

eNumber 2013

eNumber for Microsoft CRM 2013

eNumber for Microsoft CRM 2013 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.

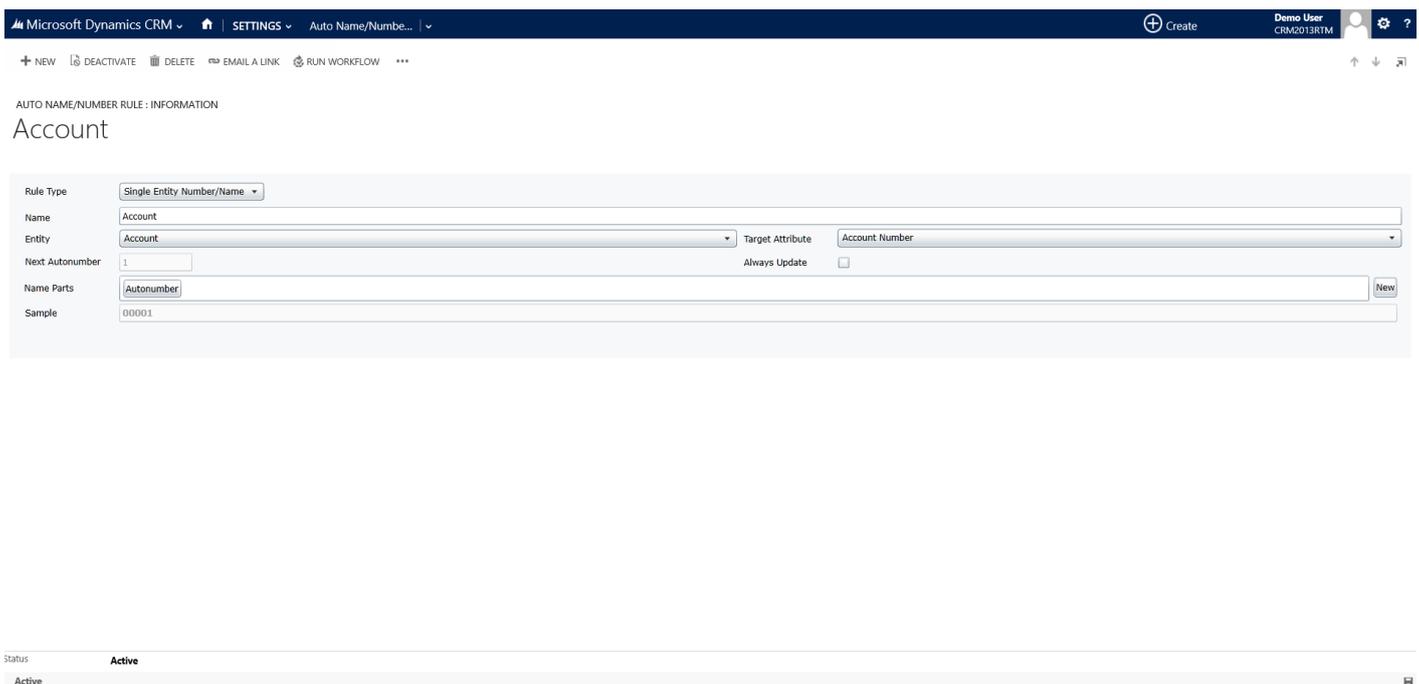
Creating Auto Numbers, Name Rules

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.



The screenshot shows the Microsoft Dynamics CRM 2013 interface for configuring an Auto Name/Number Rule. The breadcrumb trail is: Microsoft Dynamics CRM > SETTINGS > Auto Name/Numbe... > Create. The user is identified as Demo User CRM2013RTM. The page title is "AUTO NAME/NUMBER RULE : INFORMATION" and the entity is "Account".

The configuration form includes the following fields:

- Rule Type: Single Entity Number/Name
- Name: Account
- Entity: Account
- Next Autonumber: 1
- Target Attribute: Account Number
- Always Update:
- Name Parts: Autonumber
- Sample: 00001

The status bar at the bottom indicates the rule is "Active".

