CRM Rules 2013

Quick Start Guide

V 2013.2.1

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CRM Rules 2013 is a managed solution that provides Administrators with a CRM-based user interface that enhances your CRM capabilities. With over 60 possible actions, and 9 different rule types, Administrators can now modify form behavior and appearance as easily as creating a new field.

Thank you for your interest in CRM Rules. This guide is intended to get you to configure a business rule in CRM within minutes. Please follow this guide step by step to generate your first rule.

More detailed technical information can be found at www.crm-rules.com.

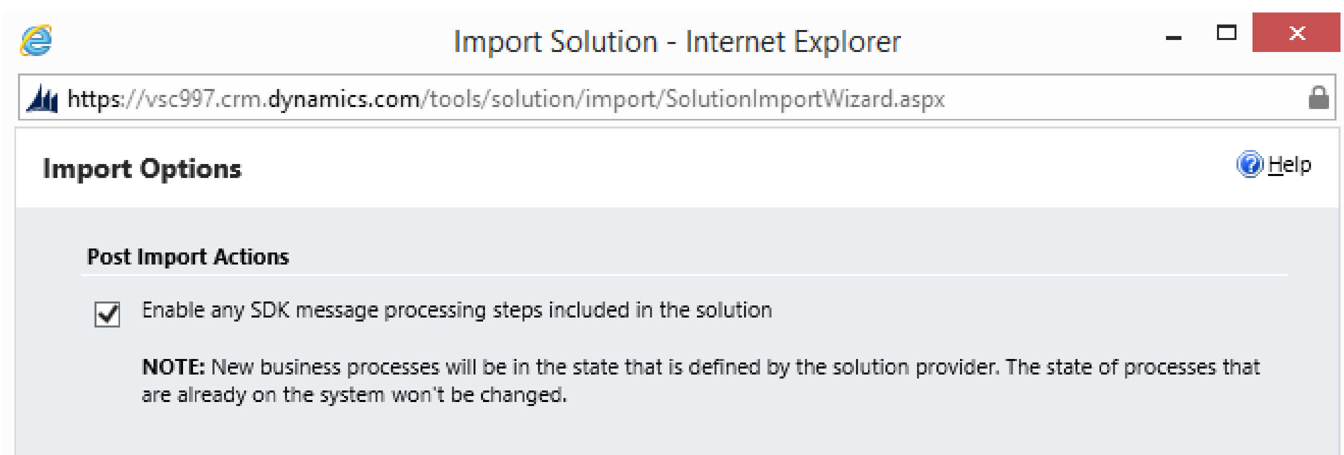
Any questions, please send an email to help@crm-rules.com.

To purchase enhanced versions of the product, please send email to: sales@crm-rules.com.

Import CRM Rules Solution

Once you download the CRM Rules solution file, import it on the CRM system where you will be creating rules.

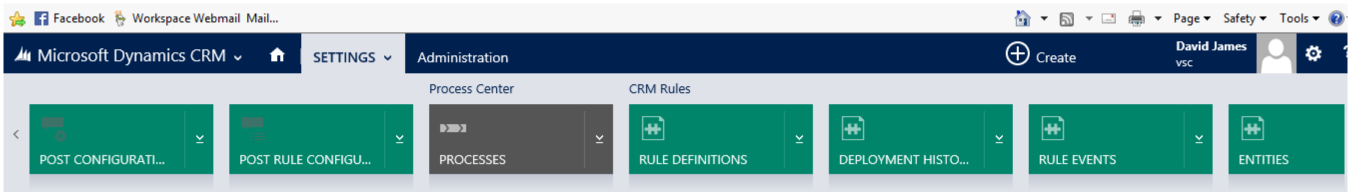
1. Open your CRM system.
2. Select **Settings**, **Customizations**, and then **Solutions**.
3. Click **Import.** Use the Browse button to select the solution file you downloaded and click **Next**.
4. Click **Next** on the Solution Information page.
5. **IMPORTANT:** You must check the “Activate any processes and enable any SDK message processing steps included in the solution”. Click **Next**.



6. You will see a message “Importing customizations…”. This process may take a few minutes to complete. (The screen may not show many progress for 3-5 minutes, but please don’t interrupt or cancel the process.)
7. Click **Close**.

8. Refresh your CRM system (or exit CRM and re-enter).

9. If you click on the down arrow next to Microsoft Dynamics CRM, Setting and scroll to the right, you will find all of the CRM Rules buttons.



