



CREATING EDITABLE ASSOCIATED VIEWS

With c360 Record Editor and Console *Microsoft Dynamics CRM version 4.0*

OVERVIEW

Record Editor

c360 Record Editor is a Microsoft CRM enhancement that provides Microsoft CRM users an easy way to edit/modify multiple CRM records within a single screen. All CRM data types including nvarchar, picklist, bit/boolean, int, float, lookup, owner types are supported.

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, integer, 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

Console

The c360 Console allows Microsoft CRM users to design their CRM workspace in virtually any way they like. Console delivers critical data with less clicks, fewer screens and allows Microsoft CRM users to see the data that is relevant to them the way they want to see it. The Console allows users to combine CRM views, search cells, custom cells (iFrames), c360 products and CRM record data into a readily configurable interface.

INTRODUCTION

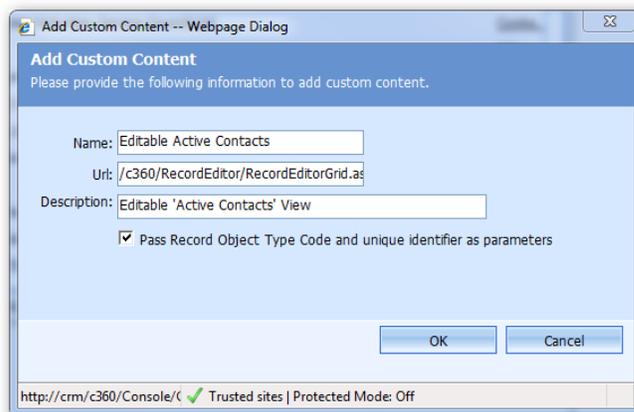
One of the most common requests from customers is the ability to edit child records while simultaneously viewing parent information. With a new enhancement to c360 Record Editor, this is now possible. It can be implemented quite literally within minutes by leveraging the robust flexibility of c360 Console.

IMPLEMENTATION:

- 1) Download and install the Record Editor enhancement. Contact support@c360.com for the download.
- 2) Creating a custom Console Cell
 - a. Select 'Add Content Item':



- b. Enter the appropriate parameters:



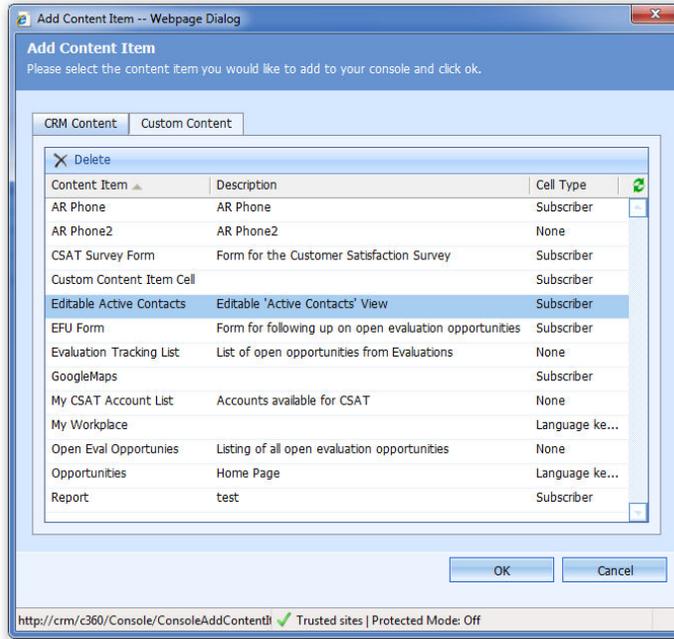
Parameter	Value
URL	/c360/RecordEditor/RecordEditorGrid.aspx?OrgName=<OrgName>&viewGUID=<childentityviewid>&viewType=system&entityType=<entityType>&isREDUsedforChildEntity=True
OrgName	Unique name of the organization
childentityviewid	the id of the child entity view to display
entityType	the name of the child entity
Pass Record OTC	true

For this example, I used:

```
/c360/RecordEditor/RecordEditorGrid.aspx?OrgName=c360SolutionsInc&viewGUID={00000000-0000-0000-00AA-000010001004}&viewType=system&entityType=contact&isREDUsedforChildEntity=True
```

3) Creating a Console

- a. Create a new Console with any cells, as long as one is a publisher cell.
- b. Add the cell created in step 2 from the 'Custom Content' tab:



4) Testing the results

In this simple example, the console has a header cell containing a CRM View cell pointing to the 'Active Accounts' view, and a footer containing the Custom Content Cell. As seen below, simply clicking on different account records will display their associated contacts in an editable format:



Console

Header Options: Add Content | Delete Header

Look for:

View: Active Accounts

Account Name	Organization Name	Primary Contact	c360 Relationship	c360 Reseller St...	Main Phone
Ziff Davis - eWeek		Ziff Davis, John	Undefined	Not a Reseller	
Zinnovation			Reseller - Prosp...		+1 800 208 276
zintel	zintel	Zintel, Kim	Prospect		
zipLogix (formerly RE Forms)	zipform	Zipform, Jack	Customer - Activ...	Not a Reseller	984 786 492
Zitac Consulting AB	Zitac Consulting AB	Zitac Consulting, Jesper	Prospect		+46 20 3706

1 of 41 selected.

