

User Guide



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
Super Grid Functionality on Custom grid in Unified Interface CRM

- ❖ Adding Super Grid to Accounts Entity.
 - Navigate to **Sales → Accounts**
 - Open any Existing Account record or Create new Account.

[Dynamics 365](#) > [Sales](#) > [Accounts](#) > A Datum Integration >

[Apps for Dynamics 365](#) View Dynamics 365 information on the go with apps for your phone, tablet, Outlook, and more! [Get Apps for Dynamics 365](#)

[NEW ALERT](#) [VIEW ALERT](#) [+ NEW](#) [DEACTIVATE](#) [CONNECT](#) [ADD TO MARKETING LIST](#) [ASSIGN](#) [EMAIL A LINK](#) [DELETE](#) ...

 ACCOUNT ▾ A Datum Integration ≡

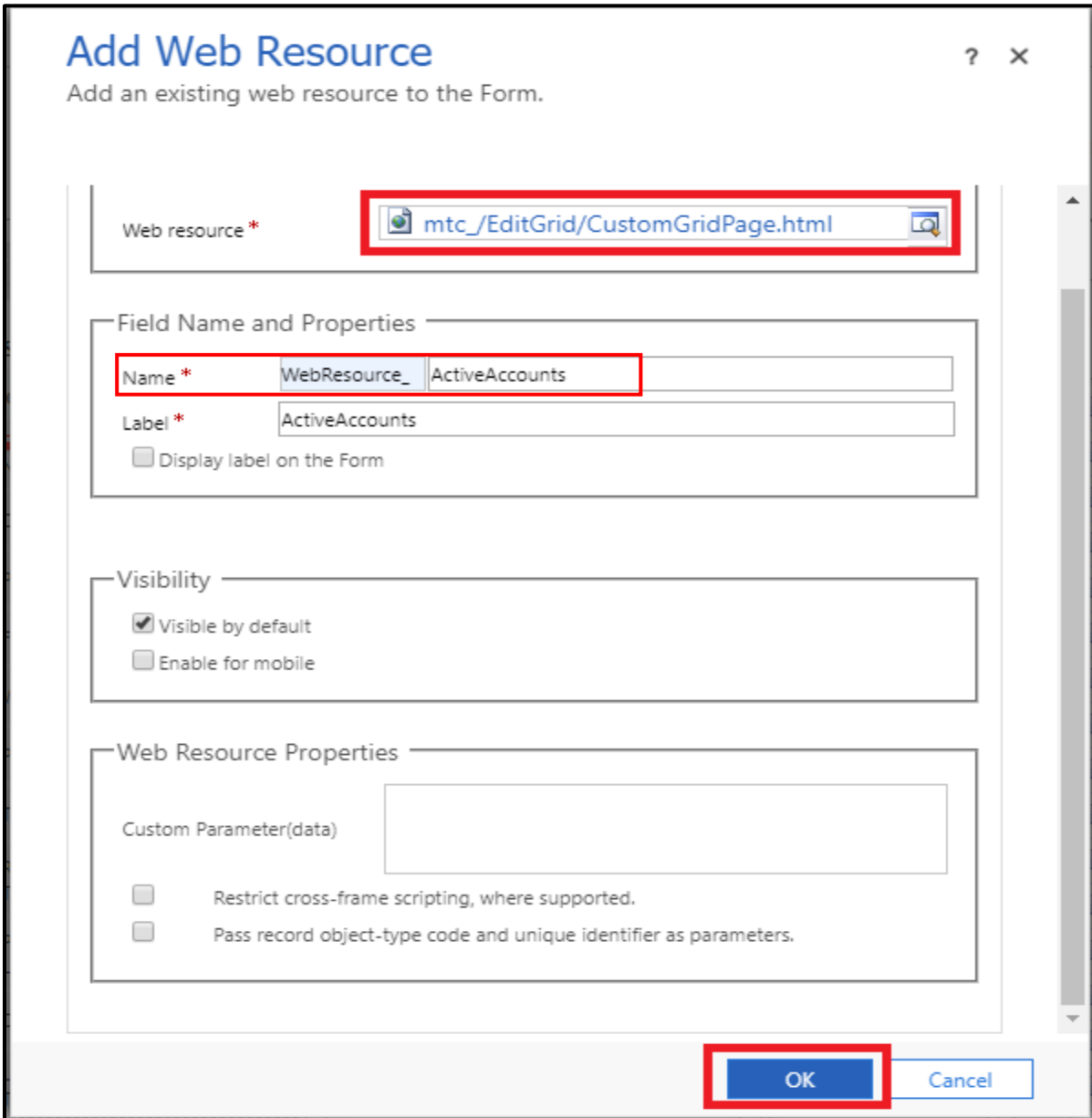
[Summary](#)

