PragmaAutoNumbering User Guide

Version 1.0.0

MS CRM Add On –PragmaAutoNumbering

Every business or Processes needs to be identified throughout its life cycle with a unique number or string which is to referred by the users constantly.

The auto numbering solution is used to generate auto incremental numeric counter for each record, which may be incremented simply by unity or may follow a particular user defined pattern according to the need of the system.

The Challenge for CRM is "Guarantee" a unique number for the record under heavy load across multiple servers and environment via multiple access points. Especially for the CRM Online environment.

Pragmasys's Auto Numbering –
With the ability for Dynamics CRM plugins to execute within the database transaction, we are now able to generate unique number sequences regardless of load and across multiple CRM servers by leveraging the transactional locking behavior of SQL Server, purely within the context of Microsoft Dynamics CRM.

Underlying Features of Auto Numbering:
- Working for default entities as well for custom entities
- Able to create auto numbering using Prefix, Suffix and Zero Pads.
- Reset Auto number daily, weekly, monthly, yearly if Required
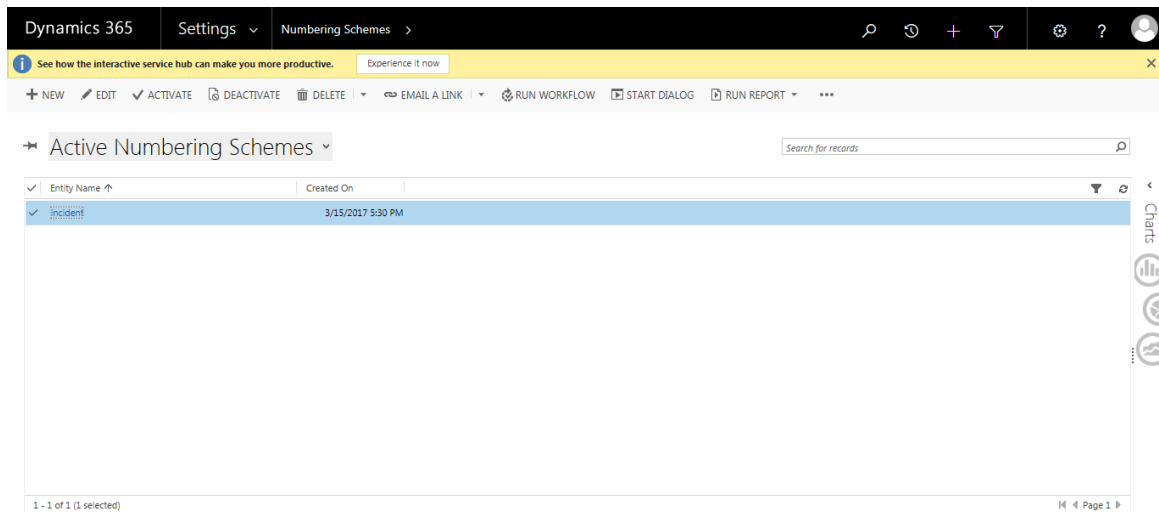- Able to add fix Prefix or Variable prefix.

Steps:

1. Login into MS CRM.

2. To view navigation of Numbering Scheme entity, enable these entities in sitemap area

PragmaAutoNumbering Configuration :

