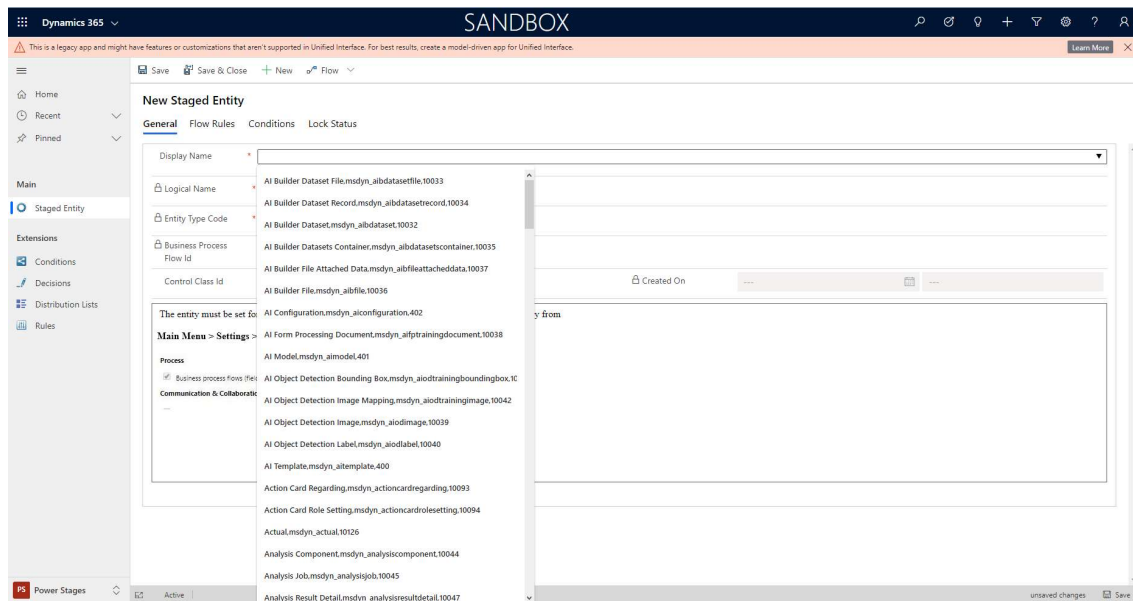


Figure 3- Search Custom Entity



Custom Entity must be configured for “Business process flows”, “Activities” and “Queues” from Entity Information Form as seen Figure 4 below

Power Apps

File Save and Close Help

New Information Working on solution: Demo

Common

- Information
- Forms
- Views
- Charts
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Business Rules

General Primary Field

Areas that display this entity

☒ Sales ☐ Service ☐ Marketing ☐ Power Stages

☐ Training ☐ Settings

Process

☒ Business process flows (fields will be created) *

Communication & Collaboration

☐ Feedback *

☐ Notes (includes attachments) *

☒ Activities *

☐ Connections *

☐ Sending email (If an email field does not exist, one will be created) *

☒ Mail merge

☐ Document management

☐ Access Teams

☒ Queues *

☐ Automatically move records to the owner's default queue when a record is created or assigned.

☐ Knowledge Management

☐ Enable for SLA (Fields will be created) *

Data Services

☐ Allow quick create

☒ Duplicate detection

☐ Auditing

☐ This entity will not be audited until auditing is enabled for the organization.

☐ Change Tracking

Auditing

☐ Single record auditing. Log a record when opened.

☐ Multiple record auditing. Log all records displayed on an opened page.

Outlook & Mobile

Figure 4- Minimum Custom Entity Information Settings for PowerStages

5. Click Save&Close.

Dynamics 365 SANDBOX

This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

Save Save & Close + New Flow

New Staged Entity Save and close this Staged Entity.

General Flow Rules Conditions Lock Status

Display Name * Customer Order Form_new_customerorderform,10168

Logical Name * new_customerorderform

Entity Type Code * 10168

Business Process Flow Id ---

Control Class Id 5b773807-9fb2-42db-97c3-7a91eff8adff Created On ---

The entity must be set for Business Process Flow so please make sure that selected entity is ready from Main Menu > Settings > Customizations

Process

☒ Business process flows (fields will be created) *

Communication & Collaboration

Power Stages Active unsaved changes Save

Figure 5- Save&Close

6. PowerStages will ask for a confirmation about Business Process Flow creation for the selected entity. Click Ok to accept and close the form. Cancel will terminate the operation thus; Custom entity will not be operable for PowerStages.

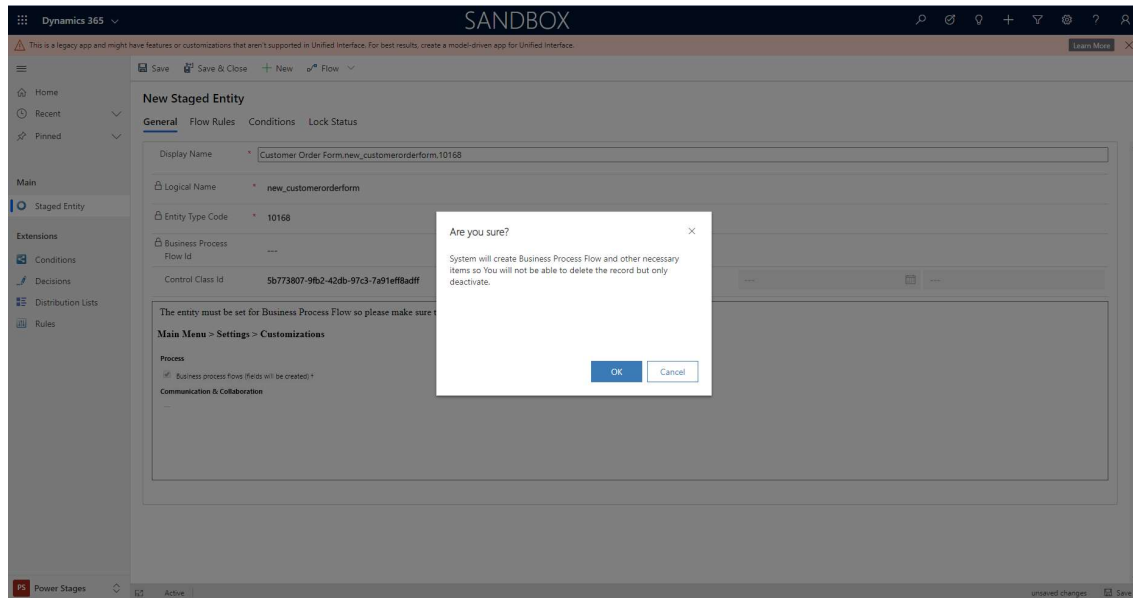


Figure 6-BPF Confirmation

Condition

It classifies rules to be implemented for certain team/user. Although, Stage Flow Rules are not bound to the condition, It is indirectly bound to rules under the condition so If You want to bind one Stage Flow Rules to a condition, You should create at least one Display Rule under the selected condition with same Status Reason in “from” field at Stage Flow Rule.

1. Open Dynamics 365 organization where PowerStages is installed
2. Click Power Stages from Area section in the menu left.



Do not make direct call through Condition menu item to create a condition.

3. Go to “Conditions” section
4. Click “+ New” to the condition.

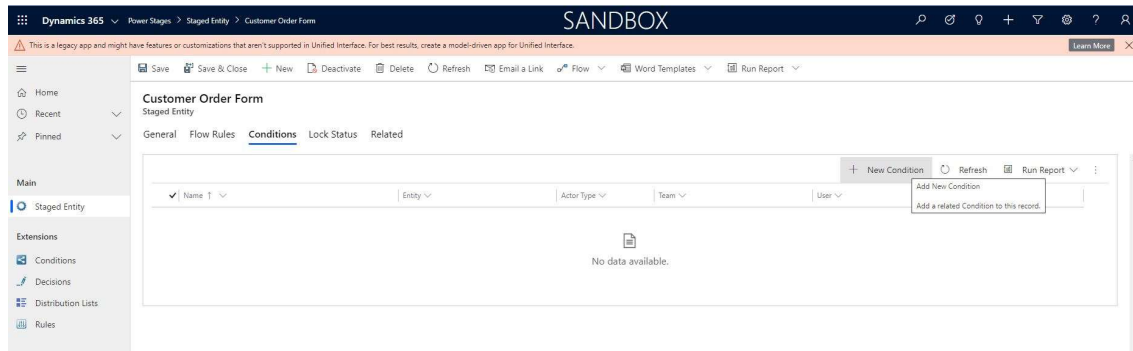


Figure 7- New Condition Record Creation

5. Condition Form opens

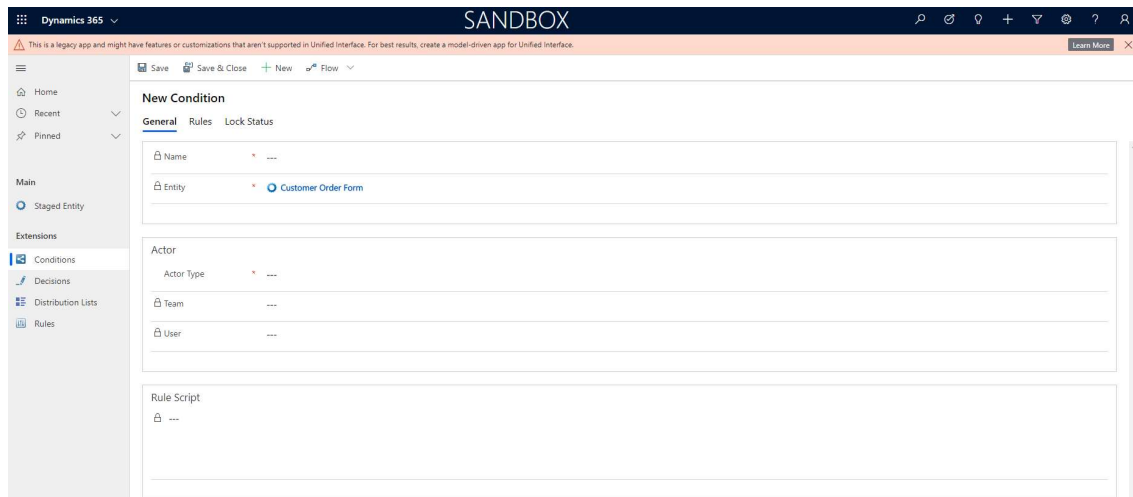
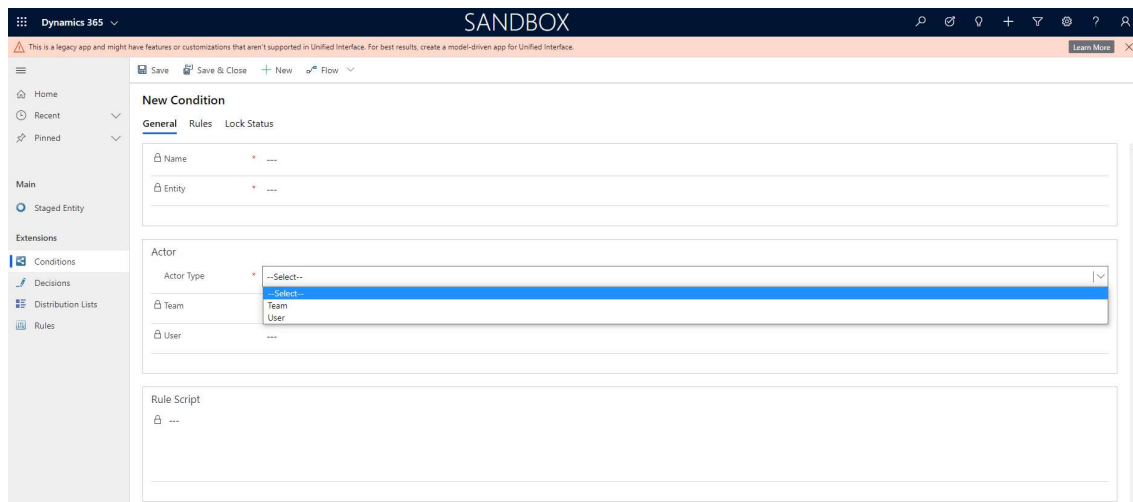


Figure 8- New Condition Form

6. Choose Actor Type whether to state to whom will rules to be applied.



The screenshot shows the 'New Condition' form in the Dynamics 365 'Sandbox' environment. The 'Actor' section is active, and the 'Actor Type' dropdown menu is open, displaying the following options: --Select--, Select, Team, and User. The 'Team' option is currently selected and highlighted in blue. Other fields like Name, Entity, Team, User, and Rule Script are visible but not yet filled out.

