DYNAMIC CASE TEMPLATE CONFIGURATION

A one-stop solution for dynamically managing different types of cases using pre-defined templates.

# Contents

Overview

Dynamic case configuration template provides solution right away for any kind of business. Any requirement which involves multiple transactions, steps, stages etc. like banking services, claims processing, HR services and anything which rotates around customer relationship management can think out of the box to change their business and adopt to this pattern for more dynamic usability.

Features

Unified Interface is the new metadata driven client interface that is designed to provide a consistent experience across devices and form factors. It provides users a consistent, accessible, uniform user interface, and follows responsive design principles for optimal viewing on any screen size or device. This application is designed to work in UCI. A model driven application named "DynamicCaseTemplate" will be installed along with the solution. Open that application as shown in below screenshot.
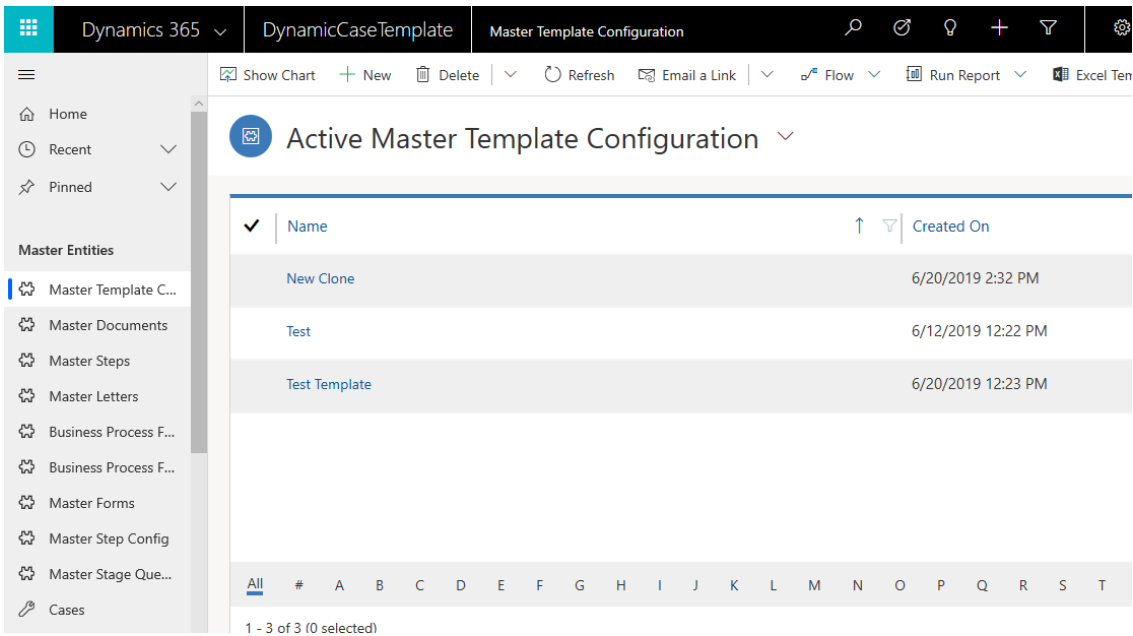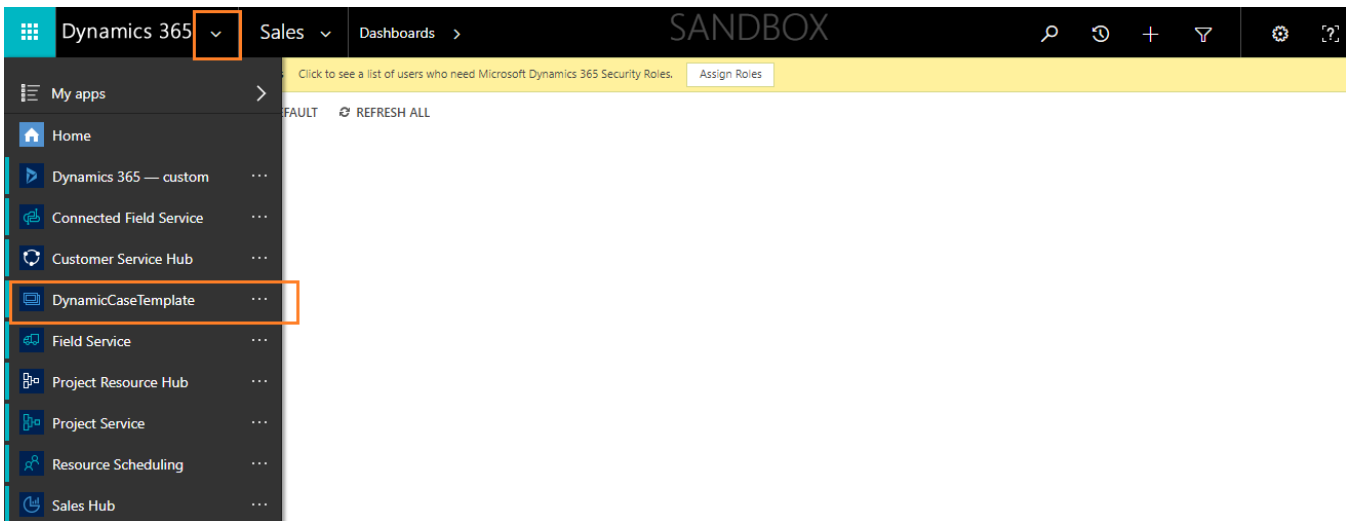
This tool is available as a solution and we need below master data to be filled as a pre-requisite:

