

# Dynamics CRM AutoNumber

Version 2.2 - Enterprise

# Contents

2	Introduction
2	About Brite Global
3	Installation
3	Solution Import
6	Security Role Requirements
7	AutoNumber Rules
7	Creating AutoNumber Rules
8	Primary Entity Rule
11	Single Lookup Rule
13	Multiple Lookups Rule
15	Single Optionset Rule
17	Multiple Optionset Rule
19	Related Entity AutoNumber Rule
21	Publishing AutoNumber Rules

# Introduction

The CRM Auto is a Dynamics CRM 2016/Dynamics 365 managed solution that provides the ability to automate the process of creating automated numerical values across entities.

The solution supports the creation of both numerical AutoNumbers and AutoNumbers made of string with prepended prefixes or appended suffixes. In the Enterprise edition, the solution also provides the ability to create AutoNumber values based on option sets and option set values as well as lookup entities and lookup entity values.

## About BGBS

Established in 2005, BGBS, Inc. is a leader in delivering Microsoft Dynamics CRM and xRM solutions to business customers. As a Microsoft Certified Partner, Brite Global has an impressive and rapidly growing list of customers benefiting from Microsoft Dynamics CRM solutions. We have embraced the Power of Choice by providing our customers the choice of a hosted, on-premises or hybrid delivery options.

Headquartered in Teaneck, NJ, BGBS, Inc. provides CRM and software solutions to business in multiple industries including Public Sector and Education, Financial Services, Real Estate, Media and Entertainment, Not for Profit, Retail and Manufacturing, Professional Services and more. For more information, visit [www.briteglobal.com](http://www.briteglobal.com).

# Installation

This section describes the installation process of the AutoNumber managed solution. The installation is straight forward and the only requirement is for the user installing the solution to have the appropriate Security Privileges to install and configure solution in the environment.

We recommend that you install this solution in your test environment prior to having installed in your production environment.

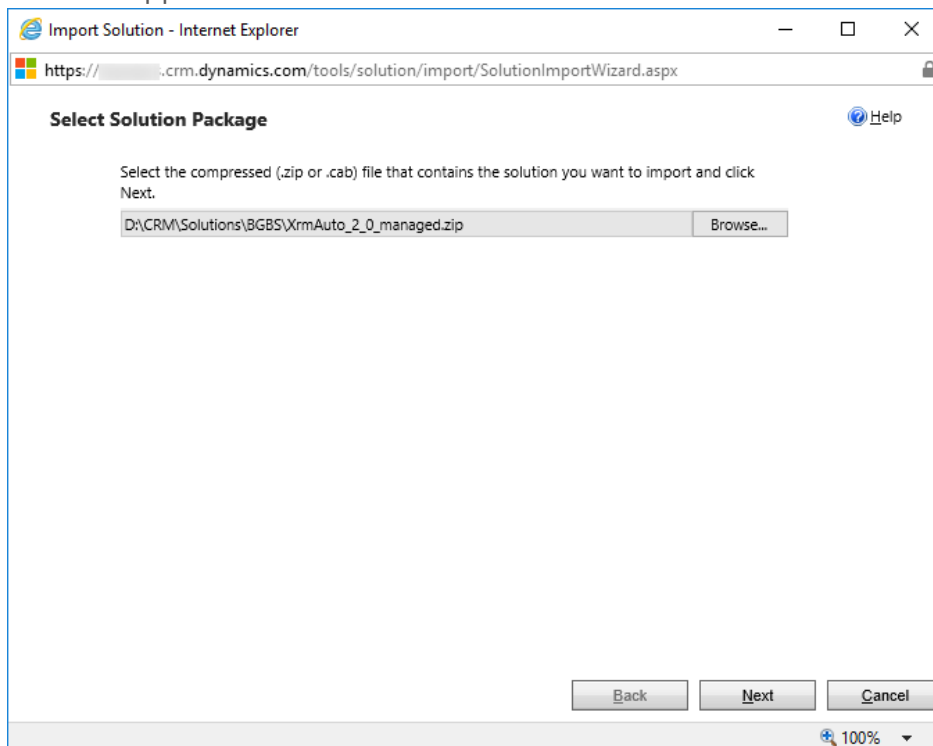
## Solution Import

In your CRM environment click on the Settings Navigation area, and under the Customization Group select Solutions.