Setup

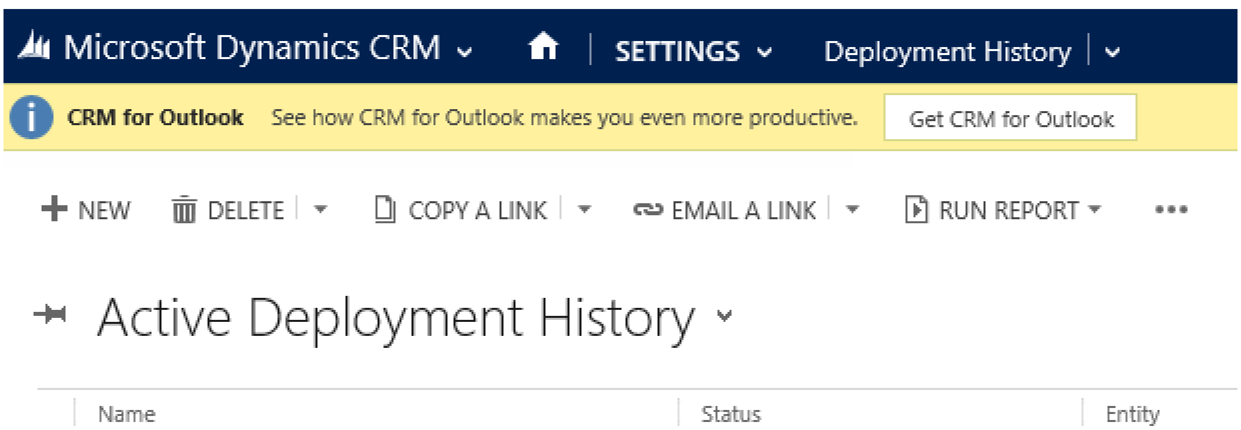
Whenever you install CRM Rules, you must run a special job to finish setup.

1. From the Settings tab, click on Deployment History.

When you click on the Settings button go to the Deployment History view, and create a new record, so we can find all of the entities in use in this CRM org. To get to Deployment History, select the down arrow next to the settings button, and click Deployment History.

When you click on Deployment History, that view will appear, and you just need to click the NEW button to create a new record.

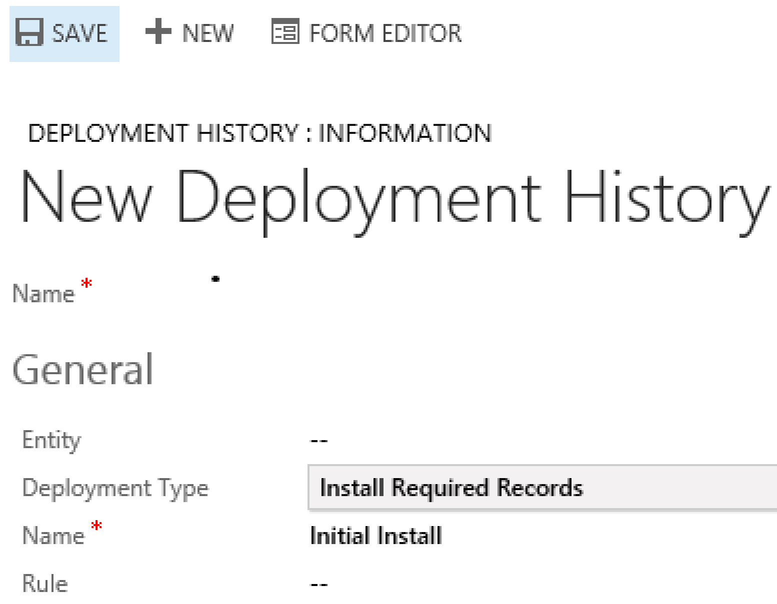
1.



2. Click the **New** button.

3. In the **Deployment Type** field, select the “Install Required Records” option.

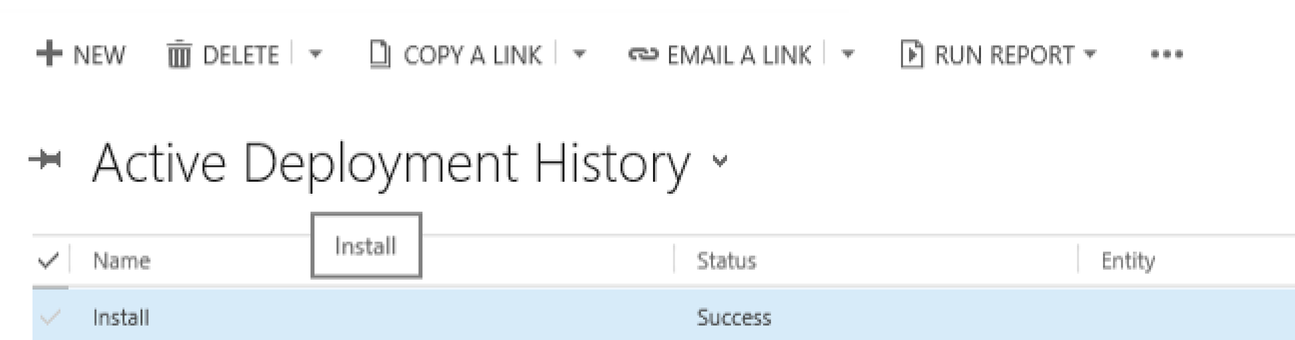
4. Enter a value in the **Name** field (e.g. install). When you are done, your screen should look similar to below



5. Click SAVE

Our CRM Rules plug-ins will now collect all of the entities that you have in this CRM organization.

We need to wait until this step has completed before moving on. To check on the progress, click on the Deployment History button to show the view.



On the far right of this Active Deployment History grid view is a refresh button (the green or blue "recycling" icon.

6. Click on the refresh button until you see the Status field says "Success"

7. To make sure this install completed successfully, you can take a look at the Active Entities. All of your entities (that have forms) in your existing CRM org should be listed here:

Go to Settings and find the Entities menu item to see all the entities CRM Rules has discovered.

