

Visionary Rules

For Microsoft
Dynamics 365

**Do What You
Do Best and
Leave the
Coding to Us**



Microsoft Dynamics 365 customization and
configuration without the coding

Make configurations in a fraction of the time without complicated coding or expensive customizations. Perfect for the System Analyst or CRM Admin. Spend your valuable time where it counts the most—designing solutions that work—not searching the internet for snippets of code to use.

Quotes

“CRM Rules is a very solid product that supplied me with the tools to easily apply Java Script through our entire CRM environment.”

CRM Admin,
Seattle Seahawks
[re: Previous version]

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Easily Configure Interactive Forms in Microsoft Dynamics 365

Stop Customizing and Start Configuring

Customizing is expensive and complicated. Visionary Rules lets you easily configure form behavior by simply entering your criteria into an easy-to-use form. Visionary Rules takes your requests and generates and inserts SDK-compliant JavaScript.

Save Time and Money

Configuration requests can now be handled by the System Administrator. Perfect for the CRM Admin, System Analyst, Citizen Developer, and anyone else who is not familiar with JavaScript or advanced customizations. Complete user enhancement requests, system changes, and other requirements faster while creating a better user experience.

More Powerful than Business Rules

Business Rules is a great start, but is highly limited. Visionary Rules has 'ELSE' and 'OR' statements and allows the user to reuse conditions or actions. With hundreds of prebuilt conditions and actions, Visionary Rules is more powerful, flexible, and advanced than Business Rules.

Technical

- Works with Microsoft Dynamics 365
- Works with the new Unified Interface forms in Dynamics 365 apps
- Resides entirely within your CDS as a managed solution
- Built using OOB configuration of custom entities and .net plug-ins and the JavaScript produced by our app
- Create an unlimited number of rules
- Preserve institutional knowledge and reduce Total Cost of Ownership by storing your business logic in a searchable CDS database
- Edit generated code by hand or by using the app

Visionary Rules



VISIONARY
software consulting

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The Full Suite contains all of the rules and rule types below:

- Show Field
 - Hide Field
 - Set Field Value
 - Set Field to Other Field Value
 - Set Field To Mathematical Formula
 - Required Field Level
 - Alert
 - Disable Field
 - Enable Field
 - Collapse Tab
 - Expand Tab
 - Set Field to Derived String Concatenation Value
 - Hide Section
 - Show Section
 - Hide Tab
 - Show Tab
 - Set Option Set List
 - Copy Field(s) from Lookup Entity
 - Set to Null
 - Set Field to Now
 - Run RULE
 - Set Focus
 - Fire OnChange
 - Refresh
 - Save
 - Set Section Focus
 - Set Section Label
 - Set Tab Focus
 - Set Tab Label
 - Disable All Fields
 - Enable All Fields
 - Set Field Label
 - Hide IFRAME
 - Hide Nav Item
 - Hide Subgrid
 - Hide Web Resource Control
 - Refresh Subgrid
 - Set Focus to IFRAME
 - Set Focus to Nav Item
 - Set Focus to Subgrid
 - Set Focus to Web Resource Control
 - Set IFRAME Label
 - Set IFRAME Source
 - Set Nav Item Label
 - Set Subgrid Label
 - Set Web Resource Control Label
 - Set Web Resource Control Source
 - Show IFRAME
 - Show Nav Item
 - Show Subgrid
 - Show Web Resource Control
 - Invoke Process Dialog
 - Return Function Value
 - Run Workflow
 - Always Submit Field
 - Set Field to Function Return Value
 - Set Field Notification
 - Clear Field Notification
 - Confirm
 - Set Form Notification
 - Clear Form Notification
 - Set Active BPF
 - Move Next Stage
 - Move Previous Stage
 - Show BPF
 - Hide BPF
 - Collapse BPF
 - Expand BPF
- Rule Types in Full Suite:**
- IF/THEN/ELSE
 - Power Filtered Lookup
 - Custom JScript
 - Aggregation (Count, Sum, Min, Max, & Average across Children)
 - Clone
 - Case
 - Return Value
 - Custom Function

*All the above use IF/THEN/ELSE only



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