



c360 Record Editor User Guide

Microsoft Dynamics CRM 2011 Compatible

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Record Editor

Overview

c360 Record Editor provides Microsoft CRM users an easy way to edit/modify multiple CRM records within a single screen.

Record Editor is an easy to use inline grid editor that allows you to pick any Advanced Find view to edit in a grid format. All CRM data types including nvarchar, picklist, bit/boolean, int, float, lookup, owner types are supported. In addition, Record Editor can be launched from all of the CRM entity grids as well as Advanced Find view results grid.

The key benefits of Record Editor are:

- Edit all CRM fields right within the grid in their own control boxes (date, memo fields, currency, picklist, lookup, boolean, int, money)
- Grid enforces CRM's security model (read-only, state attributes, write privileges)
- Select all or just specific records to edit
- **Bulk update** to copy a change made to all or select rows in the grid
- Launch Record Editor from any CRM grid and/or Advanced Find View Results

Record Editor gives CRM users an easy way to edit multiple records in a single screen

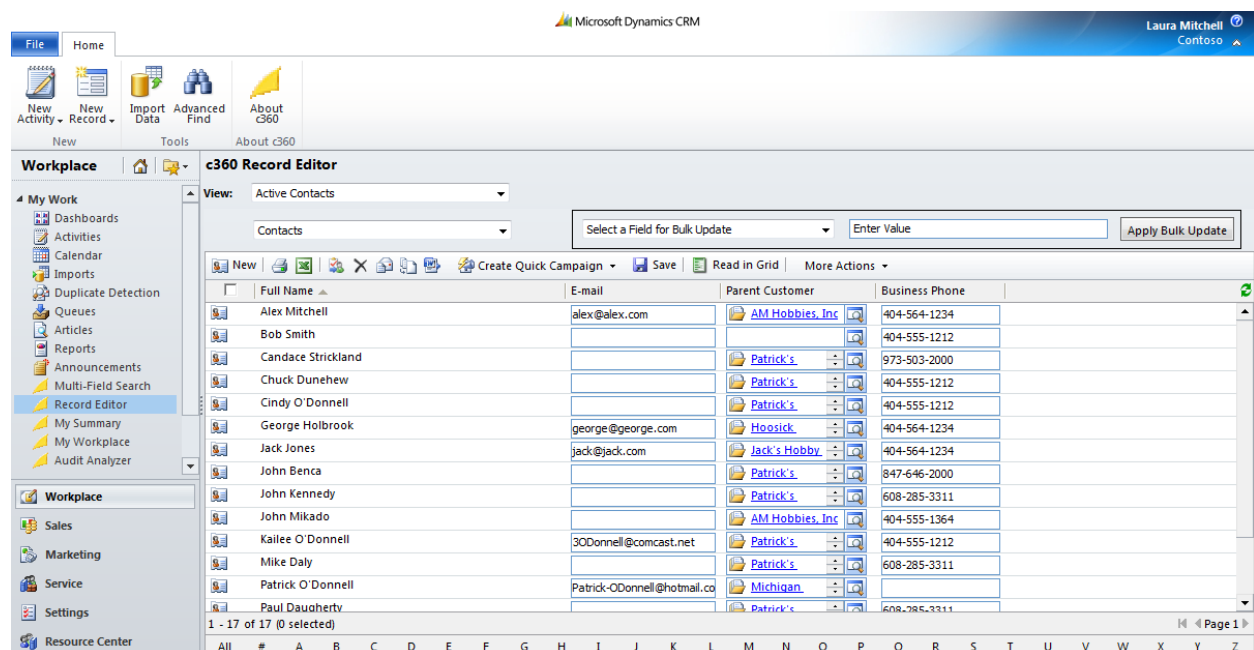


Figure 1: c360 Record Editor allows users to edit multiple CRM records

Accessing Record Editor

Record Editor can be accessed from the following places in CRM

1. The Left Navigation Bar
2. CRM Entity Grids
3. Advanced Find View Results Grid
4. Edit records within the Subgrid on Entity Record form

Left Navigation Bar

When Record Editor is accessed from the left navigation bar (Figure 1), it is displayed in the same window with Microsoft CRM.

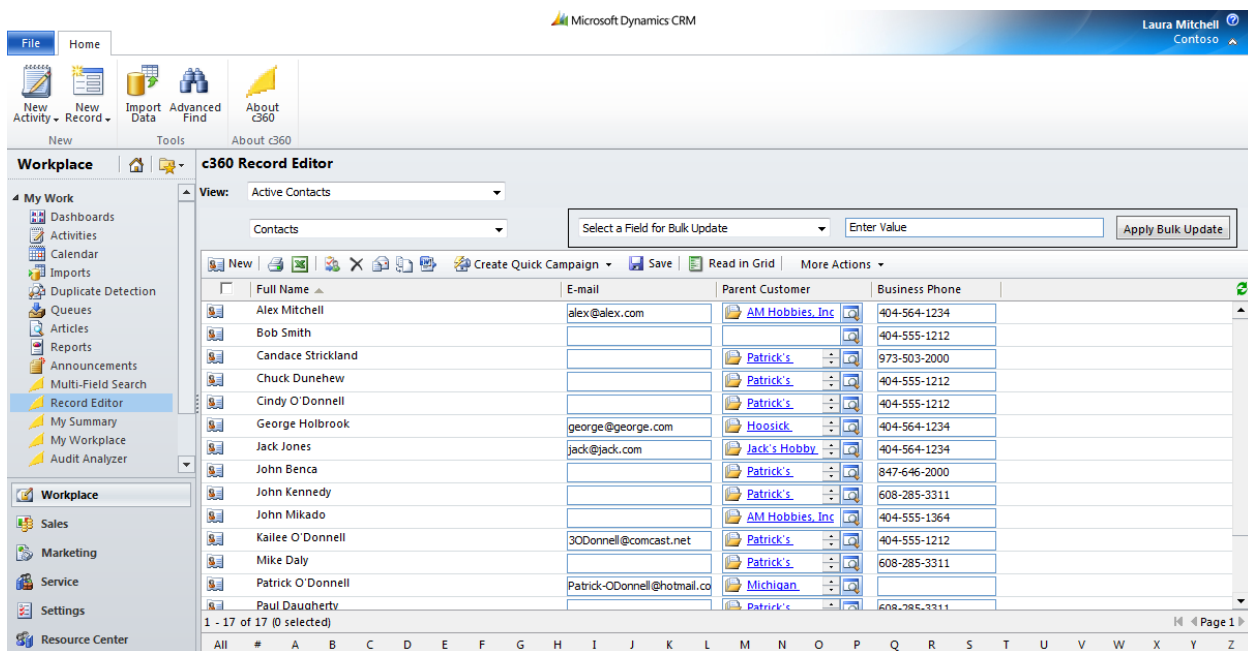


Figure 2: Accessing Record Editor

CRM Entity Grid

Record Editor can also be launched from any CRM entity grid (Accounts, Contacts, Custom Entity) by clicking on the 'Edit Records' icon in the ribbon. This will launch a separate Record Editor window with the entity view that is being displayed. (See Figure 4a & 4b)