1) Master Template Configuration -Mandatory
2) Master Forms -Optional
3) Master Documents -Optional
4) Master Steps -Optional

5) Master Letters –Optional

After creating the master data, we will use this master template in cases which will automatically populate the forms, letters, documents that have been added in the template into the case as sub grids.

Entities under case:

1) Forms
2) Documents
3) Steps
4) Letters

Now we will look into each entity:

Master Template Configuration

This entity is the parent entity for all child master entities.

First, we need to select BPF for the Template:

Since we cannot take OOB business process flows as a lookup, we have provided the custom business process flow. We need not create stages manually in this custom business process flows. When we create new master template configuration on load JS function will verify if any OOB BPFs are created, if any created it will create custom BPF with same name stages in and show it in the BPF lookup.

After selecting the BPF we can select app type and save the form. Apps type is a custom lookup field where you can mention the type of template. This is to identify the type of template.

Now we will be able to create/add the sub entities for the Master template Configuration.

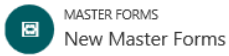## Sub Entities adding to Master template:

Master Forms

Add Master forms to the master template configuration.

Click on (+) symbol and click on new as shown below and enter the required fields and save the form. Now the form will be added to the Master template configuration. The process of creation of new master form is discussed later in this document. You can customize your own custom entity and open that entity form as your Master form.

Creation of New Master Form:

1) As shown in below screenshot, we need to give the Form Logical Name and Crm Form Id of the entity and the entity form respectively. Please follow below steps to fill these fields

You can use already existing entity or create a new entity as shown below. Copy down the name field of that entity (for below e.g. "**new_customerdemographics**"). (Any prefix is fine)
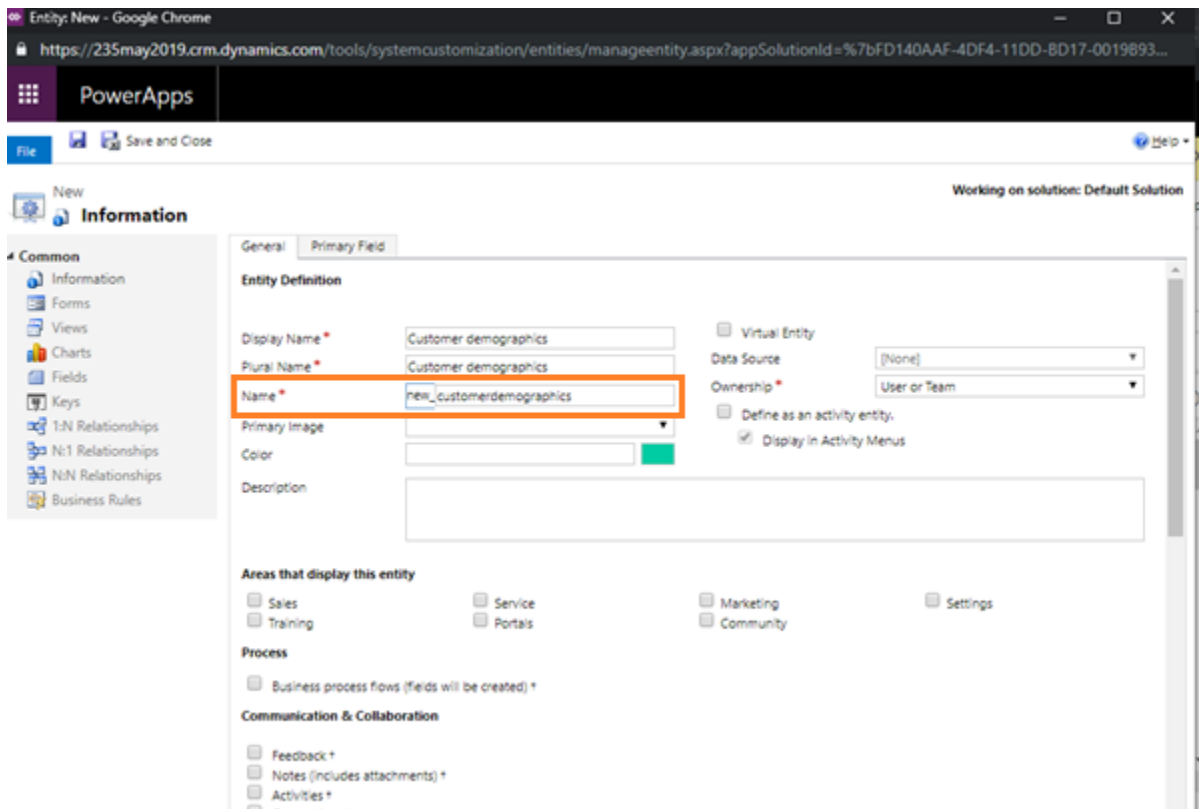
Create all the fields required in the form and along with them create a field named "**prefix_caseformid**" as **lookup** of **app forms** entity.

