

eNumber 2011

eNumber for Microsoft CRM 2011

eNumber for Microsoft CRM 2011 provides a significant enhancement by providing the ability to be able to create Auto Numbers and Auto Names that automatically populate fields in within CRM.

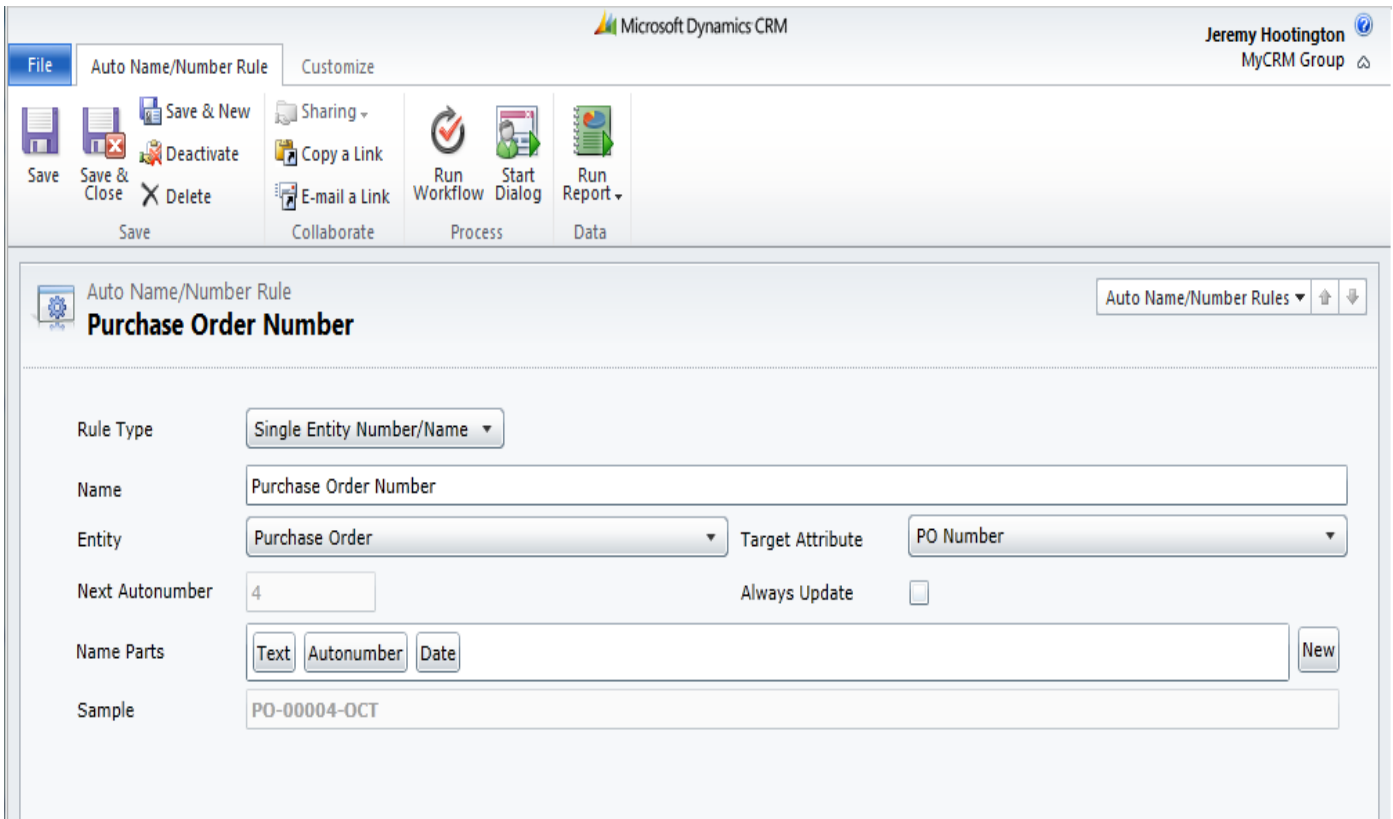
Creating Auto Numbers, Name Rules

An auto rule can be created to populate a text field within CRM and will be auto populated when saving the record.

With auto rules you can create

1. Global numbers that are sequential across many entities
2. Entity sequential numbers
3. Pre-populate text fields with data entered into other CRM fields.

The eNumber solution is a fully licenced software enhancement which is installed in the setting area of Microsoft CRM and can therefore be configured by anyone that has administration privileges.