Your CRM Rules 2013 install has been completed! Now, on to creating your first rule…

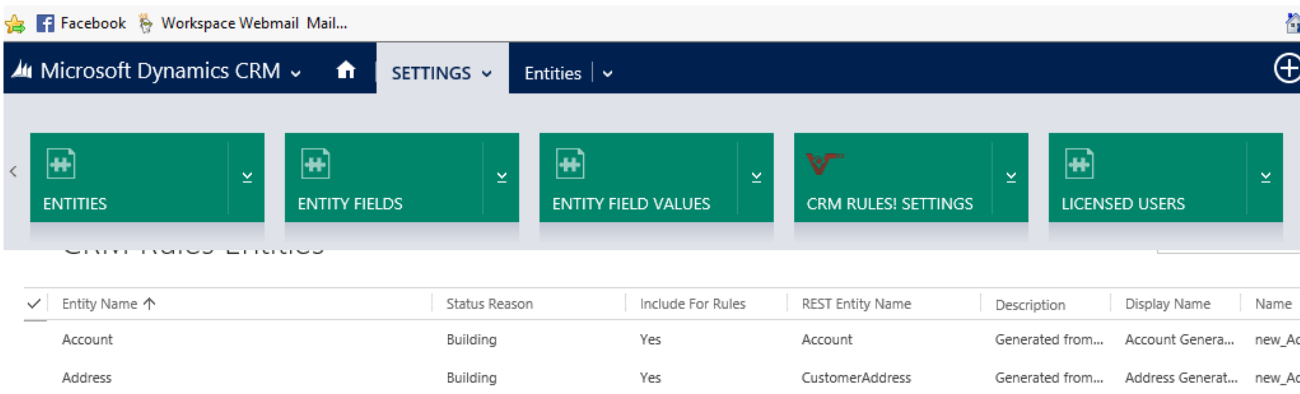
Get Ready!

Whenever you work with an entity for the first time, the metadata (e.g. fields, view, option sets, etc.) has to be made available to the CRM Rules engine. Later we'll be setting up a sample rule on the Account entity, so we're going to start by setting up the Account entity.

1. Setup the Account Entity

Add the Account metadata to CRM Rules.

1. From the Settings tab, click on the **Entities** option

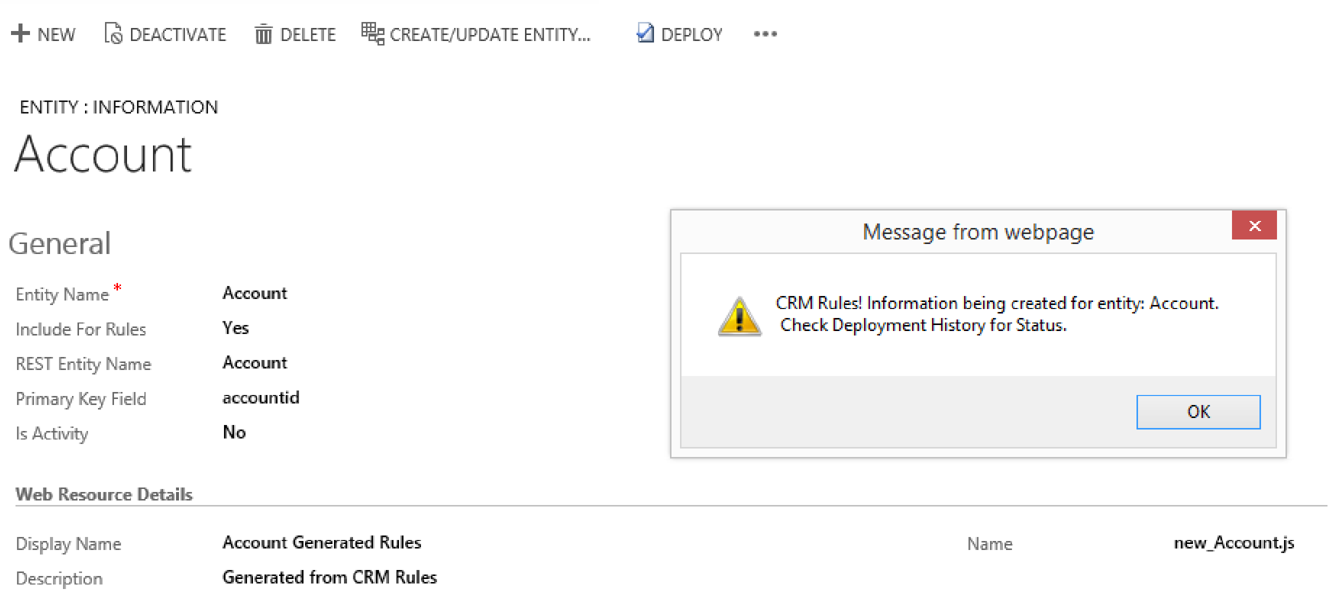


2.

