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Introduction:

The **Quick Add/Update** interface will allow the CRM users to add or update multiple records for any CRM Entity (including the custom entities).

As MS-CRM do not have any out-of-box interface to insert/update multiple records, so this interface will enable the CRM users to save lots of their time there by improving their performance. The CRM Users can insert/update multiple entities at a single place.

Another important aspect of this interface is that, it pre-populates the data (Both System and Custom data) for the **Pick list** data types.

The **Quick Add/Update** interface currently supports the following data types

- String
- Memo
- Pick list
- Integer
- Number
- Float
- Decimal

§ Support for other data types and new features will be released soon in the next version.

The interface supports two modes

1. Add Mode
2. Edit Mode

Add Mode:

This mode is for inserting new records to the CRM database. To start with

1. Select the **Mode** as '**Add**'.
2. Select the **page size**. Page size determines the number of records to be inserted.



Microsoft Dynamics CRM – Quick Add Update

Microsoft Dynamics CRM- Quick Add Update

Mode: Add

Page Size: 5

System Entities Custom Entities

Entity: Select Entity

3. Select the **Entity** -For **System Entity**, Select the **System entity** option and then select the entity from the **entity** drop down. Similarly for **Custom entity**, select the **custom entity** option and then select the **entity** from the drop down.

Microsoft Dynamics CRM- Quick Add Update

Mode: Add

Page Size: 5

System Entities Custom Entities

Entity: Project

Attributes:

<input type="checkbox"/> CreatedByDsc(Integer)	<input type="checkbox"/> CreatedByName(String)	<input type="checkbox"/> DeletionStateCode(Integer)	<input type="checkbox"/> ImportSequenceNumber(Integer)	<input type="checkbox"/> ModifiedByDsc(Integer)	<input type="checkbox"/> ModifiedByName(String)
<input type="checkbox"/> New_Comments(String)	<input type="checkbox"/> New_name(String)	<input type="checkbox"/> new_projectaccountidDsc(Integer)	<input type="checkbox"/> new_projectaccountidName(String)	<input type="checkbox"/> new_projectaccountidYomiName(String)	<input type="checkbox"/> New_ProjectCode(String)
<input type="checkbox"/> New_ProjectComments(String)	<input type="checkbox"/> New_projectcontactpersonIdDsc(Integer)	<input type="checkbox"/> New_projectcontactpersonIdName(String)	<input type="checkbox"/> New_projectcontactpersonIdYomiName(String)	<input type="checkbox"/> New_ProjectStatus(Picklist)	<input type="checkbox"/> OwnerIdDsc(Integer)
<input type="checkbox"/> OwnerIdName(String)	<input type="checkbox"/> OwnerIdType(Integer)	<input type="checkbox"/> TimeZoneRuleVersionNumber(Integer)	<input type="checkbox"/> UTCConversionTimeZoneCode(Integer)	<input type="checkbox"/> VersionNumber(String)	

4. Once the **entity** is selected, the **Attribute list** will get populated. Select the **Attributes** for which you want to insert the data. Click on **Next**.
5. The Grid will get generated. Fill up the grid and click on **Save** to insert records onto the CRM.



Microsoft Dynamics CRM- Quick Add Update

Mode: Add

Page Size: 5

System Entities Custom Entities

Entity: Project Next

Attributes:

- CreatedByDsc(Integer)
- CreatedByName(String)
- DeletionStateCode(Integer)
- ImportSequenceNumber(Integer)
- ModifiedByDsc(Integer)
- ModifiedByName(String)
- New_Comments(String)
- New_name(String)
- new_projectaccountidDsc(Integer)
- new_projectaccountidName(String)
- new_projectaccountidName(String)
- New_ProjectCode(String)
- New_ProjectComments(String)
- New_projectcontactpersonidDsc(Integer)
- New_projectcontactpersonidName(String)
- New_projectcontactpersonidName(String)
- New_projectcontactpersonidName(String)
- New_ProjectStatus(Picklist)
- OwnerIdDsc(Integer)
- OwnerIdName(String)
- OwnerIdType(Integer)
- TimeZoneRule/VersionNumber(Integer)
- UTCConversionTimeZoneCode(Integer)
- VersionNumber(String)

New_Comments(String)	New_name(String)	new_projectaccountidName(String)	New_ProjectCode(String)	New_ProjectStatus(Picklist)	VersionNumber(String)
				RED	
				RED	
				AMBER	
				GREEN	
				COMPLETE	
				RED	
				RED	

Save

Edit Mode:

This mode is for updating purpose. This mode also allow user to select the entity. Attributes and page size. It also has search criteria where user can search and update multiple records.

1. Select the **Mode** as '**Edit**'.
2. Select the **page size**. **Page size** determines the number of records to be inserted.
3. Select the **Entity** -For **System Entity**, Select the **System entity** option and then select the **entity** from the **entity** drop down. Similarly for **Custom entity**, select the **custom entity** option and then select the **entity** from the drop down.
4. Once the **entity** is selected, the **Search Criteria list attribute list** will get populated.



