



Auto Number Release Notes

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Section 1 - Introduction

Thank you for downloading and installing our Auto Number solution. This configuration page is for the Incremental Group Auto Number solution v8.0.0.0, released on 27th January 2016. Version v8.0.0.0 marks the latest official Release-To-Web (RTW) for Auto Number for Microsoft Dynamics CRM.

1.1 Known Issues

There are no known issues for this release.

1.2 Version Notes

Here is the current version and release history of Auto Number:

- » v8.0.0.0 - RTW (7th January 2016) - CRM2016 Version
- » v7.0.0.0 - RTW (22nd January 2015) - CRM2015 version
- » v6.0.1.0 – RTW (16th October 2013)
 - Upgraded and re-worked to be compatible with CRM2013.
- » v5.2.0.0 – RTW (20th June 2013)
 - Improved performance in the time taken to execute the auto number plugin logic.
 - This makes the generation of a duplicate number virtually impossible.
 - Added code to Created Auto Number definition records for existing environment where Auto number is already installed.
 - Added Create/Delete/SetstateDynamicEntity Steps in the AutoNumberDefinitionValidation plugin to manage the Auto Number Definition Index.
 - Plugin Execution mode has been changed to pre operation.
 - Removed Plugin Step like Qualify Lead as it was no longer required.
 - Removed interface parameters which were no longer required.
- » v5.0.4.20 – RTW (05th April 2013)
 - Improved performance in the time taken to execute the auto number plugin logic.
- » v5.0.4.19 – RTW (05th December 2012)
 - Fixed issue: "Interface record Auto Number Definition Validation does not exist in CRM."
- » v5.0.4.18 – RTW (27th July 2012)
 - Fixed issue: when creating a sales order from a quote using the 'Create Order' button on the quote form, if Auto Number was configured for the sales order entity an Auto Number would not be generated. This is now resolved, and an Auto Number will be generated in this scenario.
 - Fixed issue: when creating an invoice from a sales order using the 'Create Invoice' button on the Sales Order form, if Auto Number was configured for the invoice entity an Auto Number would not be generated. This is now resolved, and an Auto Number will be generated in this scenario.
 - Fixed issue: when creating a service activity, if the 'Schedule' button was clicked prior to the service activity being saved, if Auto Number was configured for the service activity entity an Auto Number would not be generated. This is now resolved, and an Auto Number will be



generated in this scenario. NOTE: After importing this latest release any existing Auto Number definitions on the Service Activity, Sales Order, and Invoice entities will be upgraded to apply the above fixes. If for some reason this behaviour is not observed, please delete and re-create the Auto Number definitions on these entities.

- » v5.0.4.16 – RTW (10th March 2012) ·
 - Fixed issue: sitemap configuration caused further errors to appear in sitemap, this latest release should no longer generate application log errors related to sitemap.
 - Fixed issue: when converting a lead to an Account, Contact, or Opportunity, if Auto Number was configured for these entities an Auto Number would not be generated. This is now resolved, and an Auto Number will be generated in this scenario.
 - Enhancement: minor cosmetic improvements including new Auto Number icon.
 - Document: updates to this documentation.
- » v5.0.4.12 – RTW (10th August 2011)
 - Fixed issue: sitemap XML error caused events to be raised in the application log, issue now resolved.
 - Fixed issue: upgrade of the managed solution failed from previous version due to a Microsoft defect related to charts in the interface job, issue now resolved.
- » v5.0.4.10 – RTW (22nd July 2011)
 - Fixed issue: When you try to save an Account record which has an email address field populated and when you save the record you receive a Business Process error and SQL Generic Error. This issue has been resolved.
 - Fixed issue: When you add a new field to the Letter entity to store your Auto Number, when you save the record you receive a Business Process error. This issue has been resolved.
- » v5.0.3.8 – BETA (10th May 2011) · Initial release



Section 2 - FAQ

2.1 Why do I get some random characters appearing instead of my Auto Number?

By default, the Auto Number solution runs in trial mode. Please see the Trial Mode section 2.8 in this document for more information.

