

User Guide

Of

Dynamic CRM Solution- Auto number



DISCLAIMER

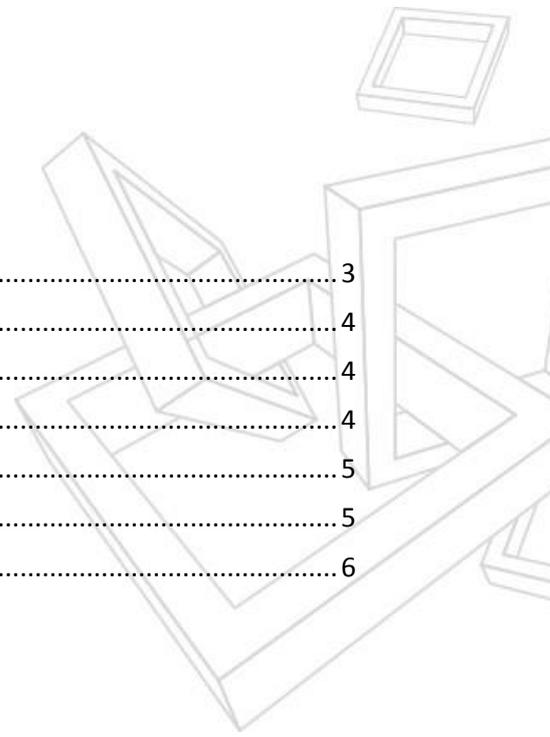
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Auto Number

In Dynamic CRM, generate unique random numbers, letters, date or time in any field of any entity.

This auto number plug-in, let the user manage their Account IDs or Invoice numbers very easily. The Dynamic CRM Add-on is helpful in making your CRM more user friendly. This auto number solution will generate numbers or letters randomly, but all are unique so that the trouble of entering the lead Ids, account number or any employee Ids, etc. is now gone.



Download the Auto Number, CRM solution from our website and integrate it in your CRM for generating the auto numbers. This solution will help you in managing your time and work effectively by reducing the bulk of data entry for employee id, account id, etc.

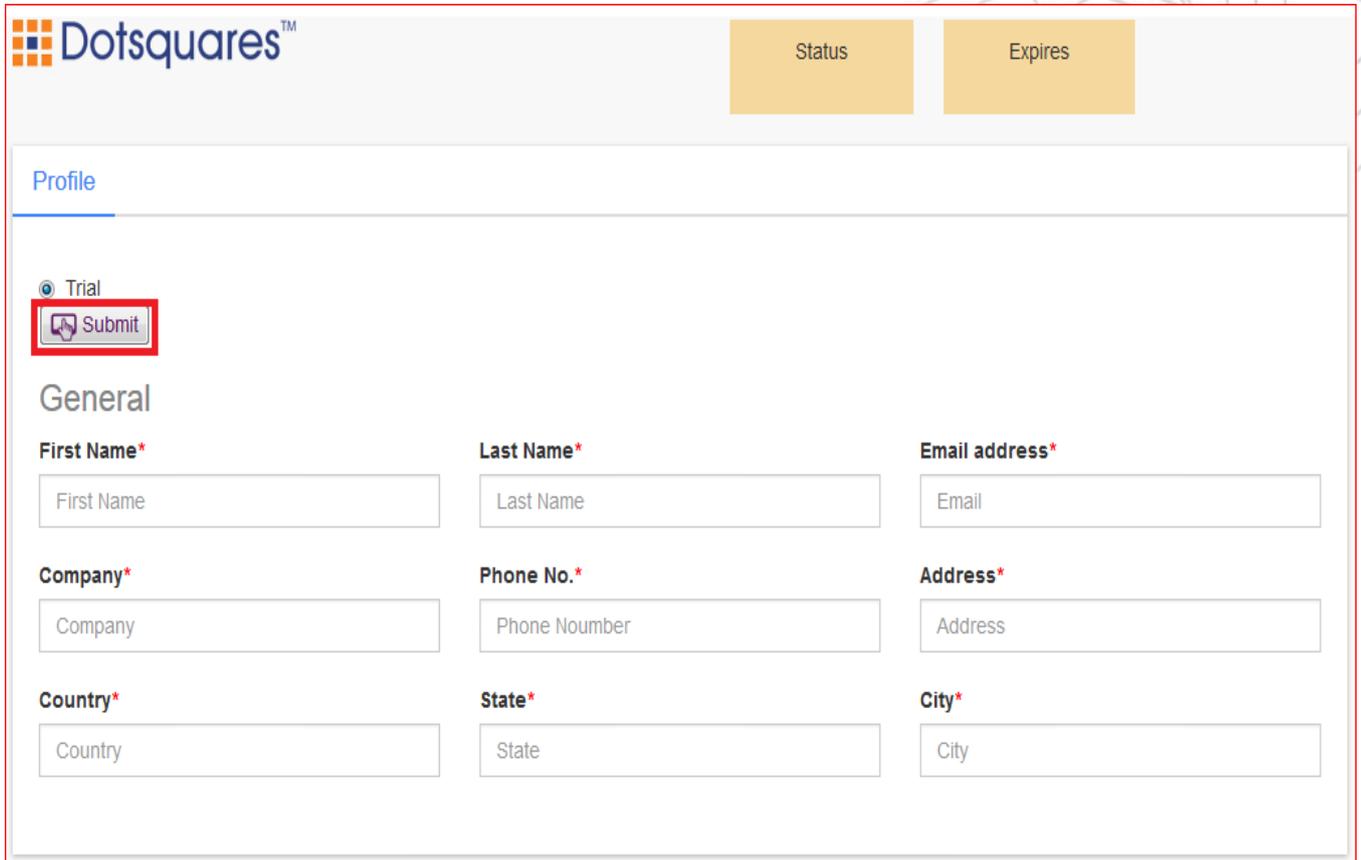
You can also find our other CRM solutions such as Lead Integration, Auto SMS, Event calendar and CRM Twitter.