3. Open the Account record.

4. Click the **Create/Update Entity Data** button at the top of the screen.

5. You should see the following message:



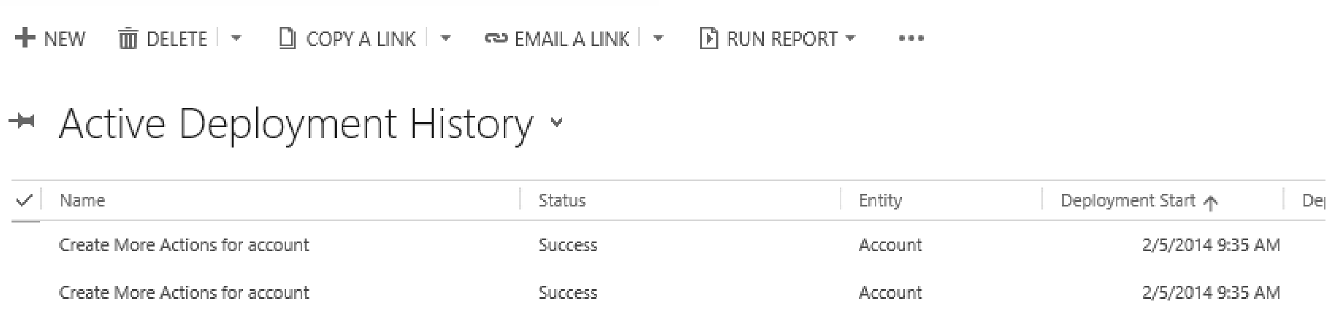
6. Click **Save & Close**.

We recommend you begin using only one entity, but when you want to write rules against another entity, simply repeat these steps, opening the desired entity record, instead of the Account record.

2. Verify Account metadata

Now verify the Account entity was updated successfully.

1. Click **Deployment History**.
2. There should be 19 entries for the Create/Update Deployment of the Account entity. This shows a record for each part of the setup. Once all say success, CRM knows everything about the metadata for that entity. Note: If some lines do not say "success", you can still use CRM Rules, but may have to create some conditions or actions yourself. 19 is not a definite number – could be more because of actions and condition – see in your screen shot how it says create more? It does that in increments of 30 fields.



As you can see, CRM Rules uses the information about field values to automatically create conditions. So, when you create a rule, you typically just have to select from existing conditions, rather than build a new one.

This completes the initial setup phase. Now, you are ready to create CRM Rules! Note: Any time you make changes to an entity like adding fields or optionset values, come back and hit this button again to keep CRM Rules in sync with your system.

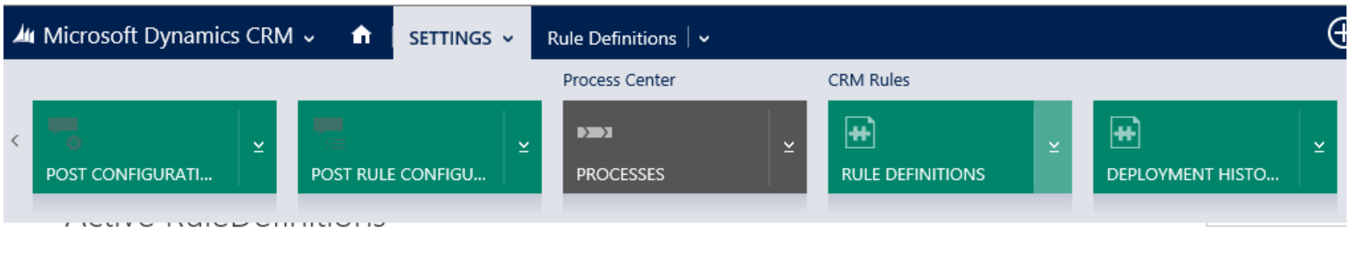
Get Ruling!

The rule we'll be creating in this exercise is to require the State field on the Account if the City has a value:

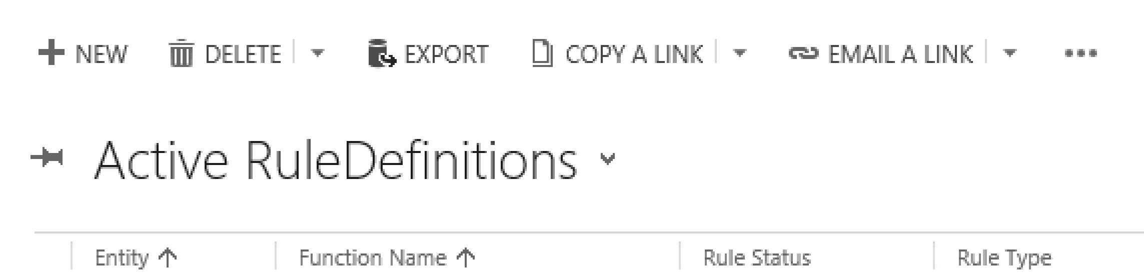
3. Create the Rule Definition

The first step, is to create a Rule!

