User Guide_Pragmasys User Default

Version 1.0.0.0

Table of Contents

MS CRM Add-On –User Default

This is a guide that depicts the enabling of the buttons i.e. 'save default' and 'load default' for an entity basis user specific. Each entity having a single record.

The objective of the 'save default' button is, whenever a user saves an entity data, a record gets created in the entity named 'Defaults' which has the data of this saved record.

Objective of 'load default' button is the default data will be loaded which is saved while creating the record.

Purpose of the guide:

In industries, there are different departments i.e. Sales and Service where there is repetition of the data. To avoid the repetition, user can simply enable the buttons once, this can provide us the below:

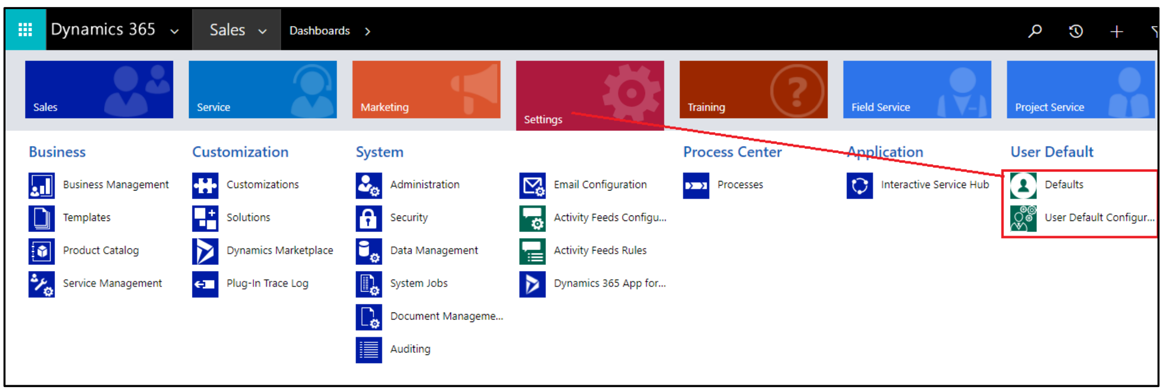
a.) It can reduce the repetition time and save the user's time
b.) It can help cloning data basis user specific details
c.) It can increase the accuracy of the data

Steps:

1. Login into MS CRM.

2. To view navigation of User Default & User Default Configuration entity, click on the menu bar followed by Settings sitemap. Now click on the User Default present below the Extensions option.