For Additional Information

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Name and Number Rules

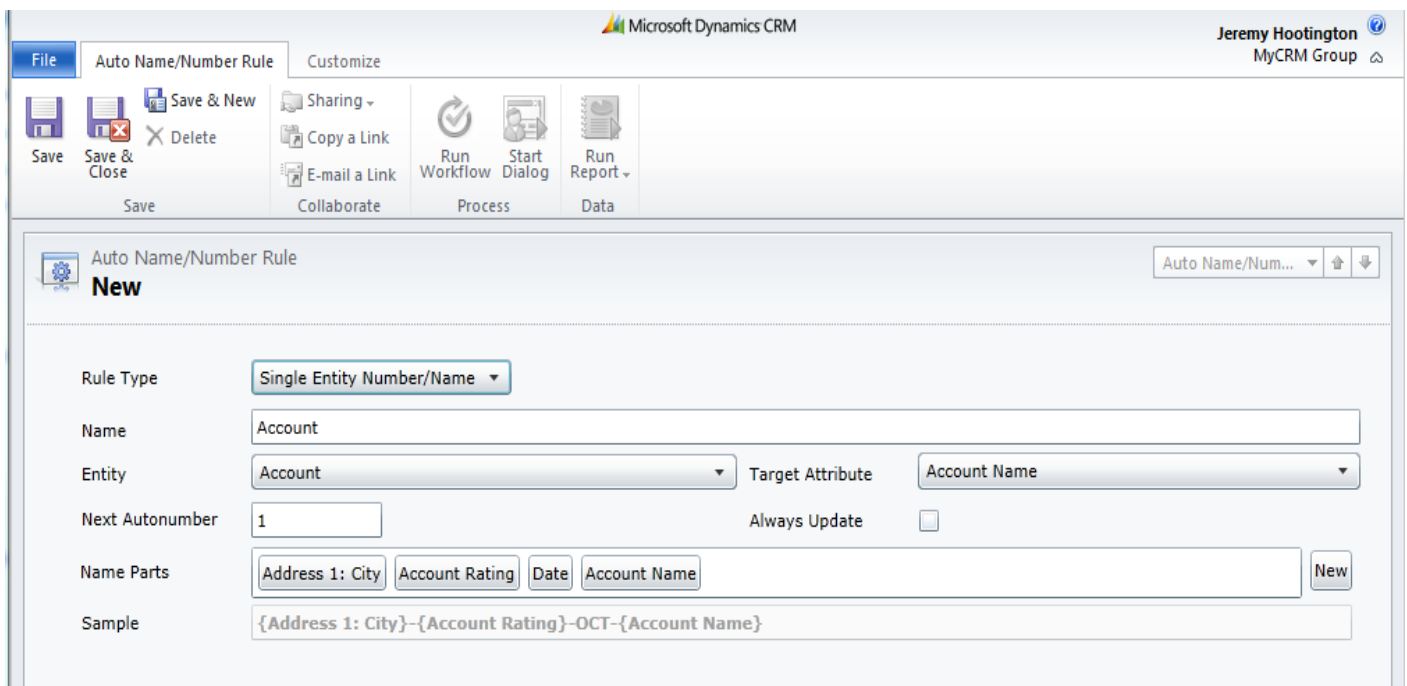
Name and Number rules can be created very simply, either by using sequential values or by using related text and date fields, allowing you to create numbers in various combinations, including:

- Sequential Number Only
- Text—Sequential Number
- Date-Sequential Number
- Text-Date-Sequential Number
- Date- Sequential Number—Text—Text
- Field—Field—Date-Field

Many combinations are possible for both number and name creation. The example below shows the value added to the Account Name being formatted into a new string.

When the account name is entered upon the account creation the value will be reformatted as City—SIC—Date and then the original value entered for account name will be added to the end.

Auto rules can be created for any customisable entity within Microsoft Dynamics CRM 2011.



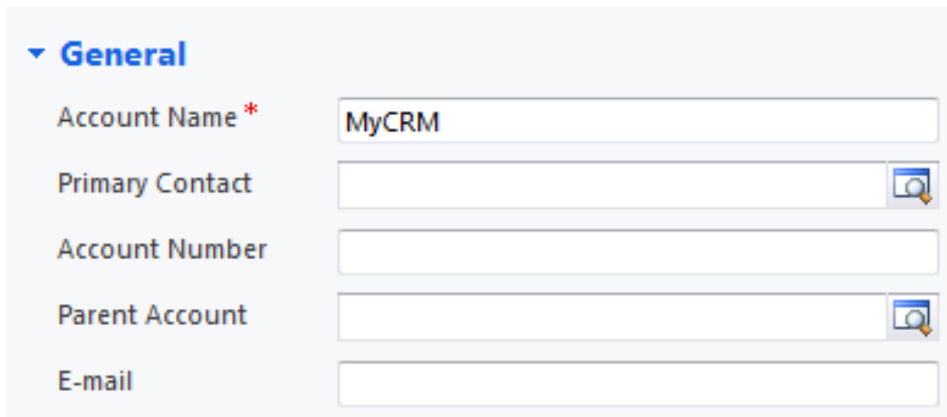
The screenshot shows the 'Auto Name/Number Rule' configuration interface in Microsoft Dynamics CRM 2011. The window title is 'Microsoft Dynamics CRM' and the user is 'Jeremy Hootington' from 'MyCRM Group'. The ribbon includes 'File', 'Auto Name/Number Rule', and 'Customize'. The 'Auto Name/Number Rule' ribbon has buttons for 'Save', 'Save & Close', 'Delete', 'Share', 'Copy a Link', 'E-mail a Link', 'Collaborate', 'Run Workflow', 'Start Dialog', and 'Run Report'. The main area is titled 'Auto Name/Number Rule' and 'New'. The configuration fields are: 'Rule Type' set to 'Single Entity Number/Name'; 'Name' set to 'Account'; 'Entity' set to 'Account'; 'Target Attribute' set to 'Account Name'; 'Next Autonumber' set to '1'; 'Always Update' checkbox is unchecked; 'Name Parts' are 'Address 1: City', 'Account Rating', 'Date', and 'Account Name'; and the 'Sample' field shows the formatted string: '{Address 1: City}-{Account Rating}-OCT-{Account Name}'.