Once downloading the Auto number solution from the website, find the below steps for further configuration.

Follow The Steps for configuring the Auto Number:

Create Your Profile:

Fill the required general details for creating your Profile then press submit.

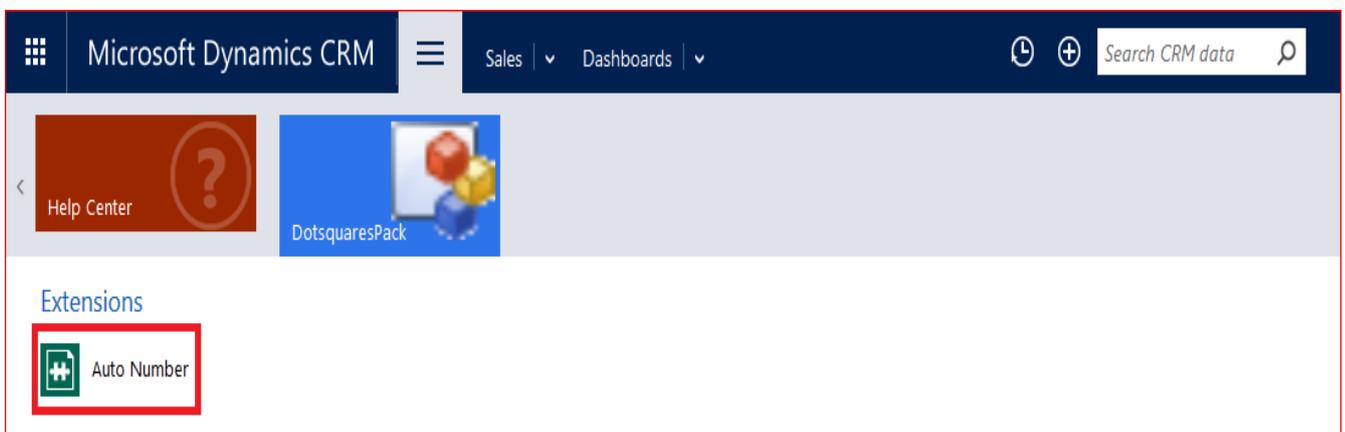


The screenshot shows the Dotsquares profile creation interface. At the top left is the Dotsquares logo. To the right are two yellow buttons labeled 'Status' and 'Expires'. Below the logo is a 'Profile' section with a 'Trial' radio button selected and a 'Submit' button highlighted with a red box. The main form is titled 'General' and contains several input fields arranged in a grid:

First Name* First Name	Last Name* Last Name	Email address* Email
Company* Company	Phone No.* Phone Nounber	Address* Address
Country* Country	State* State	City* City