Display name: caseformid
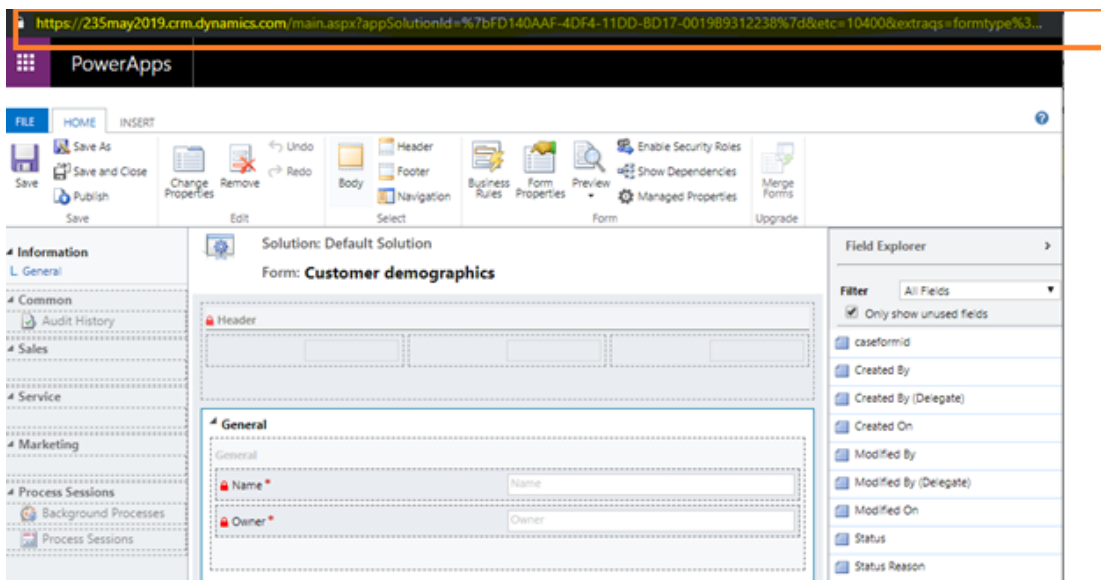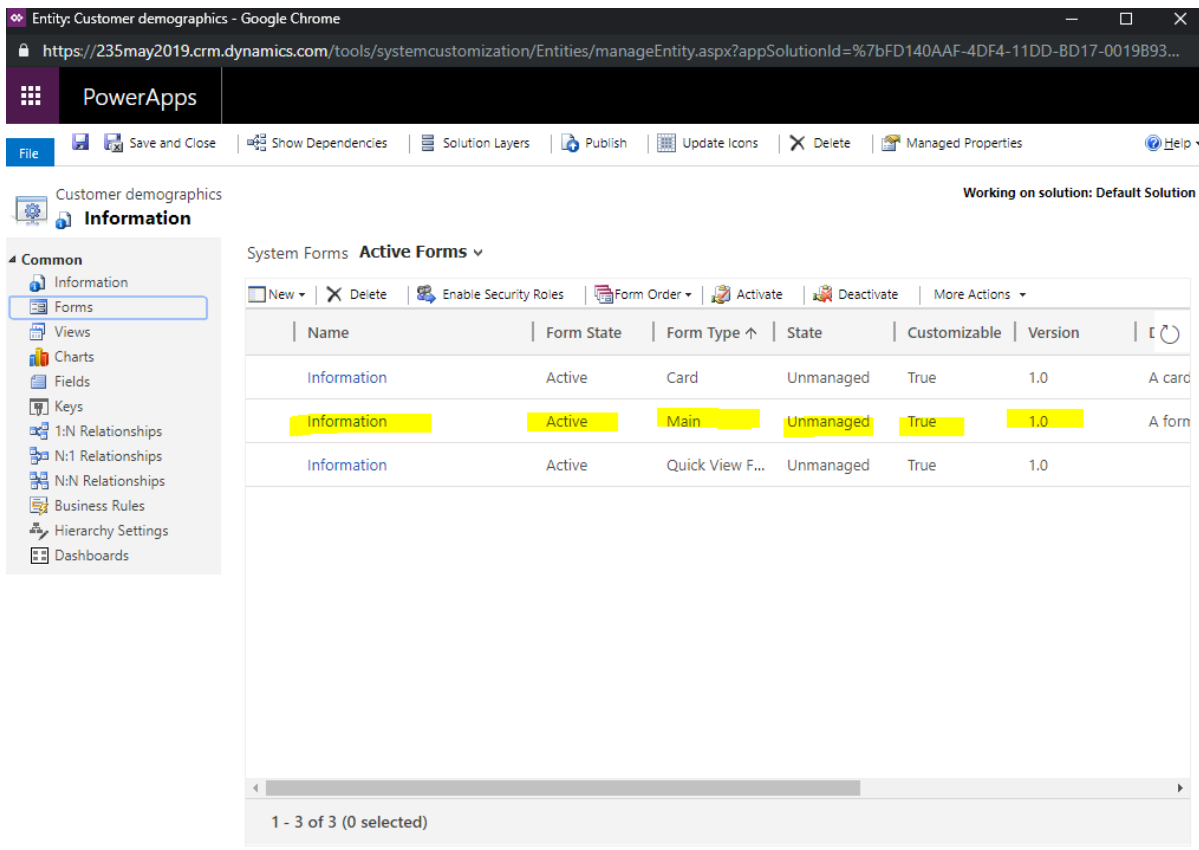**Name**: prefix_caseformid (replace prefix with your entity prefix)
Datatype: Lookup
Target Record Type: App Forms