2.2 Why is my field not updated with an Auto Number?

When you installed Auto Number, did you select the option to Activate Processes? If not, please remove and re-install Auto Number and select this option.

If you have installed Auto Number, and your field is still not updated with an Auto Number please check the following. If you have placed your field on the Microsoft Dynamics CRM form, and made it business required, then please see the "Field not updated with an Auto Number" section in this document for more information.

2.3 What does the solution cost?

The solution costs £199.00. Please visit our website at www.incrementalgroup.co.uk for more information on obtaining a licence for your Microsoft Dynamics CRM Organisation.

2.4 How many environments does the Auto Number licence cover?

You must purchase 1 licence for each of your Microsoft Dynamics CRM production Organisations. License keys for development/test organisations are free.

2.5 Does Auto Number work with Microsoft Dynamics CRM Outlook in Offline Mode?

The solution does not execute whilst offline, however when Microsoft Dynamics CRM synchronises when going back online the auto number process will run against new records.

2.6 Does Auto Number work with Microsoft Dynamics CRM on-premise and with CRMOnline?

The solution is fully compatible with CRM on-premise and CRMOnline.

2.7 Does Auto Number guarantee to avoid duplicate numbers?

Incremental Group have developed a unique locking mechanism to reduce the risk of duplicate numbers occurring, however under some scenarios there is a chance a duplicate number could be generated. Please see the Auto Number Duplicates section 3.8.5 in this document for more information.



2.8 Trial Mode

By default, this solution runs in trial mode. Whilst running in Trial Mode, approximately 1 in every 10 Auto Number requests will generate just random text. Trial Mode can be removed by applying a license key for your CRM Organisation.



Section 3 - Prerequisites

3.1.1 On-Premise or Partner Hosted

You must have the following prerequisites installed before installing Auto Number for Microsoft Dynamics CRM On-Premise or Partner Hosted:

- » A fully working installation of Microsoft Dynamics CRM
- » A Microsoft Dynamics CRM Sandbox server role installed
- » A System Administrator security role for your Organisation

3.1.2 CRM Online

You must have the following prerequisites installed before installing the SMS for Microsoft Dynamics CRM Online:

- » An active Microsoft Dynamics CRM Online subscription
- » A System Administrator security role for your Organisation



Section 4 - Installation Steps

Please use these steps to install the Auto Number RTW:

1. Navigate to Settings > Solutions, and import the Auto Number solution
Note: During import ensure you select the Activate Processes tick box
2. Once imported, click on Publish All Customizations. Press F5 to Refresh your browser.



Section 5 - Upgrade Steps

5.1.1 To upgrade a production instance, a new license key must be purchased

Although an upgraded Auto Number solution will continue to function, the CRM 2013 version requires any old version of Auto Number to be uninstalled prior to importing the solution. Ensure you note the details of your existing auto number definitions including the next number so that after installing the new version, the new definitions can be created correctly.

NOTE: Upgrading from the CRM2013 version to CRM2015 or CRM2016 is simply a case of importing the CRM2015/16 version, then uninstall the CRM2013 version. Upgrading from CRM2015 to CRM2016 is simply a case of importing the CRM2016 solution.

The following steps are for an upgrade from CRM2013 to a later version:

1. View each Auto Number definition and note the pertinent details
2. Delete all Auto Number definition records
3. Delete the old Auto Number solution (this will uninstall all components included in the solution)
4. Click 'Publish All'
5. Import the new version of Auto Number
6. Click 'Publish All'
7. Re-create your auto number definition records

5.2 Requesting a Licence Key

To request a licence key for your Auto Number solution please follow these steps:

1. Navigate to the customisations area of CRM. Click on Customisations
2. Click Developer Resources
3. Copy and paste the Organisation Unique Name send a licence key request to support@incrementalgroup.co.uk

5.3 Installing a Licence Key

To install a licence key for your Auto Number solution please follow these steps:



1. Navigate to Settings > Interfaces
2. Open the Auto Number Generation interface
3. Double click to open the Licence Key interface parameter record
4. Copy and paste your licence key into the value field to replace the "Trial Version" value
5. Save and close the Interface Parameter. Auto Number will now operate in licenced mode

5.4 Uninstallation Steps

To remove Auto Number please perform the following two steps. The steps apply to all current releases of Auto Number.

