

CRM Rules 2011

A Microsoft
Dynamics
CRM 2011
add on

**Want
Microsoft
Business
Rules, but still
on CRM 2011?
We can help.**

Get the power of Microsoft Business Rules in Microsoft Dynamics CRM 2011. Make configurations in a fraction of the time without complicated coding or expensive customizations. Perfect for the System Analyst or CRM Admin.

Quotes

"[CRM Rules] provided all the critical customization capabilities we were looking for..."

Gregg Taft,
bNoticed.com

Richard Knudson,
MS Dynamics CRM
MVP, calls CRM Rules
*one of his favorite new
CRM add ons*

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Easily Configure Dynamic Forms and Business Rules in Microsoft Dynamics CRM 2011

Stop Customizing and Start Configuring

Customizing CRM is expensive and complicated. CRM Rules 2011 lets you easily configure form behavior by simply entering your criteria into the CRM Rules forms. CRM Rules takes Microsoft's Business Rules to a new level.

Save Time and Money

Configuration requests can now be handled by the System Administrator. Perfect for the CRM Admin and anyone else who is not familiar with coding or advanced customization. Complete user enhancement requests faster and create a better user experience!

Easily Change Form Behavior Based on User Input

Every department works differently. CRM forms containing Service Level Agreements, Customer Contracts, Sales Forms, and all of your Custom Entity Forms can change on the fly depending on the data entered by the user. Make the system work for YOU, not the other way around. And all without coding JavaScript!

Technical

- CRM Rules 2011 works on-premise only
- Resides entirely within your CRM 2011 database as a managed solution.
- Built using OOB configuration of new entities and .net
- With nearly 60 rule action types and 70+ operators, combined with any customization functions the user adds, an unlimited number of rules can be created
- Preserve institutional knowledge by storing business logic in a searchable database for ease of maintenance
- Tiered Pricing
- VAR Site Developer License available

**CRM Rules:
The Business Rules
Builder**

**FREE
TRIAL
OFFER**

 **VISIONARY**
software consulting

CRM Rules

A Microsoft
Dynamics
CRM 2011 &
2013 add on



The Business Rules Configurator. Which version is right for you?

BASIC PACKAGE

- Show Field
- Hide Field
- Set Field Value
- Set Field to Other Field Value
- Set Field To Mathematical Formula
- Required Fields
- Alert
- Disable Field
- Enable Field

ADMIN SUITE

Includes everything in BASIC PLUS:

- Collapse Tab
- Expand Tab
- Set Field to Derived String Concatenation Value
- Hide Section
- Show Section
- Hide Tab
- Show Tab
- Set Option Set List
- Copy Field(s) from Lookup Entity
- Set to Null
- Set Field to Now
- Run RULE!
- Set Focus
- Fire OnChange
- Set Field to Value From Other Entity

ADVANCED SUITE

Everything in BASIC and ADMIN PLUS:

- Set Section Focus
- Set Section Label
- Set Tab Focus
- Set Tab Label
- Disable All Fields
- Enable All Fields
- Format Phone Number
- Set Field Label
- Hide IFRAME
- Hide Nav Item
- Hide Subgrid
- Hide Web Resource Control
- Refresh Subgrid
- Set Data for Silverlight
- Set Focus to IFRAME
- Set Focus to Nav Item
- Set Focus to Subgrid
- Set Focus to Web Resource Control
- Set IFRAME Label
- Set IFRAME Source
- Set Nav Item Label
- Set Subgrid Label
- Set Web Resource Control Label
- Set Web Resource Control Source
- Show IFRAME
- Show Nav Item
- Show Subgrid
- Show Web Resource Control

ADVANCED SUITE continued

- Custom JScript
- Invoke Process Dialog
- Return Function Value
- Run Workflow
- Always Submit Field
- Set Field to Function Return Value

ADVANCED SUITE ALSO CONTAINS

THE FOLLOWING RULE TYPES:

- IF/THEN/ELSE
- Case
- Custom JScript
- Clone
- Aggregation (Count, Sum, Min, Max, & Average Across Children)
- Return Value
- Custom Function
- Filtered Lookup



*All the above use IF/THEN/ELSE only