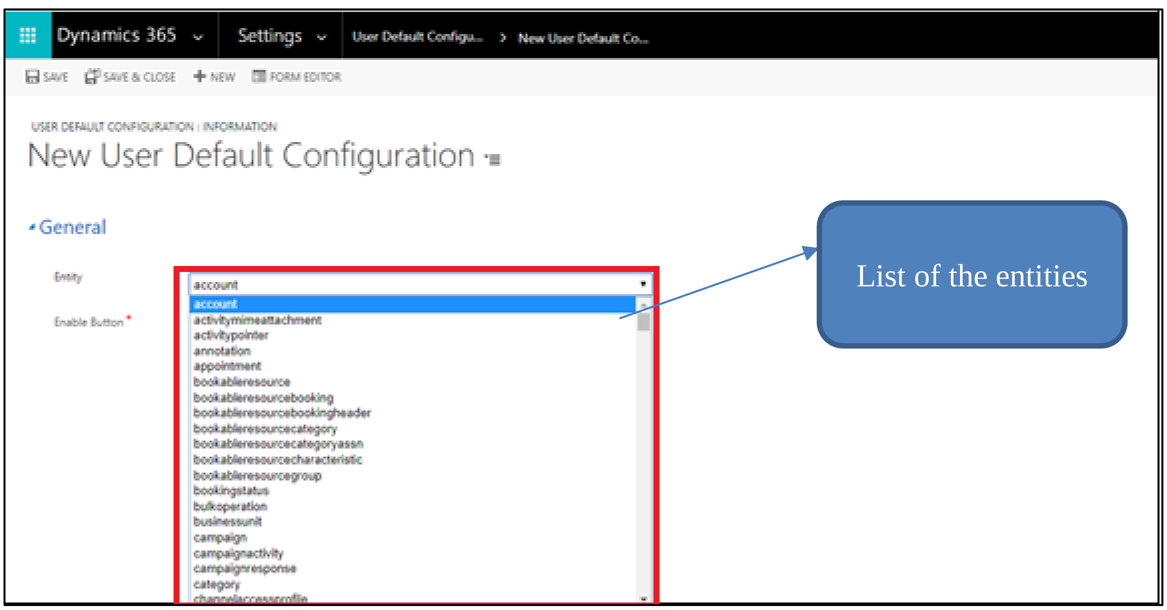
User Default



User Default → User Default Configuration

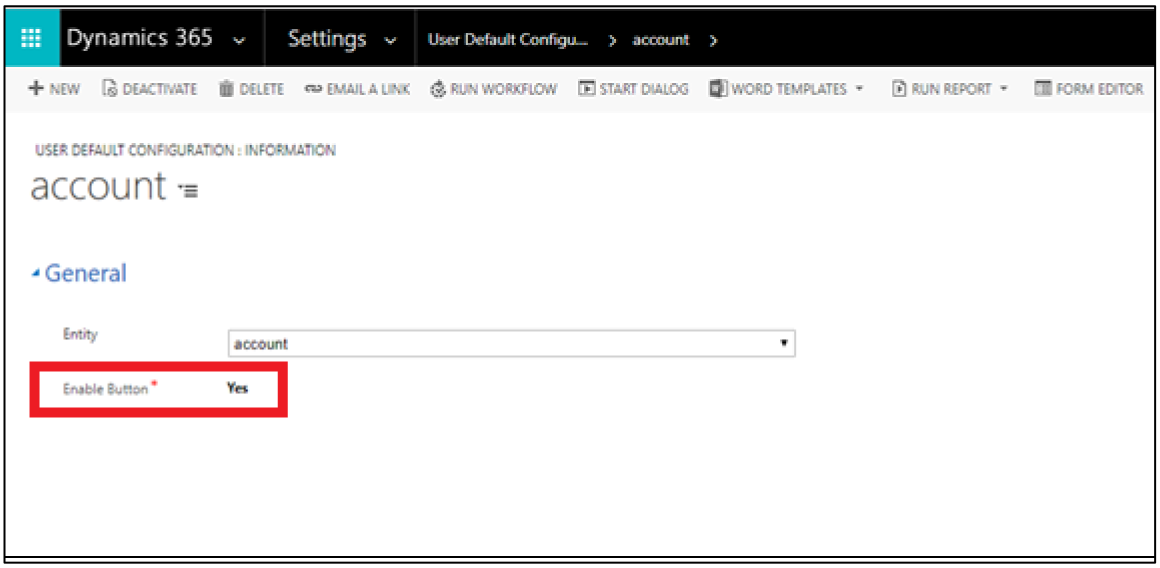
Steps to follow:

1. Click on User Default Configurations.
2. Click on New (+) and then enter the details as per your requirement in the below mentioned form.
3. Entity field will display the drop-down list for the available entities in MS CRM.
4. Select the Entity as per your requirement and select YES or NO to enable buttons for selected entity.