Note:

- Record Editor will only be launched with the records that have been highlighted (selected) in the CRM grid. So if only 3 records are selected, the Record Editor will only display those 3 records
- To select all the records in the page, check the 'select all' checkbox on the top left hand side

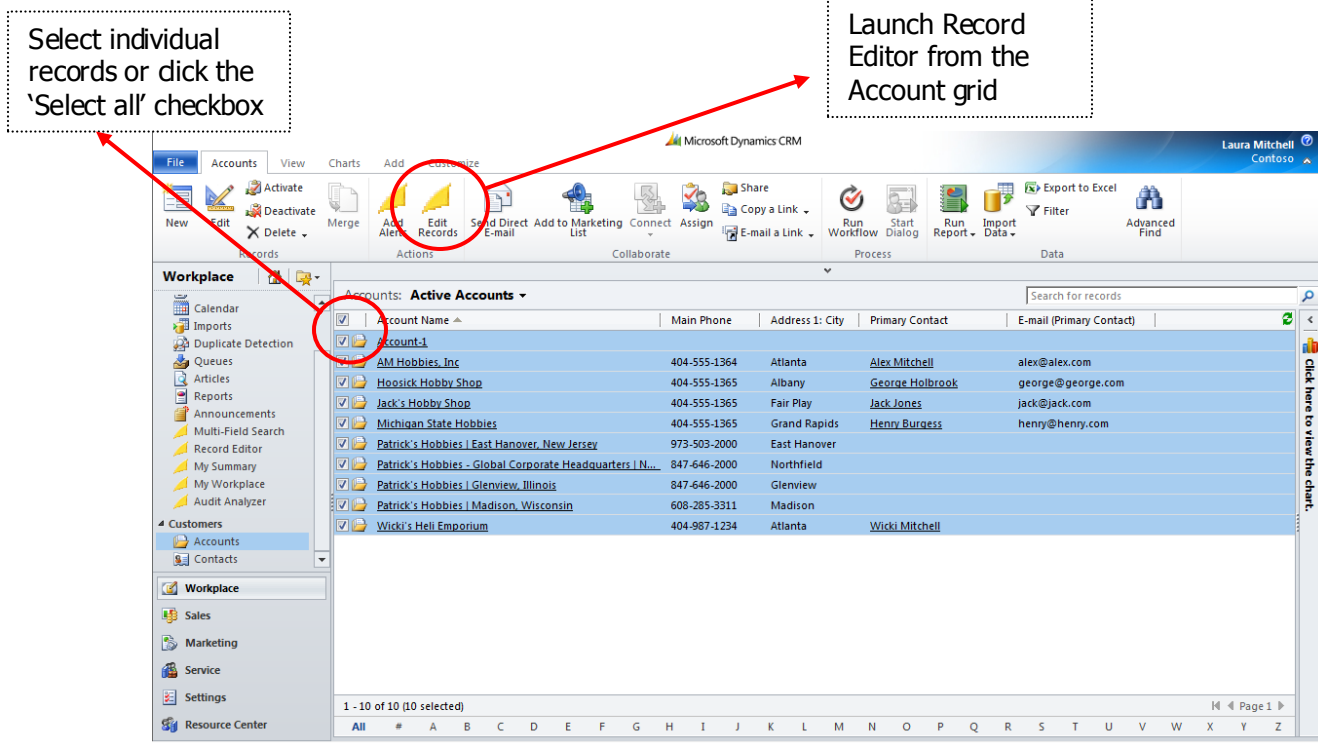


Figure 4a: Launching Record Editor from CRM Account grid

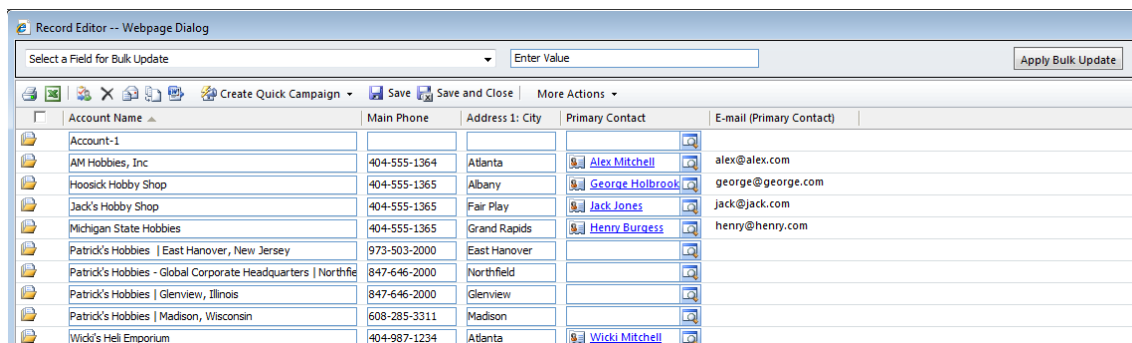


Figure 4b: Record Editor launched from CRM entity grid

Advanced Find View Results Grid

Record Editor can also be launched from the Advanced Find View Results grid by clicking on the 'Edit Records' icon in the Advanced Find Results ribbon (See Figure 5).

Note:

- Similar to when launched from a CRM grid, Record Editor will only be launched with the records that have been highlighted (selected) in the Advanced Find View Results grid
- To select all the records in the page, check the 'select all' checkbox on the top left hand side

