



USER GUIDE

PowerAutoNumber

CRM 2011



Service



Support



Education



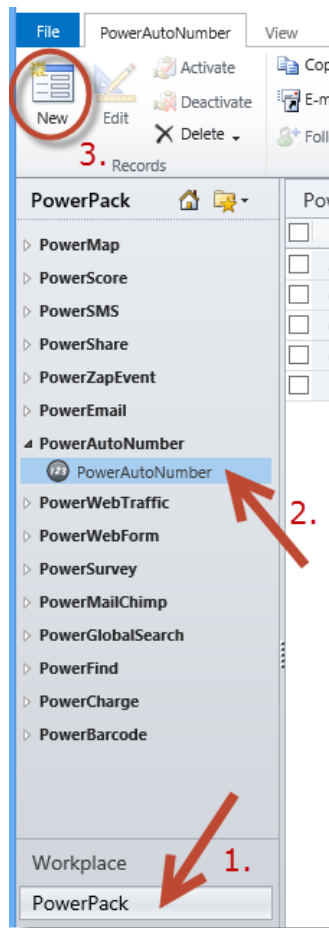
Add-ons

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Creating an AutoNumber

Once you've imported PowerAutoNumber, navigate to the PowerPack section of your CRM and click on PowerAutoNumber. To create a new PowerAutoNumber, click on New.



Then select which entity (Target Entity) and which field (Target Attribute) in your CRM you are looking to create an auto-number for.

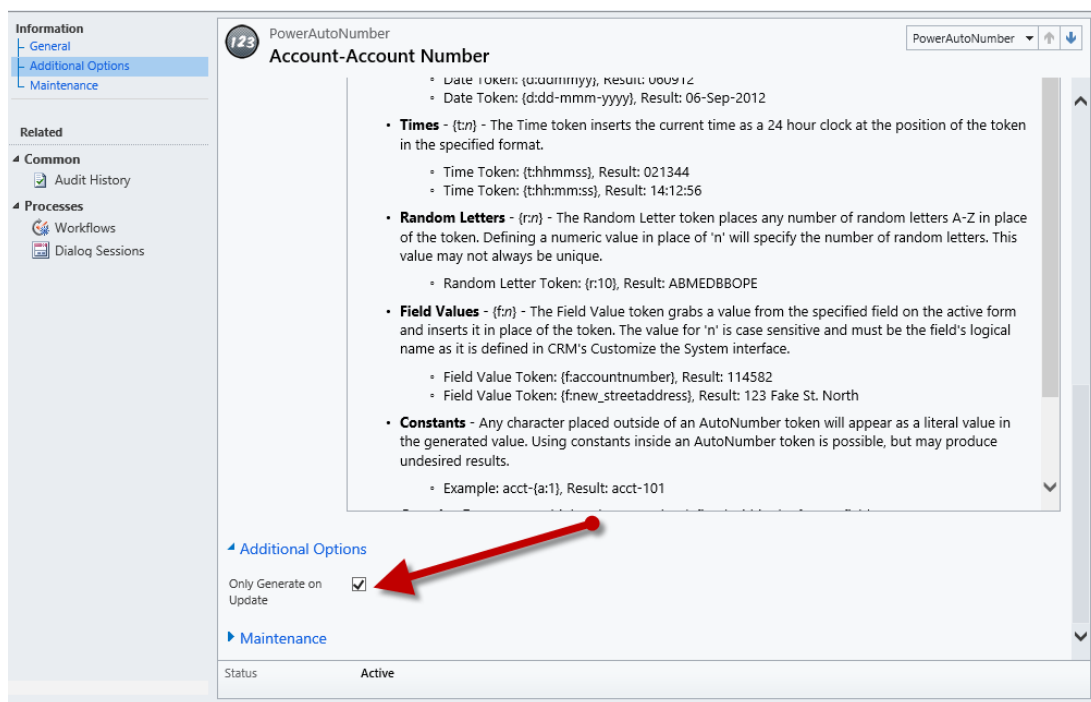
A screenshot of the 'New PowerAutoNumber' form. The 'General' tab is selected. Under the 'Target' section, 'Target Entity' is set to 'Account' and 'Target Attribute' is set to 'Account Number'. 'Attribute Type' is 'Text' and 'Max Length' is '20'. The 'Name' field contains 'Account-Account Number' and the 'Place Holder' field is empty. A red circle highlights the 'New' button in the top right corner.