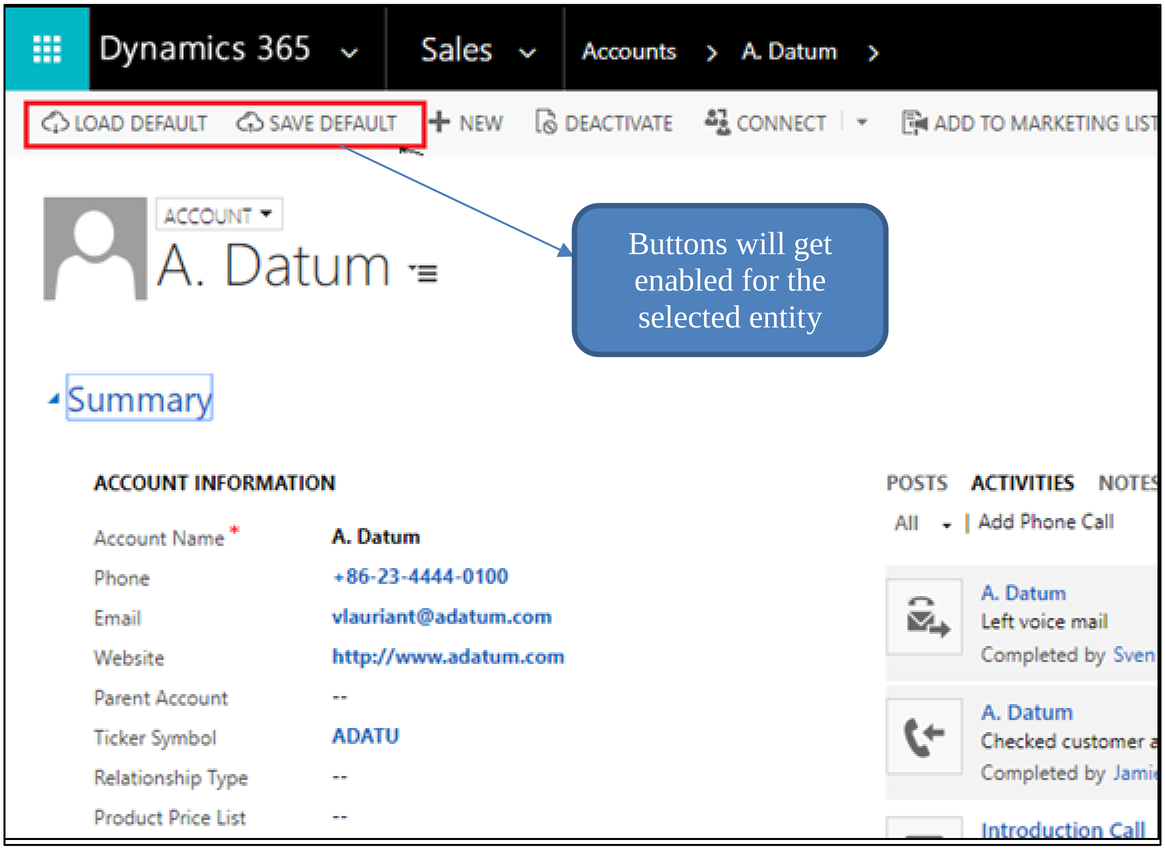


Activating Load Default and Save Default button

1. After selecting the desired entity name, select yes to enable the button



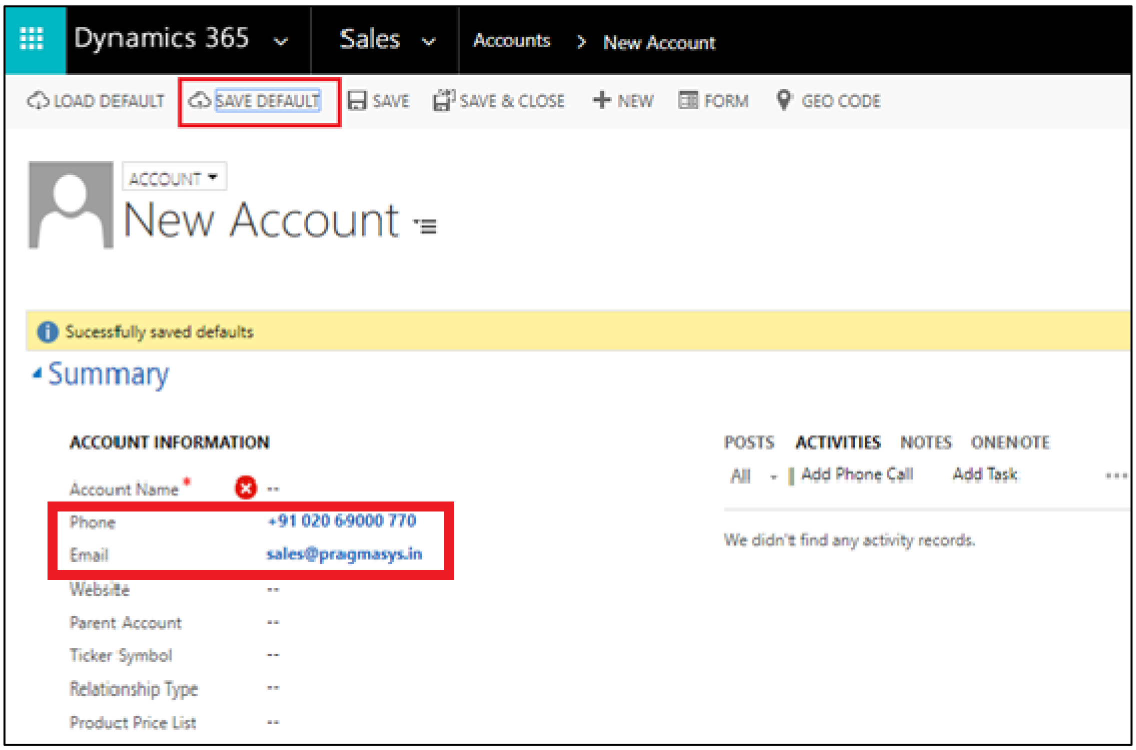
Result: Verify whether the buttons are enabled for the account record