Footer Options: Add Content | Delete Footer

Editable Active Contacts

Full Name	E-mail	Job Title	Parent Customer	Business Phone	Mo
Ziff Davis, Charles		Help Desk Supervisor	zipLogix		
Ziff Davis, Charlie	charlie@zipform.cc		zipLogix		
Zintel, Kim	kzwint@ziplogi		zipLogix		+1 800 208 276

Console

Header Options: Add Content | Delete Header

Look for:

View: Active Accounts

Account Name	Organization Name	Primary Contact	c360 Relationship	c360 Reseller St...	Main Phone
Zwitterleven	Zwitterleven	Zwitterleven, Michiel	Suspect		
ZY Solutions	ZY Solutions Corporation	Zy Solutions, David	Partner N/A		947 467 0300
ZyLAB	zylab	Zy Lab, Roderik	Prospect		310 400 8000
Zylo-Net		Zylo-Net, Bill	Undefined	Not a Reseller	
Zyman Group			Undefined		416 982 5100

1 of 41 selected.

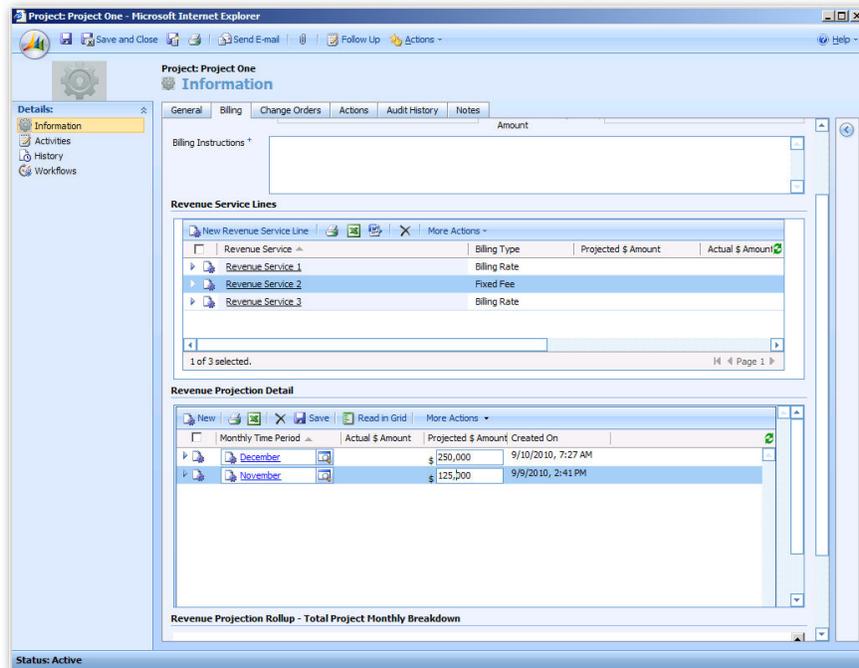
Footer Options: Add Content | Delete Footer

Editable Active Contacts

Full Name	E-mail	Job Title	Parent Customer	Business Phone	Mo
Zy Solutions, David	dzsolut@zysolut	President & CFO	ZY Solutions		(947) 467-0300
Zy Solutions, Teresa			ZY Solutions		(947) 467-0300
Zy Solutions, David	dzsolut@zysolut	Manager of Business Develo	ZY Solutions		(947) 467-0300
Zy Solutions, Ryan	Rylo@zysolutions		ZY Solutions		(947) 467-0300
Zy Solutions, Dale	Dale@zysoluti	Director, Technical Services	ZY Solutions		(947) 467-0300

ADDITIONAL POSSIBILITIES

Because a Custom Console cell can be called from any iFrame*, this implementation can easily be carried over to a CRM form, giving the user an additional option for navigating records. In the following example, a partner has implemented child (Revenue Service Lines) and grandchild (Revenue Projection Detail) records within a form, exemplifying the flexibility of this solution.



* using the following URL:
`/c360/Console/content/products/productpage.aspx?OrgName=<OrgName>&ContentCellID=<ContentCellID>&ContentItemType=2&type=<ParentEntityTypeCode>&typename=<ChildEntityName>`

where ContentCellID is found by running the following query on the <OrgName_c360> database:

```
select cells.contentcellid from db_contentcells cells inner join
db_contentitems items
on cells.contentitemid = items.contentitemid and items.name like
'<Content cell name>%'
```

If you are interested in purchasing the Core Productivity Pack, please contact sales@c360.com. For those with current maintenance on these products, this enhancement is completely free! And, as always, please visit us at www.c360.com for other exciting new products and news.