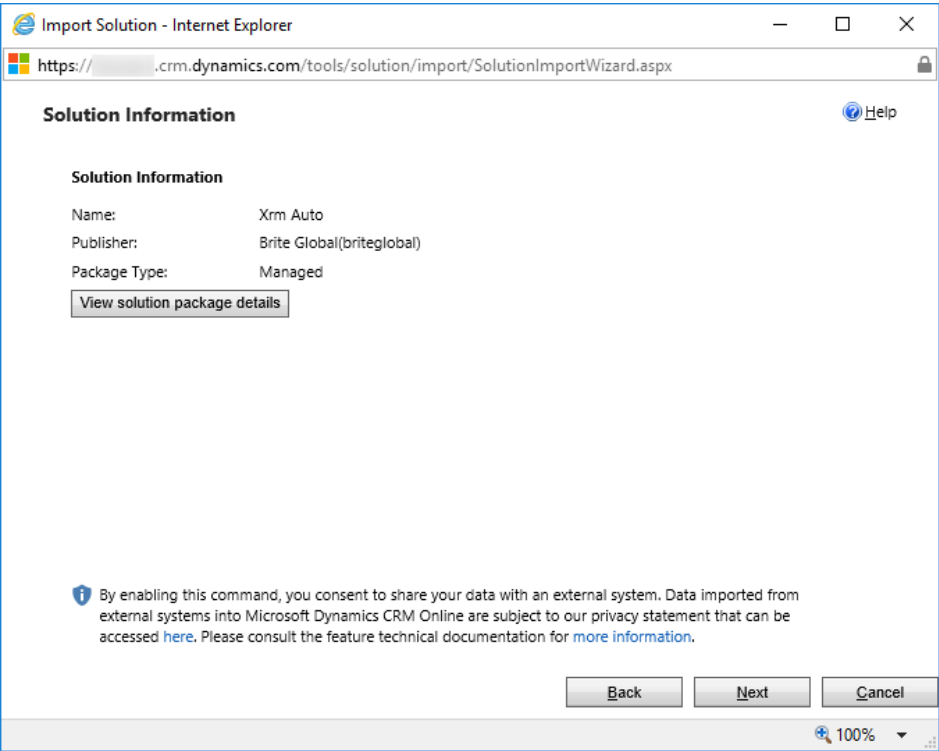
Click on the Import button on the Solution grid toolbar as shown in the image below.



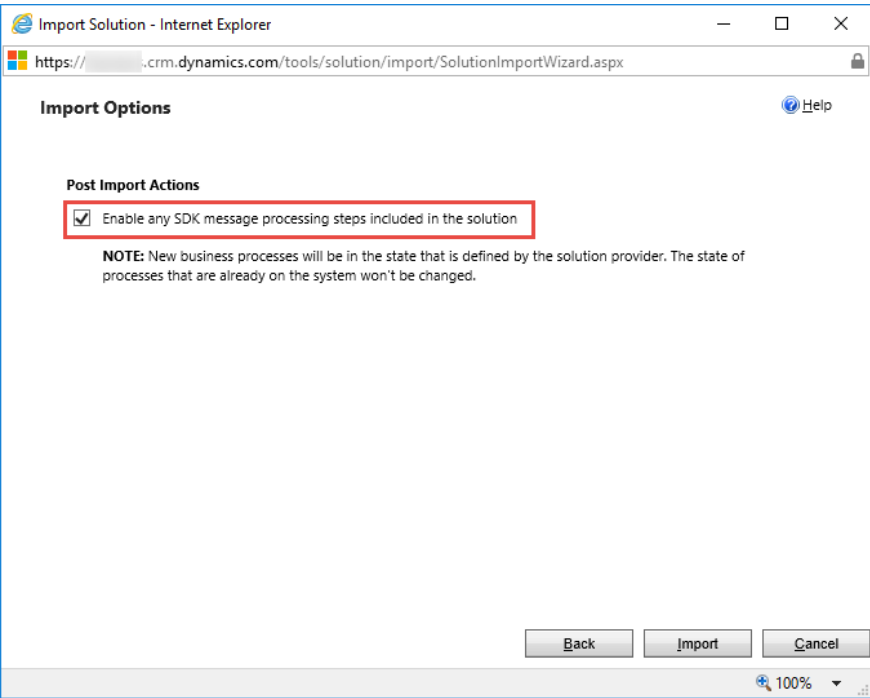
This will launch the Import Solution wizard. In the Select Solution Package page, click on the Browse button, navigate to the folder containing the managed solution installation file that you received, and select the file so that it appears in the text box next to the Browse button:



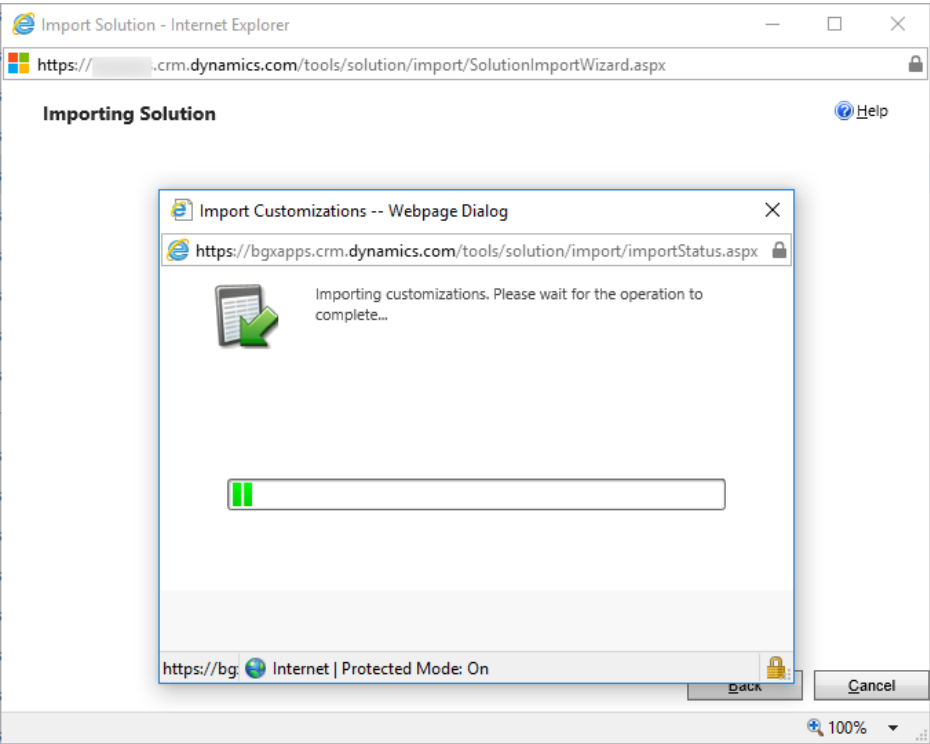
Click on the Next button. This will show you the Solution information page. If you would like to see the contents of the solution package, you can click on the *View solution package details*, however this is not required.



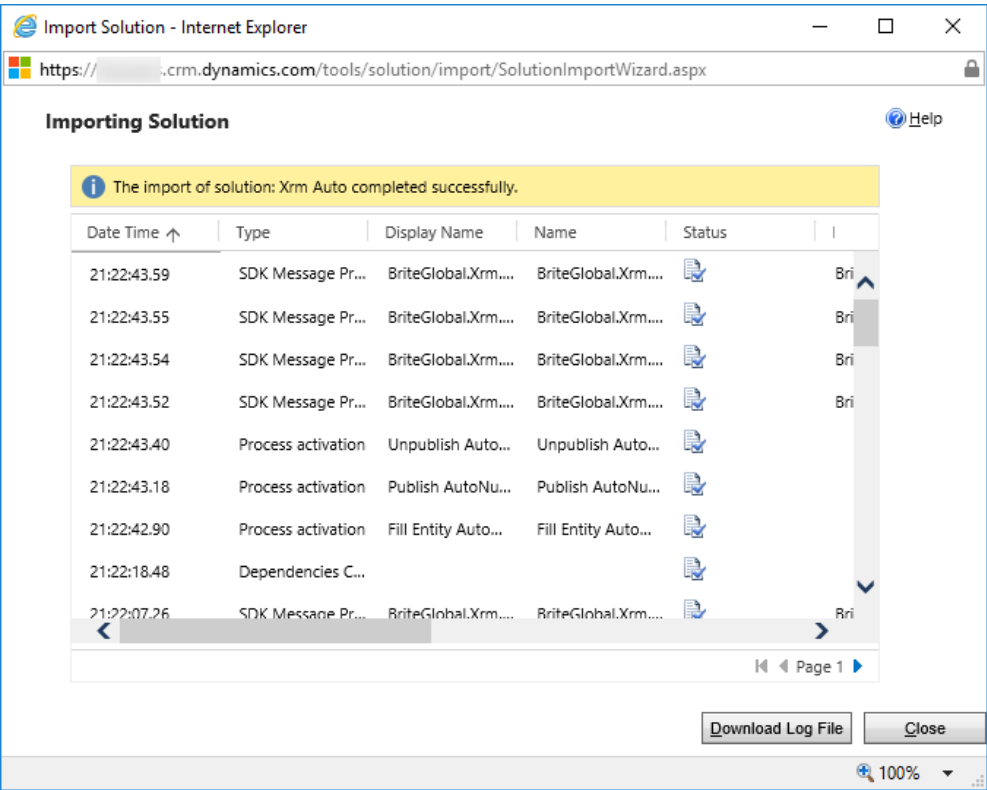
Click on the Next button. The Import Options page will display. In the Post Import Actions area, click on the checkbox that says *Activate any processes and enable any SDK message processing steps included in the solution*, as shown below.



Click on the Next button. The import of the solution will commence, and the progress will be displayed as shown in the image below:



Once the solution has been imported an Installation summary page will appear as shown below:



Click on the Close button. There is no need to publish your customizations at this point.

# Security Role Requirements

After the installation of the managed solution has been completed, you can start adding your AutoNumber rules. Make sure to refresh your browser window.

The Auto Numbers entity will appear under Extensions in the Settings Navigation area, as shown in the picture to the right

## Security Role Configuration

There are two security roles that have to be configured for the use of the AutoNumber.