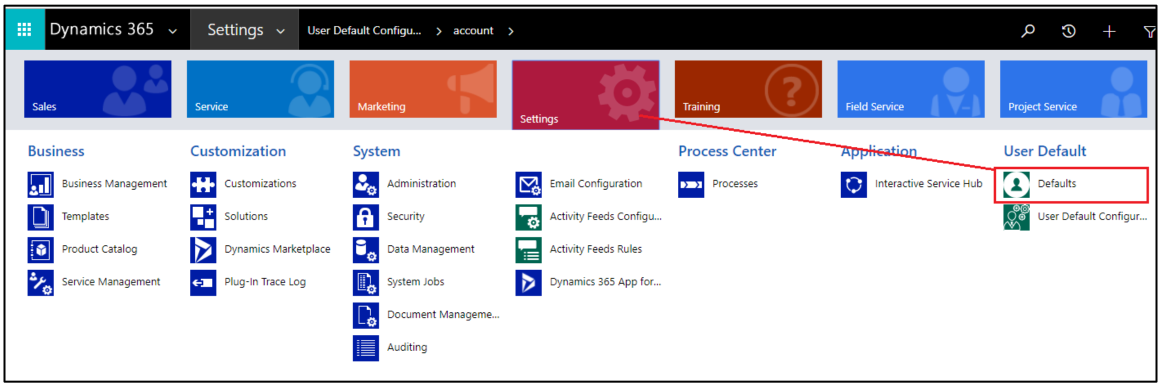
Purpose of the buttons:

a.) Save Default – On saving the record details, a record gets created in the entity named 'Defaults' which holds the data of this saved record

Provide the field values which you want to save and Click on the SAVE DEFAULT button