Figure 9- Actor Type Selection

- a. If Actor Type is Team, Team field will be editable and mandatory. Choose a team to be considered for all rules underneath.

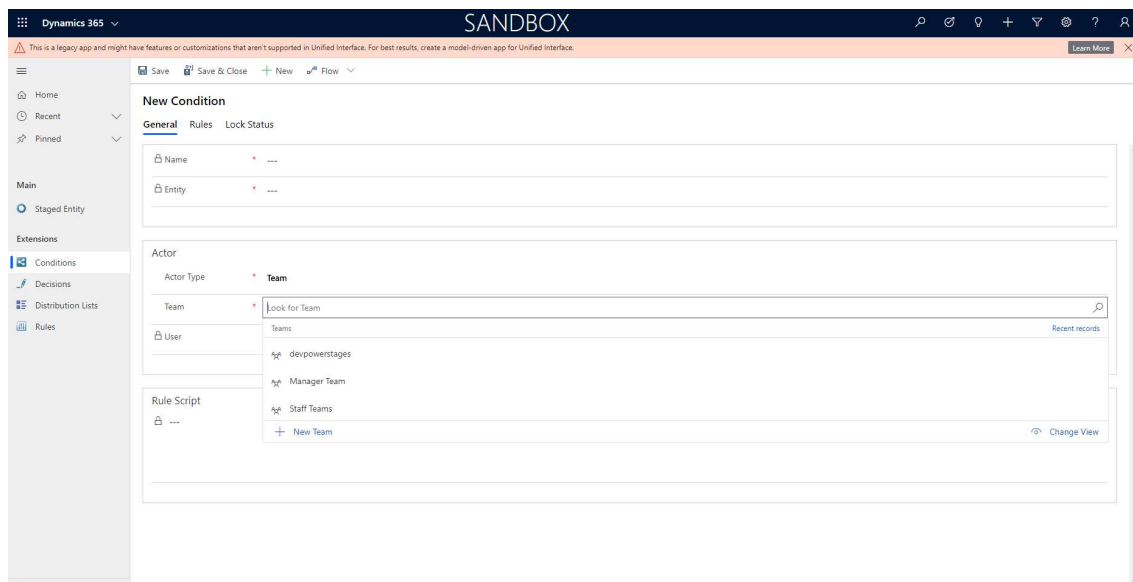


Reminder:

Team must have necessary privilege to access custom entity (at least Read)

User must be ready to send or receive email if there is an E-Mail type notification for the user (see Distribution List section below).

Team must have necessary privilege to queue (at least read), if there is an queue type notification for the team (see Distribution List section below).



The screenshot shows the 'New Condition' form in the Dynamics 365 'Sandbox' environment. The 'Actor' section is active, and the 'Actor Type' is set to 'Team'. The 'Team' field is active, showing a list of teams: devpowerstages, Manager Team, Staff Teams, and New Team. The 'Look For Team' button is visible. Other fields like Name, Entity, User, and Rule Script are visible but not yet filled out.

Figure 10- Team Lookup

- b. If Actor Type is User, User field will be editable and mandatory. Choose a user to be considered for all rules underneath.
7. Click Save (if you continue with Rule Creation below) or Save&Close

The screenshot shows the Dynamics 365 Sandbox interface. At the top, there's a header bar with 'Dynamics 365' and 'SANDBOX'. Below the header, a warning message states: 'This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.' The main area is divided into a left sidebar and a central pane. The sidebar has sections for 'Main' (Home, Recent, Pinned) and 'Extensions' (Conditions, Decisions, Distribution Lists, Rules). The central pane shows the 'Save Condition' dialog box with tabs for 'General', 'Rules', and 'Lock Status'. The 'General' tab is active, showing fields for 'Name' (empty), 'Entity' (set to 'Customer Order Form'), 'Actor Type' (set to 'Team'), 'Team' (set to 'Start teams'), and 'User' (empty). There is also a 'Rule Script' section with a text area. At the bottom of the dialog, there are 'Save' and 'Save & Close' buttons. The status bar at the bottom indicates 'Power Stages' and 'Active'.

Figure 11- Save Condition

Rule

Rule defines PowerStages objects to be used for operations. It can be a Display Rule, Stage Flow Rule and Button Rule.

Display Rule

 There must have at least one Display Rule for a user in order to open the form.

1. Go to Rules section from Condition as described above then click “+ New Rule” from the Grid View.

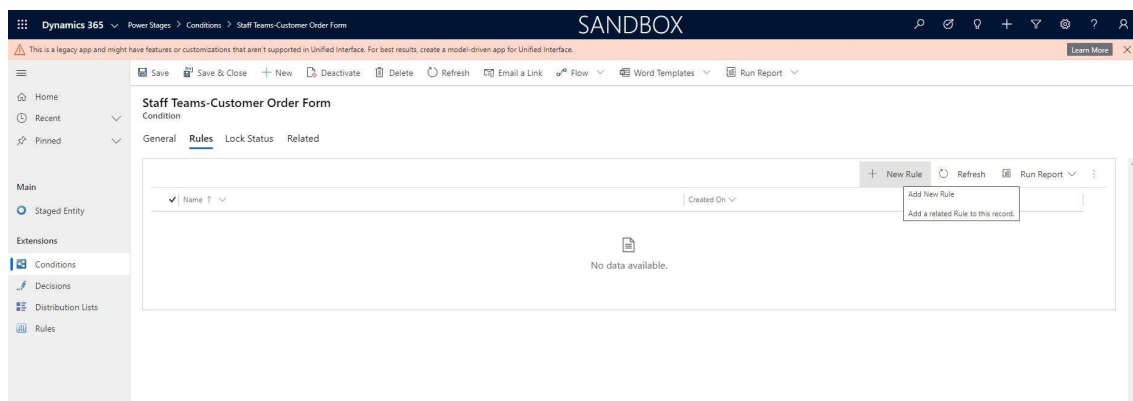


Figure 12- New Rule Creation

2. Rule form will open.
3. Select “Display Rule” from Type field.

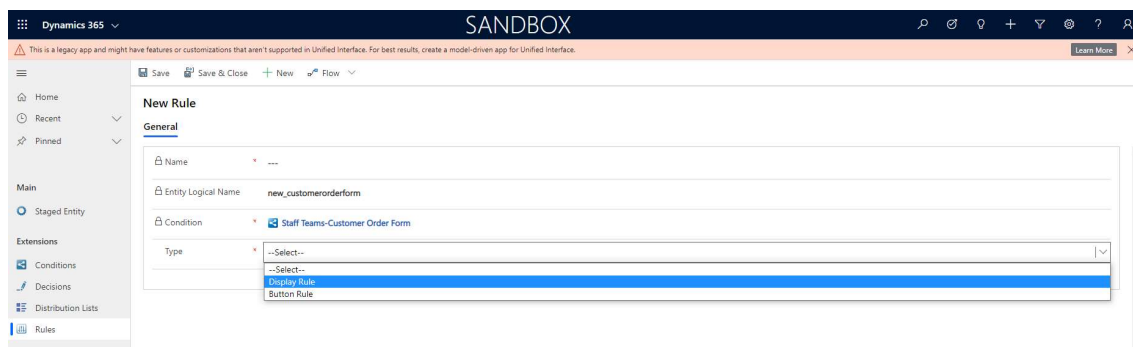


Figure 13- New Form of General Section

4. Record Status field and Display Rule Tab will be appeared.

- Click Record Status. PowerStages will display all valid values. Choose one item that will be used by Display Rule.

The screenshot shows the 'New Rule' form in Dynamics 365, specifically the 'Display Rule' tab. The form has a left sidebar with navigation options: Home, Recent, Pinned, Main, Staged Entity, Extensions, Conditions, Decisions, Distribution Lists, and Rules. The main area contains the following fields:

- Name: ---
- Entity Logical Name: new_customerorderform
- Condition: Staff Teams-Customer Order Form
- Type: Display Rule
- Record Status: A dropdown menu is open, showing three options: Inactive.2, Manager Review:100000000, and Staff Preparation.1.
- Record Status Item Id: ---

Figure 14- Record Status Selection



How to read Condition – Display Rule – Record Status.

Display Rule will be applied to an actor under condition for the record status that matches the selection so

According to Figure 4; Display Rule will be valid for an user whose member of “Staff Teams” and a record which’s status is “Staff Preparation”

- Go to Display Rule tab then choose the proper value.

The screenshot shows the 'New Rule' form in Dynamics 365, specifically the 'Display Rule' tab. The form has a left sidebar with navigation options: Home, Recent, Pinned, Main, Staged Entity, Extensions, Conditions, Decisions, Distribution Lists, and Rules. The main area contains the following fields:

- Display Rule Type: A dropdown menu is open, showing three options: --Select--, --Select--, and Relationship.

Figure 15- Display Rule Type Selection

7. Field

- a. If you choose Field for the Display Rule Type, regarding fields will be displayed. Choose a value from Field. PowerStages lists all valid fields of the custom entity where is stated in Staged Entity

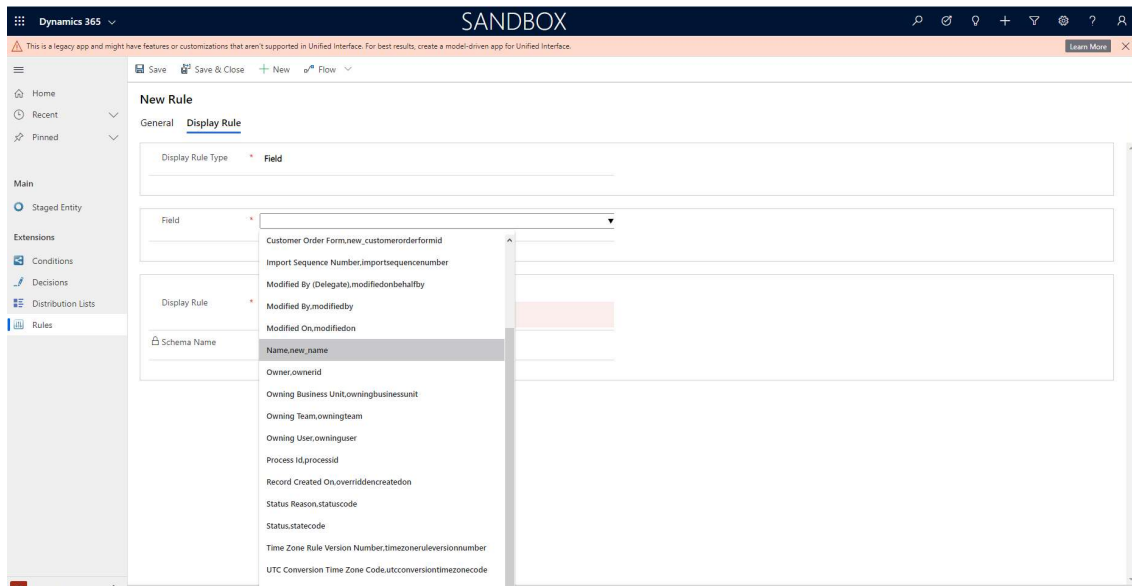


Figure 16- Field Selection for Field type in Display Rule

- b. Choose a rule.

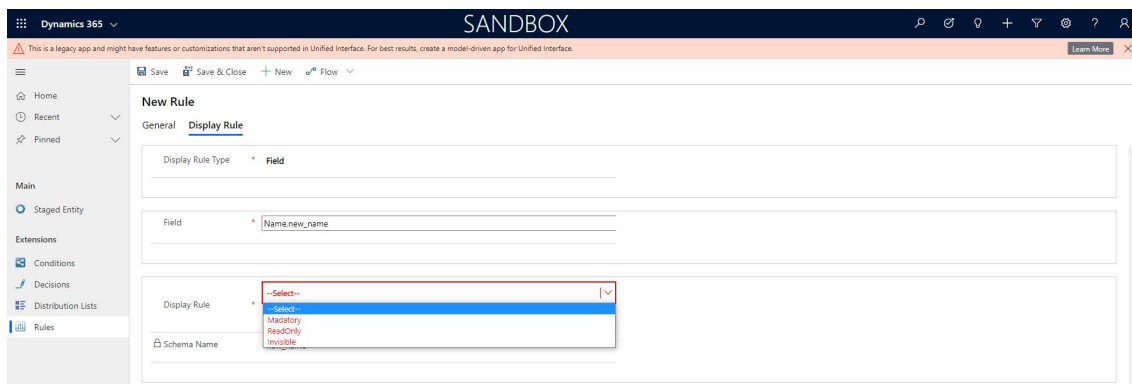


Figure 17- Display Rule

- c. Click Save&Close to complete

The screenshot shows the Dynamics 365 'New Rule' interface in 'Display Rule' mode. The interface is titled 'New Rule' and has a 'Save & Close' button in the top right corner. The 'Display Rule Type' is set to 'Field'. The 'Field' is set to 'Name.new_name'. The 'Display Rule' is set to 'ReadOnly'. The 'Schema Name' is set to 'new_name'. The interface also includes a 'Save' button and a 'New' button in the top left corner. The 'Save & Close' button is highlighted with a red border.