ACCOUNT INFORMATION		POSTS	ASSISTANT
Account Name *	A Datum Integration	<div>Enter post here</div>	
Description			
Phone	512-555-0163		

- ❖ Add Web Resource on account Form for Configuring the Custom grid.
 - Open Account Form and Click on **Web Resource**.

The screenshot displays the Microsoft PowerApps development environment. At the top, the 'PowerApps' title bar is visible. Below it, the ribbon includes 'FILE', 'HOME', and 'INSERT' tabs. The 'INSERT' tab is active, showing various control icons. The 'Form' icon, which represents a data form, is highlighted with a red square. Below the ribbon, the left-hand pane shows a tree view of the app's structure, with 'Account' and 'Common' sections expanded. The main canvas area shows a form layout with sections for 'ACCOUNT INFORMATION', 'SOCIAL PANE', and 'Relationship Assistant'. The right-hand pane shows the 'Field Explorer' with a list of fields and a filter set to 'All Fields'.

- A pop-up window will be displayed.
- Select '**mtc_/Edit Grid/CustomGridPage.html**' with the help of lookup icon
- Enter Web Resource Name



Add Web Resource ? x

Add an existing web resource to the Form.

Web resource *

Field Name and Properties

Name *

Label *

☐ Display label on the Form

Visibility

☒ Visible by default

☐ Enable for mobile

Web Resource Properties

Custom Parameter(data)

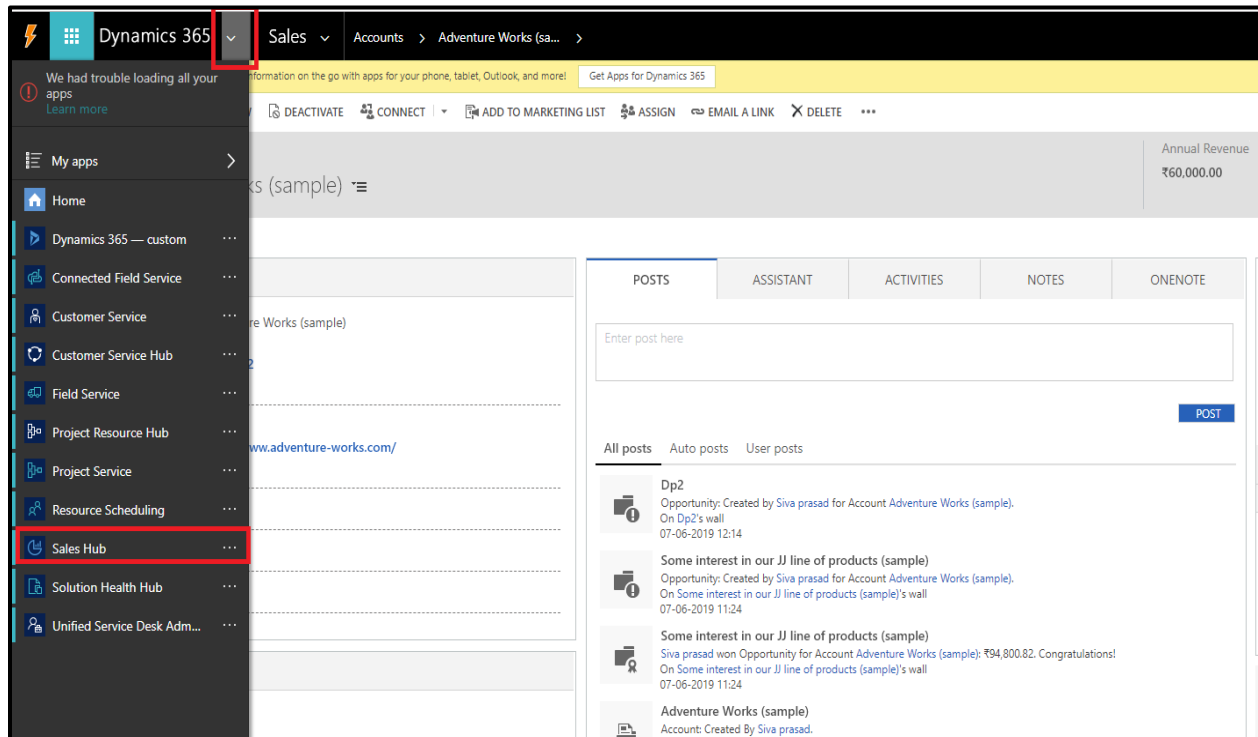
☐ Restrict cross-frame scripting, where supported.