Placeholder Value

The placeholder field is a critical field on the auto-number. The value defined in the placeholder field can be used to flag a record for CRM's bulk update process, for the purpose of retroactively generating unique identifiers. This value will automatically appear in the defined field; should your PowerAutoNumber license expire, or if the connection to the PowerObjects cloud fails. This field should hold a unique value, such as {acctnmbr} or something similar. We always suggest including brackets so that the field value is more unique.

Additional Placeholder Options

PowerAutoNumber allows you to check this box, so that auto-numbers are only created when the placeholder value is present, instead of when the record is initially created. This check box is Un-checked by default, so that, by default the autonumber will be created when the record is first saved.



PowerAutoNumber Definitions

When creating a PowerAutoNumber, there are a number of different elements you can choose from.

Sequential Numbers

If you'd like to number a field using sequential numbers, you will use the {a:n} token, where "a" stands for auto-number, and "n" is the length of the auto-number you're looking for. For example, if you put {a:5}, and set the Initialize Number to 5, your first auto-number will be 00005. These auto-numbers are guaranteed to be unique.

Note: If you put {a: 03} in your autonumber field, your autonumber will not be padded with a 0. It will just be 3 digits long.

Dates

If you'd like to use a date in your auto-number field, you will use the {d:n} token, where "d" stands for date, and "n" will be replaced by the format of the date you're wanting to insert. The date that will be entered into this auto-number field is the date when the record was created, in the time zone that your CRM server is running in. For example, {d:mm/dd/yyyy} will insert the date 05/15/2012. If you'd like to display the day first, your format would be {d:dd/mm/yyyy}. The format {d:mmmm dd,yyyy} will insert the date May 15,2012. Another example of a date auto-number could be {d:dd-mm-yy} which would insert the date 05-15-12.

Times

If you'd like to use a time stamp in your auto-number field, you will use the {t:n} token, where "t" stands for time, and "n" will be replaced by the format of the time you're looking to insert. The time that will be entered in the field is the time that the record was created, in the time zone that your CRM server is running in. You can use "hh" for hour, "mm" for minute and "ss" for seconds. So, for example, {t:hh:mm:ss} will insert the time 08:15:45 into the auto-numbered field. The format {t:hh:mm} will insert the time 08:15 into the auto-number field. The time displayed here will be based on a 12 hour clock. If you would like to insert AM or PM into the field, simply add "tt" within the end of the {}, so it would be formatted {t:hh:mm:ss tt} and would appear 08:15:23 AM.

Random Letters

If you'd like to use random letters in your auto-number field, you will use the {r:n} token, where "r" stands for random letters, and "n" will be replaced by the number of random letters you would like in your field. For example, if you use the token {r:5} will get KDNVK (or some random letter sequence) in your auto-numbered field. The letters will always be capital letters, and letters will be A-Z. These random letters are not guaranteed to be unique.

Field Values

If you'd like to use CRM fields in your auto-number field, you can do that as well. For this, you will use the {f:n} token, where "f" stands for field, and "n" will be replaced by the **logical** name of the field you are looking to insert. For example, if you want to insert the First Name field, your token would say {f:firstname}. The field you are using must be on the same record as the entity you are inserting the auto-number into. For example, if the entity of your auto-number is "Account", you can only pull fields in from the account entity.

Note: PowerAutoNumber does not support lookup fields. The field should be a string.

Constants

If you'd like a constant prefix or suffix on your auto-number, you would simply type the character outside of your auto-number token. Any character that is placed outside of the auto-number token will appear as a literal value in the generated auto-number value. For example, if you'd like the letter "A" in front of all of your account numbers, you would put A-{a:4} in your field format field, and get an auto-number similar to A-2356.

Complex Formats

If you'd like to use more than one type of auto-number in a field, you would simply insert more than one token. For example, if you'd like the CRM field name and a random date, you would use the token {f:firstname}-{a:5} and you would get something similar to Jim-52369 in your auto-number field. You can use more than one of any type of token, such as more than one auto-number token or more than one random letter token.

Examples of Common PowerAutoNumber Formats

Type of AutoNumber	Format	Initial Number	Result
Sequential Numbers			
	{a:5}	0	00001
	{a:10}	12000	0000120001
Dates			
	{d:mm/dd/yy}	0	06/18/12
	{d:mmmm dd, yyyy}	0	June 18, 2012
	{d:dddd mmmm dd, yyyy}	0	Monday June 18, 2012
Times			
	{t: hh:mm tt}	0	11:02 AM
	{t: hh:mm:ss tt}	0	11:02:34 AM
Random Letters			
	{r:5}	0	ADFRD
	{r:10}	0	JFKRIDKCJE
Field Values			
Account Number	{f:accountnumber}	0	234589
Account Name	{f:name}	0	PowerObjects
Constants			
	A#{a:5}	0	A#00001
	Date:{mm-dd-yy}	0	Date:06-14-12
Complex Formats			
	{a:5} - {r:5}	0	00001 - JEIFK
	{a:3} - {f:accountnumber}	250	250 - 56230
	{f:address1_city}, {f:address1_state} {f:address1_postalcode}	0	Minneapolis, MN 55441
	{d:mm/dd/yy} at {t:hh:mm tt}	0	06/14/12 at 11:17 AM

When you are done formatting your field, click Save & Close.