Figure 18- Save&Close to Field type Display Rule

8. Relationship

It defines relationship dependencies for the record in order to submit, reject or approve. If the record meets the rule, PowerStages allows to the form for sending next stage or back to previous stage or deactivating form.

- a. If you choose Relationship in Display Rule Type, regarding fields will be displayed.
Choose a value from Display Rule Relationship Type.

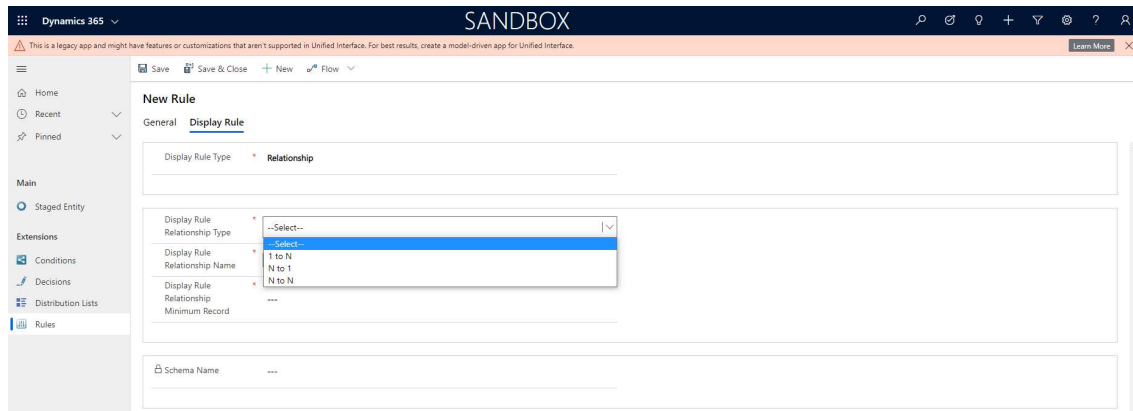


Figure 19- Relationship Type

- b. Choose Relation from the list in Display Rule Relationship Name. PowerStages lists all relations of the custom entity based on Relationship Type (1-N, N-1, N-N).

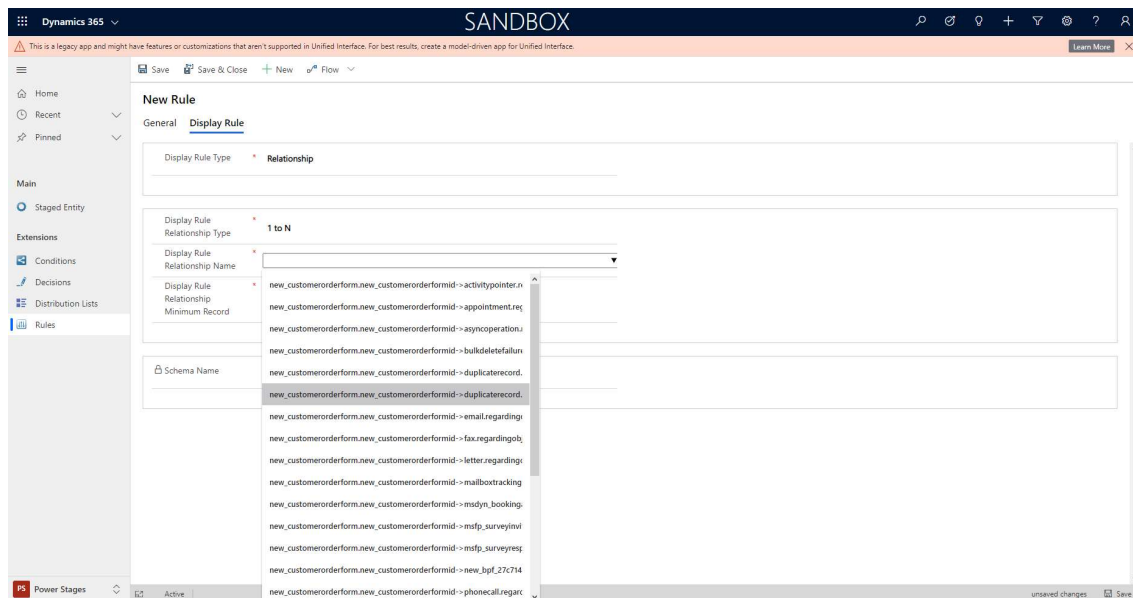


Figure 20- Relation selection

- c. Set a number to Display Rule Relationship minimum record. PowerStages does not allow to start any operations unless Related entity record's count of the form is exceeded to given number.

The screenshot shows the 'New Rule' configuration window in Dynamics 365 Sandbox. The 'Display Rule' tab is selected. The configuration includes:

- Display Rule Type:** Relationship
- Display Rule Relationship Type:** 1 to N
- Display Rule Relationship Name:** new_customerorderform.new_customerorderformid->msfp_surveyinvite.regardingobjectid.n
- Display Rule Relationship Minimum Record:** 2
- Schema Name:** new_customerorderform_msfp_surveyinvites

Figure 21- set minimum records that must be exists for the related entity

- d. Click Save&Close to complete

The screenshot shows the 'New Rule' configuration window in Dynamics 365 Sandbox. The 'Display Rule' tab is selected. The configuration includes:

- Display Rule Type:** Field
- Field:** Name.new_name
- Display Rule:** Read Only
- Schema Name:** new_name

Figure 22- Save&Close to Relationship type Display Rule

Button Rule

1. Go to Rules section from Condition as described above then click “+ New Rule” from the Grid.

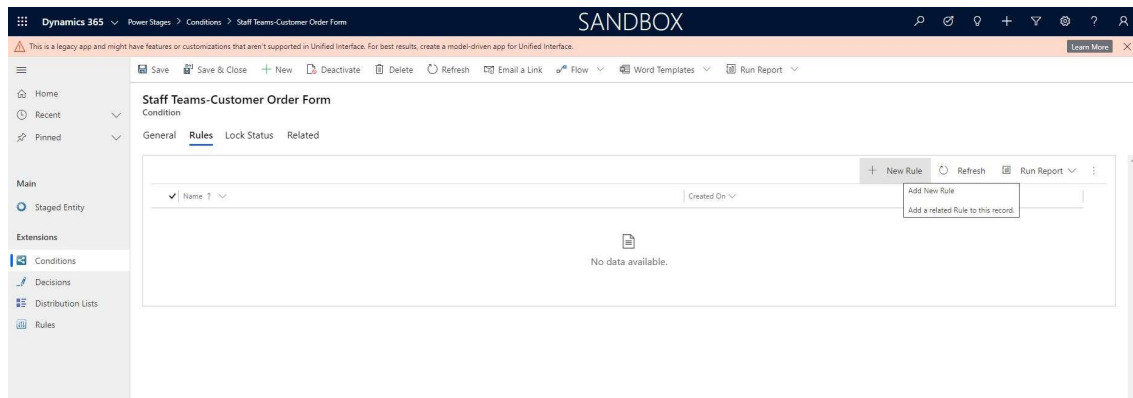


Figure 23- New Rule Creation

2. Rule form will open.
3. Select “Button Rule” from Type field.

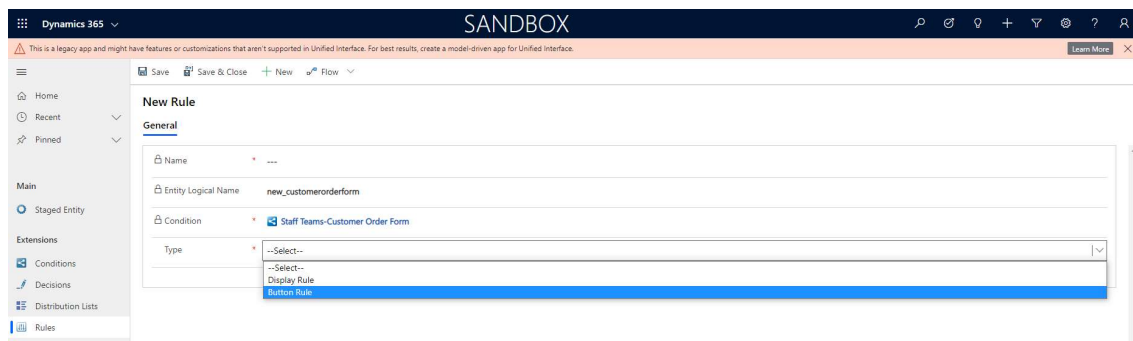


Figure 24- Button Rule Type Selection

4. PowerStages is going to ask a verification. Click Ok to continue, Otherwise, It is not allowed to create Button Rule.

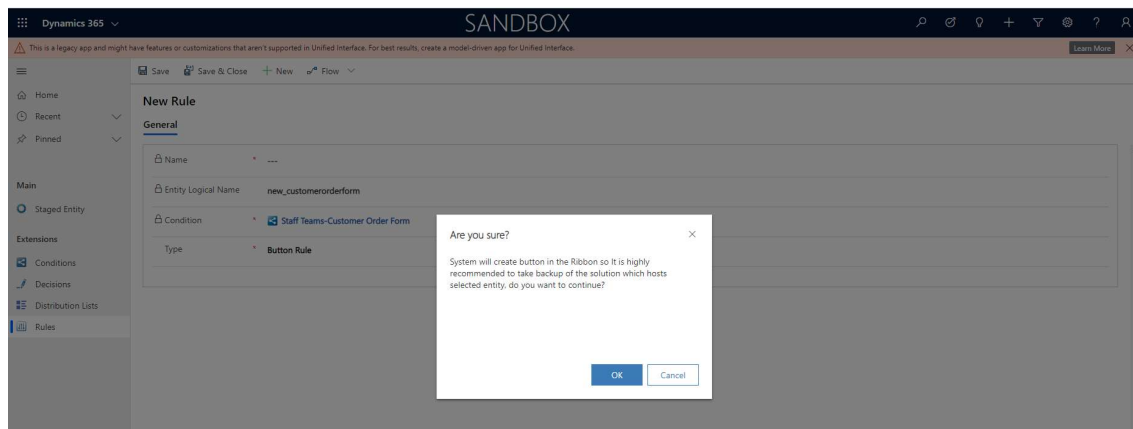


Figure 25- Button Rule Verification

- Record Status field and Button Rule Tab will be appeared.
- Click Record Status. PowerStages will display all valid values. Choose one item that will be used by Button Rule.

The screenshot shows the 'New Rule' configuration page in Dynamics 365. The 'General' tab is active. The 'Record Status' dropdown menu is open, displaying three options: 'Inactive:2', 'Manager Review:100000000', and 'Staff Preparation:1'. The 'Entity Logical Name' is set to 'new_customerorderform' and the 'Condition' is 'Staff Teams-Customer Order Form'.

Figure 26- Record Status Selection

- Go to Button Rule then select a value that will be set to the form for given Record Status (Stages) and selected User or Type (under Condition).

The screenshot shows the 'New Rule' configuration page in Dynamics 365, now in the 'Button Rule' tab. The 'Button Type' dropdown menu is open, displaying four options: '--Select--', '--Select--', 'Approve', and 'Reject'. The 'Record Status' is set to 'Inactive:2'.

Figure 27- Button Type Selection

- Click Save&Close

The screenshot shows the 'New Rule' configuration page in Dynamics 365, now in the 'Button Rule' tab. The 'Button Type' dropdown menu is set to 'Submit'. The 'Record Status' is set to 'Inactive:2'.

Figure 28- Save&Close



PowerStages is going to modify Ribbon in Dynamics CRM so There may have performance degradation during the operation.

It is recommended to create a button out of peak time or business hours.