☐ Pass record object-type code and unique identifier as parameters.

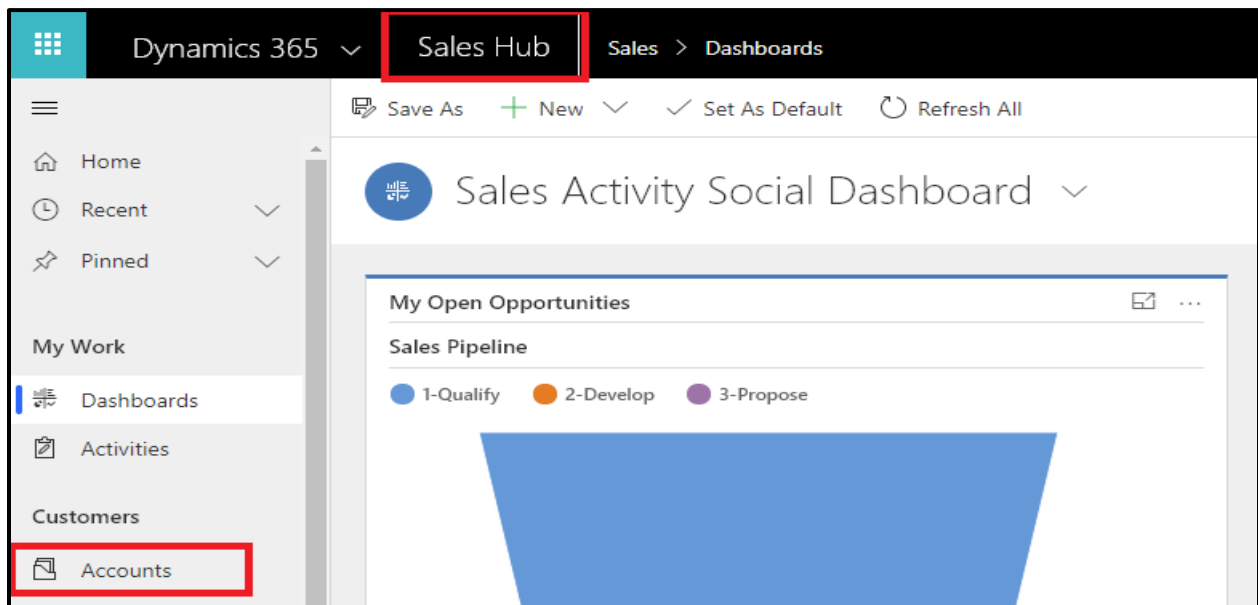
OK Cancel

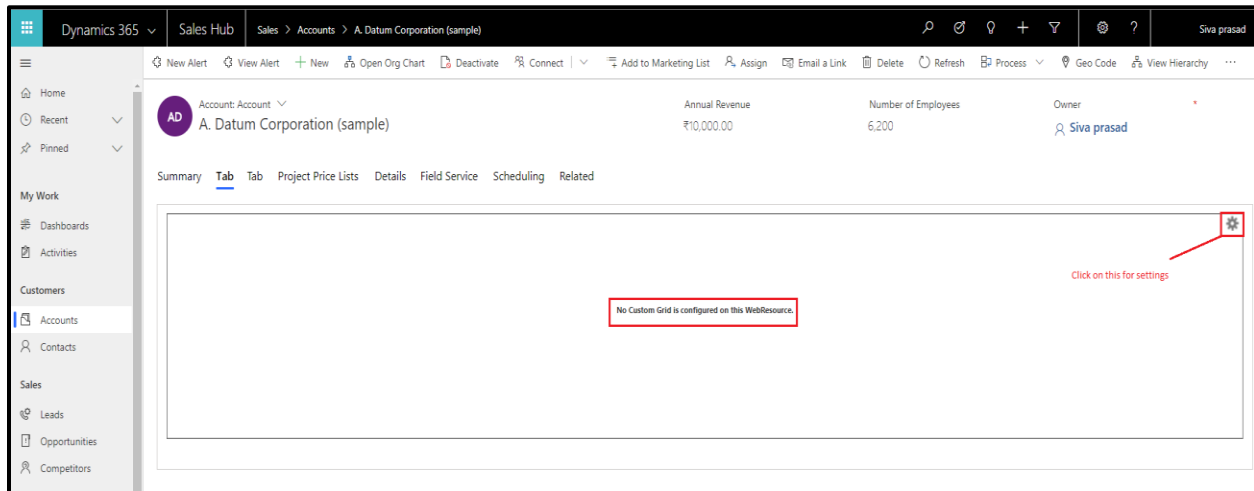
- click on **OK**.

- Open **Unified Interface CRM** through **Sales Hub** Module.