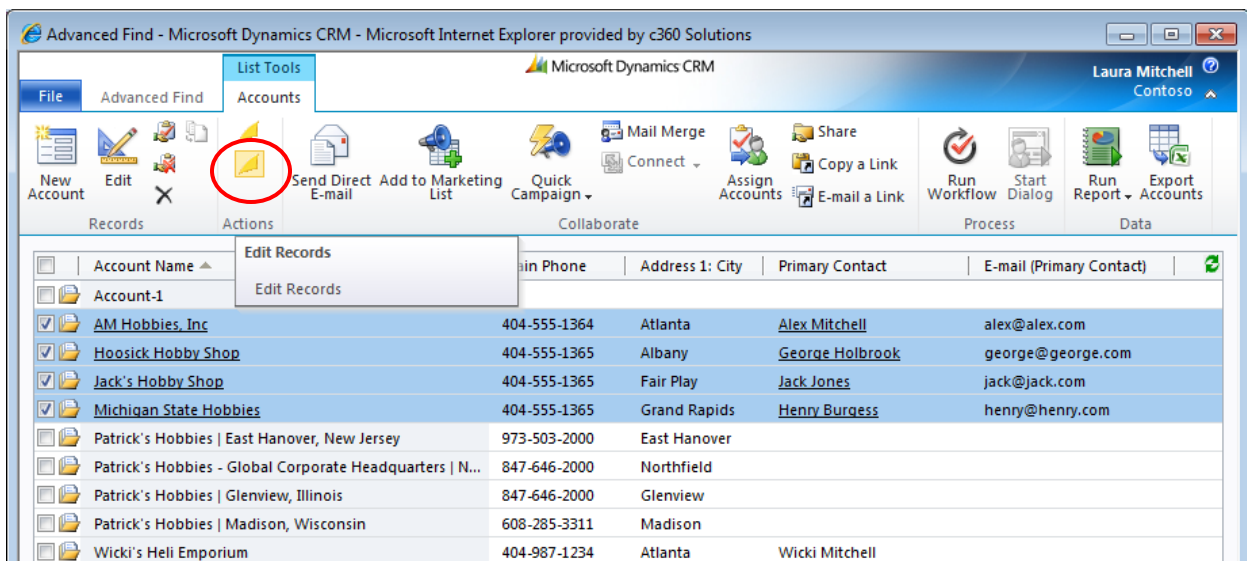


Figure 5: Launching Record Editor from Advanced Find View Results Area

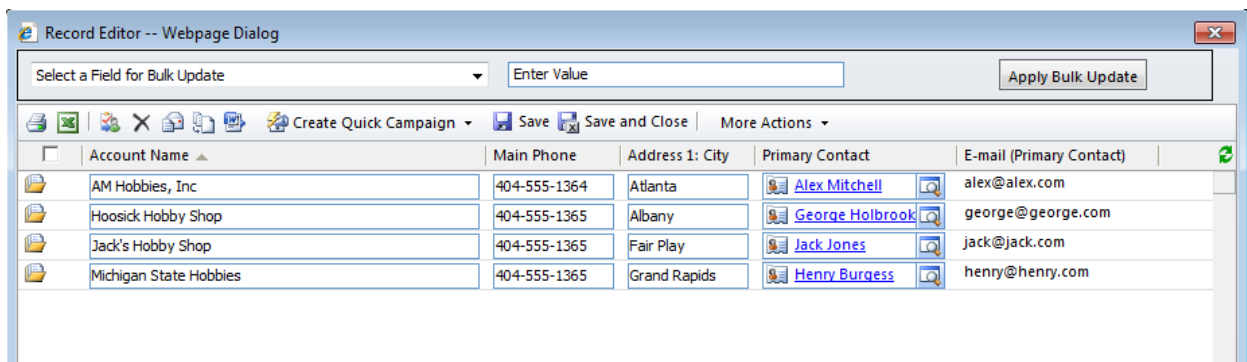


Figure 6: Record Editor displays selected records from the Advanced Find Results view

Edit records within the Subgrid on Entity Record form

Record Editor can also be launched from within the subgrid on Entity Record forms via Edit Record icon in the Ribbon (See Figure 7).

Note:

- Similar to when launched from a CRM grid, Record Editor can also be launched from within the entity records by selecting the records in the sub-grid.
- To select all the records in the page, check the 'select all' checkbox on the top left hand side

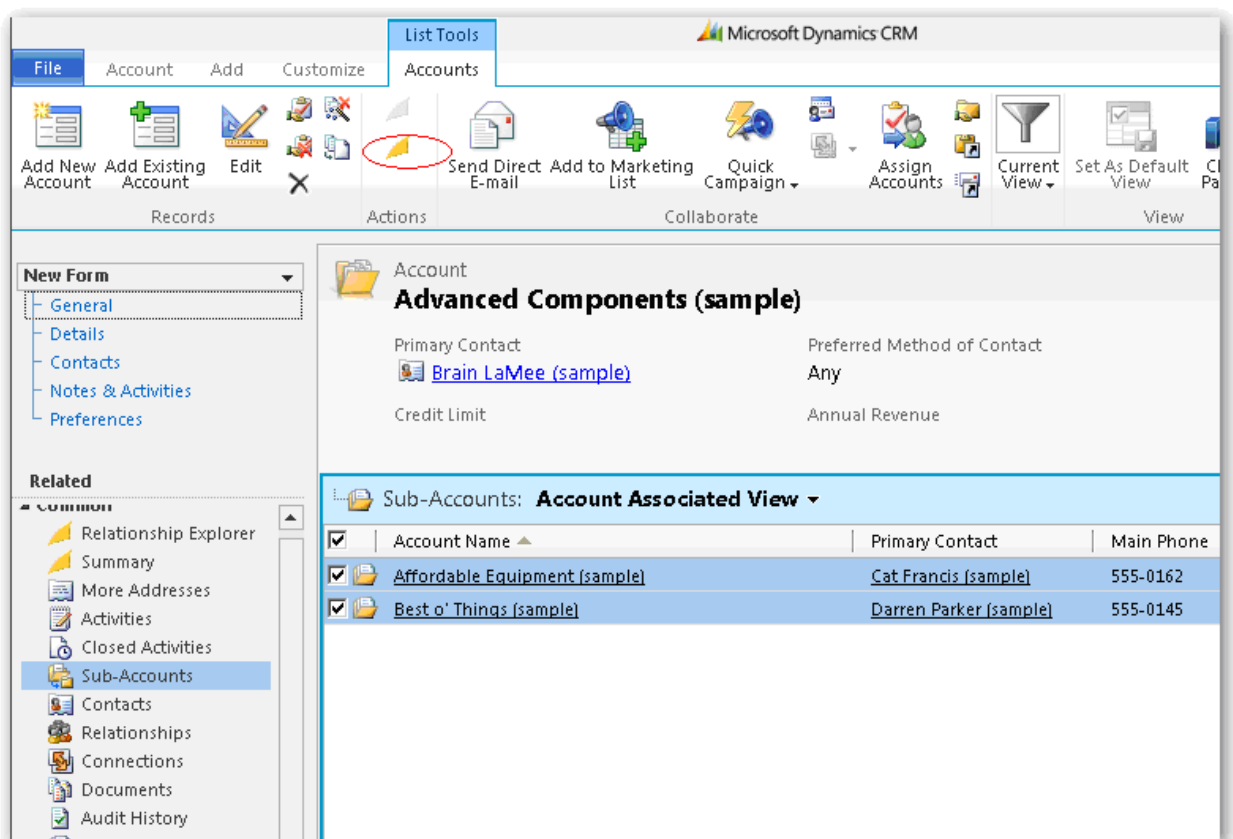


Figure 7: Launching Record Editor from Entity Record Form

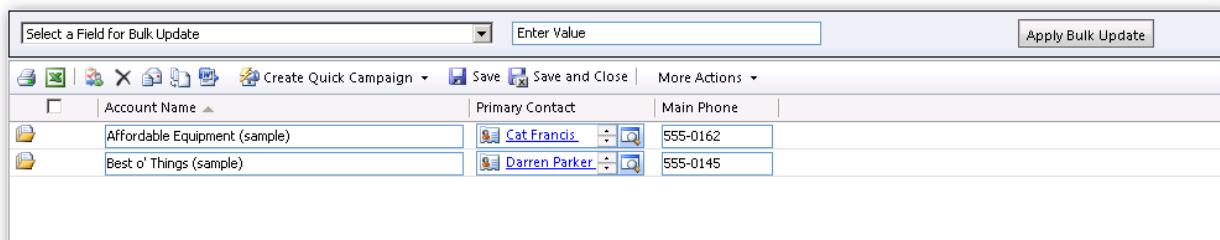


Figure 8: Record Editor displays selected records from the Sub-Entity Advanced Find Results view

Using Record Editor

This section outlines the usage of Record Editor when accessing it directly from the left navigation bar or the c360 Tools Menu.