1. Click on New (+) and then enter the details as per your requirement in the below mentioned form.

2. The Attribute and description for configuring the Auto numbering for an Entity are as follows:

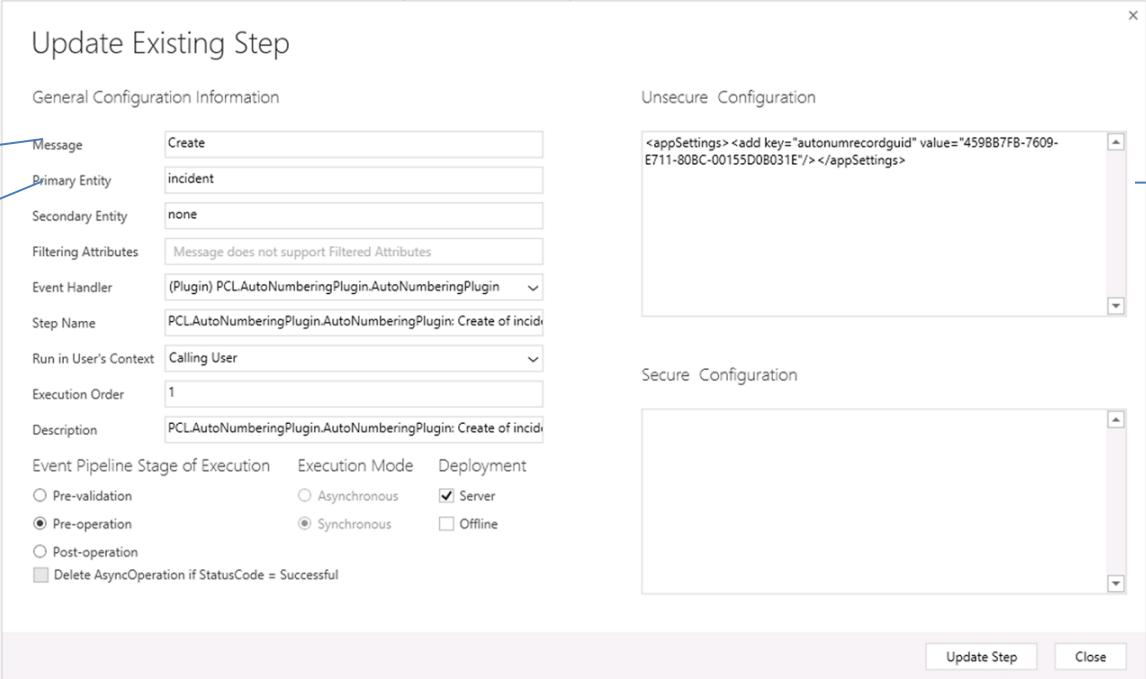| No.	Field Name	Description
1.	Entity Name	Enter the logical name of the entity on which Auto Number to be configured.
2.	Attribute Name	Enter the logical name of Attribute where auto-number to be updated
3.	Length	Length of auto number, excluding suffix and prefix.
4.	Length Pad	Enter character which we will pad, if length of number is less the expected length.
5.	Current Number	Enter the number form where to start the counter.
6.	Increment By	The numeric value by which the sequence needed to be incremented.
7.	Reset On	Select If want reset auto number on specific Frequency. 1. **Never:** Do not reset number. 2. **Daily**: Reset Number Daily. 3. **Monthly:** Reset Number Monthly. 4. **Yearly:** Reset Number Yearly.
8.	Fix Prefix	Fix Prefix to auto number
9.	Prefix Type	Select the type of prefix to append on. 5. **None**: it is the default value, for this value, get the value as Blank in the suffix /prefix. 6. **Value**: it can provide us the value as string for the suffix /prefix. 7. **Date Time Expression**: It will provide us the values in the form of expression, which will be equated and appended for on the auto number. It can provide all possible combination of Date-Time format expression in it.
10.	Prefix	Variable value of the prefix.

11.	Fix Suffix	Fix Suffix to auto number
12.	Suffix Type	Select the type of Suffix to append to. 1. **None**: it is the default value, for this value, get the value as Blank in the suffix /prefix. 2. **Value**: it can provide us the value as string for the suffix /prefix. 3. **Date Time Expression**: It will provide us the values in the form of expression, which will be equated and appended for on the auto number. It can provide all possible combination of Date-Time format expression in it.
13.	Suffix	Variable value of the suffix.
14.	Random Number	* For admin use only.
15.	Plugin Unsecure configuration Key	This is read only field, use the value of this field to add the key in unsecured configuration of Plugin.
16.	Last Update On	* For admin use only.
17.	Generated Key	This message shows, pattern of the auto generated Sequence on load.

Plugins:
- Open Plugin registration tool. Search plugin" PCL.AutoNumberingPlugin".
- Add a new step to the plugin as follows.

- The Description of the required changes for the entity are follows.

No.	Field Name	Description
1.	Message	The point of trigger, at which the plugin needed to trigger. For this Plugin put the value as "Create".
2.	Primary Entity	Put the logical name of the entity for which need to generate auto number.
3.	Stage of Execution	Mark the stage of execution as "Pre-Operation".
4.	Unsecure Configuration	It is field that you have get from the numbering schema field no.15.

- For each entity, we must make new step under this plugin.