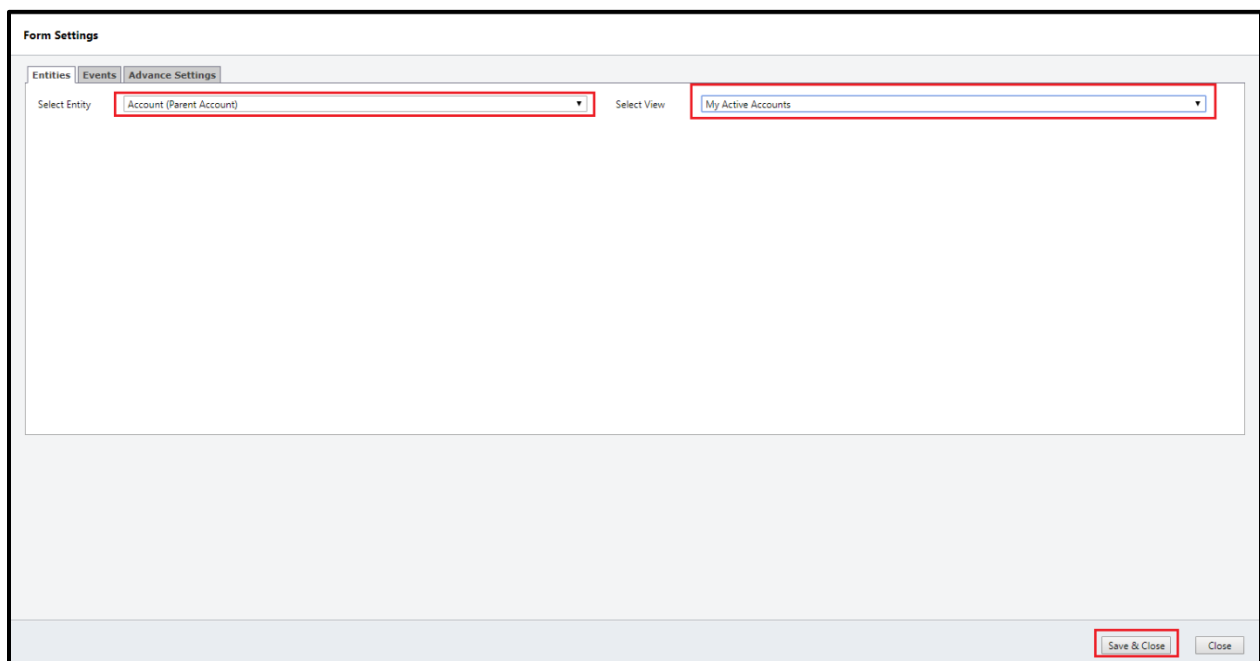
- Click on **Accounts** from Left hand Panel
- Open any Existing Account record or Create new Account





❖ Settings Area for Super Grid on Forms.