NOTE: All functionality remain the same when launching directly from CRM Grids and/or Advanced Find View Results area.

Selecting an Entity and View

After selecting Record Editor, users can select the '**Record Type**' <entity> and the corresponding View to display in Record Editor. This will bring up the selected view in the Record Editor grid.

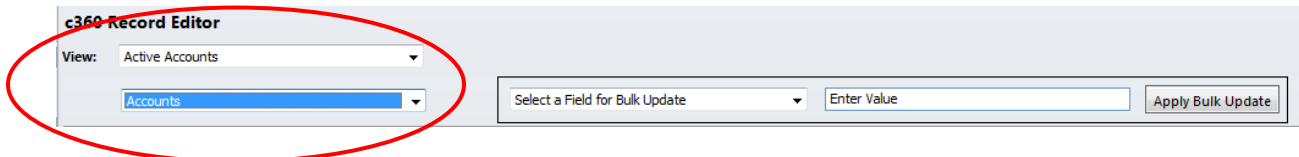


Figure 7: Selecting an Entity View to display in Record Editor

Note:

- Record Editor will also display all custom entities in the Record Type dropdown
- Record Editor does NOT support associated attributes added to the record via Record Editor

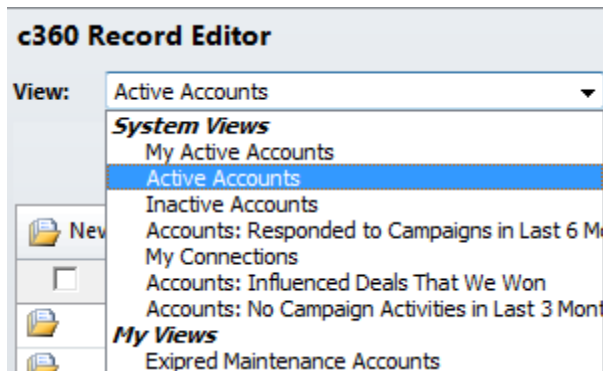


Figure 8: List of possible views for the Account entity

Record Editor can either be launched in 'Edit Mode' or 'Read Mode'. Record Editor always remembers the last mode setting you were in and will launch the next time in the same exact mode.

Edit Mode

Record Editor is launched in 'Edit Mode' by default. Edit Mode allows you to edit the records in the grid



Figure 9: Record Editor in 'Edit Mode'

To switch to Read Mode, click on the 'Read in Grid' icon in the header grid.

Read Mode

Read Mode displays the Record Editor grid in a read-only format as seen below.

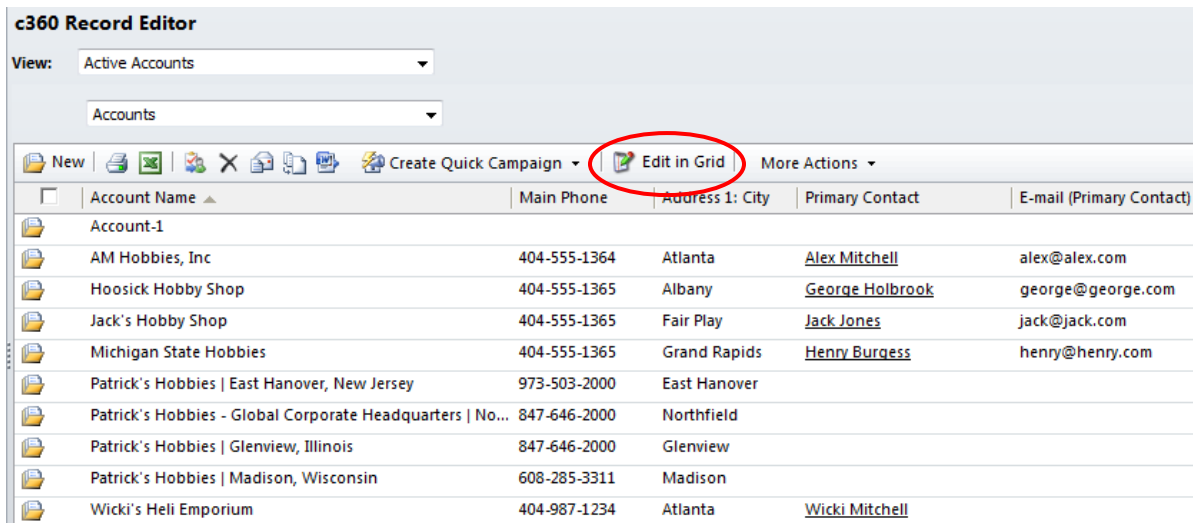


Figure 10: Record Editor in 'Read Mode'

Switch to Edit Mode by clicking on the 'Edit in Grid' icon on the grid header.

NOTE:

- If any records have been selected (highlighted) in the Read Mode, only those records will be launched in the Edit Mode
- Unselect all records by checking the 'Select/Unselect all' checkbox on the left hand. If no records have been highlighted, the Edit Mode will be launched with all the records from the view

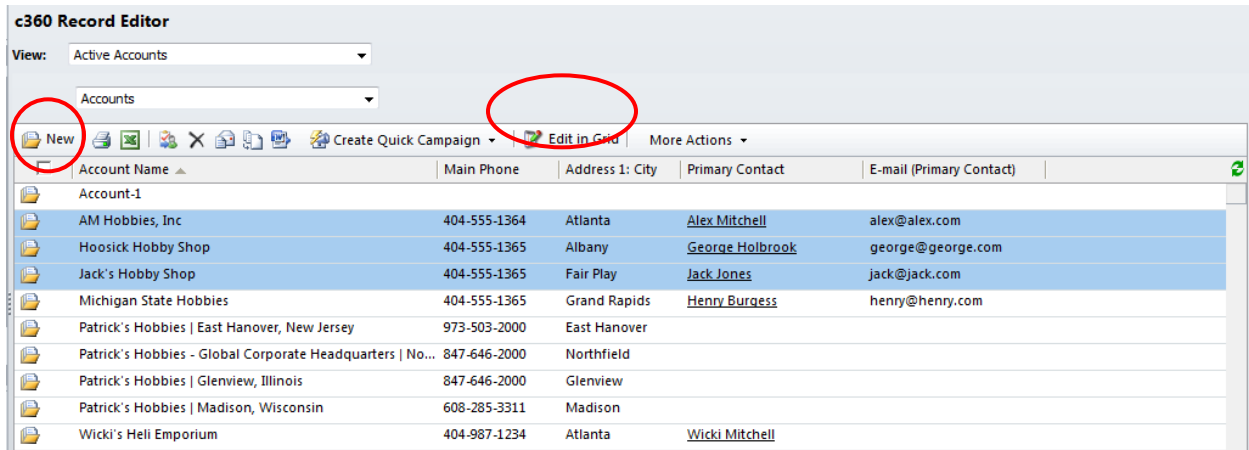


Figure 11: Highlight records or use the checkbox to select all. 'Edit in Grid' toggles between read only and edit mode