9. Check Lock Status in the Condition to see if the button creation has been completed or not.

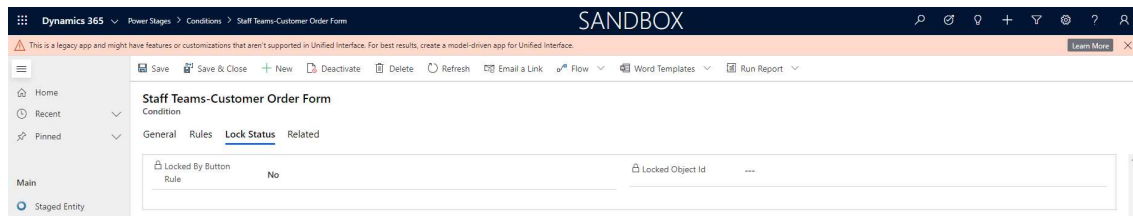


Figure 29- Lock Status

Stage Flow Rule

It creates stages for the form to flow.

1. Click Power Stages from Area section in the menu left.
2. Open the record where Stage Flow Rule will be created.
3. Go to Stage Flow Rule tab

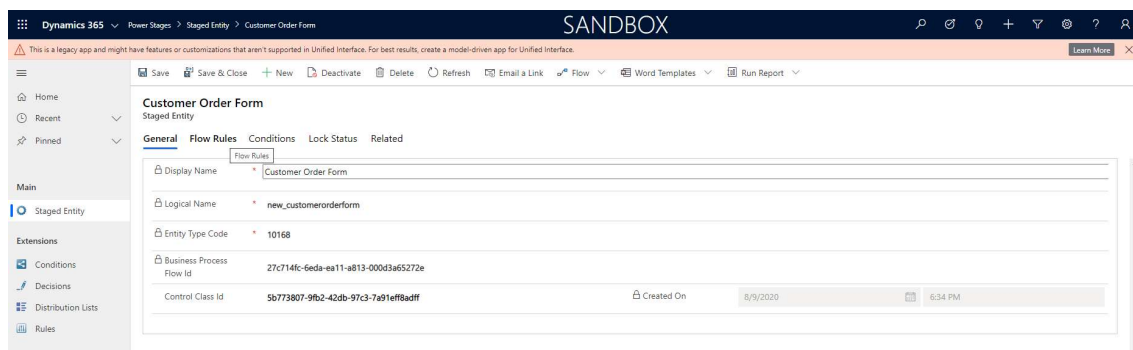


Figure 30- Flow Rules Tab

4. Click "+ New Rule"

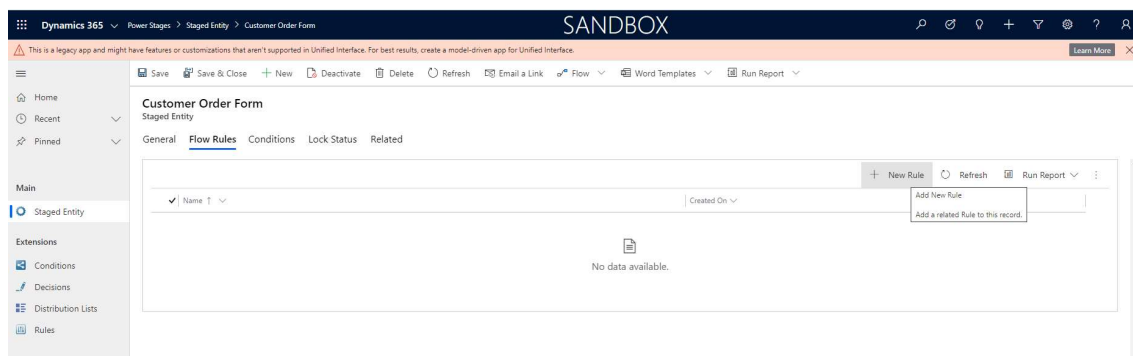


Figure 31- Click "+ New" for Stage Flow Creation

5. PowerStages will open the form itself then go to “Stage Flow Rule” tab

The screenshot shows the Dynamics 365 'New Rule' form in the 'Stage Flow Rule' tab. The form has a left sidebar with navigation options: Home, Recent, Pinned, Main, Staged Entity, Extensions (Conditions, Decisions, Distribution Lists), and Rules. The main content area is titled 'New Rule' and has tabs for 'General' and 'Stage Flow Rule'. The 'Stage Flow Rule' tab is active, showing a form with the following fields: Name (empty), Entity (Customer Order Form), Entity Logical Name (new_customerorderform), and Type (Stage Flow Rule). A warning banner at the top states: 'This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.'

Figure 32- Stage Flow Rule Main Form Page

6. Choose “From” and “To”. PowerStages prepares valid Record Status for the custom entity and displays them in the lists.

The screenshot shows the Dynamics 365 'New Rule' form in the 'Stage Flow Rule' tab. The 'From' field is selected, and a dropdown menu is open showing the following options: Inactive.2, Manager Review,100000000, and Staff Preparation,1. The 'To' field is empty. The 'Record Status Stage Flow From Item Id' field is empty. The 'Record Status Stage Flow To Item Id' field is empty. The 'Distribution List' field is empty. A warning banner at the top states: 'This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.'

Figure 33- From Selection

The screenshot shows the Dynamics 365 'New Rule' form in the 'Stage Flow Rule' tab. The 'To' field is selected, and a dropdown menu is open showing the following options: Inactive.2, Manager Review,100000000, and Staff Preparation,1. The 'From' field is empty. The 'Record Status Stage Flow From Item Id' field is empty. The 'Record Status Stage Flow To Item Id' field is empty. The 'Distribution List' field is empty. A warning banner at the top states: 'This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.'

Figure 34- To Selection

7. Save the form to continue with Distribution List definition.

The screenshot shows the 'Stage Flow Rule' configuration in Dynamics 365. The 'General' tab is selected. The 'Order' is 1. The 'From' field is set to 'Staff Preparation.1'. The 'To' field is empty. The 'Record Status Stage Flow From Item Id' is 1. The 'Record Status Stage Flow To Item Id' is ---. A 'Distribution List' field is at the bottom.

Figure 35- Save the Stage Flow Rule



There must have at least one submit type button rule under condition for the Staged Entity in order to send form from "From" to "To".

8. Click "+ New Distribution List" to create a record for the Flow Stage Rule.

The screenshot shows the 'Stage Flow Rule-1- From Staff Preparation To Manager Review' configuration in Dynamics 365. The 'Stage Flow Rule' tab is selected. The 'Order' is 1. The 'From' field is set to 'Staff Preparation.1'. The 'To' field is set to 'Manager Review.100000000'. The 'Record Status Stage Flow From Item Id' is 1. The 'Record Status Stage Flow To Item Id' is 100000000. The 'Distribution List' section shows a table with columns 'Name', 'Default Email Address', and 'Default Queue'. A '+ New Distribution List' button is visible.

Figure 36- Distribution List Creation

Distribution List

It is notification and keeps parties who are going to get E-Mail or Item in their Queue when an operation executes.

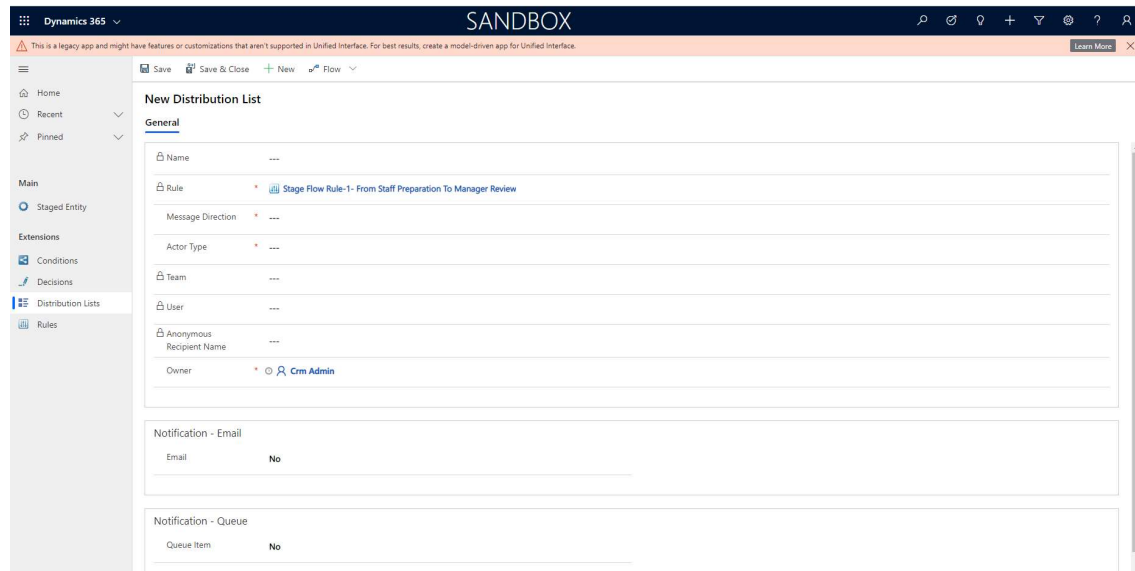


Figure 37- Distribution List Main Form

Distribution List can be accessed only through Stage Flow Rule under Entity Staged as describe above.

1. Choose direction when notification is triggered.
 - a. Next Stage via Submit Button
 - b. Previous Stage via Reject Button
 - c. Closure via Approve Button

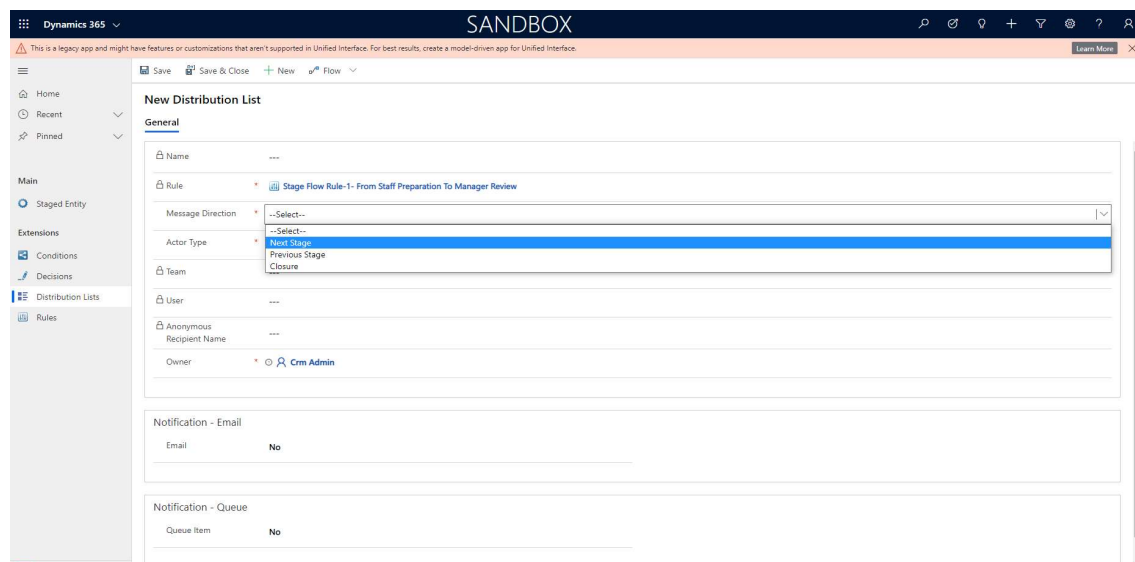


Figure 38- Message Direction

2. Choose Actor Type
 - a. Team
 - b. User
 - c. Anonymous (only email can be defined)

Figure 39- Actor Type

3. Team, User or Anonymous Recipient Name will be enabled according to the selection in Actor Type so choose an item for Team and User but text name for the Anonymous Recipient Name.

Figure 40- Team Type Recipient Definition

4. You can set up either Email or Queue or Both to configure notification for the actor type.
 - a. If you want to set up Email, Choose Yes to Email under Notification – Email section

Figure 41- Email Notification

- i. Choose an email address for default delivery. If you do not fill the field, PowerStages will use Email address of user (each member if Actor Type is Team) in the organization.
- ii. You can set Email subject or leave empty for default
- iii. You can also set a message for the Email to be sent. Default message will be sent in Email body to recipient if you leave it empty.




User or Users under the team must be configured properly to send or receive emails in the Dynamics 365 Tenant.

- b. If you want to set up Email, Choose Yes to Email under Notification – Queue section

The screenshot shows the 'New Distribution List' form in the 'Notification - Queue' section. The 'Queue Item' is set to 'Yes'. The 'Default Queue' dropdown is currently empty. Below, the 'Main Menu > Settings > Customizations' section shows 'Queue' selected under 'Queue Item'.

Figure 42- Queue Notification

- i. Choose a queue for the Actor Type. Form will be sent to the selection, once Submit or Reject buttons are clicked accordingly. If you do not fill the field, PowerStages will use default queue of the Actor Type.

