



# CRM Rules 2015

A Microsoft  
Dynamics  
CRM 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
- Refresh
- Save

\*All the above use IF/THEN/ELSE only

### 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
- Custom JScript
- Invoke Process Dialog

### ADVANCED SUITE continued

- Return Function Value
- Run Workflow
- Always Submit Field
- Set Field to Function Return Value
- Alert
- Set/Clear Field Notification
- Prompt
- Set/Clear Form Notification

### Business Process Flow Actions:

- Set Active BPF
- Move Next / Previous Stage
- Show/ Hide BPF
- Collapse/ Expand BPF

### Rule Types in Advanced Suite:

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