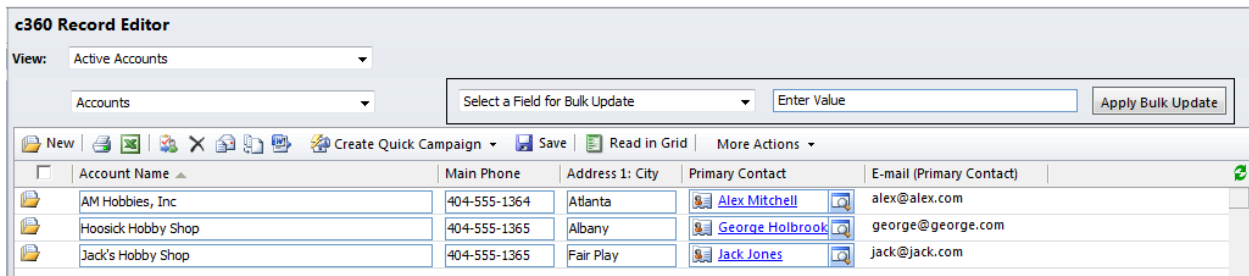


Figure 12: Selected records from the 'Read Only' grid are editable

Editing Grid Records

Users can edit the records in the grid. Record Editor allows you to edit all of the different types of CRM fields (with the grid and displays the corresponding controls for the various field types (text, picklist, lookup, date).

Below show some of the different controls:

A screenshot of a text box control containing the text 'AM Hobbies, Inc'.

Figure 12a: Text box (nvarchar) control

A screenshot of a lookup control showing a search icon, the text 'Alex Mitchell', and a magnifying glass icon.

Figure 12b: Lookup control

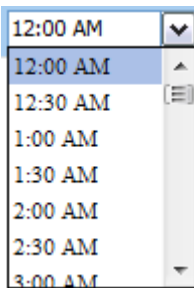
A screenshot of a picklist control showing a dropdown menu with time options: 12:00 AM, 12:30 AM, 1:00 AM, 1:30 AM, 2:00 AM, 2:30 AM, and 3:00 AM.

Figure 12c: Picklist control

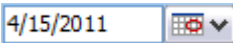
A screenshot of a date control showing the date '4/15/2011' and a calendar icon.

Figure 12d: Date control

Saving Changes to Grid Records

After you make the required changes, click **'Save'** button on the grid header to make these changes.

A pop-up window appears asking you to confirm these changes. After you click **'OK'**, the changes are made to CRM and 'Save Operation in progress' window will appear. Note that Record Editor does **NOT** support associated attributes added to the record via Record Editor.

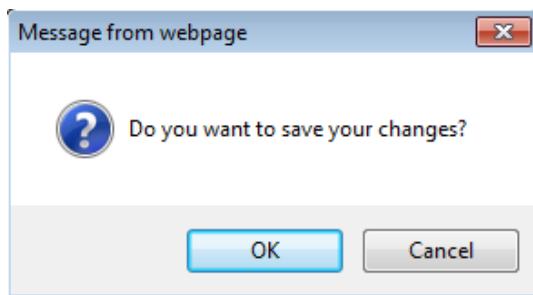


Figure 13a: Saving changes in the grid

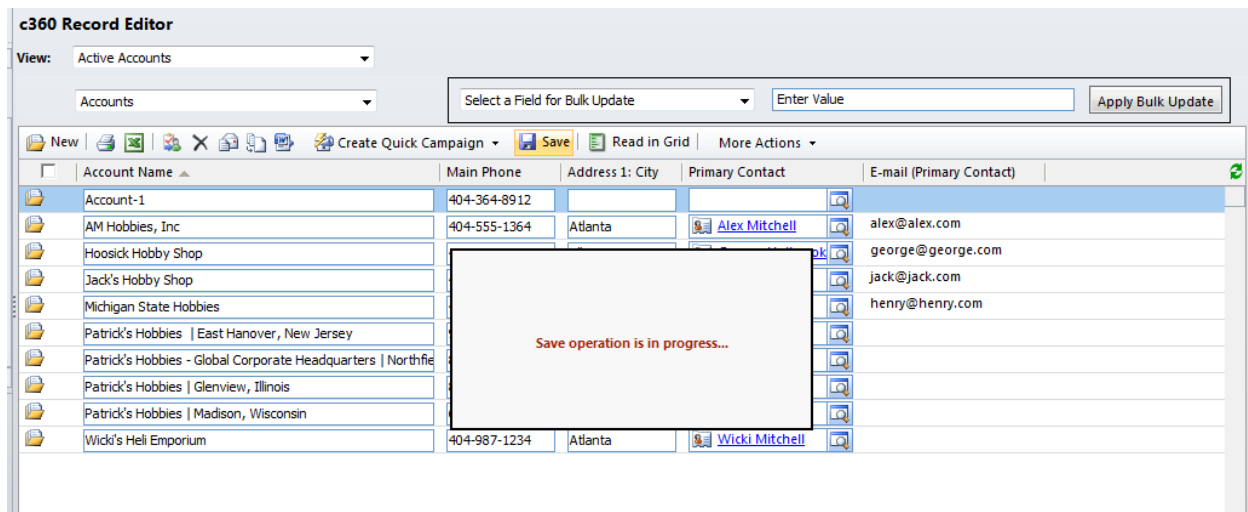
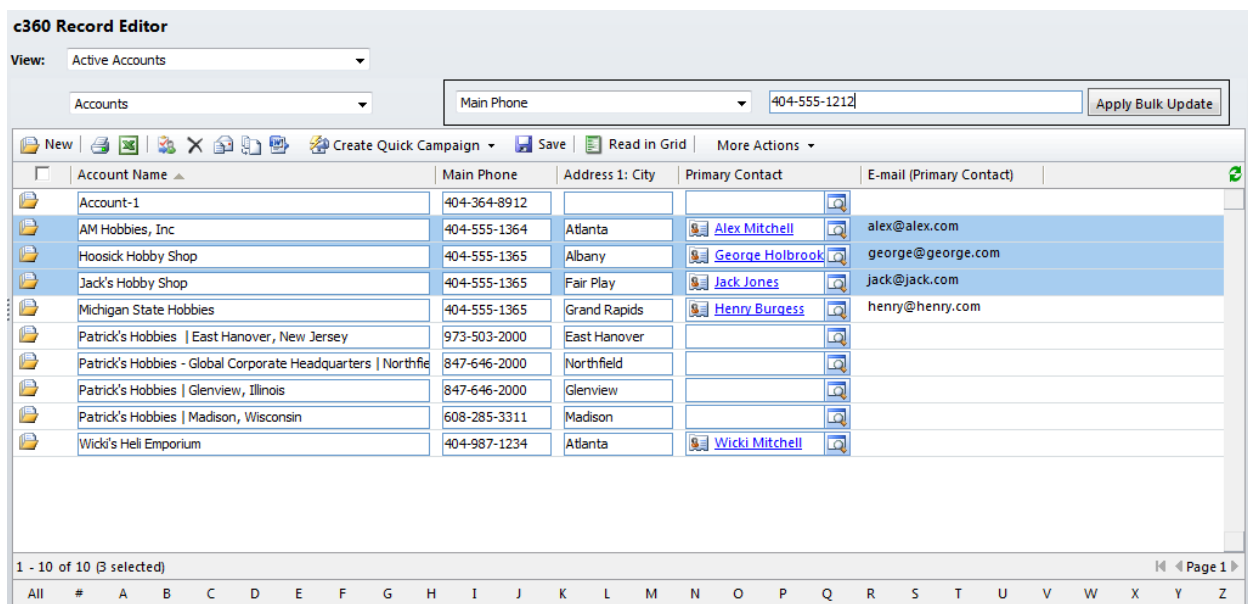


Figure 13b: Save Operation in progress

Bulk Update

Record Editor also allows you to bulk update a field in the grid with a certain value. In addition, you can selectively pick which records to apply these changes.