The first role, is the user that will be creating the AutoNumber rules. If that user has the System Administrator security role, then you do not need to make any configuration. If the user is of a different security role, you will need to provide Organization Create, Read and Write access to the role as shown in the image below:

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Auto Number	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

The second role, is for ALL users of the application. If you have a shared Security role that is used by all users, make the modifications there. If you have different roles for different users, you will have to make the modification for each security role, or you can create a new role that will contain the AutoNumber permissions and add it to all the users. The required permissions for the regular users is displayed below:

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Auto Number	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

# AutoNumber Rules

In this section we will show the different options for the different rules that are available for creating AutoNumbers.

## Creating AutoNumber Rules

There are several different options for Creating AutoNumbers, and should be used based on your business requirements.

The following table explains each of these different options:

Relationship Type	Attribute Type	Description
<b>Primary Entity</b>	Whole Number	Create an AutoNumber for an entity, and store the AutoNumber in a numeric field in the entity
<b>Primary Entity</b>	Single Line of Text	Create an AutoNumber for an entity, and store the AutoNumber in a text field in the entity
<b>Lookup Attribute (Single AutoNumber)</b>	Single Line of Text	Create an AutoNumber for an entity based a value in a related entity, and stores the AutoNumber in a text field in the entity
<b>Lookup Attribute (Multiple AutoNumbers)</b>	Single Line of Text	Create an AutoNumber for an entity based a multiple values of a related entity, and stores the AutoNumber in a text field in the entity
<b>Option Set Attribute (Single AutoNumber)</b>	Single Line of Text	Create an AutoNumber for an entity based a value in an option set field, and stores the AutoNumber in a text field in the entity
<b>Lookup Attribute (Multiple AutoNumbers)</b>	Single Line of Text	Create an AutoNumber for an entity based a multiple values of an option set, and stores the AutoNumber in a text field in the entity

\*

The option to create a single AutoNumber across multiple entities, has been deprecated.



# AutoNumber Primary Entity Rule

## AutoNumber Numeric Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against. Use lowercase letters when using the entity names, such as account.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Primary Entity. This means that we are not running rules based on other values in the entity.
Attribute Type	Whole Number. This AutoNumber is numeric, and does not support custom rules using Prefix and Suffix numbers.
Field Name	The name of the attribute in the target Entity. This is the Whole Number field where the AutoNumber will be stored.
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Primary Entity with a Whole Number Attribute Type.

The screenshot shows the configuration interface for an AutoNumber rule. The title bar includes actions like NEW, DEACTIVATE, DELETE, AUTO FILL NUMBERS, SET NEXT AUTONUMBER, PUBLISH, EMAIL A LINK, and RUN WORKFLOW. The main heading is "Account Entity Number AutoNumb...". The "General" tab is selected, showing fields for Name, Entity Name, Relationship Type, Attribute Type, and Field Name. The "AutoNumbering Value Settings" section includes Starting Value, Current Value, and Next Value. The status is "Active".

Name *		Account Entity Number AutoNumber for crm_id field	
Entity Name *		account	
Relationship Type *		Primary Entity	
Attribute Type *		Whole Number	
Field Name *		crm_id	

AutoNumbering Value Settings			
Starting Value *	10,000	Current Value *	10,000
Preview	--	Next Value *	10,000

Status: Active

## AutoNumber Text Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against. Use lowercase letters when using the entity names, such as account.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Primary Entity. This means that we are not running rules based on other values in the entity.
Attribute Type	Single Line of Text. This AutoNumber is a string value, and therefore supports the use of Prefixes and Suffixes.
Field Name	The name of the attribute in the target Entity. This is the Single Line of Text field where the AutoNumber will be stored.
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system
Prefix	A text value that can be entered as a prefix for the AutoNumber. This field is not required.
Suffix	A text value that can be entered as the suffix for the AutoNumber. This field is not required
Length	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Primary Entity with a Single Line of Text Attribute Type.

+ NEW
DEACTIVATE
DELETE
AUTO FILL NUMBERS
SET NEXT AUTONUMBER
PUBLISH
EMAIL A LINK
RUN WORKFLOW
...
↑
↓

AUTO NUMBER : INFORMATION

Account Entity Text AutoNumber for..

Entity Name\*  
account
Field Name\*  
accountnumber

General

Name\*  
Account Entity Text AutoNumber for accountnumber field

Entity Name\*  
account

Relationship Type\*  
Primary Entity

Attribute Type\*  
Single Line of Text

Field Name\*  
accountnumber

AutoNumbering Value Settings

Starting Value\*  
10,000

Current Value\*  
10,000

Preview  
--

Next Value\*  
10,000

Text AutoNumber Settings

Prefix  
ACCT

Suffix  
--

Separator Character  
--

Length  
5

Status  
Active

## Primary Entity Text AutoNumber Creation

In order to generate the AutoNumbers, as in our example for the account entity, simple create a new account record. Do not enter any data in the account number field. The account number field does not physically have to be on the form.