 PowerStages displays available queue based on the selection in Team or User field.

The screenshot shows the 'New Distribution List' form in the 'Notification - Queue' section. The 'Queue Item' is set to 'Yes'. The 'Default Queue' dropdown now shows a list of available queues, with 'Staff Teams - a9821072-1bd1-ea11-a812-000d3a6527e5' selected.

Figure 43- PowerStages lists all available queue to be used in the Distribution List

Decisions

It keeps logs of the Submit, Reject and Approve operations. You can reach the entity from PowerStages Area in the menu right

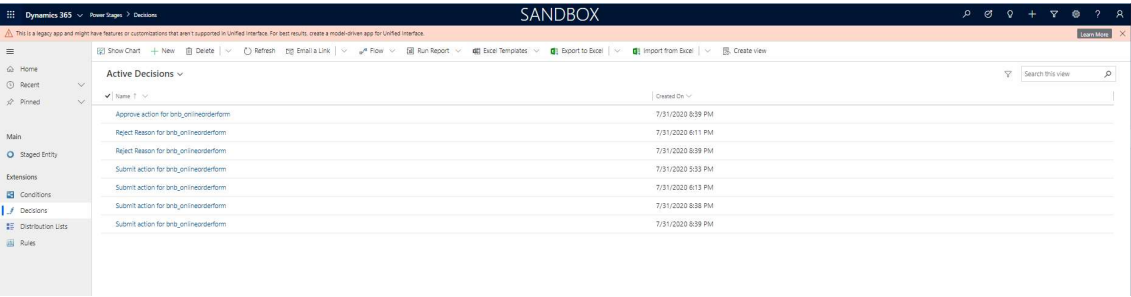


Figure 44- List view of Decisions

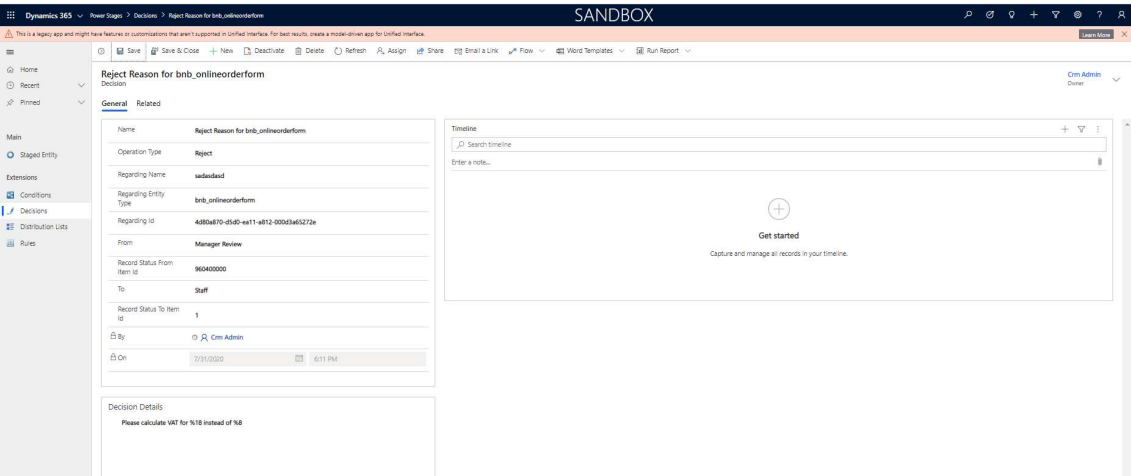



Figure 45- Decision Record Main Form View

 Administrator should consider a solution to display records under decisions to the user if needs or make a report for managers or even leave as is for only monitoring.

Custom Entity Configuration

The entity which is going to be used by PowerStages, must be configured below.

Make sure that default value of the Status Reason (StatusCode) for the custom entity, is exactly same with the “From” field in the very first Stage Flow Rule (Order is 1), See Figure 46.

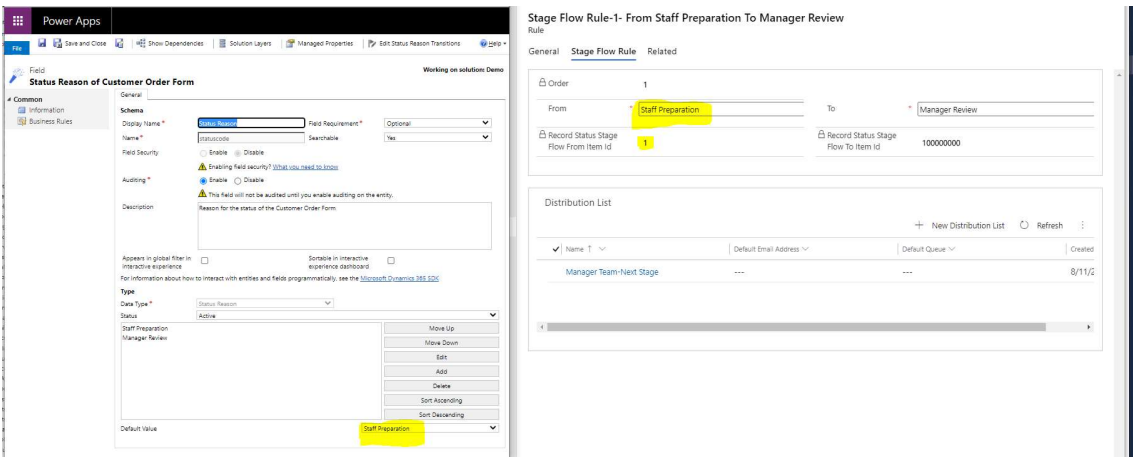


Figure 46- Default Value Status Reason Dependency with the first Stage Rule

Custom entity which is used in the screenshots below, is built for an example.