1. Launch Record Editor
2. Highlight the records that you want to apply these changes. Use **'CTRL'** to click and select multiple records
3. Verify the number of records selected in the footer section of the grid. The message will indicate (3 selected) in the bottom left corner of the screen
4. Pick the field in the **'Select a field for bulk update'** drop down (Main Phone)
5. Enter the correct value in the text box. This entry box can be any of the controls on p.10, depending on the field that is being updated
6. Click **'Apply Bulk Update'**. The new values will be reflected on the screen (they are not yet saved to CRM yet so you can change other fields also)
7. Click **'Save'** to save these changes to CRM



c360 Record Editor

View: Active Accounts

Accounts

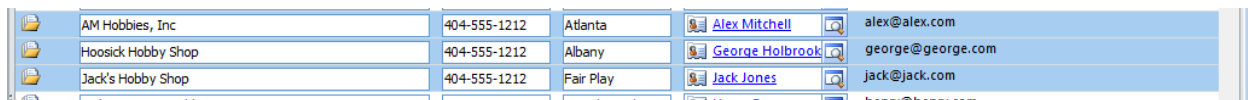
Main Phone: 404-555-1212

Apply Bulk Update

Account Name	Main Phone	Address 1: City	Primary Contact	E-mail (Primary Contact)
Account-1	404-364-8912			
AM Hobbies, Inc	404-555-1364	Atlanta	Alex Mitchell	alex@alex.com
Hoosick Hobby Shop	404-555-1365	Albany	George Holbrook	george@george.com
Jack's Hobby Shop	404-555-1365	Fair Play	Jack Jones	jack@jack.com
Michigan State Hobbies	404-555-1365	Grand Rapids	Henry Burgess	henry@henry.com
Patrick's Hobbies East Hanover, New Jersey	973-503-2000	East Hanover		
Patrick's Hobbies - Global Corporate Headquarters Northfie	847-646-2000	Northfield		
Patrick's Hobbies Glenview, Illinois	847-646-2000	Glenview		
Patrick's Hobbies Madison, Wisconsin	608-285-3311	Madison		
Wicki's Heli Emporium	404-987-1234	Atlanta	Wicki Mitchell	

1 - 10 of 10 (3 selected) Page 1

Figure 14a: Bulk update with 3 selected records indicated in the bottom left of the screen



AM Hobbies, Inc	404-555-1212	Atlanta	Alex Mitchell	alex@alex.com
Hoosick Hobby Shop	404-555-1212	Albany	George Holbrook	george@george.com
Jack's Hobby Shop	404-555-1212	Fair Play	Jack Jones	jack@jack.com

Figure 14b: all selected records are updated with the new phone number

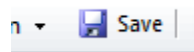
NOTE:

If no records have been selected (highlighted) in the grid and Bulk Update is performed, Record Editor will display a dialog box as shown below.



Figure 14c: Bulk Update Record Selection Dialog box

Click **'Save'** to update the records with the edits.



Additional features in the Record Editor Grid

The Record Editor grid header, pictured below, gives the user the following options

- Ability to create a new record
- Print the data on screen
- Export the data on screen to Microsoft Excel
- Assign the records
- Delete records
- Send a direct email
- Merge multiple records
- Perform a mail merge
- More Actions (actions dependent on the CRM entity)

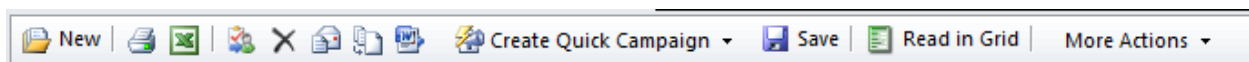


Figure 15: Record Editor menu bar

Using Record Editor from the CRM grids

Record Editor can also be launched from any CRM entity grid (Accounts, Contacts, Custom Entity) by clicking on the 'Edit Records' icon in the entity ribbon. This will launch a separate Record Editor window with the entity view that is being displayed.

NOTE:

- Record Editor will only be launched with the records that have been highlighted (selected) in the CRM grid. So if only 3 records are selected, the Record Editor will only display those 3 records (See below screens)
- To select all the records in the page, check the 'select all' checkbox on the top left hand side

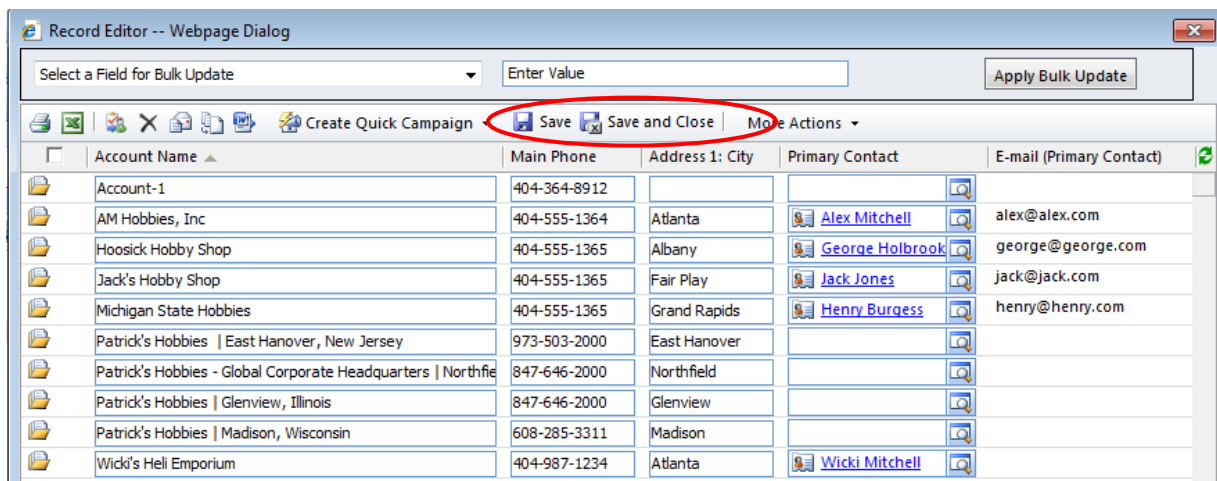


Figure 16: Edit records and click 'Save' or 'Save and Close'

After you make the required field changes, you must click '**Save**' or '**Save and Close**' to save these changes.