ACCOUNT INFORMATION

Account Name\*  
Los Angeles Department of Water and Power

Account Number  
--

Phone  
--

Fax  
--

Website  
http://www.ladwp.com

Parent Account  
--

Ticker Symbol

ACCOUNT INFORMATION

Account Name\*  
Los Angeles Department of Water and Power

Account Number  
ACCT10000

Phone  
--

Fax  
--

Website  
http://www.ladwp.com

Parent Account  
--

Ticker Symbol  
--

The following tables shows an example of how the auto numbers will appear:

Prefix	Suffix	Length	Next Value	Generated AutoNumber
ACCT		5	10000	ACCT10000
ACCT		5	10001	ACCT10001

The logic basically is irrelevant of the entity, so when you create a new contact or customer record, the AutoNumber gets incremented, which means that you can have gaps within a particular entity, but not when you look at the data of both entities.

# AutoNumber Single Lookup Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Lookup Attribute (Single AutoNumber). This means that the rule is based on values in a related entity.
Attribute Type	Single Line of Text. This is automatically prepopulated, and cannot be modified.
Field Name	The name of the attribute in the AutoNumber entity where we want to store the generated AutoNumber.
Lookup Field Name	The name of the lookup field in the AutoNumber Entity, that will be used to generate the AutoNumber
Related Entity Name	The name of the entity that is based on the lookup field. This is in order get the value from the related entity.
Related Entity Field Name	The name of the field where we want to take the AutoNumber from. This value of this field should be some sort of code, that can be used in an AutoNumber
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system
Prefix	A text value that can be entered as a prefix for the AutoNumber. This field is not required.
Suffix	A text value that can be entered as the suffix for the AutoNumber. This field is not required
Separator	A Separator character that will be entered between the Lookup Field Code and the AutoNumber
Length	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Lookup Attribute (single AutoNumber).

+ NEW
DEACTIVATE
DELETE
AUTO FILL NUMBERS
SET NEXT AUTONUMBER
PUBLISH
EMAIL A LINK
RUN WORKFLOW
...
↑ ↓
X

AUTO NUMBER : INFORMATION

Contact Entity Related AutoNumber
Entity Name\*
contact
Field Name\*
jobtitle

General

Name\*
Contact Entity Related AutoNumber
Entity Name\*
contact
Relationship Type\*
Lookup Attribute (Single AutoNumber)
Field Name\*
jobtitle
Lookup Field Name
parentcustomerid
Attribute Type\*
Single Line of Text

Lookup (Related Entity) Settings
Related Entity Name
account
Related Entity Field N:
accountnumber

AutoNumbering Value Settings
Starting Value\*
1
Current Value\*
1
Preview
ACSHN254.0001
Next Value\*
2

Text AutoNumber Settings
Prefix
--
Suffix
--
Separator Character
.
Length
4

Status
Active

## AutoNumber Single Lookup Creation

In order to generate the AutoNumbers that are based on a related entity, as in our example for the contact entity with values from the account entity, simply create a new contact record, and make sure that you select a valid account record in the parent customer field. Do not enter any data in the job title field (used to store the AutoNumber in our case). The job title field does not physically have to be on the form.

Once the record is saved, the AutoNumber will be generated from the value of the accountnumber field of the parent form, as shown in the image below:

## Summary

CONTACT INFORMATION

Full Name\*
Janet Doors
Job Title
--
Account Name
Alpine Ski House (sample)
Email
jd@alpineski.com
Business Phone
--
Mobile Phone
--
Fax
--
Preferred Method of C
Any
Address
--

## Summary

CONTACT INFORMATION

Full Name\*
Janet Doors
Job Title
ABC09M32-0001
Account Name
Alpine Ski House (sample)
Email
jd@alpineski.com
Business Phone
--
Mobile Phone
--
Fax
--
Preferred Method of C
Any
Address
--

The following table shows how the autonumber gets generated:

Prefix	Suffix	Separator	Length	Data Field Value (from Lookup)	Next Value	Generated AutoNumber
		-	4	ABCO9M32	1	ABCO9M32-0001

## AutoNumber Multi Lookup Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Lookup Attribute (Multi AutoNumber). This means that the rule is based on values in a related entity.
Attribute Type	Single Line of Text. This is automatically prepopulated, and cannot be modified.
Field Name	The name of the attribute in the AutoNumber entity where we want to store the generated AutoNumber.
Lookup Field Name	The name of the lookup field in the AutoNumber Entity, that will be used to generate the AutoNumber
Related Entity Name	The name of the entity that is based on the lookup field. This is in order get the value from the related entity.
Related Entity Field Name	The name of the field where we want to take the AutoNumber from. This value of this field should be some sort of code, that can be used in an AutoNumber
Starting Value*	The Value of the First AutoNumber to use.
Current Value*	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value*	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Prefix*	A text value that can be entered as a prefix for the AutoNumber. This field is not required.
Suffix*	A text value that can be entered as the suffix for the AutoNumber. This field is not required
Separator*	A Separator character that will be entered between the Lookup Field Code and the AutoNumber
Length*	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

\* All of the fields that are marked with an asterisk will be copied as initial values to the Related Values Grid. They can be changed individually if necessary, and additional fields can be added later, which will be based on the field values in the AutoNumbering Value Settings and Text AutoNumber Settings sections.