This Super Grid functionality is available only if the necessary settings and changes are made. As shown below.



- Click on the icon as shown above to open Form Settings screen
- Click on the icon as shown above for Settings .It Pops up Form Settings

- Select Entities – Select Entity as **Account(Parent Account)** (example) and Select View as **MY ACTIVE CCOUNTS** (example) both from drop down list provided.
- Here you can **Add(+)** the new record and enter data in any column and click on **save** button

Account: Account ▾
A. Datum Corporation (sample)

Annual Revenue ₹10,000.00 Number of Employees 6,200 Owner Siva prasad

Summary **Tab** Tab Project Price Lists Details Field Service Scheduling Related




✓	✕	Account Name * ▲	Main Phone	Address 1: City	Primary Contact	Email (Contact)	Account Rating	Address 1	Aging 30	Created On	Credit Limit	Currency	MultiSelect, Op.	+
✓	✕	Golden Rule Insurance Company	464646											
		Allison Transmission	889080	New York	Abraham McCormick	abraham_mccormick@fabri...	Default Value	New York		07-06-2019 14:47		Australian Dollar	Rjy,Hyd,Test	
		AM Genera	345366	Los Angele	Maria Campbell (sample)	someone_d@example.com	Default Value	Los Angele		07-06-2019 14:49	₹45,645.00	₹यप	Hyd,Test,Bang	
		Aqua Hotel's and Resorts	34546	Housto	Jim Glynn (sample)	someone_j@example.com	Default Value	Housto		10-06-2019 19:40				
		Batesville Casket Company	3453266	Chicago	siva prasad		Default Value	Chicago		07-06-2019 14:47		Australian Dollar	Rjy,Hyd,Test,Bang	
		Casey's General Stores	4353368	California	Jim Glynn (sample)	someone_j@example.com	Default Value	California		10-06-2019 19:40				
		Emmis Communications	5477788	Texas	Abraham McCormick	abraham_mccormick@fabri...	Default Value	Texas		10-06-2019 19:40				
		Golden Rule Insurance Company	4578688	North Carolina	d aju	aju@gmail.com	Default Value	North Carolina		10-06-2019 19:40				


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- Here you can Edit the any column and click on **Save** button.

Summary **Tab** Tab Project Price Lists Details Field Service Scheduling Related

✓  Account Name ▲	Main Phone	Address 1: City	Primary Contact	Email(Contact)	Account Rating	Address 1	Aging 30	Created On	Credit Limit	Currency	MultiSelect Op... + u
Alison Transmission	688080	New York	Abraham McCormick	abraham_mccormick@fabri...	Default Value	New York		07-06-2019 14:47		Australian Dollar	Rij Hyd Test
AM General	345366	Los Angeles	Maria Campbell (sample)	someone_d@example.com	Default Value	Los Angeles		07-06-2019 14:49	₹45,645.00	रुपया	Hyd Test Bang
Aqua Hotels and Resorts	3454677	Houston	Jim Glynn (sample)	someone_j@example.com	Default Value	Houston		10-06-2019 19:40			
✓  Batesville Casinet Company	345326	Chicago	silva prasad		Default Value	Chicago		07-06-2019 14:47		Australian Dollar	Rij Hyd Test Bang
 Casey's General Stores	435336	California	Jim Glynn (sample)	someone_j@example.com	Default Value	California		10-06-2019 19:40			
Emmis Communications	5477788	Texas	Abraham McCormick	abraham_mccormick@fabri...	Default Value	Texas		10-06-2019 19:40			
Golden Rule Insurance Company	4578688	North Carolina	d aiju	aiju@gmail.com	Default Value	North Carolina		10-06-2019 19:40			
Happy Joe's	457888	Washington	test test		Default Value	Washington		10-06-2019 19:40			

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❖ Select Events

- Under Events add Web Resource and Select Event from the Drop down list provided

Form Settings

Entities **Events** Advance Settings

Existing Web Resources: new_CustomGrid [X Delete]

Event: On Load

Function Name: [Empty] [+ Add]

Existing Functions: [Empty] [X Delete]

Save & Close Close

Note: There are five types of Event available from the Dropdown list.