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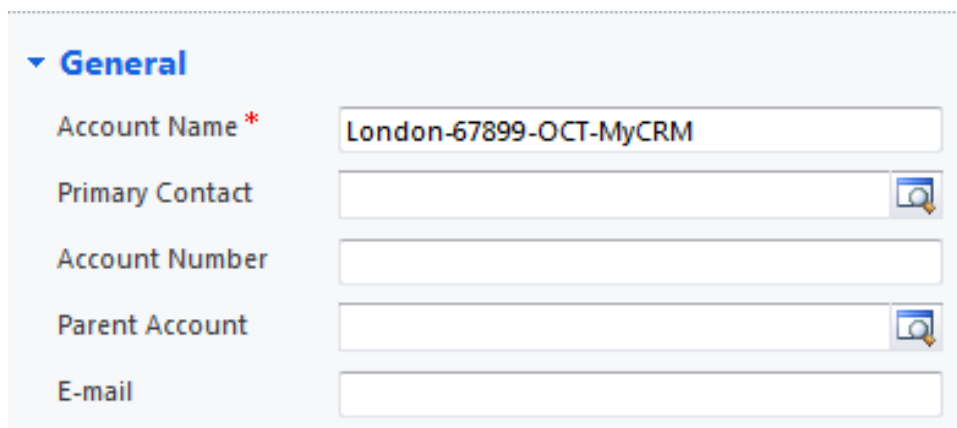
The value entered into Account name was



▼ **General**

Account Name *	<input type="text" value="MyCRM"/>
Primary Contact	<input type="text"/>
Account Number	<input type="text"/>
Parent Account	<input type="text"/>
E-mail	<input type="text"/>

After saving the account record and applying the rule the value is



▼ **General**

Account Name *	<input type="text" value="London-67899-OCT-MyCRM"/>
Primary Contact	<input type="text"/>
Account Number	<input type="text"/>
Parent Account	<input type="text"/>
E-mail	<input type="text"/>

This is just one example of how data in the CRM system can be auto formatted after saving.

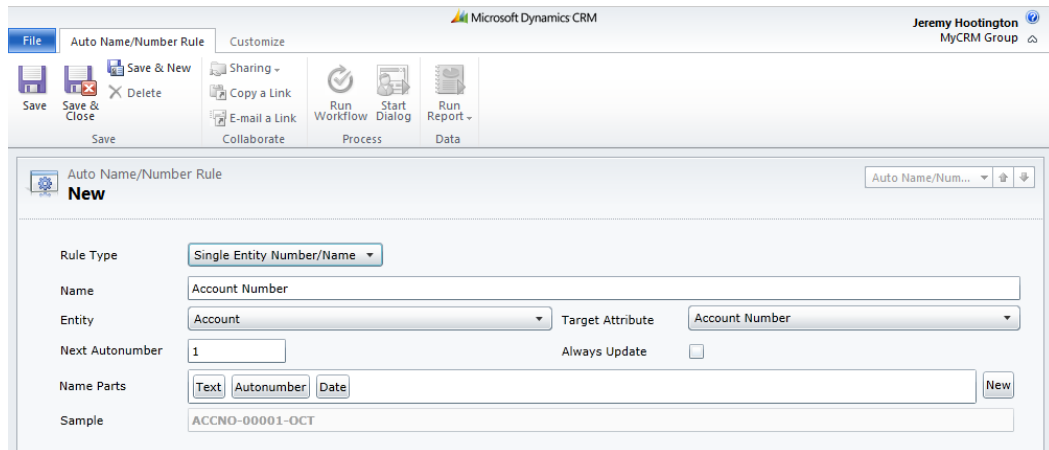
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The same applies for numbers that are to be created sequentially.

The first step is to simply create an auto number rule. Note this time the account number (shown below) is auto populated...



Save the account record and the rule is applied to the record...

Account Name *	My CRM
Primary Contact	
Account Number	
Parent Account	
E-mail	

The account record will have an auto generated number. Auto rules can be created for any customisable entity within Microsoft Dynamics CRM 2011.

Account Name *	My CRM
Primary Contact	
Account Number	ACCNO-00001-OCT
Parent Account	
E-mail	

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