1. From the Settings tab, click on the **Rule Definitions** item.



2. You'll see all of the rules you have built in your system, which, at 0, isn't very exciting yet…



3. Click New to create a new Rule Definition.

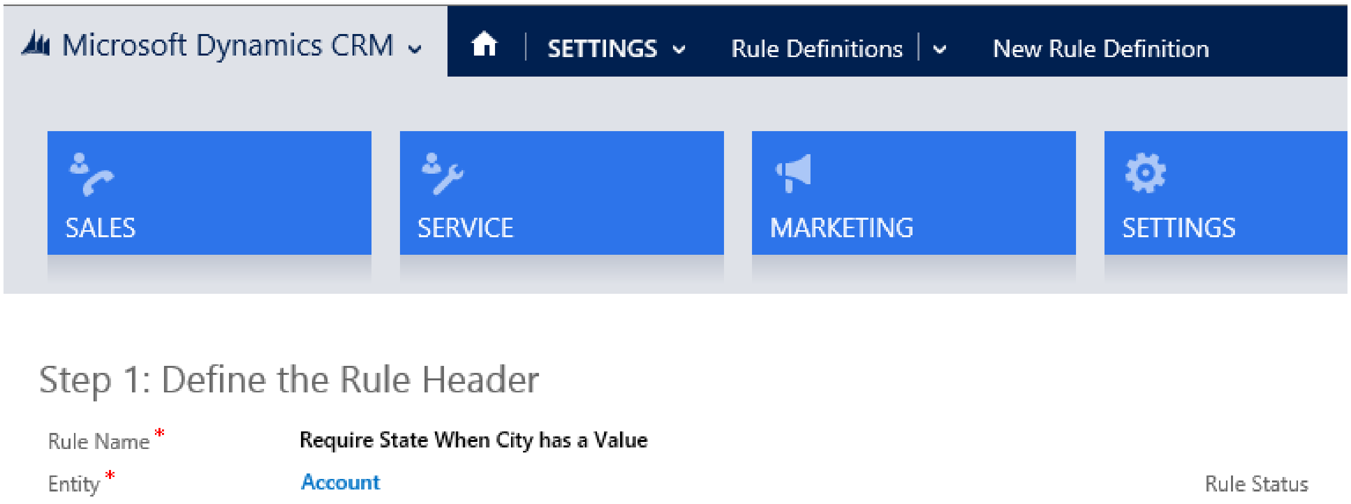
4. Enter a Rule Name that will allow you to easily identify the rule later. For example, "**Require State when City has a value**".

5. In the Entity field, select **Account**.

6. Select Rule Type: In the simple form this is set at I*f/Then/Else. (for more advanced features, please ask for a trial of our Admin or Advanced Package)*

   NOTE: IF/THEN/ELSE allows you to specify IF this *condition* is true THEN take these *actions*, ELSE take these alternative *actions*. In our example, the condition is "City has a value". Our action to take is "require the State field".

7. Your screen should look similar to the image below:

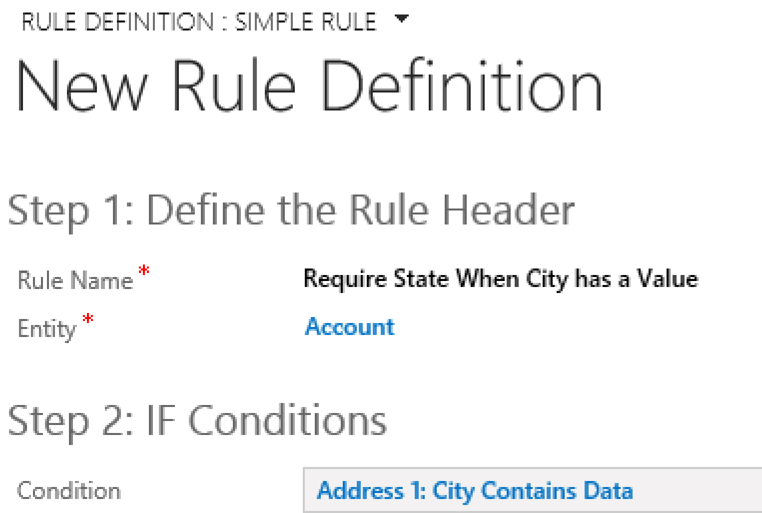


4.

5. Add IF Conditions

Now that we've created the rule "header", we have to specify the condition(s) that, if met, will result in the action(s) being taken.

1. In our example, we want the rule to fire when the City field has a value.
2. Click on the "IF" line and choose one of the pre-installed conditions.

