

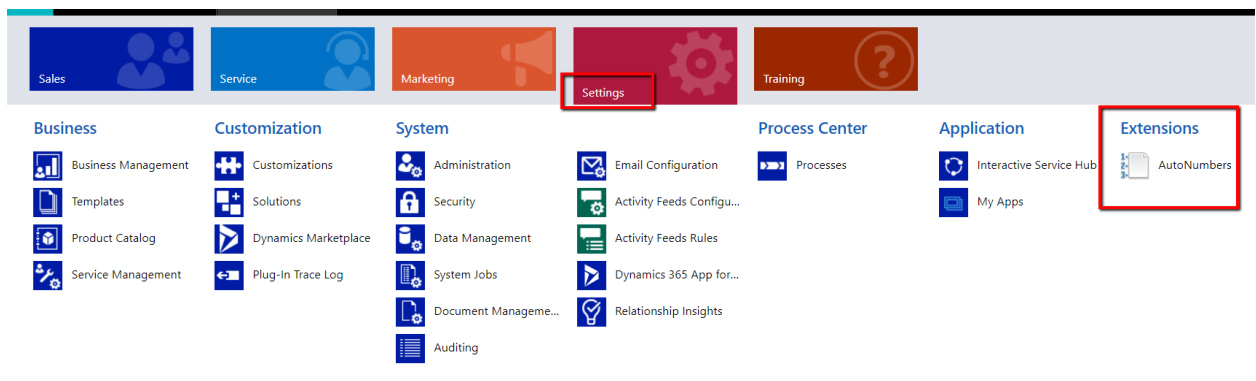
## Autonumbering Configuration

The warranty management and product repair solution contains a custom workflow step that sets sequential numbers on the RMA record.

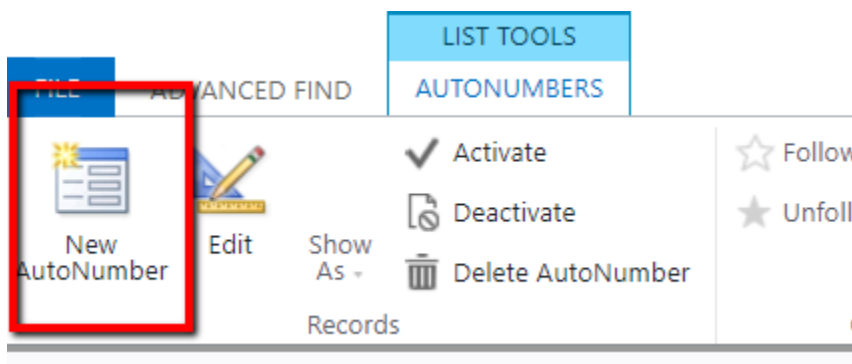
This workflow must be configured and activated after the solution install as follows

1. Set Up the Autonumber Record

Go to Settings > Extensions > Autonumber



2. Create a record with an initial number



[+ NEW](#)
[DEACTIVATE](#)
[DELETE](#)
[EMAIL A LINK](#)
[RUN WC](#)

AUTONUMBER : INFORMATION

# Autonumber ☰

◀ **General**

Name <sup>+</sup>	<b>Autonumber</b>
Number <sup>*</sup>	<b>1</b>
Lock	<b>--</b>
Lock Date	<b>7/25/2017 10:48 PM</b>

### 3. Update the autonumbering Workflow and Select Options

Go to Settings> Processes> and find the workflow named **RMA Set RMA Number** and Set properties for custom step

Process: RMA Set RMA Number

**Information**

General Administration Notes

▼ Hide Process Properties

Process Name \* RMA\_Set RMA Number

Entity RMA

Activate As Process

Category Workflow

**Available to Run**

Run this workflow in the background (recommended)

As an on-demand process

As a child process

**Options for Automatic Processes**

Scope Organization

Start when: After

Record is created

Record status changes

Record is assigned

Record fields change  [Select](#)

Record is deleted

Execute as:  The owner of the workflow

The user who made changes to the record

**Workflow Log Retention**

Keep logs for workflow jobs that encountered errors

Add Step | [Insert](#) | [Delete this step.](#)

Type a step description here.

AMLLP.WorkFlow.AutoNumber (1.0.1.2):AMLLP.WorkFlow.AutoNumber.Autonumber [Set Properties](#)

Type a step description here.

Update: RMA [Set Properties](#)

Select the Autonumber record that was created on step 2

Set Custom Step Input Properties - Microsoft Dynamics 365 - Google Chrome

Secure | <https://amgprma.crm.dynamics.com/SFA/Workflow/customactivityform.aspx?activityname=CustomActivitySt>

File Save and Close

Process: RMA Set RMA Number Working on solution

### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
AutoNumberRecord	Lookup	Required	<input type="text" value="Autonumber"/>
Format String	Single Line of Text	Optional	<input type="text" value="RMA{0:000000}"/>
Date Argument {1:<date format>}	Date and Time	Optional	<input type="text"/>
Number Argument {2:0000}	Whole Number	Optional	<input type="text"/>

**Form Assistant**

Dynamic Values

Dynamic Values

**Operator:**  
Set to

**Look for:**  
RMA

Ac

✕ | ↑ | ↓

#### 4. Save and Activate workflow

Process: RMA Set RMA Number - Microsoft Dynamics 365 - Google Chrome

Secure | <https://amgprma.crm.dynamics.com/sfa/workflow/edit.aspx?id=%7b39FC4950-DAAD-4D96-BBB8-2CA88CCAE41%7d>

File Save and Close **Activate** Convert to a background workflow Show Dependencies Actions

Process: RMA Set RMA Number **1** **2**

**Common**

- Information
- Audit History

**Process Sessions**

- Process Sessions

General Administration Notes

**Hide Process Properties**

Process Name \*  Entity

Activate As  Category

**Available to Run**

Run this workflow in the background (recommended)

As an on-demand process

As a child process

**Options for Automatic Processes**

Scope

Start when:   Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Execute as:

The owner of the workflow

The user who made changes to the record

Add Step | Insert | Delete this step.

- Type a step description here.
- AMLLP.WorkFlow.AutoNumber (1.0.1.2):AMLLP.WorkFlow.AutoNumber.Autonumber
- Type a step description here.
- Update:

Creative Draft