1. Navigate to the Auto Number Definition area in Settings. Click on each Auto Number Definition and press the delete key to remove this record.
2. Navigate to the Solution area in Settings. Click on Auto Number, click delete, and follow the instructions.



Section 6 - Configuration

6.1.1 Information

The Incremental Group Auto Number Solution can be used against any customisable entity and field including custom entities and fields. It is a requirement of Auto Number to store the result into a field of type String. Ensure you either create a new custom field or identify a standard Microsoft Dynamics CRM field for storing your Auto Number.

6.1.2 Creating a new Auto Number

To create a new Auto Number following these steps:

1. Navigate to the Auto Number Definition, and click new
2. Enter a name for the Auto Number
3. Select an Entity and Field to store the Auto Number result
4. Enter the starting number, increment value, and any prefix or suffix requirements
5. Save and close the Auto Number Definition record

Your setup is complete, now test your new Auto Number in Microsoft Dynamics CRM by creating a new record.

6.2 Security Requirements

There is a security role available within the Auto Number Solution called "Auto Number Generation (for All Users)". This security role must be given to all users who require the ability to generate Auto Number when creating new records. Alternatively, ensure the same privileges contained within the 'Auto Number Generation (for All Users)' security role are added to your existing security roles.



Section 7 - Operation

7.1.1 Field not updated with an Auto Number

You can either use existing fields in Microsoft Dynamics CRM, or you can create new fields of type string or integer. If your field is displayed on a Microsoft Dynamics CRM form for the end users to see, you must ensure the field is not business required.

The Auto Number solution has been designed to “do no harm” to existing data. When you create an Auto Number Definition there is a logic check built into the solution which checks, when creating an Auto Number, for the presence of data existing in the target field.

When the user clicks on a new record, they are forced to enter data into this field. When Auto Number launches, it detects the presence of data in the field, and therefore does not update it. To avoid this scenario, it is recommended to add your field to the form, ensure it is not required, and make the field read only to avoid users changing the value once created.

7.1.2 How to enable logging

Auto Number for Microsoft Dynamics CRM provides two levels of run-time logging - Event Logging and Trace Logging. Please note, for live operation logging should always be disabled.

If you require support, you could be asked to enable logging for Auto Number which is based on the following steps:

1. Navigate to Settings > Interfaces
2. Open the Auto Number Generation interface (or the interface required)
3. In the Interface Options & Parameters section click to enable the logging type required, save and close
4. Run Auto Number by creating a new record which is configured with an Auto Number Definition record
5. Open the interface record again. You should now see a new Interface Job record. Double click to open the Interface Job Record for detailing logging information

7.1.3 Importing Large Datasets

There is a processing overhead each time an Auto Number is generated. Therefore, if you are importing large amounts of data, using Auto Number may reduce the performance of the data load when compared to not using Auto Number. If the elapsed time of your data load is not important you can leave the default settings in place, and import your data as required.

If you are importing large volumes of data, and require a fast import time, it is recommended to disable Auto Number and generate your Auto Number requirements in your source data. Once all data is imported then enable your Auto Number requirement for day to day operational use.

7.1.4 Target String Length

During the creation of an Auto Number Definition record the Auto Number solution will validate the length of the target field. The validation process will take your Auto Number Definition of Prefix + Number + Suffix and add a tolerance value of 5 characters for growth. If the length of the target field is too small Auto Number will alert you.



You can resolve this by increasing the size of your string field which will store the Auto Number.

7.1.5 Duplicate Detection for Auto Number Definition records

Auto Number supports the creation of an Auto Number for a specified entity and field combination. To avoid configuration error, it is recommended you manually create a duplicate detection rule, to run against the Auto Number Definition entity based on the match code of the Entity and Field lookup values. Once published, if an administrator accidentally tries to re-use an Entity and Field combination which is already in use then standard Microsoft Dynamics CRM will alert the administrator to the error.

7.2 Support

If you require support for our Auto Number for Microsoft Dynamics CRM product, please contact us at support@incrementalgroup.co.uk.