NEW

DEACTIVATE

DELETE

AUTO FILL NUMBERS

SET NEXT AUTONUMBER

PUBLISH

EMAIL A LINK

RUN WORKFLOW

↑

↓

×

AUTO NUMBER : INFORMATION

Create of Lead AutoNumber (Looku... ⌵

Entity Name\*

lead

Field Name\*

pager

General

Name\*

Create of Lead AutoNumber (Lookup Multi)

Entity Name\*

lead

Relationship Type\*

Lookup Attribute (Multiple AutoNumbers)

Field Name\*

pager

Lookup Field Name

new\_keyvaluepairid

Attribute Type\*

Single Line of Text

Lookup (Related Entity) Settings

Related Entity Name

new\_keyvaluepair

Related Entity Field Ni

new\_value

AutoNumbering Value Settings

Starting Value\*

1,001

Current Value\*

1,001

Preview

--

Next Value\*

1,001

Text AutoNumber Settings

Prefix

--

Suffix

--

Separator Character

-

Length

4

Set Related Values

Auto-Create

Yes

+

Name ↑	Key	Starting Value	Current Value	Next Value	Number Length	Prefix	Suffix	Separator Cha
AVG	bb191846-61fc-e611-...	1,001	1,001	1,001	4			-
CLA	94e3a956-61fc-e611-...	1,001	1,001	1,001	4			-
NLA	58aa4369-61fc-e611-...	1,001	1,001	1,001	4			-

Status

Active

## AutoNumber Multi Lookup Creation

In order to generate the autonumbers that are based on a related entity, and can differentiate by each individual value of the lookup, as in our example for the lead entity with values from the keyvaluepair entity, simply create a new lead record, and make sure that you select a valid keyvaluepair record in the Key Value Pair field. Do not enter any data in the pager field (used to store the autonumber in our case). The pager field does not physically have to be on the form.

Once the record is saved, the AutoNumber will be generated from the value of the Key Value Pair field of the parent form, as shown in the image below:

## Summary

### CONTACT

Topic \* **Multi Lookup AutoNumber Test**  
 Name \* **Sam Franklin**  
 Job Title --  
 Business Phone --  
 Mobile Phone --  
 Email **samf@leads.com**  
 Key Value Pair **AVG**  
 Pager --



## Summary

### CONTACT

Topic \* **Multi Lookup AutoNumber Test**  
 Name \* **Sam Franklin**  
 Job Title --  
 Business Phone --  
 Mobile Phone --  
 Email **samf@leads.com**  
 Key Value Pair **AVG**  
 Pager **Arroyo.1001**

You will notice that the AutoNumber that was generated is not AVG.1001, but Arroyo.1001, since we specified in the Related Entity Field Name to use the field new\_value, and not the default new\_name that is linked with AVG.

## AutoNumber Single Option Set Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Option Set Attribute (Single AutoNumber). This means that the rule is based on values in an option set field.
Attribute Type	Single Line of Text. This is automatically prepopulated, and cannot be modified.
Field Name	The name of the attribute in the AutoNumber entity where we want to store the generated AutoNumber.
Option Set Field Name	The name of the lookup field in the AutoNumber Entity, that will be used to generate the AutoNumber
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system
Prefix	A text value that can be entered as a prefix for the AutoNumber. This field is not required.
Suffix	A text value that can be entered as the suffix for the AutoNumber. This field is not required



Separator	A Separator character that will be entered between the Option Set Field Code and the AutoNumber
Length	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Lookup Attribute (single AutoNumber).

AUTO NUMBER : INFORMATION

## Create of Contact AutoNumber (OptionSet Single)

Entity Name: contact | Field Name: jobtitle

**General**

Name: Create of Contact AutoNumber (OptionSet Single)

Entity Name: contact

Relationship Type: Option Set Attribute (Single AutoNumber) | Field Name: jobtitle

OptionSet Field Name: accountrolecode | Attribute Type: Single Line of Text

**AutoNumbering Value Settings**

Starting Value: 1 | Current Value: 1

Preview: -- | Next Value: 1

**Text AutoNumber Settings**

Prefix: WBS | Suffix: -- | Separator Character: . | Length: 4

## AutoNumber Single Option Set Creation

In order to generate the AutoNumbers that are based on an option set, as in our example for the contact entity with values from the account role optionset field, simply create a new contact record, and make sure that you select a valid value from the accountrole field. Do not enter any data in the job title field (used to store the AutoNumber in our case). The job title field does not physically have to be on the form.