Open the Forms of the created entity and get the url of the form which you have customised.

To get the GUID of the CRM form ID of the entity form from the URL, search for formId in the URL:

https://235may2019.crm.dynamics.com/main.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d&etc=10400&extraqs=formtype%3dmain%26formId%3d3C6C1725-33DA-467A-8575-EA0064A23585%26action%3d-1&pagetype=formeditor#952674413

Remove %3d after formId and take the GUID till "%".

formId%3d**3C6C1725-33DA-467A-8575-EA0064A23585**%

GUID: **3C6C1725-33DA-467A-8575-EA0064A23585**

Create a record in the master form entity with the following details as shown in below screenshot:
(Need to provide the created entity logical name in the "Form Logical Name" field and give the GUID of the entity form in "CRM form Id" field)

Now add this master form to a master template configuration record.

Create a case with that template as template name.

A master form record with same name will be created here. Select that record as shown below. It will open the related entity form.

Master Documents

Add Master Documents to the master template configuration.

Click on (+) symbol and add an existing document or click on new if you want to create a new master document as shown below and enter the required fields and save the form. Now the document will be added to the Master template configuration.
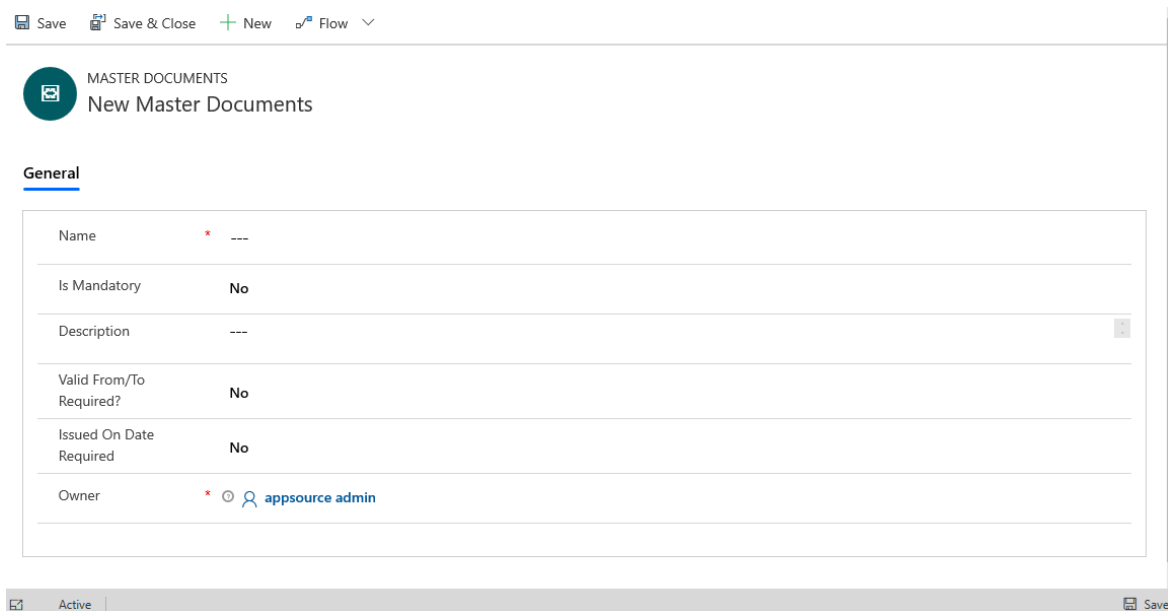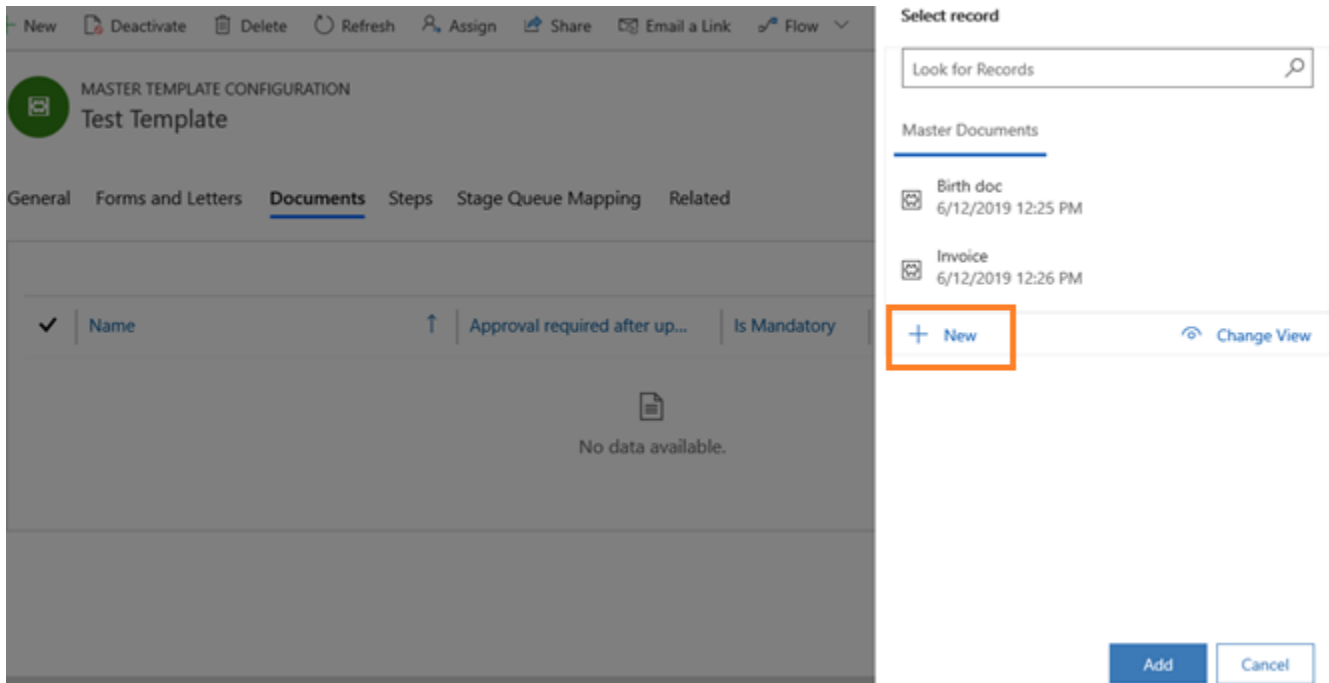
Master Step Config

Add Master Step Config to the master template configuration.