Microsoft Dynamics CRM – Quick Add Update

Microsoft Dynamics CRM- Quick Add Update

Mode: Edit

Page Size: 5

System Entities Custom Entities

Entity: Project

Search Criteria:

CreatedByName ModifiedByName New_Comments New_name new_projectaccountIdName
 new_projectaccountIdYomiName New_ProjectCode New_ProjectComments New_projectcontactpersonIdName New_projectcontactpersonIdYomiName
 OwnerIdName VersionNumber

Search Text:

Attributes:

CreatedByDsc(Integer) CreatedByName(String) DeletionStateCode(Integer) ImportSequenceNumber(Integer) ModifiedByDsc(Integer) ModifiedByName(String)
 New_Comments(String) New_name(String) new_projectaccountIdDsc(Integer) new_projectaccountIdName(String) new_projectaccountIdYomiName(String) New_ProjectCode(String)
 New_ProjectComments(String) New_projectcontactpersonIdDsc(Integer) New_projectcontactpersonIdName(String) New_projectcontactpersonIdYomiName(String) New_ProjectStatus(Picklist) OwnerIdDsc(Integer)
 OwnerIdName(String) OwnerIdType(Integer) TimeZoneRuleVersionNumber(Integer) UTCConversionTimeZoneCode(Integer) VersionNumber(String)

5. Select the **Search Criteria** – Select the **Attributes** from the search criteria list and enter the search text
6. The Grid will get populated with the records from the CRM database as per the search criteria.

Microsoft Dynamics CRM- Quick Add Update

Mode: Edit

Page Size: 5

System Entities Custom Entities

Entity: Project

Search Criteria:

CreatedByName ModifiedByName New_Comments **New_name** new_projectaccountIdName
 new_projectaccountIdYomiName New_ProjectCode New_ProjectComments New_projectcontactpersonIdName New_projectcontactpersonIdYomiName
 OwnerIdName VersionNumber

Search Text: test*

Attributes:

CreatedByDsc(Integer) CreatedByName(String) DeletionStateCode(Integer) ImportSequenceNumber(Integer) ModifiedByDsc(Integer) ModifiedByName(String)
 New_Comments(String) New_name(String) new_projectaccountIdDsc(Integer) new_projectaccountIdName(String) new_projectaccountIdYomiName(String) New_ProjectCode(String)
 New_ProjectComments(String) New_projectcontactpersonIdDsc(Integer) New_projectcontactpersonIdName(String) New_projectcontactpersonIdYomiName(String) New_ProjectStatus(Picklist) OwnerIdDsc(Integer)
 OwnerIdName(String) OwnerIdType(Integer) TimeZoneRuleVersionNumber(Integer) UTCConversionTimeZoneCode(Integer) VersionNumber(String)

New_Comments(String)	New_name(String)	New_ProjectCode(String)	New_ProjectComments(String)	New_ProjectStatus(Picklist)	VersionNumber(String)
	Test MPS Project5	005		COMPLETE	
	Test MPS Project2	002		COMPLETE	
	Test MPS Project3	003		COMPLETE	
	Test MPS Project4	004		COMPLETE	
	Test MPS Project1	001		COMPLETE	

Save



Installation:

1. Download the zip file.
2. Open the web.config file and modify the URL, Organization name and the metadataservice.

```
<configuration>
  <configSections>
    <sectionGroup name="system.web.extensions" type="System.Web.Configuration.SystemWebExtensionsSectionGroup, System.Web.Extensions, Version=
    <sectionGroup name="scripting" type="System.Web.Configuration.ScriptingSectionGroup, System.Web.Extensions, Version=3.5.0.0, Culture=neu
    <section name="scriptResourceHandler" type="System.Web.Configuration.ScriptingScriptResourceHandlerSection, System.Web.Extensions, Ver
    <sectionGroup name="webServices" type="System.Web.Configuration.ScriptingWebServicesSectionGroup, System.Web.Extensions, Version=3.5.0
    <section name="jsonSerialization" type="System.Web.Configuration.ScriptingJsonSerializationSection, System.Web.Extensions, Version=3
    <section name="profileService" type="System.Web.Configuration.ScriptingProfileServiceSection, System.Web.Extensions, Version=3.5.0.0
    <section name="authenticationService" type="System.Web.Configuration.ScriptingAuthenticationServiceSection, System.Web.Extensions, V
    <section name="roleService" type="System.Web.Configuration.ScriptingRoleServiceSection, System.Web.Extensions, Version=3.5.0.0, Cult
  </sectionGroup>
</sectionGroup>
</sectionGroup>
</configSections>
  <appSettings>
    <add key="CrmSdk.Discovery.CrmDiscoveryService" value="http://localhost:5555/MSCRMServices/2007/AD/CrmDiscoveryService.aspx"/>
    <add key="CrmSdk.CrmServiceWsd1" value="http://dycrm:5555/MSCRMServices/2007/CrmService.aspx"/>
    <!-- Modify the URL of Metadata Service-->
    <add key="CrmSdk.Metadata.MetadataService" value="http://localhost:5555/MSCRMServices/2007/MetadataService.aspx"/>
    <!-- Modify the URL of CRM Server-->
    <add key="url" value="http://localhost:5555"/>
    <!-- Modify the Organization name-->
    <add key="org" value="mfsbbsr"/>
  </appSettings>
```

3. Deploy the website on the IIS manager of the CRM Server.

Specification:

Operating System: **Microsoft Windows Server 2003 or 2008**

Server: **MS CRM 4.0 (On-Premise)**

Browser: **Microsoft Internet Explorer 7 or higher**

Screen Resolution: **1600 by 900 (Best View)**

Mindfire Solutions has deep experience in Customizing [Microsoft Dynamics CRM](#) application. We will be glad to share our expertise in detail with you. To learn about our Microsoft Dynamics [CRM expertise](#) and services please visit our website.

Please provide your feed back to info@mindfiresolutions.com or call 1-248-686-1424.