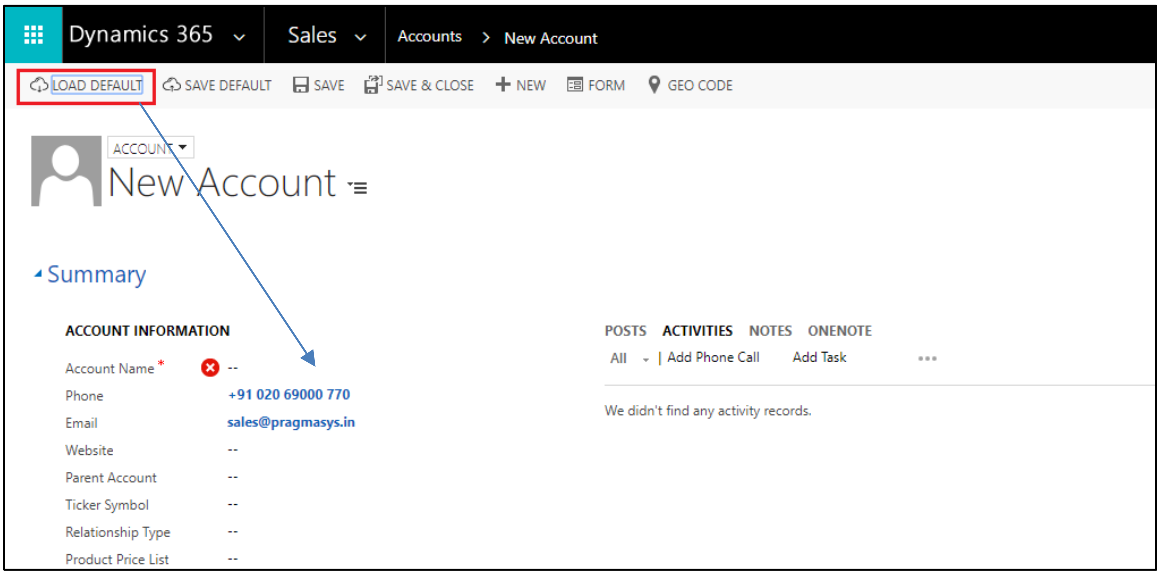


Click on the Defaults entity to view saved record data
(It will automatically create a record in Defaults entity in which it shows saved record as shown below)



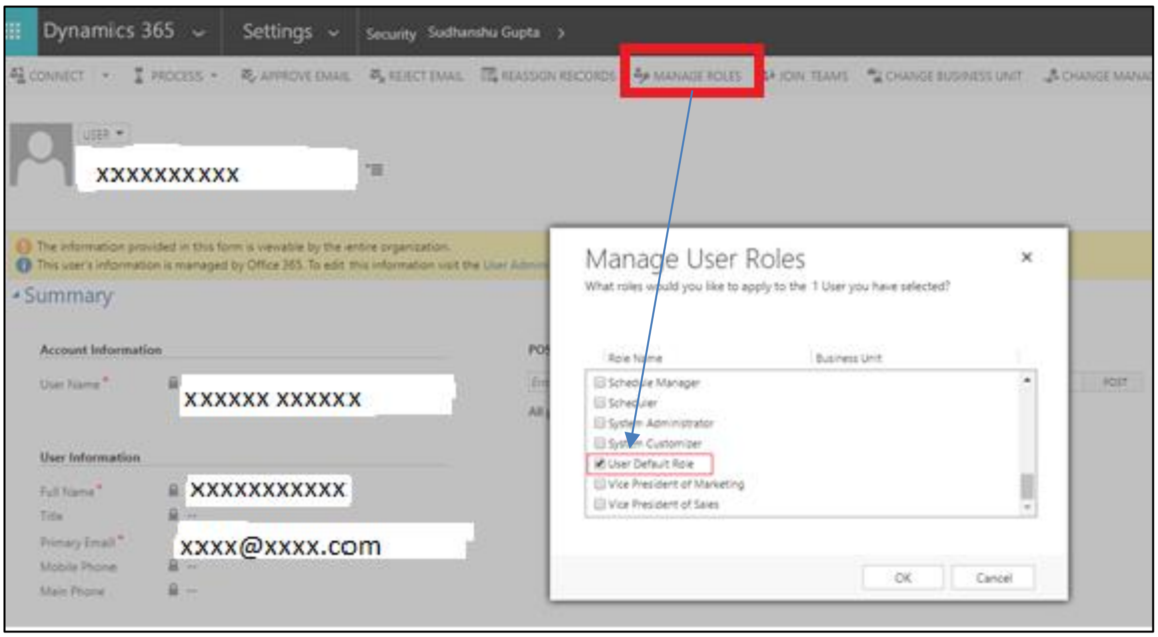
b.) Load Default – On clicking of the Load Default button, the default data will be loaded which is saved while creating the record