Click on (**+**) symbol and click on new as shown below and enter the required fields and save the form. Now the form will be added to the Master template configuration.

Master Step Configuration is an intermediate entity between Master steps and master template configuration.

Master Steps is an Entity where we are maintaining the general information of the step like step name, Queue, Step Stage and Step type.

Master Steps

After filling the details in master steps, we will select the same master step in master step Config to add and save.

Now master step configuration is added to the master template configuration.

MASTER TEMPLATE CONFIGURATION
Test Template

General Forms and Letters Documents **Steps** Stage Queue Mapping Related
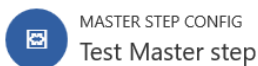
		+ Add New Master Step ...	↻ Refresh	...

✓	Name	↑	Step Order	Required/Optio...	Step Type	Created On	
	Test Master step		1.00	Optional	---	6/20/2019 12:29 PM	

Master Letters

Master Templates are document templates of OOB CRM. Create a document under document template and with the same name, we must create a master letter in master letters entity.

We should use only Microsoft word document to use for the Master Letters. Also, we can customize the word document as per business requirement.

DOCUMENT TEMPLATE : INFORMATION
TestTemplate ▾

▲ **General**

Details

Status	🔒 Activated
Name *	TestTemplate
Description	‹ _____ ›
Type *	🔒 Microsoft Word
Modified On	🔒 4/29/2019 3:56 PM
Modified By	🔒 test user3
Associated Entity Type Code	🔒 Case
Created By	🔒 test user3
Created On	🔒 4/29/2019 3:56 PM
Language *	English

After creating OOB document we should use same name to create master letters to reflect this document as an attachment under Case Letters.

Under Master template configuration we will provide only name of OOB document template for the master letters and save.

+ New   ⊘ Deactivate   🗑 Delete   ↻ Refresh   👤 Assign   ↗ Share   ✉ Email a Link   ⌁ Flow ∨   📄 Word Templates ∨   📊 Run Report ∨

MASTER LETTERS
TestTemplate

General   Related

| Title | * | **TestTemplate** |

Stage Queue Mappings

Stage Queue Mappings are nothing but stages of BPF. When we select BPF and save the form all the stage mapping queue creates automatically.

MASTER TEMPLATE CONFIGURATION
Test Template

General   Forms and Letters   Documents   Steps   **Stage Queue Mapping**   Related

↻ Refresh   📊 Run Report ∨   ⋯

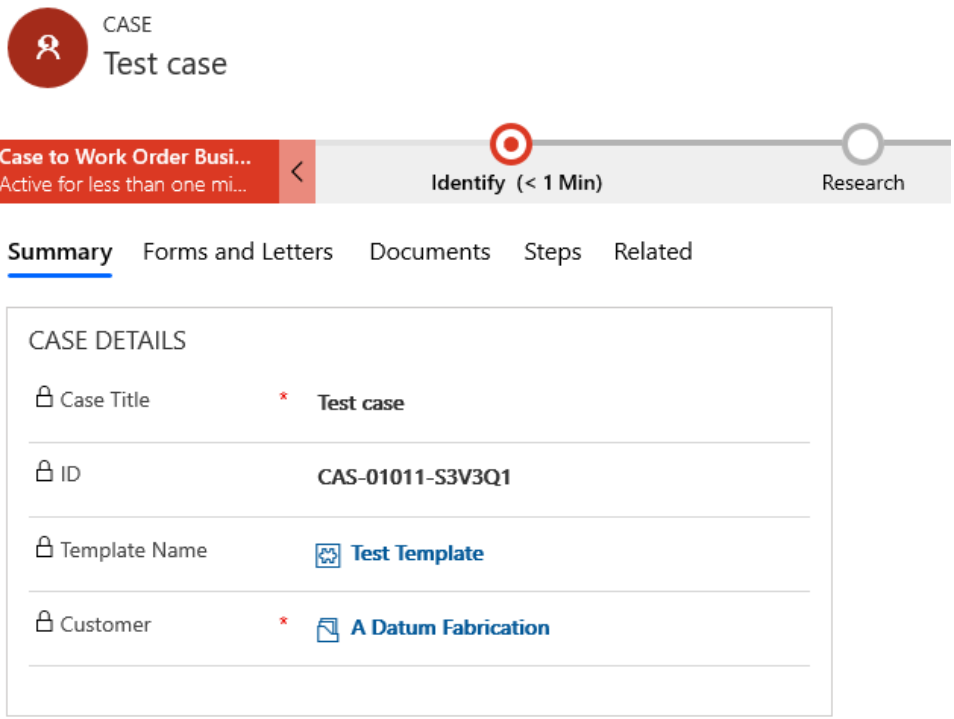| ✓	Name	↑	Business Proces...	Queue	BPF Stage	Master Template confi...	Created On	
	Close Work Order		Case to Work Order Bus	---	Close Work Ord	Test Template	6/20/2019 12:2...	
	Identify		Case to Work Order Bus	---	Identify	Test Template	6/20/2019 12:2...	
	Research		Case to Work Order Bus	---	Research	Test Template	6/20/2019 12:2...	
	Resolve		Case to Work Order Bus	---	Resolve	Test Template	6/20/2019 12:2...	