Save – Save will save the changes and keep the Record Editor window open

Save and Close – Save and Close will save the changes and close the Record Editor window

Using Record Editor from Advanced Find

Record Editor can also be launched from the Advanced Find View Results grid by clicking on the 'Edit Records' icon (See Figure 5).

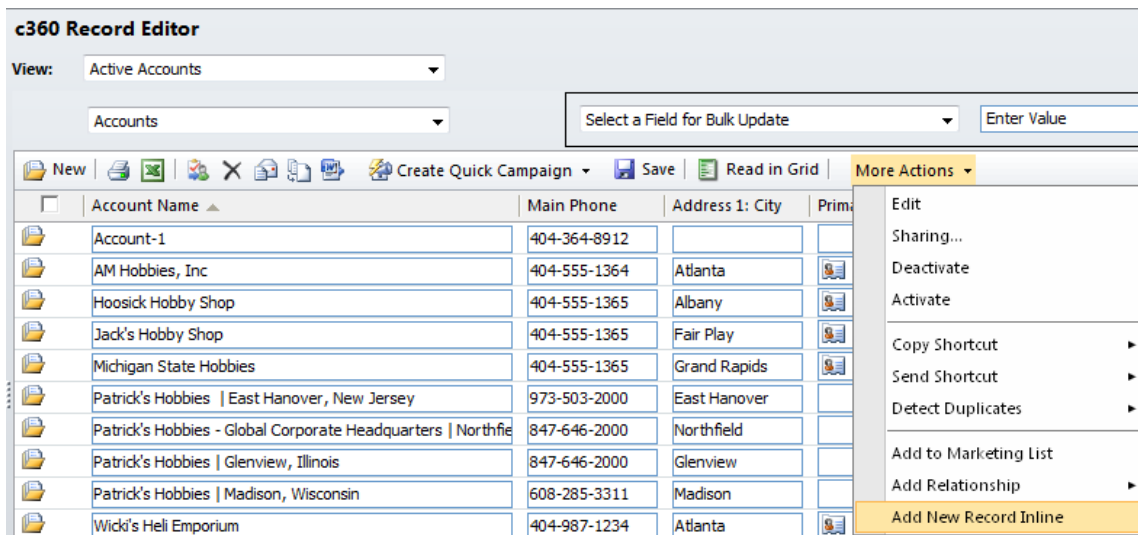
All standard Record Editor functionality is available.

Inline Addition of a New Record

You can also add new records to CRM Entities right within the Record Editor grid.

This can be done by:

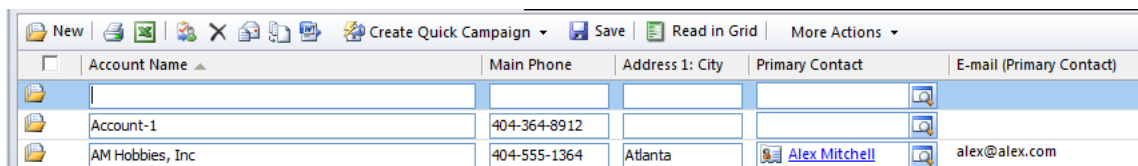
1. Click **More Actions** -> '**Add New Record Inline**' (Figure 17a)
2. A new empty row will be added to the bottom of the grid (Figure 17b)
3. You can enter the data and click '**Save**'. A new record is now created in CRM



The screenshot shows the 'c360 Record Editor' window. At the top, there's a 'View:' dropdown set to 'Active Accounts' and a 'Accounts' dropdown. Below that is a 'Select a Field for Bulk Update' dropdown and an 'Enter Value' input field. The main area contains a grid of account records. A 'More Actions' menu is open over the grid, with 'Add New Record Inline' highlighted in yellow. The grid data is as follows:

Account Name	Main Phone	Address 1: City	Primary Contact
Account-1	404-364-8912		
AM Hobbies, Inc	404-555-1364	Atlanta	
Hoosick Hobby Shop	404-555-1365	Albany	
Jack's Hobby Shop	404-555-1365	Fair Play	
Michigan State Hobbies	404-555-1365	Grand Rapids	
Patrick's Hobbies East Hanover, New Jersey	973-503-2000	East Hanover	
Patrick's Hobbies - Global Corporate Headquarters Northfield	847-646-2000	Northfield	
Patrick's Hobbies Glenview, Illinois	847-646-2000	Glenview	
Patrick's Hobbies Madison, Wisconsin	608-285-3311	Madison	
Wick's Heli Emporium	404-987-1234	Atlanta	

Figure 17a: Adding New Record in the Record Editor grid



The screenshot shows the 'c360 Record Editor' window with a new empty row added to the top of the grid. The grid data is as follows:

Account Name	Main Phone	Address 1: City	Primary Contact	E-mail (Primary Contact)
Account-1	404-364-8912			
AM Hobbies, Inc	404-555-1364	Atlanta	Alex Mitchell	alex@alex.com

Figure 17b: A new record can be added to the grid

NOTE:

- onSave scripts created at the CRM form level will **NOT** be enforced
- onChange scripts for particular fields will **NOT** be enforced (see p.16)
- The following entities **DO NOT** support new record additions via the grid
 - Activity
 - Associated attributes - ALL
 - Business Units
 - Campaign Activities
 - Campaign Response
 - Contracts
 - Facilities/Equipment
 - Marketing Lists
 - Roles
 - Sites
 - Users