Once the record is saved, the AutoNumber will be generated from the value of the accountrolecode field of the form, as shown in the image below:

**CONTACT INFORMATION**

Full Name: Lee Han

Job Title: --

Account Name: --

Role: Decision Maker

Email: leehan@mymail.com

**CONTACT INFORMATION**

Full Name: Lee Han

Job Title: WBS1.0001

Account Name: --

Role: Decision Maker

Email: leehan@mymail.com

The following table shows how the AutoNumber gets generated:

Prefix	Suffix	Separator	Length	Data Field Value (from OptionSet)	Next Value	Generated AutoNumber
WBS		.	4	1 (Decision Maker)	1	<b>WBS1.0001</b>

## AutoNumber Multi Option Set Rule

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Lookup Attribute (Multi AutoNumber). This means that the rule is based on values in a related entity.
Attribute Type	Single Line of Text. This is automatically prepopulated, and cannot be modified.
Field Name	The name of the attribute in the AutoNumber entity where we want to store the generated AutoNumber.
Lookup Field Name	The name of the lookup field in the AutoNumber Entity, that will be used to generate the AutoNumber
Starting Value*	The Value of the First AutoNumber to use.
Current Value*	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value*	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Prefix*	A text value that can be entered as a prefix for the AutoNumber. This field is not required.
Suffix*	A text value that can be entered as the suffix for the AutoNumber. This field is not required
Separator*	A Separator character that will be entered between the Lookup Field Code and the AutoNumber
Length*	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

\* All of the fields that are marked with an asterisk will be copied as initial values to the Related Values Grid. They can be changed individually if necessary, and additional fields can be added later, which will be based on the field values in the AutoNumbering Value Settings and Text AutoNumber Settings sections.

+ NEW
DEACTIVATE
DELETE
AUTO FILL NUMBERS
SET NEXT AUTONUMBER
PUBLISH
EMAIL A LINK
RUN WORKFLOW
START DIALOG
...
↑
↓
🔍
✕

AUTO NUMBER : INFORMATION

# Lead Entity Option Set Multiple Aut...

Entity Name\*  
lead
Field Name\*  
pager

General

Name\*  
Lead Entity Option Set Multiple AutoNumber
Entity Name\*  
lead
Relationship Type\*  
Option Set Attribute (Multiple AutoNumbers)
OptionSet Field Name\*  
industrycode
Field Name\*  
pager
Attribute Type\*  
Single Line of Text

### AutoNumbering Value Settings

Starting Value\*  
101
Current Value\*  
101
Preview  
--
Next Value\*  
101

### Text AutoNumber Settings

Prefix  
IC
Suffix  
--
Separator Character  
-
Length  
4

### Option Set Related Values

Auto-Create Option S  
Yes

Name ↑	Key	Starting Value	Current Value	Next Value	Number Leng...	Prefix	Suffix	Separator Cha...
Accounting	1	101	101	101	4	IC		-
Agriculture and Non-petr...	2	101	101	101	4	IC		-
Broadcasting Printing and...	3	101	101	101	4	IC		-
Brokers	4	101	101	101	4	IC		-
Building Supply Retail	5	101	101	101	4	IC		-
Business Services	6	101	101	101	4	IC		-
Consulting	7	101	101	101	4	IC		-


Status  
Active

## AutoNumber Multi Option Set Creation

In order to generate the AutoNumbers that are based on an option set, and can differentiate by each individual value of the option set, as in our example for the lead entity with values from the industrycode option set, simply create a new lead record, and make sure that you select a valid industry code option set value. Do not enter any data in the pager field (used to store the AutoNumber in our case). The pager field does not physically have to be on the form.

Once the record is saved, the AutoNumber will be generated from the value of the industry code field of the option set, as shown in the image below:

CONTACT		CONTACT	
Topic *	Multi OptionSet AutoNumber Test	Topic *	Multi OptionSet AutoNumber Test
Name *	Tracy Harp	Name *	Tracy Harp
Job Title	--	Job Title	--
Industry	Brokers	Industry	Brokers
Business Phone	--	Business Phone	--
Mobile Phone	--	Mobile Phone	--
Email	--	Email	--
Key Value Pair	--	Key Value Pair	--
Pager	--	Pager	IC4-0101



## Related Entity Counter Rule

### CONTENTS OF THIS RULE ARE STILL UNDER DEVELOPMENT

The table below explains what the fields are in the AutoNumber entity, and the data that is expected in each of these fields. Note that all of the fields (with the exception of Preview are required).

Attribute	Description
Name	The Name of the AutoNumber Rule. Use something that makes sense to you.
Entity Name	The name of the entity that you want to run the AutoNumber rule against.
Relationship Type	The type of AutoNumber Rule. In this case we will be selecting Lookup Attribute (Single AutoNumber). This means that the rule is based on values in a related entity.
Attribute Type	Single Line of Text or Whole Number. This is automatically prepopulated, and cannot be modified.
Field Name	The name of the attribute in the AutoNumber entity where we want to store the generated AutoNumber.
Lookup Field Name	The name of the lookup field in the AutoNumber Entity, that will be used to generate the AutoNumber
Related Entity Name	The name of the entity that is based on the lookup field. This is in order get the value from the related entity.
Related Entity Field Name	The name of the field where we want to take the AutoNumber from. This value of this field should be some sort of code, that can be used in an AutoNumber
Starting Value	The Value of the First AutoNumber to use.
Current Value	The Value of the Current AutoNumber. When configuring, enter the current value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Next Value	The Value of the Next AutoNumber. When configuring, enter the next value to be the same as the Starting Value. This will be modified by the system as AutoNumbers are being set.
Preview	Ignore. This is being set by the system
Prefix	A text value that can be entered as a prefix for the AutoNumber. This field is not required.