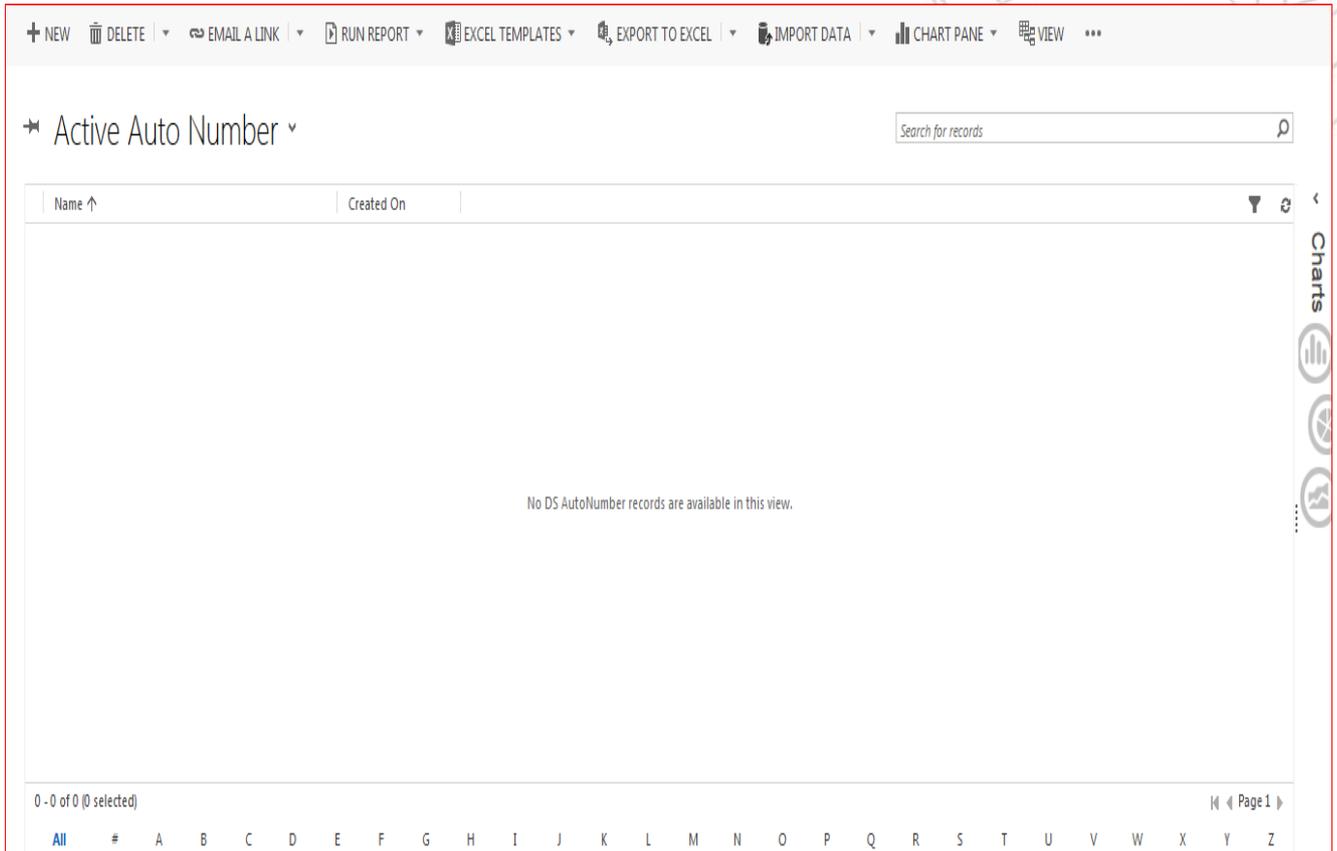
Go to Extension Column:

Once you create your profile, then Auto number solution can be accessed from the Extension column (as appearing in the below screenshot).



Active Auto number:

On clicking the Auto number icon, a page will appear as shown in the image below. There are multiple features like Create a new auto number, excel templates, export to excel, import data, etc.



Features

The auto number solution will help in accessing the following features:

- Create a New auto number
- Delete
- Email a Link
- Export to excel
- Import data
- Chart Pane
- View
- Search

New Auto number:

For creating a new Auto number, fill the form with the details like target entity, target attribute and other essential fields and save it to activate the auto number.

DS AUTO NUMBER - INFORMATION

New DS AutoNumber

General

Target Entity*

Target Attribute*

Attribute Name

Max Length

Name*

Target Entity Name*

Placeholder

Target Attribute Name

Initialize Number

Current Number

Field Format

Help Format

- Dates - {dx} - The Date inserts the current date at the position of the token in the specified format.
 - Date DD: {dd}, Result: 03
 - Date MM: {MM}, Result: 06
 - Date MMM: {MMM}, Result: Aug
 - Date YY: {yy}, Result: 16
 - Date YYYY: {yyyy}, Result: 2016
 - Date 0: {0}, Result: 06

Active