



# Welcome to MyCRM *Making CRM work for business*

## eWorkflow for Microsoft Dynamics CRM 2011

The all new eWorkflow component for Microsoft Dynamics CRM 2011 from MyCRM has been designed to further extend and increase the available functionality and functions that can be used within Microsoft CRM 2011 workflow jobs and processes.

### FACTSHEET

Product Name	MyCRM eWorkflow
Version	2011
Owner	MyCRM

#### Available For

MyCRM Hosted	✓
Microsoft CRM Online	✗
CRM On-Premise	✓



Workflow in Microsoft Dynamics CRM is a powerful business tool and with the extension of eWorkflow from MyCRM end business users can create a range of extended business automation activities.



#### For Additional Information

Contact : [Alistair Dickinson](mailto:Alistair.Dickinson@mycrmgroup.com)  
 Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
 Phone : 01983 245245  
 Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)



## Welcome to MyCRM *Making CRM work for business*

By including and deploying eWorkflow, a business user will gain a range of new functions, including workflows functions for :-

### FACTSHEET



1. Marketing
2. Sales
3. Dates Manipulation
4. String Manipulation
5. Number Calculations
6. Manipulation of Regular Expressions
7. Manipulation of Safe Web URL's
8. Check Entity Type

With eWorkflow we have provided a separate end user document that details each of the new function calls available with suitable examples that an end user may require for day to day use.

But as an example our new function calls in eWorkflow include manipulation of managing **Marketing Lists for members**, calculating the value of **All Invoice** or **All Orders** on a customer records, or counting the number of **Open or Closed Cases** for a customer.

These are just a few examples of the new functions in the eWorkflow function Library

For Additional Information

Contact : [Alistair Dickinson](mailto:Alistair.Dickinson@mycrmgroup.com)  
Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
Phone : 01983 245245  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)



# Welcome to MyCRM *Making CRM work for business*

## Deployment of eWorkflow to CRM

### FACTSHEET



### Pre-Q2 2012 Update

To install eWorkflow prior to the Microsoft Dynamics CRM Q2 2012 Update, the installing user must be a CRM Deployment Administrator.

For more information you can read more about Deployment Administrators at the Microsoft TechNet site: <http://technet.microsoft.com/en-us/library/gg197626>.

eWorkflow must be installed via the MyCRM Licence Manager inside CRM, so the installing user should also have a user account in CRM, preferably with the System Administrator role.

**CRM Online:** It is important to note that until CRM Online is updated with the new Q2 2012 update features, eWorkflow is only available for on-premise and partner-hosted CRM deployments, and any attempts to install on a CRM Online instance will error.

### Post-Q2 2012 Update

A number of improvements are coming with the Q2 2012 Update, workflow plugins in CRM will be able to run in Isolation or in "Sandbox" mode.

This means that there will no longer be a requirement for the installing user to be a Deployment Administrator, and eWorkflow will be compatible with CRM Online.

#### For Additional Information

Contact : Alistair Dickinson  
Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
Phone : 01983 245245  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)



## Welcome to MyCRM *Making CRM work for business*

For more information about eWorkflow please contact our sales team on :  
**+44 (0) 1983 245245**

### FACTSHEET



or email  
[sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)

or visit  
<http://www.mycrmgroup.com>

or visit  
<http://downloads.mycrmgroup.com>

#### For Additional Information

Contact : Alistair Dickinson  
Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
Phone : 01983 245245  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)