1. Open custom entity form design which is defined in Staged Entity then choose “Form Properties” from the menu.

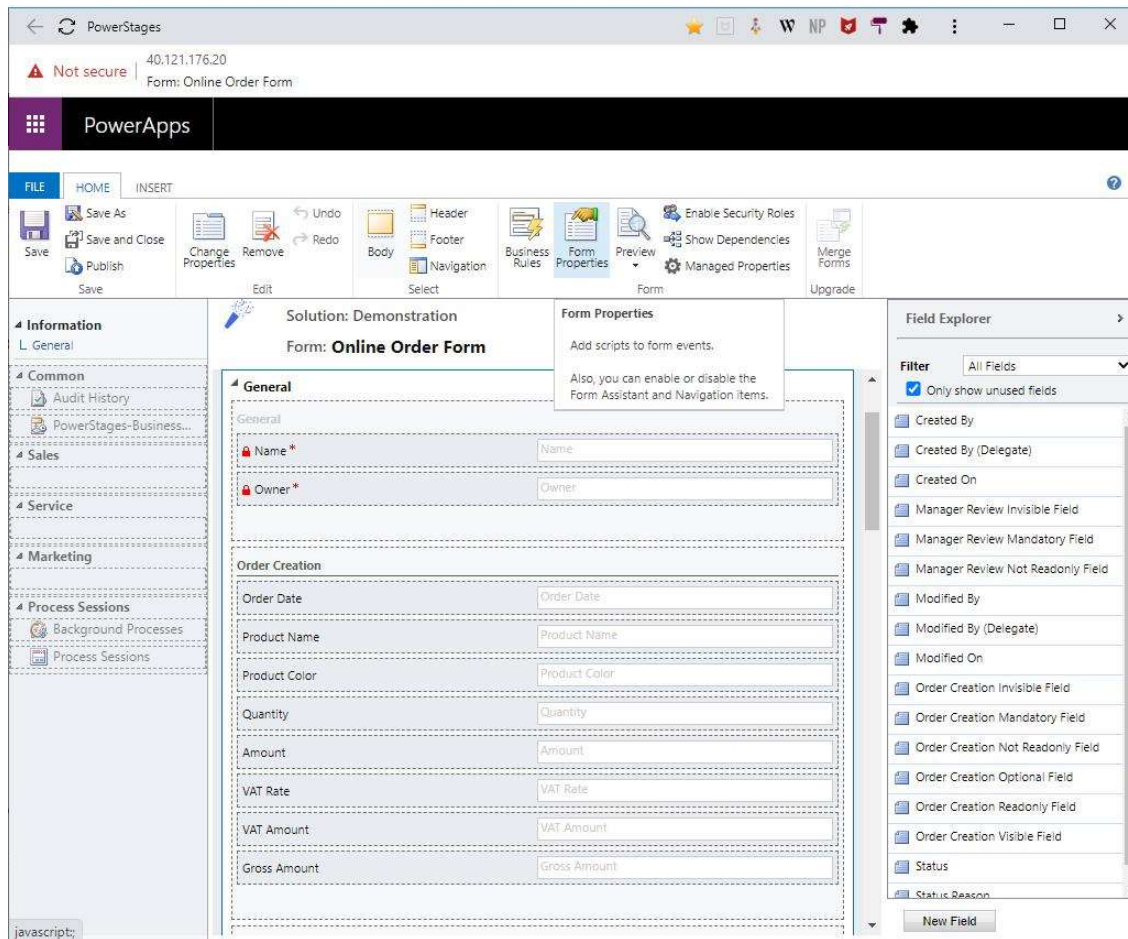


Figure 47- Custom Entity Main Form Design

2. Click “+ Add” from “Form Properties” pop-up window.

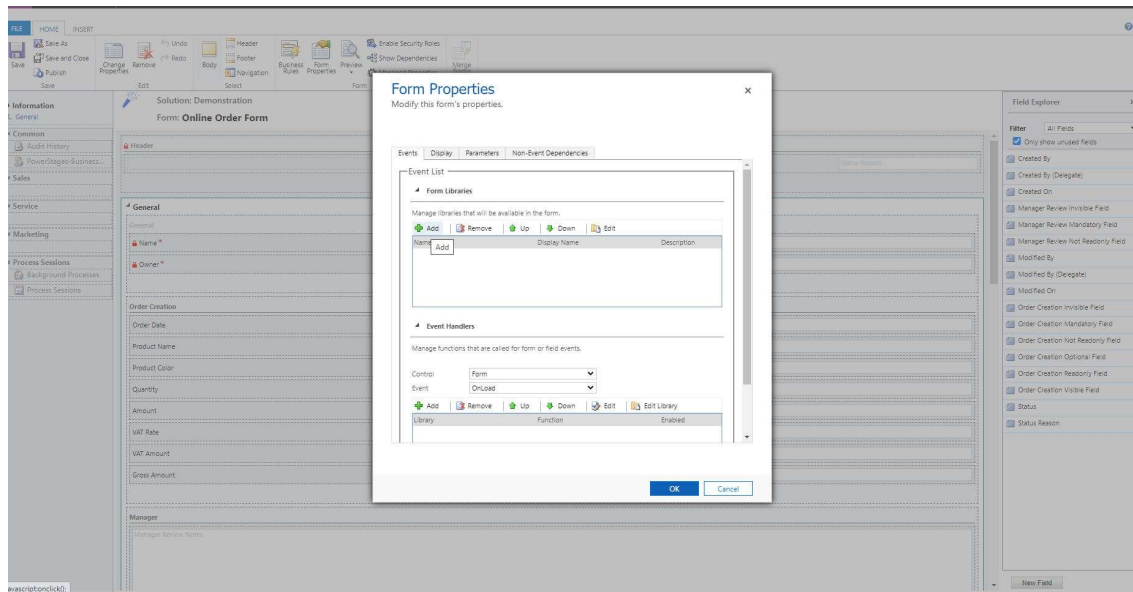


Figure 48- Form Properties

3. Look for Process JavaScript file (“bnb_/stages/js/process”) from the list.

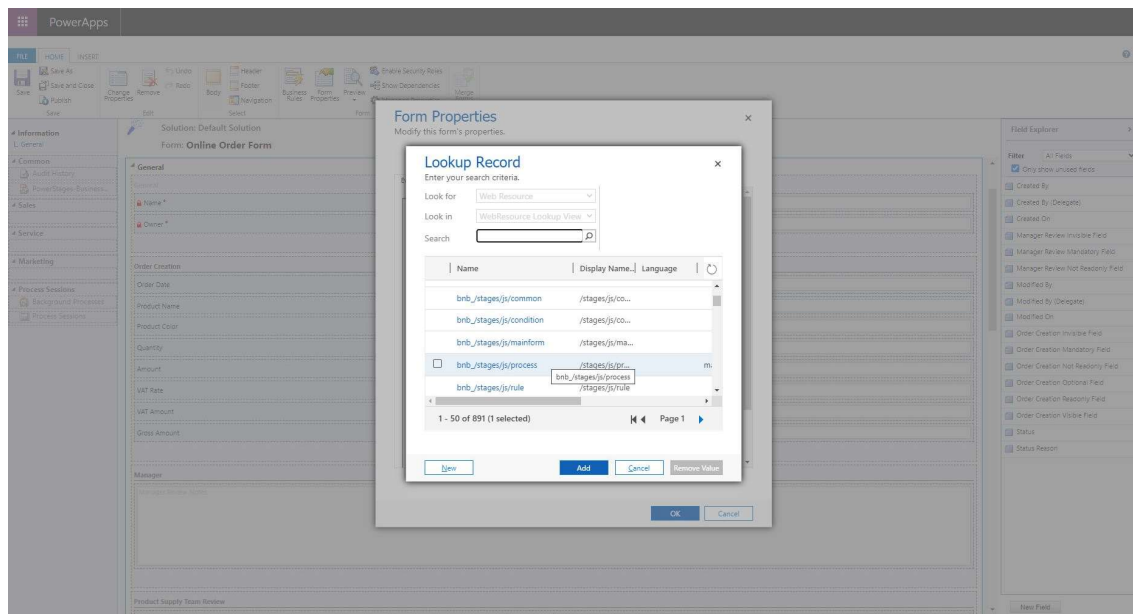


Figure 49- Lookup Record for Process.js

4. Select the “bnb_stages/js/process” then click add.

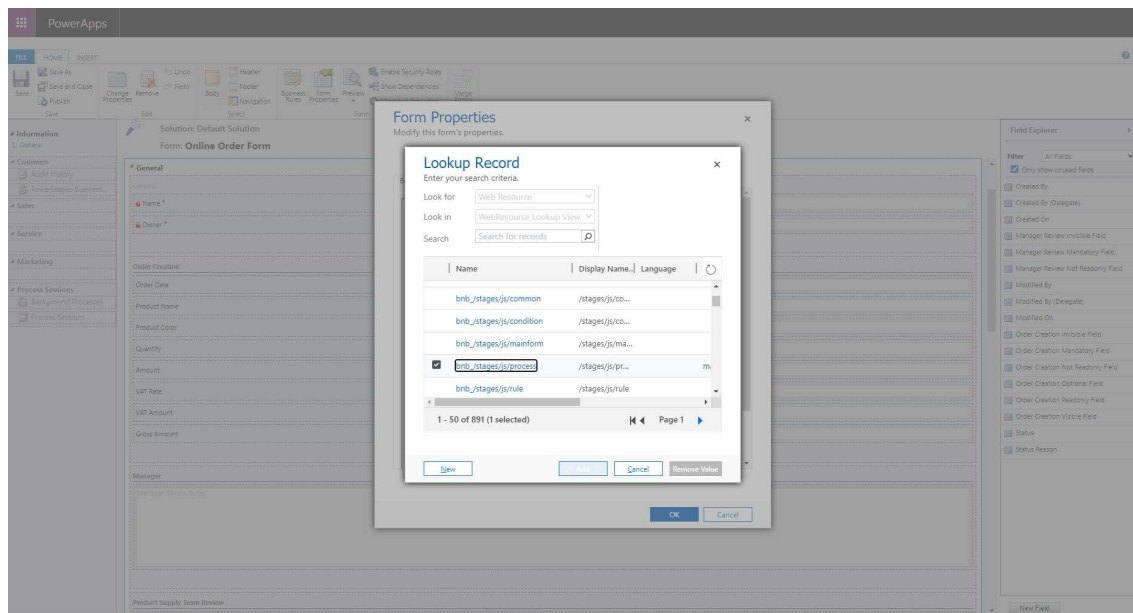


Figure 50- Choosing process.js

5. Click “+ Add” again to add common JavaScript file (It must be ordered in second).

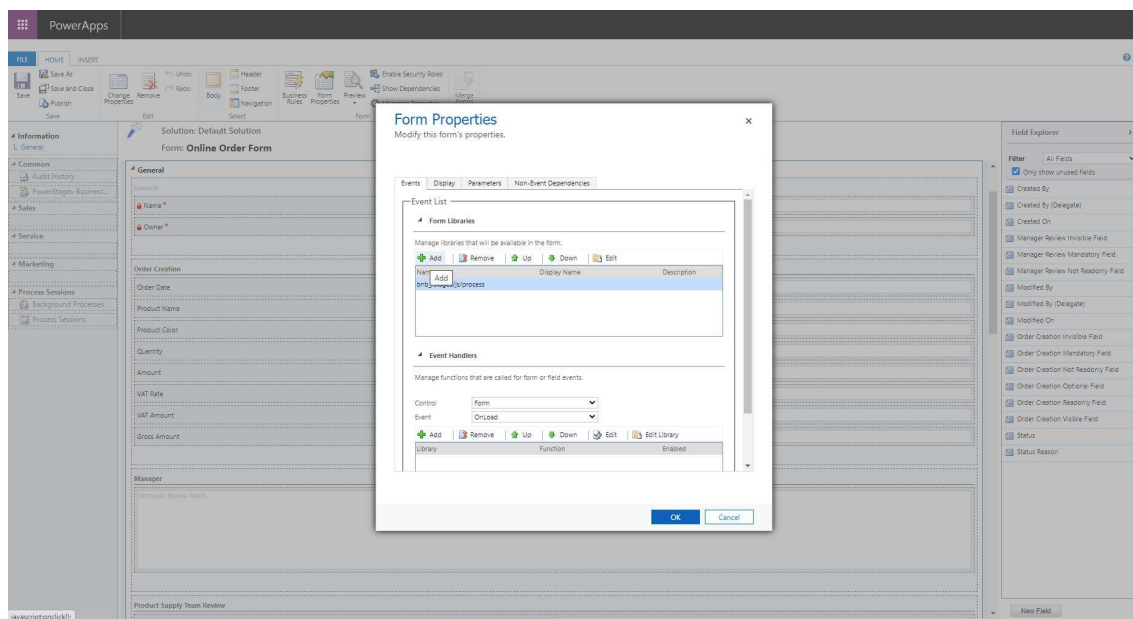
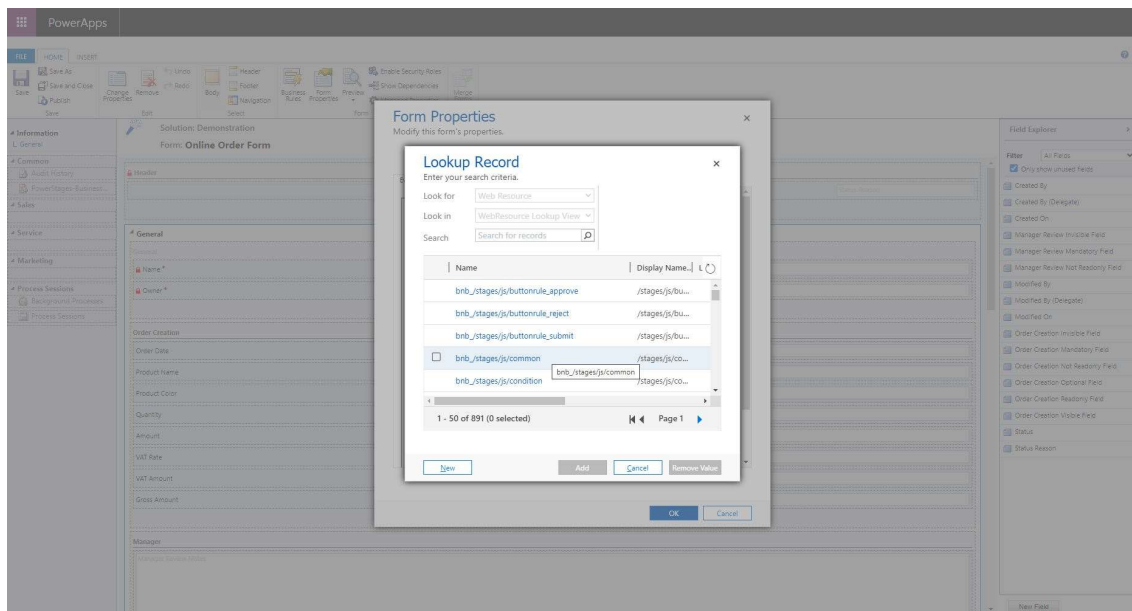
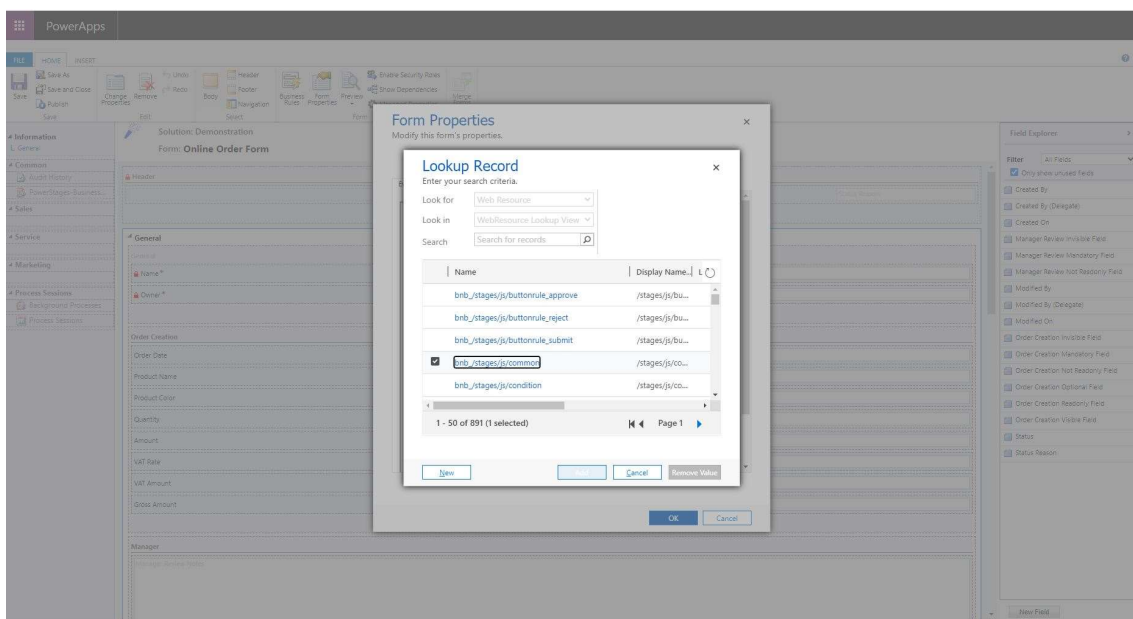