Click on Load Default button



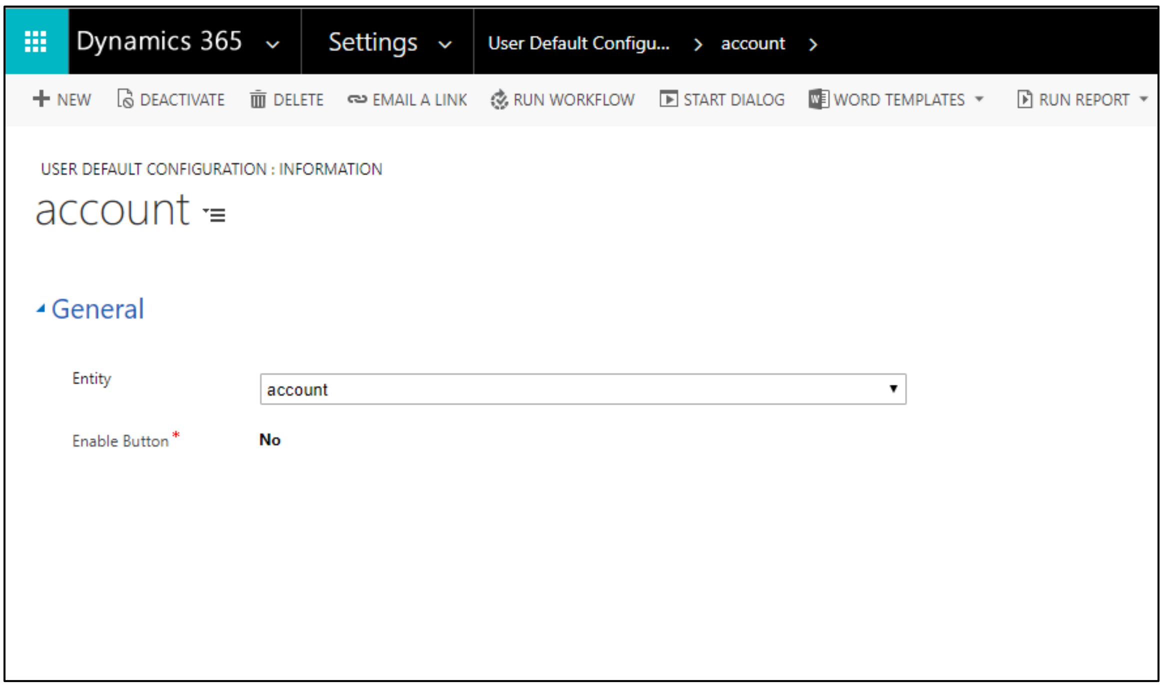
Note: If a user has security role e.g. CSR Manager role instead of 'System Administrator' then give role as 'User Default Role' as well

1. To assign role, Navigate to Settings->Security->Users
2. Click -> Manage Roles
3. Select User Default Role
4. Click OK



Deactivating Save Default and Load Default button

1. After selecting the desired entity name, select No as an option in the field name Enable Button.



Result: Verify whether the buttons are disabled for the account record