Administering Record Editor

Configuration option to allow editing of fields with onChange Script

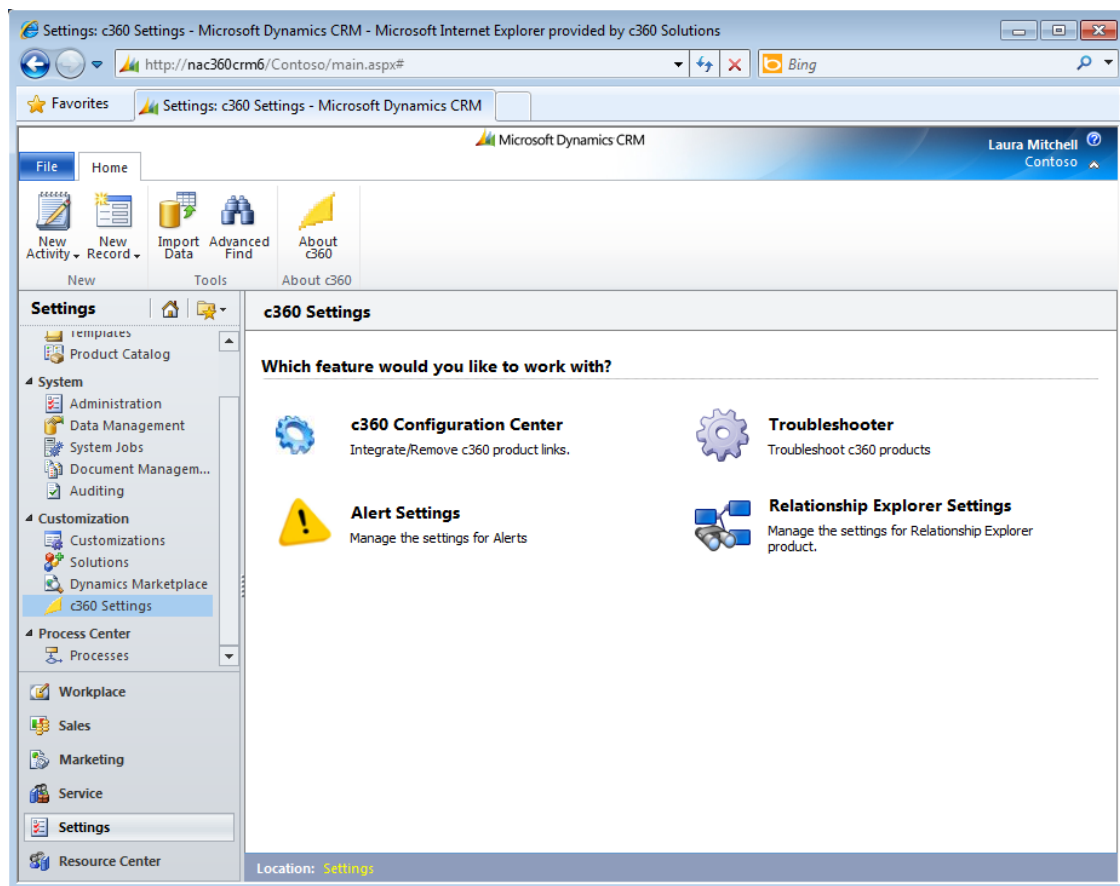
Record Editor does not enforce any onchange() script that may be created at the form level. The fields which have onchange() script are read-only in the Record Editor grid

Administrators can now enable editing of these fields. Note that the onchange() script will still NOT BE enforced but at least the fields can be edited via the grid

Steps to allow editing









Note: You must be a CRM Administrator to make these changes

1. Go to Settings -> c360 Settings

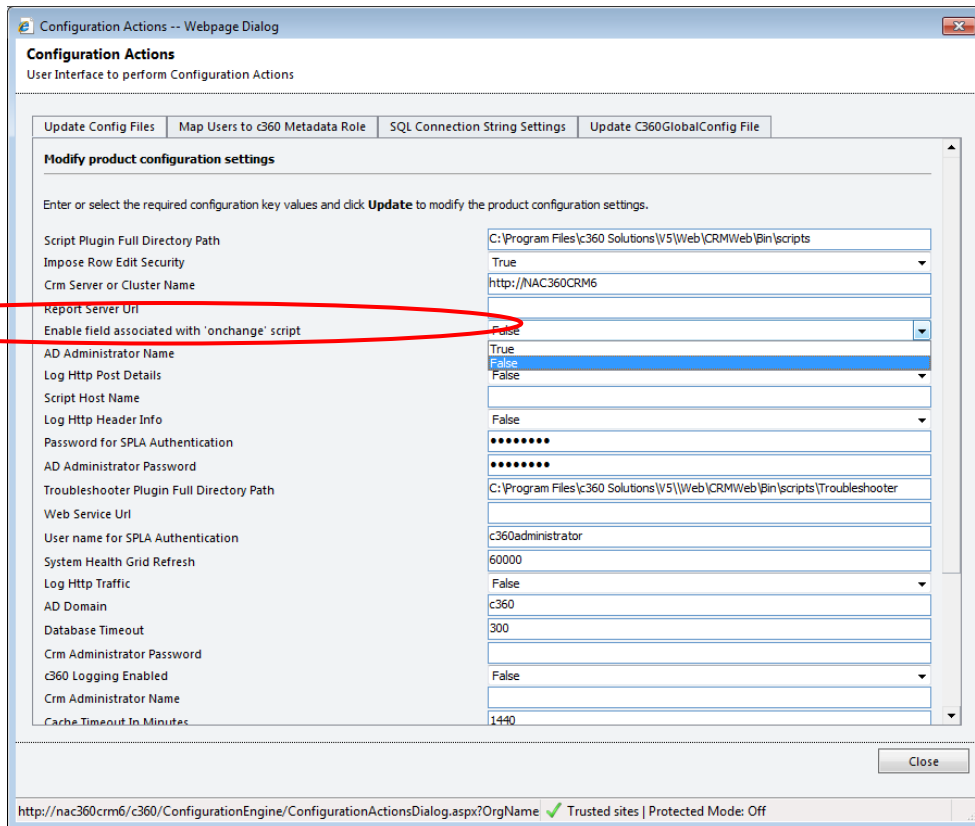




2. Click on 'c360 Configuration Center'. You will now see below screen

c360 Settings	
c360 Configuration Center	
 Global Configuration	Configure
 Plugin Configuration	Configure
 c360 Alerts	Configure
 c360 Audit	Configure
 c360 Console	Configure
 c360 Multifield Search	Configure
 c360 My Workplace	Configure
 c360 Record Editor	Configure

- Click on 'Configure' in the 'Global Configuration' row. That will launch a window allowing you to set the different configuration values (see below)



Configuration Actions
User Interface to perform Configuration Actions

Update Config Files | Map Users to c360 Metadata Role | SQL Connection String Settings | Update C360GlobalConfig File

Modify product configuration settings

Enter or select the required configuration key values and click **Update** to modify the product configuration settings.

Script Plugin Full Directory Path	C:\Program Files\c360 Solutions\VS\Web\CRMWeb\Bin\scripts
Impose Row Edit Security	True
Crm Server or Cluster Name	http://NAC360CRM6
Report Server Uri	
Enable field associated with 'onchange' script	False
AD Administrator Name	True
Log Http Post Details	False
Script Host Name	
Log Http Header Info	False
Password for SPLA Authentication	*****
AD Administrator Password	*****
Troubleshooter Plugin Full Directory Path	C:\Program Files\c360 Solutions\VS\Web\CRMWeb\Bin\scripts\Troubleshooter
Web Service Uri	
User name for SPLA Authentication	c360administrator
System Health Grid Refresh	60000
Log Http Traffic	False
AD Domain	c360
Database Timeout	300
Crm Administrator Password	
c360 Logging Enabled	False
Crm Administrator Name	
Cache Timeout In Minutes	1440

Close

http://nac360crm6/c360/ConfigurationEngine/ConfigurationActionsDialog.aspx?OrgName ✓ Trusted sites | Protected Mode: Off

- Change the drop-down value for "Enable field associated with 'onchange' script" from 'False' to 'True'
- Click 'Close'
- Fields in Record Editor grid which have onchange() script will now be editable



FAQ

Is it possible to add/edit fields from related entity ?

CRM Advanced Find allows you to create a view and include columns (attributes) from related entities. Record Editor will allow you to view these fields but they will **NOT** be editable. (They will appear as Read-Only). If updates are attempted, they will not be supported.