Using PowerAutoNumber

Once you have set up a definition as shown in the steps above, a PowerAutoNumber will automatically be created when the entity is first saved. PowerAutoNumber will not overwrite a value, if there is already a value in that field.

If you would like to pause the auto-numbering of records, simply deactivate the PowerAutoNumber record, and the numbering will pause. To reactivate the numbering, reactivate the PowerAutoNumber record, and the auto-numbering will resume where it left off.

How to Update Records that are Already Saved with an AutoNumber using the Placeholder Field

As mentioned earlier in this user guide, the placeholder field will allow users to update records that are already saved in CRM. PowerAutoNumber creates auto-numbers when a record is first saved. However, most users will already have records saved in their CRM that they'd like to update with an auto-number as well.

To update pre-saved records in CRM, navigate to the view of the record you'd like to update. For this example, let's say we want to update the account number field on all pre-existing accounts. First, I would go to my 'account number auto-number' and make sure a placeholder value is set.

The screenshot shows the PowerAutoNumber configuration window for 'Account-Account Number'. The 'General' tab is active. Under 'Target', the 'Target Entity' is 'Account', 'Target Attribute' is 'Account Number', 'Attribute Type' is 'Text', and 'Max Length' is '20'. The 'Name' field is 'Account-Account Number'. The 'Place Holder' field is highlighted in yellow and contains the text '{acct nmbr}'. Under 'Numbering', 'Initialize Number' is '0' and 'Current Number' is '2'. Under 'Formatting', 'Field Format' is '{a:5} - {r:5}' and 'Sample Number' is '00001 - TEZOO'.

After this, go to the Account section in CRM, change the view to "Active Accounts," select all and select Edit.

The screenshot shows the CRM interface. The 'Accounts' section is active, and the view is set to 'Active Accounts'. The 'Edit' button in the top toolbar is circled in red. Below the toolbar, a table of accounts is displayed with columns: Account Name, Relationship Type, Main Phone, and Street 1. All rows in the table are selected, indicated by checkmarks in the first column.

Account Name	Relationship Type	Main Phone	Street 1
ACME, Inc.		555.145.6688	
Bank For Everyone		651-123-1145	2420 Hen
Brandon Bank	Consultant	435-872-2309	95 Sherbu
Canal Street Ferry			1 Canal S
CJM Properties		507-647-5996	222 Frenz
Cleanwire US LLC			1835 Ener
Comcast Business Communications L...		651-222-3333	10 River F
CRM Learning Institute		612-339-3355	115 Wash
DA Sports		612-869-0200	1700 W 7
Disney		564-698-9651	2 South C

In the Account Number field, type exactly what the placeholder value of this particular auto-number, in this case it is {acct nmbr}.

Note: If you have changed the field to read-only, you will need to change it to Write & Read so that you can type in the placeholder value.

Edit Multiple Records
Enter your edits in the form, and then click Save to publish the edits to the selected records. Fields that you don't edit will not be changed.

General

Account Name * Owner *

Account Number {acct nmbr} Main Phone

Primary Contact Other Phone

Parent Account Fax

Relationship Type Web Site

Summary

Address

Address Type State/Province

Street 1 ZIP/Postal Code

Street 2 Country

City

Description

Save Cancel

Then click 'Save' and all of the auto-numbers that were selected will be updated.

Account Name	Account Number	Relationship Type	Main Phone	Street 1	City	State/Pro
Animal ALLS	00005 - AQLBM		156-487-9320	156 Paws Highway	Colorado Springs	CO
CRM Learning Institute	00006 - CZITW		658-987-6523			
Demo Account	00007 - PUBME					
Disney	00008 - XWLXF		564-698-9651	586 Mickey Ave.	Orlando	FL
PowerObjects	00009 - PEQIV		612-339-3355	718 Washington Ave...	Minneapolis	MN
Test	00010 - QBFNK				Hudson	

Please Note: If there are records selected that are already auto-numbered, the field will be re-numbered in this bulk edit.

Thank you for your interest in PowerAutoNumber. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of installation. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged \$1/CRM user/month.

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