Figure 51- Add Client-script library second time for common.js file

- Find common JavaScript file (“bnb_/stages/js/common”) from the look up



- Select “bnb_/stages/js/common” then click Add



- Click “+ Add” from “Events Handler” section

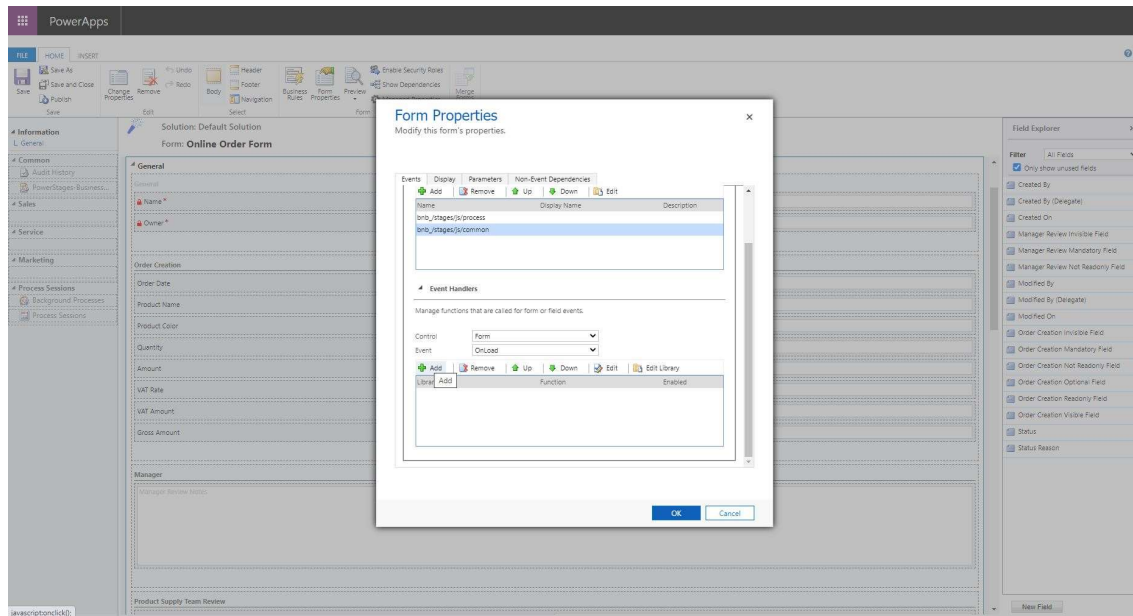


Figure 54- Adding on-load method for PowerStages to the Custom Entity

- Choose “bnb_stages/js/common” from “Library” field

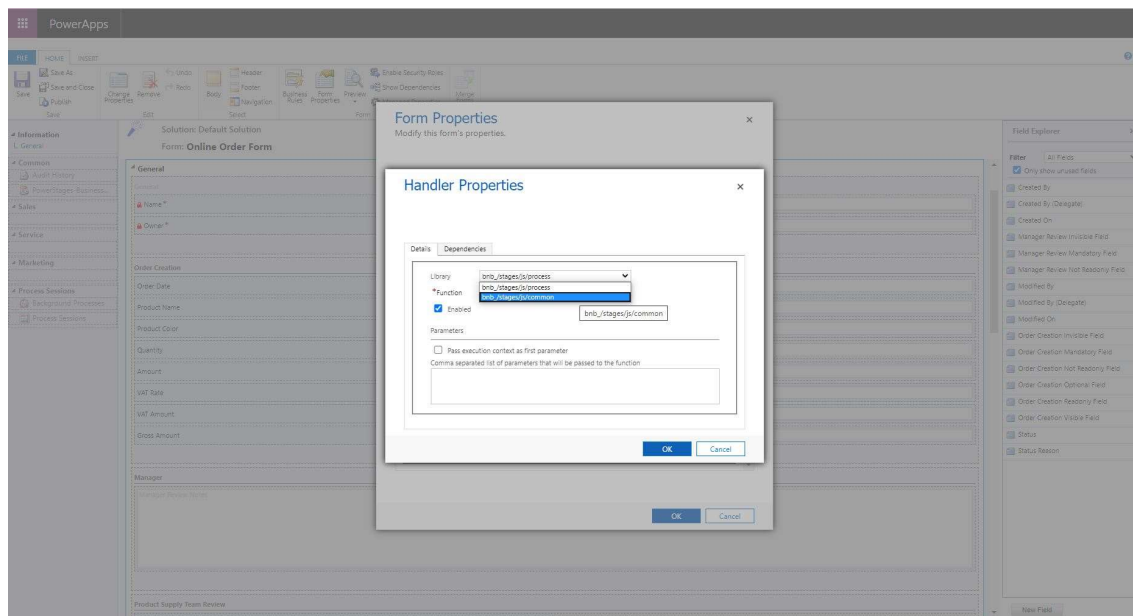


Figure 55- Add library to Event Handler

10. Type **bnb_common_onFormLoad** to the Function and check Pass execution context as first parameter then Click Ok

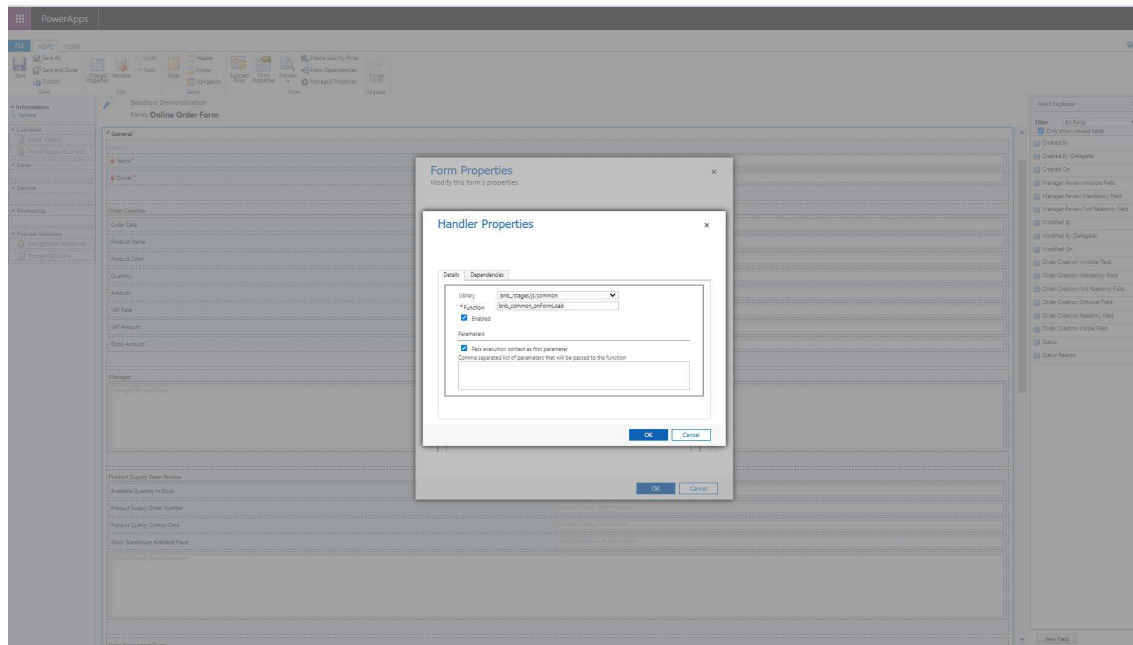


Figure 56- Setting Function Name to be called by the Custom Entity Form

11. Click Ok to close the popup window.

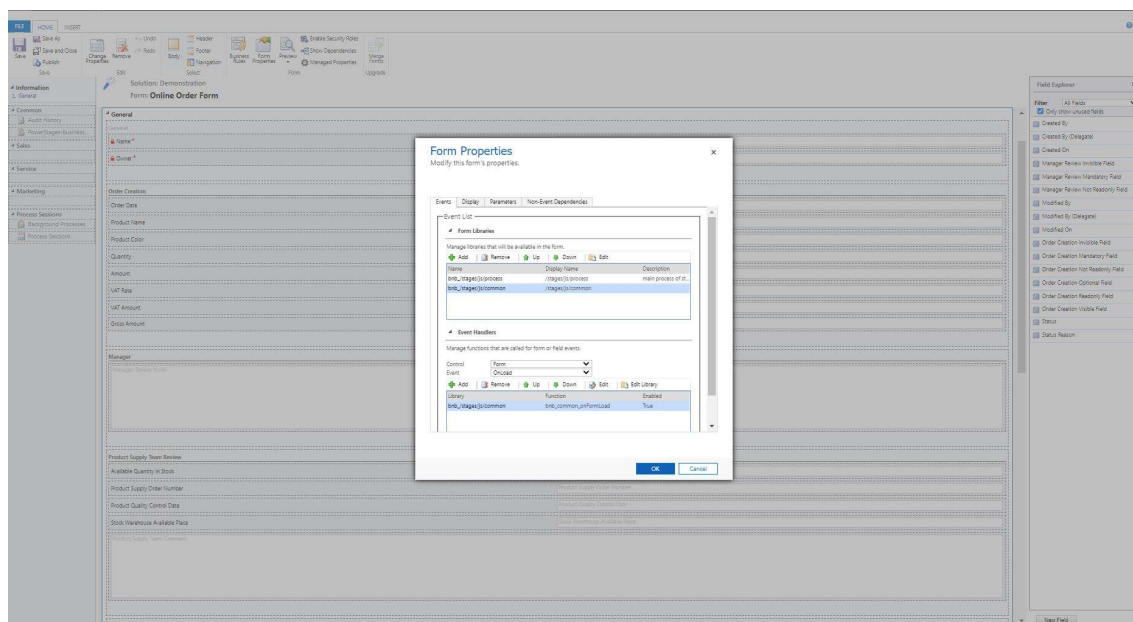


Figure 57- Form Properties

12. Click Save to store the change to the Custom Entity form.

Figure 58- Custom Entity Main Form

13. Click Publish

Figure 59- Publishing the Form Design

14. Click Save&Close to close the form design.

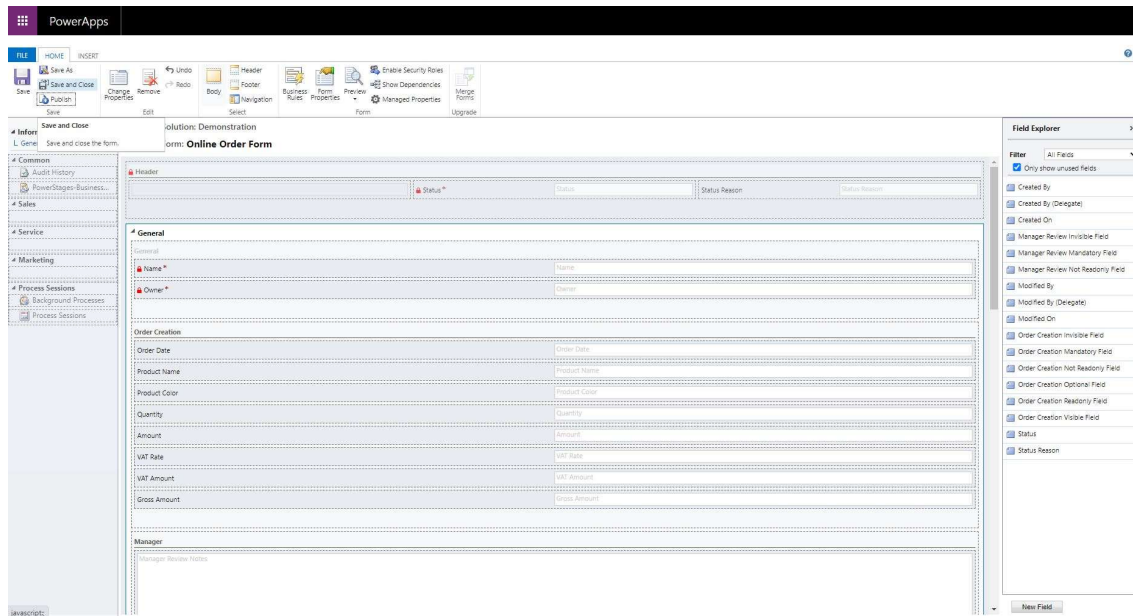


Figure 60- Save&Close the form design.

Troubleshooting

PowerStages use Plug-In Trace Tool for logging of all backend operations. You can open the out of box Dynamics CRM Plug-In trace section follow instruction below;