For Additional Information

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Name and Number Rules

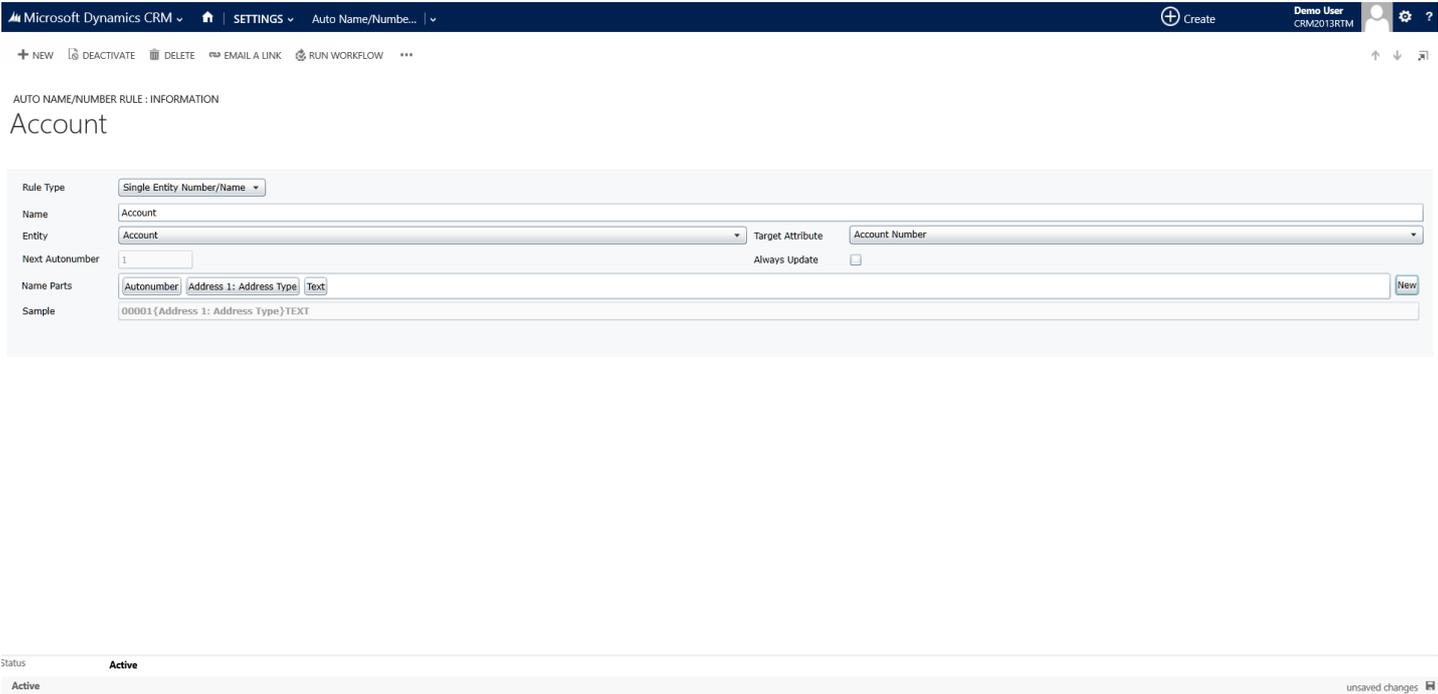
Name and Number rules can be created very simply, either by using sequential values or by using related text and date fields, allowing you to create numbers in various combinations, including:

- 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 CRM 2013.



The screenshot shows the Microsoft Dynamics CRM 2013 interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SETTINGS', and 'Auto Name/Numbe...'. The main area displays 'AUTO NAME/NUMBER RULE: INFORMATION' for the 'Account' entity. The configuration details are as follows:

- Rule Type:** Single Entity Number/Name
- Name:** Account
- Entity:** Account
- Target Attribute:** Account Number
- Next Autonumber:** 1
- Always Update:**
- Name Parts:** Autonumber | Address 1: Address Type | Text
- Sample:** 00001(Address 1: Address Type)TEXT