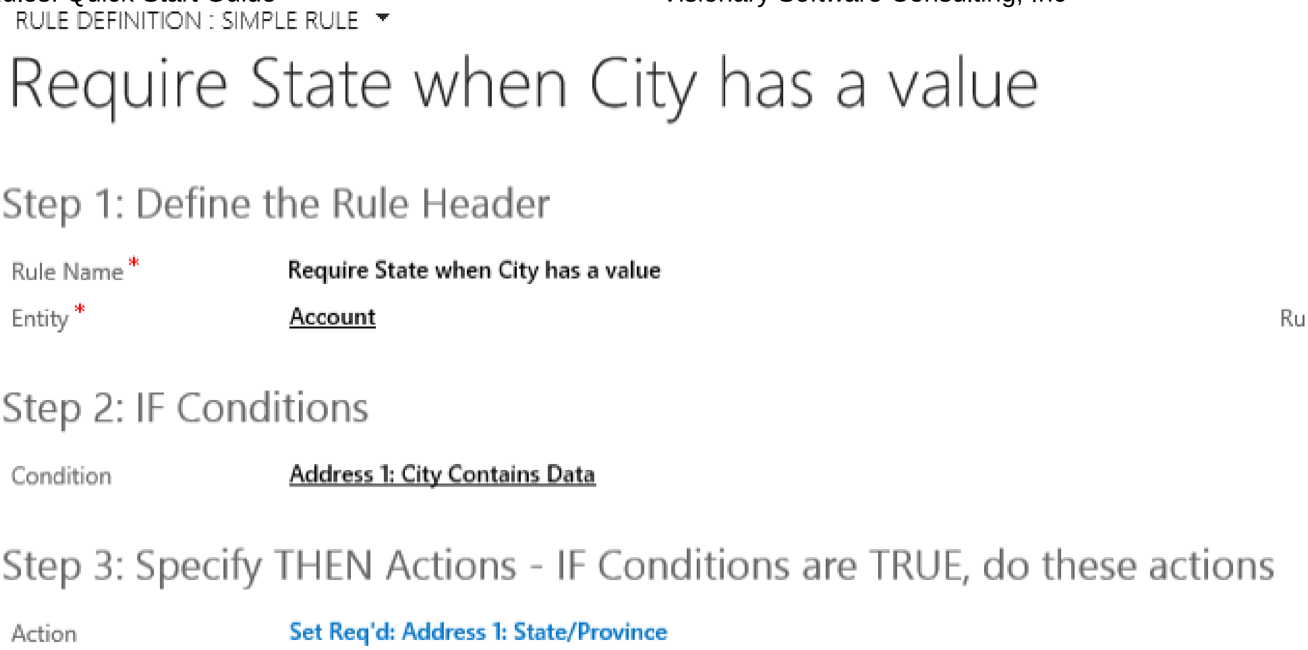


Remember when you clicked on the “Create/Update” entity button on the Account record, the system created many records in Deployment History. Several of these jobs were to automatically create the vast majority of conditions you will need to use when creating rules. For example, for text fields like City, we auto-create a condition “address1_city Contains Data”.

3. Click on the Condition field, and either enter wildcards like “*city*con” or click on the lookup and search for the Address1_City Contains Data condition.

6. Add THEN Actions

When the City Contains Data we want to require the State field.



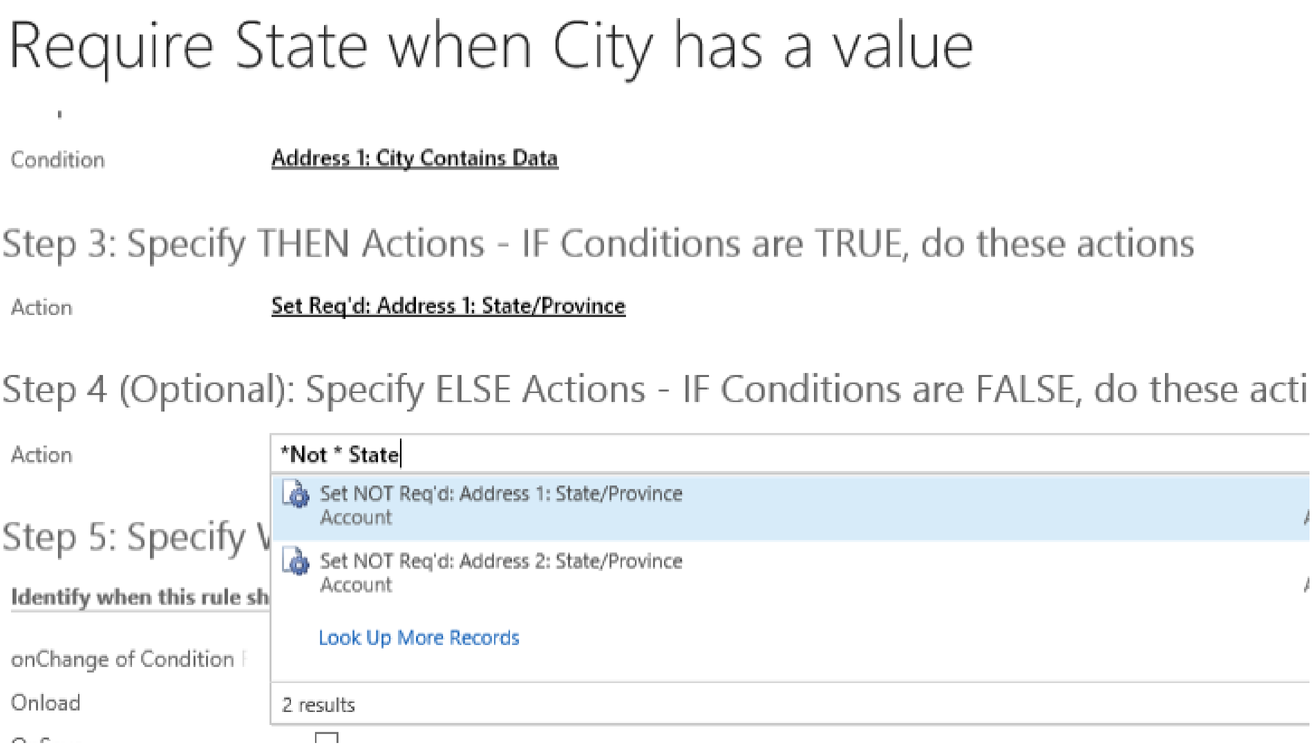
Click on the “Then” line and choose one of the pre-installed actions.

7.

8. Add Else Actions

Else actions are always optional. In this case, if someone removes the City value, the state will still be required. To make the State not required would require you to code an ELSE action as described below.

Click on the "ELSE" line and choose one of the pre-installed actions.