1 - 4 of 6 (0 selected) |←   ←   Page 1   →

Now we have created a master template with all the master records like master forms, master documents, master steps and master letters. Now we are ready to create app documents, app forms, app steps and app letters under the case. We can create a case by selecting the template which creates a case with all the required sections. This pre-defined template-based solution is configured and used for any type of need and can be widely used and can be customized.

Below are the steps to use the template configuration.

Go to Service → Case → New Case

Select "**App_case**" form when case is opened. Fill all the mandatory fields and select the master template configuration lookup. On saving the case, app documents, app forms and app steps will be created.

To create Letters, we need to click on "**Generate Cover Letters**" button on ribbon.

On clicking the "**Generate Cover Letters**" button, letters for the case will be created which is similar to the master letters of Master template configuration. When you open the created Letter, the document template of the letter will attached in the notes as shown below:

+ New   Deactivate   Delete   Refresh   Assign   Share   Email a Link   Flow ∨   Word Templates ∨   Run Report ∨

APPS LETTERS
TestTemplate

General   Related

Title *	Timeline + ⋯
TestTemplate	Enter a note... 📎
Url	
---	TODAY ↓ ⓘ
Owner *	Note modified by **appsource admin** - Just now
⊘ appsource admin	📄 TestTemplate.docx
Status *	
Active	🗑 Delete ✎ Edit note

Clone Master Template Configuration:

This is a new feature in Dynamic Case Configuration where we can copy the same master Template with all master Data to another template and also, we can modify (add/remove) the latter as per our requirement.

To Clone/Copy the master template configuration we need to provide unique name for newly created master template configuration.

⊙   + New   Deactivate   Delete   Refresh   Assign   Share   Email a Link   Flow ∨   Word Templates ∨   Run Report ∨

MASTER TEMPLATE CONFIGURATION
Test Template

General   Forms and Letters   Documents   Steps   Stage Queue Mapping   Related

Template Name * **Test Template**	Administration Section		
BPF 🔷 **Case to Work Order Busine...**	Copy Master template Config ☑	Update BPF Config ☐	
Apps Type ---	New Master Template Config Name **New Clone**		

To create clone of master template, we need to open existing master template configuration record and check the *'Copy Master Template Config'* check box. Then it will ask for new unique master template configuration name. Providing name and save the form will create clone/copy of the master template configuration. To see newly created master template, go back to master template configuration main grid and refresh.