1. Activate Plug-In Trace Tool for the organization, if it is off (Default value is off)

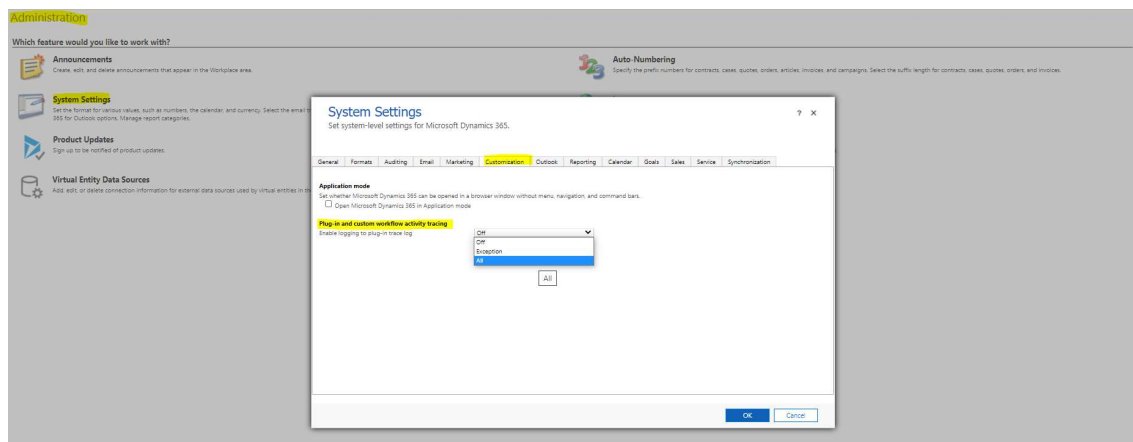


Figure 61- Log Activation

2. Go to Advanced Settings

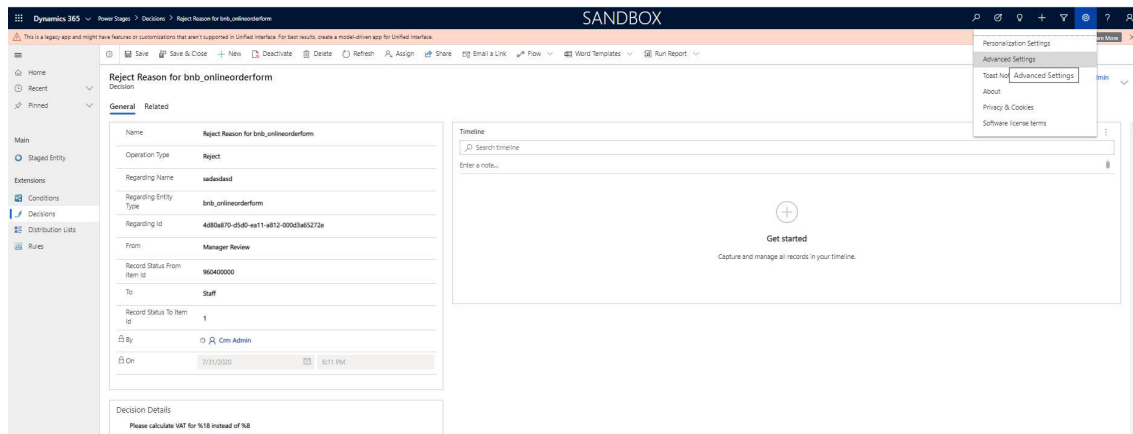


Figure 62- Advance Settings

3. New tab will be opened then click Plug-In Trace Tool

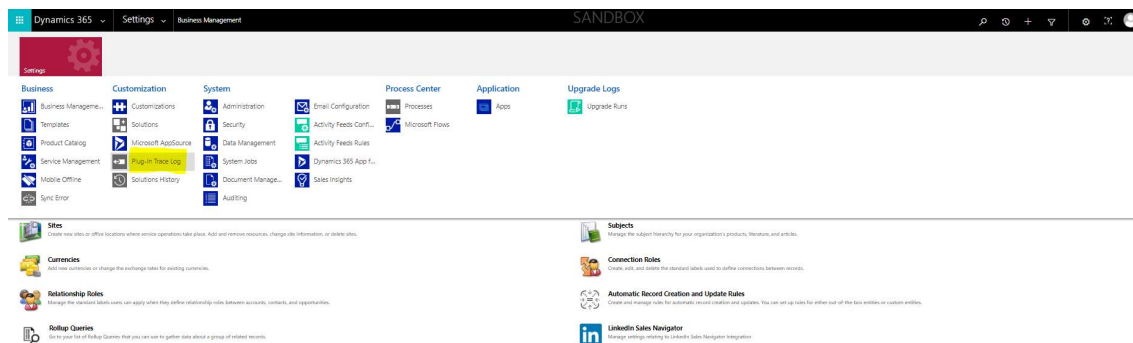


Figure 63- Plug-In Trace Tool Menu Item

4. List view will be displayed

Dynamics 365
Settings
Plug-In Trace Log
SANDBOX

Apps for Dynamics 365
View Dynamics 365 information on the go with apps for your phone, tablet, Outlook, and more!
Get Apps for Dynamics 365

All Plug-in Trace Logs

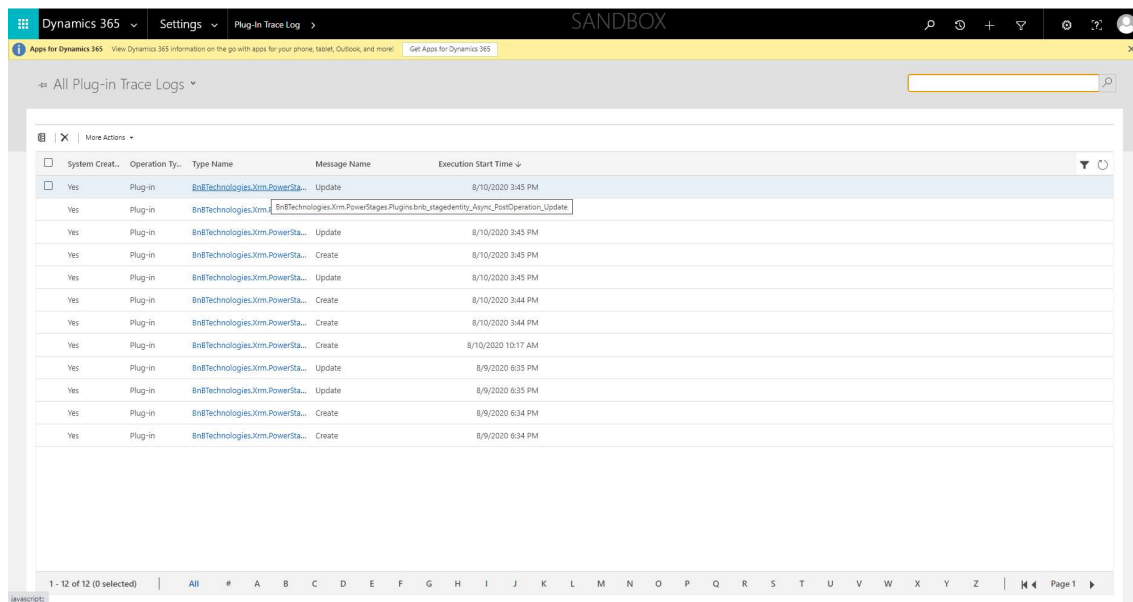
X
More Actions

<input type="checkbox"/>	System Creat...	Operation Ty...	Type Name	Message Name	Execution Start Time
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 3:45 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 3:44 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 3:44 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 10:17 AM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/9/2020 6:35 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/9/2020 6:35 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/9/2020 6:34 PM
<input type="checkbox"/>	Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/9/2020 6:34 PM

1 - 12 of 12 (0 selected)
All
#
A
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Z
Page 1

Figure 64- Plug-In Trace Tool List View

- Choose one of the to see the details For Example double click to the first one to see details of log for the last operation since it is ordered by “Execution Start Date”.

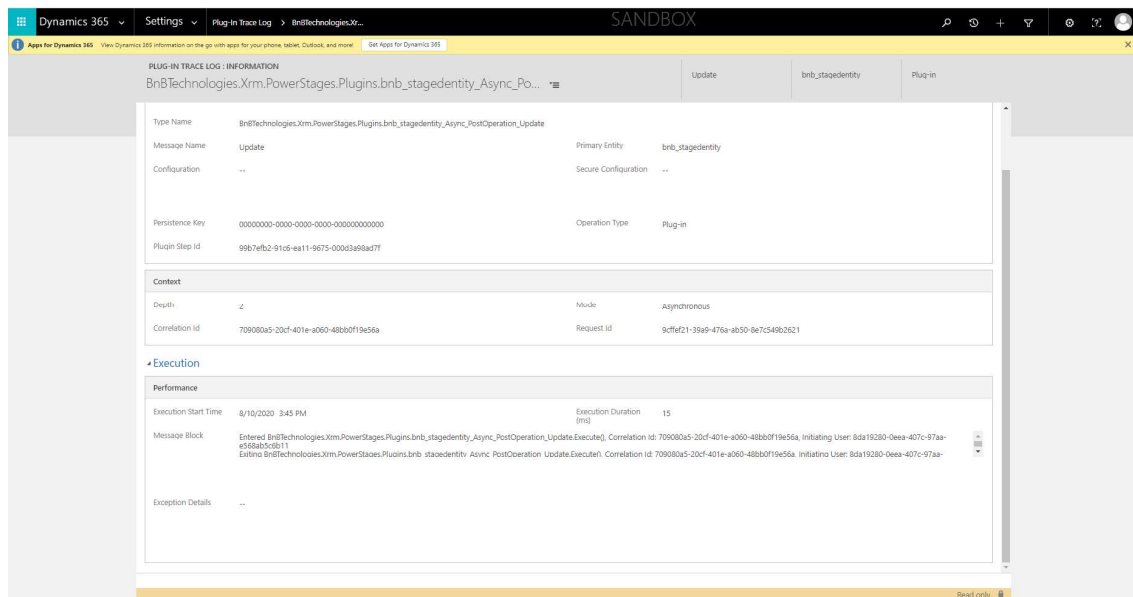


The screenshot shows the Dynamics 365 interface with the 'Plug-in Trace Log' tab selected. A table lists various plug-in operations. The first row is highlighted in blue.

System Creat...	Operation Ty...	Type Name	Message Name	Execution Start Time
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
Yes	Plug-in	BnBTechnologies.Xrm...	BnBTechnologies.Xrm.PowerStages.Plugins.bnb_stagedentity_Async_PostOperation_Update	
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 3:45 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/10/2020 3:45 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 3:44 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 3:44 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/10/2020 10:17 AM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/9/2020 6:35 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Update	8/9/2020 6:35 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/9/2020 6:34 PM
Yes	Plug-in	BnBTechnologies.Xrm.PowerSta...	Create	8/9/2020 6:34 PM

Figure 65- First Item Highlighted

- New form will be appeared.



The screenshot shows the Dynamics 365 interface with the 'Plug-in Trace Log' tab selected. The details for a specific operation are displayed.

PLUG-IN TRACE LOG : INFORMATION

BnBTechnologies.Xrm.PowerStages.Plugins.bnb_stagedentity_Async_Po...

Update | bnb_stagedentity | Plug-in

Type Name	BnBTechnologies.Xrm.PowerStages.Plugins.bnb_stagedentity_Async_PostOperation_Update		
Message Name	Update	Primary Entity	bnb_stagedentity
Configuration	...	Secure Configuration	...
Persistence Key	00000000-0000-0000-0000-000000000000		
Plug-in Step Id	99b7efb2-91c6-ea11-9b75-000d3a99ad7f		
Context			
Depth	12	Mode	asynchronous
Correlation Id	709080a5-20cf-401e-a060-48bb0f19e56a	Request Id	9c0ff21-39a9-476a-ab50-b67c549b2621
Execution			
Performance			
Execution Start Time	8/10/2020 3:45 PM		Execution Duration (ms)
Message Block	[Entered BnBTechnologies.Xrm.PowerStages.Plugins.bnb_stagedentity_Async_PostOperation_Update.Executed] Correlation Id: 709080a5-20cf-401e-a060-48bb0f19e56a. Initiating User: Bda19280-0eea-407c-97aa-4548a0200b11 [Exiting BnBTechnologies.Xrm.PowerStages.Plugins.bnb_stagedentity_Async_PostOperation_Update.Executed] Correlation Id: 709080a5-20cf-401e-a060-48bb0f19e56a. Initiating User: Bda19280-0eea-407c-97aa-4548a0200b11		
Exception Details	...		

Figure 66- A Sample for a Succeeded Operation

PLUG-IN TRACE LOG : INFORMATION		bnb_powerstagesformpr		none		Workflow Activity	
BnBTechnologies.Xrm.PowerStages.Workflows.FormProcess							
Configuration							
General							
System Created *	Yes						
Type Name	BnBTechnologies.Xrm.PowerStages.Workflows.FormProcess						
Message Name	bnb_powerstagesformprocessingsubmit			Primary Entity	none		
Configuration	..			Secure Configuration	..		
Persistence Key	00000000-0000-0000-0000-000000000000			Operation Type	Workflow Activity		
Plugin Step Id	9401ce04-76bc-ea11-9674-000d3a98ad7f						
Context							
Depth	1			Mode	Synchronous		
Correlation Id	7aa12c01-ee1c-4e83-a10d-c12376816372			Request Id	4db775f3-b6de-477d-9a5c-a8dca1fac7cb		
Execution							
Performance							
Execution Start Time	6/9/2020 11:02 AM			Execution Duration (ms)	133,016		
Message Block	<p>Entered FormProcess.Execute(), Activity Instance Id: 1, Workflow Instance Id: a0c8c109-ec55-4f8e-ae4c-21b8fd2136d FormProcess.Execute(), Correlation Id: 7aa12c01-ee1c-4e83-a10d-c12376816372, Initiating User: 1a86bb8f-5293-ea11-9665-000d3a98ad7f</p>						
Exception Details	<p>Unhandled Exception: System.ServiceModel.FaultException`1[[Microsoft.Xrm.Sdk.OrganizationServiceFault, Microsoft.Xrm.Sdk, Version=9.0.0.0, Culture=neutral, PublicKeyToken=31bf3856ad364e35]]: Unexpected exception from plug-in (Execute): BnBTechnologies.Xrm.PowerStages.Workflows.FormProcess: System.TimeoutException: Couldn't complete execution of the custom activity BnBTechnologies.Xrm.PowerStages.Workflows.FormProcess plug-in within the 5-minute time limit. Details:</p>						
Read only							

Figure 67- A Sample for a Operation Failure