We have now built a rule with one condition and one action to take if the entire set of conditions is true, and one action to take if the condition set is false. Now the final step is to tell CRM when to run this rule.

9.

10. Add Event Handlers

We want this rule to trigger whenever the City changes or when the form is loaded. CRM Rules sets this to happen automatically. In the Event Handler options section you can see the defaults:

Step 5: Specify WHEN to run this rule

Identify when this rule should run (all Forms)

onChange of Condition F	☑
Onload	☑
OnSave	☐

Notes

Your whole rule now looks like this:

11.

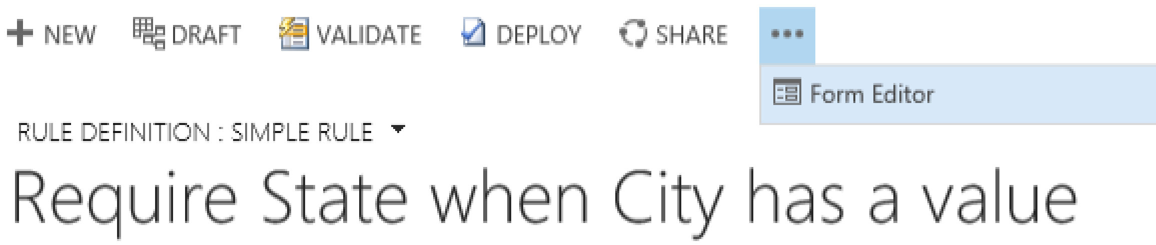
12. Deploy your Rule

Now you are ready to deploy your rule to the Account entity. To do so, we have three buttons that give you control over when, and what rules, are published to CRM.

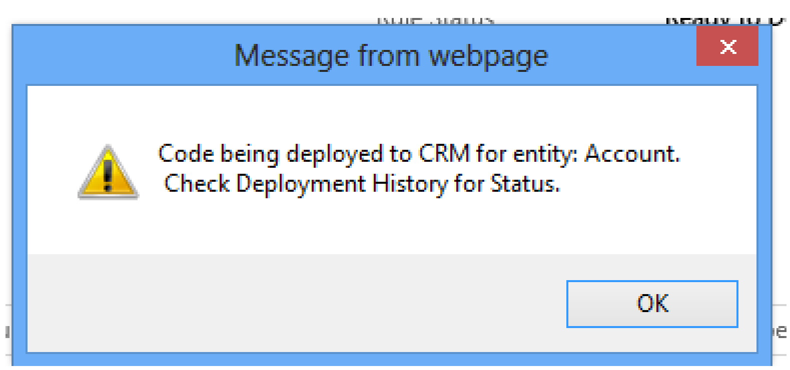
There are 3 buttons. A description of each of the buttons follows:

Field Name	Description

Draft	Puts the rule in Draft status.
Validate	Validate will generate or re-generate code and deployments for a Rule that is not already in Validated status. You can see the code that was produced by clicking the Generated Code tab on the Rule Definition form. If there are any errors generating the code, the Rule Status will change to Validation Err
Deploy	Save and publish your all rules for this Entity that are in “Ready to Deploy” or “Deployed” status.



1. Click the **Validate** button. Wait for the rule form to refresh. The status should show “Ready to Deploy”.
2. When you are ready, click the **Deploy** button to publish the rule.



NOTE: If you need to make changes to any rule, click the Draft button to put the Rule back in a “Draft” status, and go through the cycle: Draft, Validate, Deploy.

You can confirm that the rule was deployed into CRM by clicking on the Deployment History tab, and verifying that the last entry (top of the grid) shows that the code was deployed successfully.

Active Deployment History

Name	Deployment Start	Status	Entity	Deployment End	Deployment Type
Deploy for :Account	12/8/2013 8:25 PM	Success	Account	12/8/2013 8:20 PM	Deploy and Publish for Current Entity
Validation	12/8/2013 8:19 PM	Success		12/8/2013 8:19 PM	Validate Rule
Validation	12/8/2013 8:16 PM	Success		12/8/2013 8:17 PM	Validate Rule
Create Entity: Account	12/6/2013 10:17 PM	Success	Account	12/6/2013 10:12 PM	Create/Update Current Entity
Create Conditions for account	12/6/2013 10:13 PM	Success	Account	12/6/2013 10:14 PM	Create/Update Conditions for Current Entity - Lookups
Create Conditions for option set fields for account	12/6/2013 10:13 PM	Success	Account	12/6/2013 10:14 PM	Create/Update Conditions for Current Entity - Option S
Create Conditions for text fields for account	12/6/2013 10:13 PM	Success	Account	12/6/2013 10:13 PM	Create/Update Conditions for Current Entity - Text Box