Now you can see the newly created master template configuration is cloned from another master template configuration.
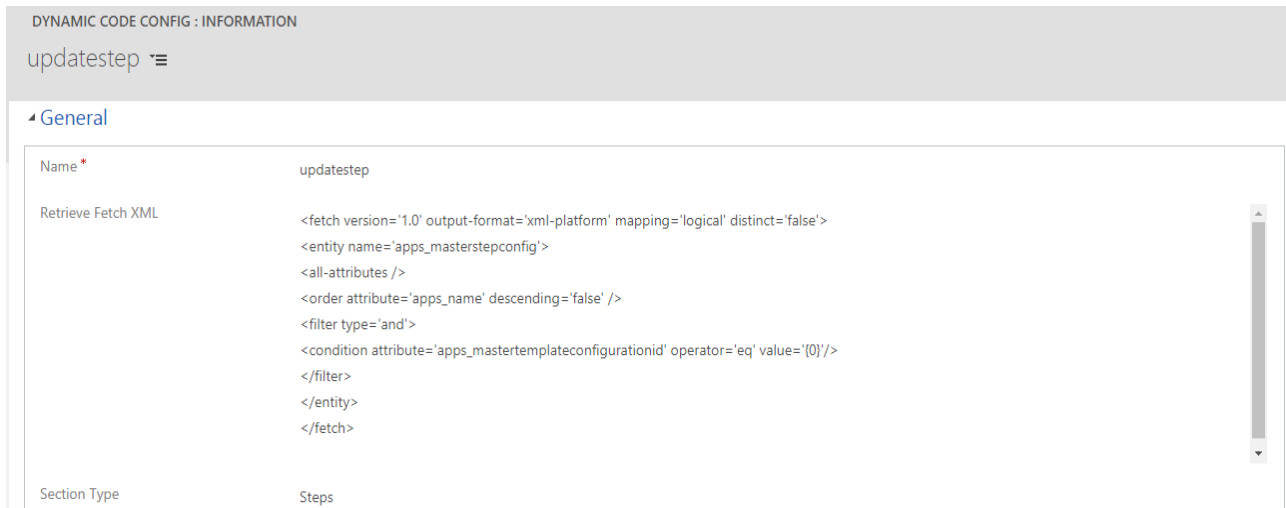
Update BPF Configuration

Update BPF configuration is another feature when we create new BPF and if it is not update in the master template configuration BPF lookup , then we can force to update the lookup by checking the '*Update BPF Config lookup'* checkbox. This will update the all newly created BPF and update the BPF lookup of under master template Config.
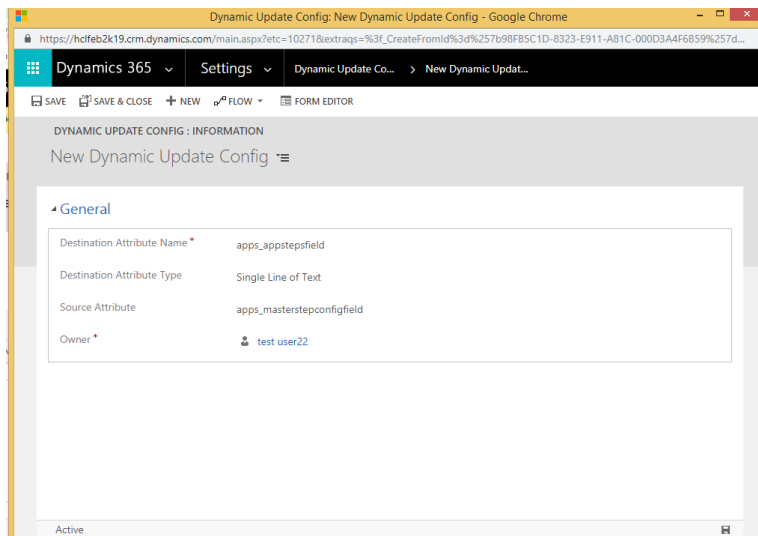
Dynamic Code Config

If you want to update any field value in app steps entity (steps created in the case) with the value of any field in master steps config entity. Then create a dynamic code config record and add required fetch xml in "Retrieve Fetch XML" field as shown below:

Add a dynamic update config record. Click on (**+**) symbol and click on new as shown below and enter the required fields and save the form. Destination attribute is the attribute that you want to update in the app steps. Source attribute is the attribute in master step config entity. The value of source attribute will be updated in the destination attribute.

Sample Code:

```
<fetch version='1.0' output-format='xml-platform' mapping='logical' distinct='false'>
  <entity name='apps_masterstepconfig'>
    <all-attributes />
    <order attribute='apps_name' descending='false' />
    <filter type='and'>
      <condition attribute='apps_mastertemplateconfigurationid' operator='eq' value='{0}'/>
    </filter>
  </entity>
</fetch>
```

> **Note**: Go to Processes in the solution after installation and check if all the processes present in the solution are activated. If there are any processes related to Dynamic case template solution which are in draft status, go to Settings→ Processes and activate them.

End of Document