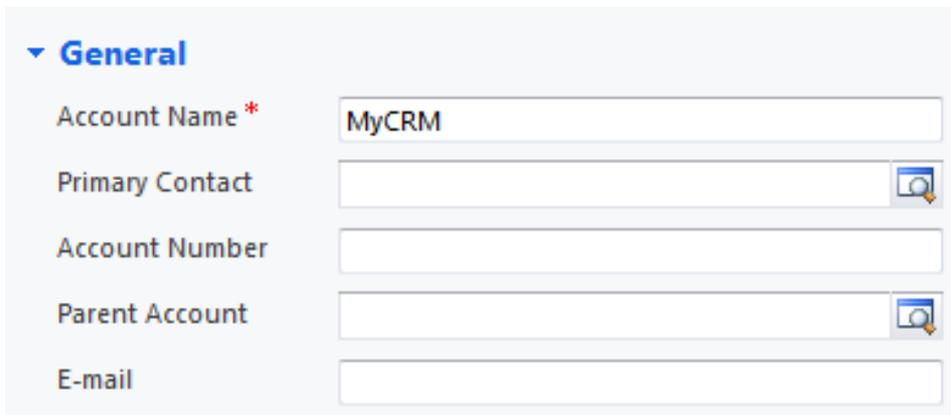
At the bottom, the status is 'Active' and there is a note for 'unsaved changes'.

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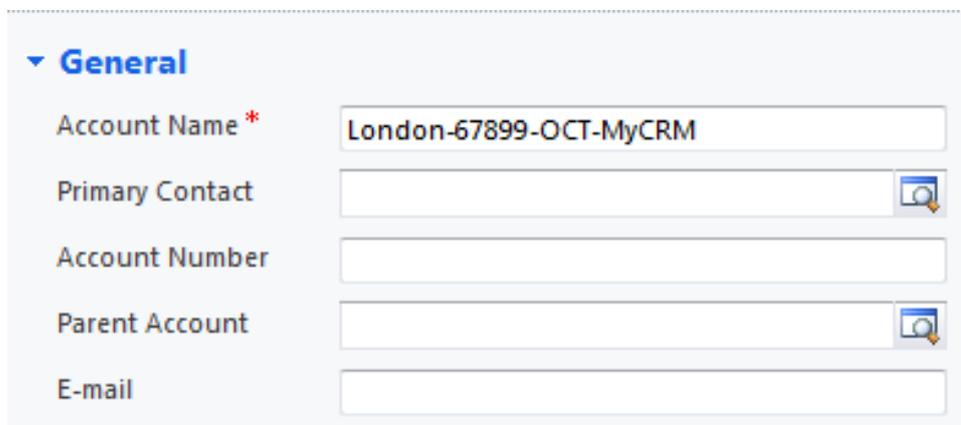
The value entered into Account name was



▼ **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.

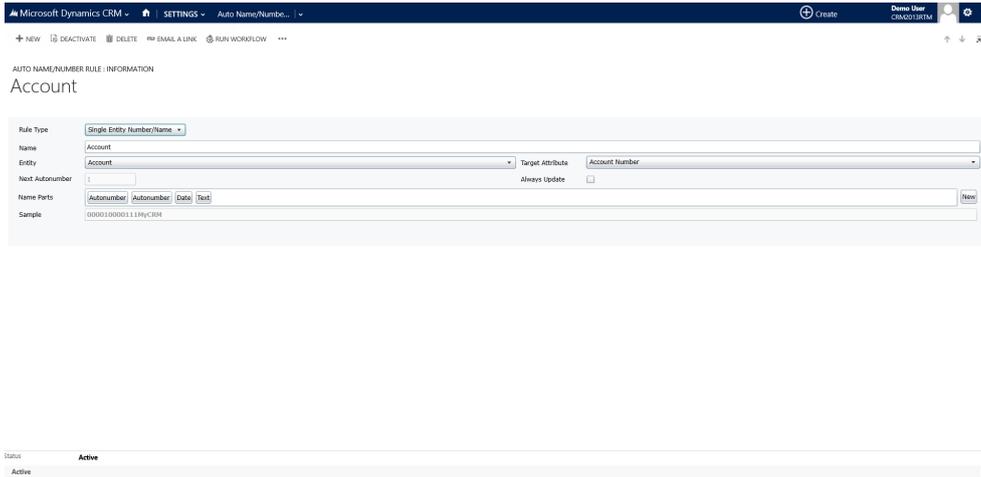
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The same applies for numbers that are to be created sequentially.

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 CRM 2013.

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

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