

Visionary Rules: Renewal Anniversary


For
Microsoft
Dynamics 365

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

Configure D365 Forms, Sections, Tabs, and Fields 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.

Contact Us:

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Easily identify yearly anniversaries such as
Contract, Warranty & Maintenance dates

Elevate your customer service in Microsoft Dynamics 365 without coding

Renewal Anniversary Rule

This targeted app includes everything necessary to create a rule to recognize important yearly dates. Flag Contract Renewals, Maintenance or Warranty Expiration dates, Customer Birthdays or Anniversaries.

Create that Personal Touch

Use the Renewal Anniversary rule in conjunction with Workflow to send automated emails, trigger a phone call, or other Tasks.

Easy/No Code solution

It would take an experienced consultant hours to create a plug-in and code .net at hundreds of dollars an hour. Using Visionary Rules, a Citizen Developer or System Admin can set it up in less than an hour.

Simply create a checkbox field called “Upcoming Birthday” (or Contract Renewal, etc.)

Create the rule to update that field if the customer’s birthday is within the next month.

Set the rule to run nightly – the field will be set to ‘yes’ if it meets the criteria specified. Then use Power Automate (CRM Workflow) to activate the desired activity.

Includes Visionary Rules: BASIC

The Renewal Anniversary app includes Visionary Rules: Basic at no additional charge. With hundreds of prebuilt conditions and actions, Visionary Rules is more powerful, flexible, and advanced than Business Rules.

Technical

- Works with Microsoft Dynamics 365
- Compatible with the new Unified Interface forms in Dynamics 365 apps