Suffix	A text value that can be entered as the suffix for the AutoNumber. This field is not required
Separator	A Separator character that will be entered between the Lookup Field Code and the AutoNumber
Length	The number of characters that will make up that AutoNumber. This is used in case the actual AutoNumber is less characters then what is entered. The system will fill the AutoNumber will zeros ahead of the number. In the example below, if the current value would be 1, and the length is 5, the number portion of the AutoNumber would be 00001.

The image below illustrates how the AutoNumber record will look like, after creating an AutoNumber record for Lookup Attribute (single AutoNumber).

+ NEW
DEACTIVATE
DELETE
AUTO FILL NUMBERS
SET NEXT AUTONUMBER
PUBLISH
EMAIL A LINK
RUN WORKFLOW
...
↑
↓
Print
Close

AUTO NUMBER : INFORMATION

Contact Entity Related AutoNumber

Entity Name\*
contact
Field Name\*
jobtitle

General

Name\*
Contact Entity Related AutoNumber
Entity Name\*
contact
Relationship Type\*
Lookup Attribute (Single AutoNumber)
Field Name\*
jobtitle
Lookup Field Name
parentcustomerid
Attribute Type\*
Single Line of Text

Lookup (Related Entity) Settings

Related Entity Name
account
Related Entity Field N:
accountnumber

AutoNumbering Value Settings

Starting Value\*
1
Current Value\*
1
Preview
ACSHN254.0001
Next Value\*
2

Text AutoNumber Settings

Prefix
--
Suffix
--
Separator Character
.
Length
4

Status
Active

## Related Entity AutoNumber Creation

In order to generate the AutoNumbers that are based on a related entity, as in our example for the contact entity with values from the account entity, simply create a new contact record, and make sure that you select a valid account record in the parent customer field. Do not enter any data in the job title field (used to store the AutoNumber in our case). The job title field does not physically have to be on the form.

Once the record is saved, the AutoNumber will be generated from the value of the accountnumber field of the parent form, as shown in the image below:

## Summary

### CONTACT INFORMATION

Full Name *	Janet Doors
Job Title	--
Account Name	Alpine Ski House (sample)
Email	jd@alpineski.com
Business Phone	--
Mobile Phone	--
Fax	--
Preferred Method of C	Any
Address	--

## Summary

### CONTACT INFORMATION

Full Name *	Janet Doors
Job Title	ABCO9M32-0001
Account Name	Alpine Ski House (sample)
Email	jd@alpineski.com
Business Phone	--
Mobile Phone	--
Fax	--
Preferred Method of C	Any
Address	--

The following table shows how the autonumber gets generated:

Prefix	Suffix	Separator	Length	Data Field Value (from Lookup)	Next Value	Generated AutoNumber
		-	4	ABCO9M32	1	ABCO9M32-0001

## Publishing Rules

You will notice in the image below that there can be multiple AutoNumber rules for a single entity with different types of fields. The first AutoNumber on the list is for the account entity, and shows a status of Unpublished. In order to Publish an entity, open the Unpublished record.

### Active Auto Numbers

✓	Name ↑	Relationship Type	Entity Name	Field Name	Attribute Type	Starting Value	Next Value	Preview	AutoNumber Status	⌵	⚙
	Account Entity Single Lookup AutoNu...	Lookup Attribute (Sin...	account	accountnumber	Single Line of Text	1,001	1,001		Unpublished		
	AutoNumber Entity Text for accountNL	Primary Entity	account	accountnumber	Single Line of Text	10,000	10,001	ACCT10000	Published		
	Create of Contact AutoNumber (Opt...	Option Set Attribute (...)	contact	jobtitle	Single Line of Text	1	2	WBS1.0001	Published		
	Lead Entity Option Set Multiple Auto...	Option Set Attribute (...)	lead	pager	Single Line of Text	101	101		Published		

Once the Unpublished record is open, click on the Publish button in order to Publish the AutoNumber record.

NEW DEACTIVATE DELETE AUTO FILL NUMBERS SET NEXT AUTONUMBER **PUBLISH**

Once Published, the status of the published record will change from Unpublished to Published.

AutoNumber Status **Published**

Repeat the same steps for any additional AutoNumbers that you created

When a record for a particular entity is published for the first time, a Plugin Step is created, and the status for that record is changed from Unpublished to Published. If you have multiple published records for the same entity, there will still be only a single plugin step.

When a record for an entity is unpublished, the plugin step does not get removed, in case there are additional records for that particular entity, or will be required in the future.