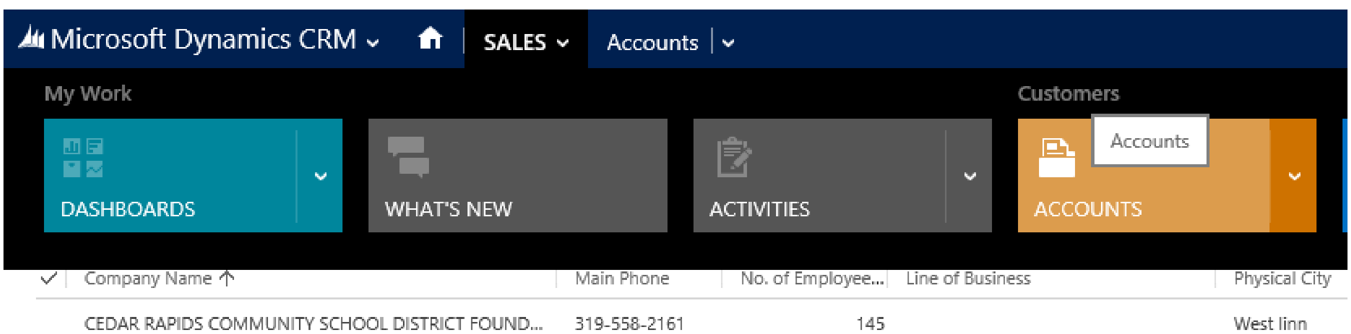
We are now ready to test the rule in CRM!

13.

14. Test your new Rule

Open the Account and verify your rule was created successfully.

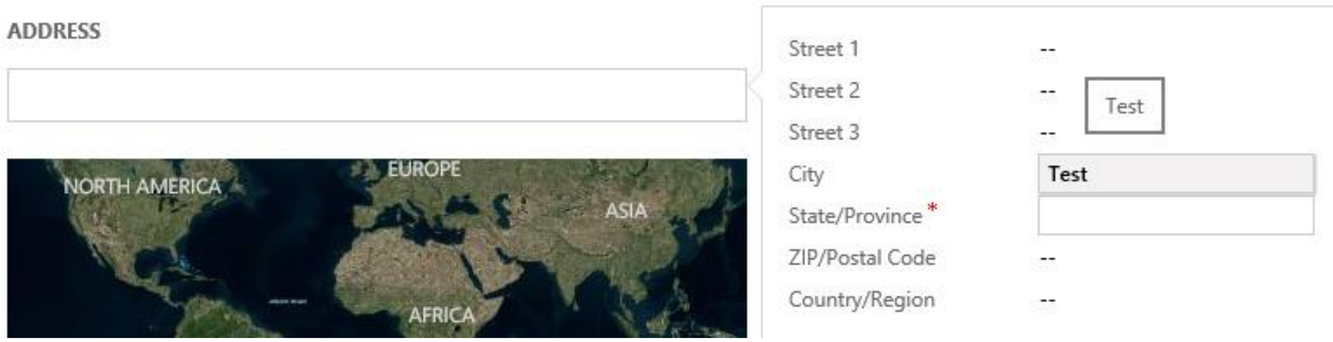
1. To test the new rule, go back to your main Accounts view. (Click the SALES area, and then click ACCOUNTS:



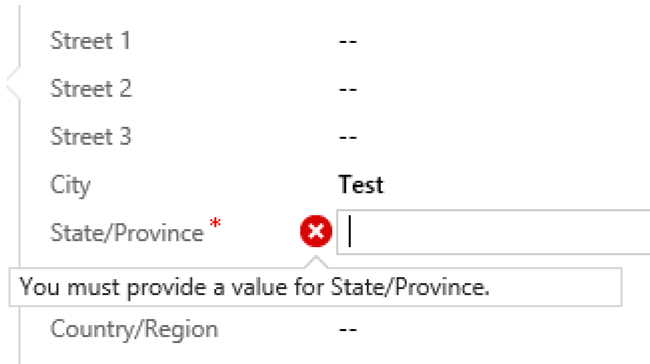
2. Create a new Account.

3. Move your cursor into the consolidated address field, so you can see the address fields.

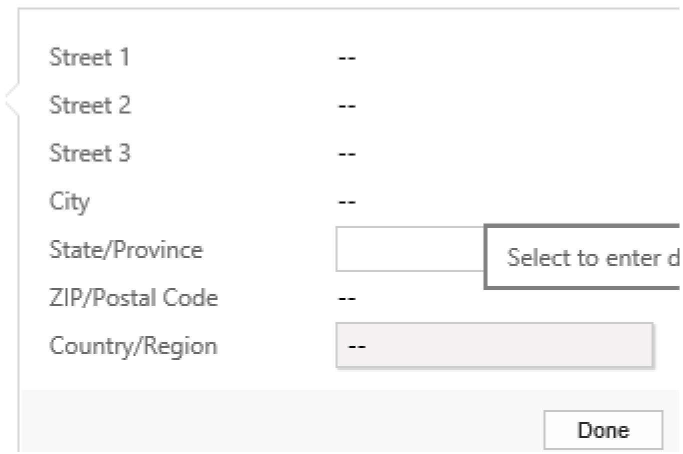
4. Enter a value in the City field. When you leave the City field, you'll now see that the State has a red asterisk (*). Congratulations, you've implemented your first rule!


ADDRESS
NORTH AMERICA
EUROPE
ASIA
AFRICA
Street 1
--
Street 2
--
Test
Street 3
--
City
Test
State/Province *
ZIP/Postal Code
--
Country/Region
--

If you try to save the address without entering a State, you will get the message:



To make sure the ELSE condition is working, simple remove the value from the City, and hit tab.



The red asterisk is removed from the State, indicating that the ELSE action was taken by CRM.

Congrats, you can now RULE CRM!