1. On Load
2. On Save
3. On Add Row
4. On Change
5. On Save Complete.

➤ Except On Change Event, you can directly give the Function name and Click Add button as shown below.

Event: On Save

Function Name: onSave [+ Add]

Existing Functions: [Empty] [X Delete]

- Now “On Save” event is fired once change the value in any field and click on save.

The screenshot shows the Dynamics CRM interface for 'A. Datum Corporation (sample)'. A notification box at the top says 'Record is Saved'. Below it, a table lists various accounts with columns for Account Name, Main Phone, Address 1: City, Primary Contact, Email (Contact), Account Rating, Address 1, Aging 30, Created On, Credit Limit, Currency, and MultiSelect_Op... The table contains 10 rows of data, including 'Allison Transmission', 'AM Genera', 'Aqua Hotels and Resorts', 'Batesville Casket Company', 'Casey's General Stores', 'Emmis Communications', 'Golden Rule Insurance Company', and 'Happy Joe's'.

- On click of Add, the Name is moved to existing Functions. This can be deleted if needed by selecting the function and click on Delete Button.
- **For On Change Function:** On Selecting on Change from the drop down list

The screenshot shows the 'On Change' event configuration window. The 'Event' dropdown is set to 'On Change'. The 'Function Name' field contains 'Add Function'. Below this, there is a list of 'Existing Functions' and a 'Delete' button.

- Add Function Button is shown the place of Function Name, Click on Add Function button
- A new Pop up window is displayed as shown below

The screenshot shows a 'Filter by view' dialog box. It has fields for 'Attribute Name' (set to 'Address 1: City') and 'Function Name' (set to 'onChange1'). There are 'Ok' and 'Cancel' buttons. To the right of the dialog, there is a '+ Add' button and a 'Delete' button.

- ❖ **Note:** If Filter by View is checked, only the Attributes pertaining to Select Views under Entities are displayed for Attribute Names. If not selected then all the Attributes of the entities are displayed for Attribute Names.
- Here you have to select the Attribute Name and Function Name.

- These can also be filtered by View if needed.
- Click OK to continue.
- **“On Change”** event is fired once change the value in selected field and click on **Save**.

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Contact)	Account Rating	Address 1	Aging 30	Created On	Credit Limit	Currency	MultiSelect Op...
Allison Transmission	889080	New York	Abraham McCormick	abraham_mccormick@fabri...	Default Value	New York		07-06-2019 1447		Australian Dollar	Rij,Hyd,Test
AM Genera	345366	Los Angeles	Maria Campbell (sample)	someone_d@example.com	Default Value	Los Angeles		07-06-2019 1449	\$45,645.00	₹	Hyd,Test,Bang
Aqua Hotels and Resorts	34546	Houston	Jim Glynn (sample)	someone_d@example.com	Default Value	Houston		10-06-2019 1940			
Batesville Casket Company	3453266	Chicago	Siva prasad		Default Value	Chicago		07-06-2019 1447		Australian Dollar	Rij,Hyd,Test,Bang
Casey's General Stores	4353368	California	Jim Glynn (sample)	someone_d@example.com	Default Value	California		10-06-2019 1940			
Eminis Communications	5477788	Texas	Abraham McCormick	abraham_mccormick@fabri...	Default Value	Texas		10-06-2019 1940			
Golden Rule Insurance Company	4578688	North Carolina	d alju	alju@gmail.com	Default Value	North Carolina		10-06-2019 1940			
Happy Joe's	457888	Washington	test test		Default Value	Washington		10-06-2019 1940			

❖ Select Advance Settings

- Under this select Auto Save, CRM Required fields, Filter Attributes etc. as shown below

Note: If Filter by Attributes are checked, only the Attributes pertaining to Select Views under Entities are displayed for Required Fields.

If not selected then all the Attributes of the entities are displayed for Required Fields.

- For grouping columns to add select Is Group able

- Select Enable Sub grid to Parent-child relation Entity
- Finally click on Save and Close

Summary **Tab** Tab Project Price Lists Details Field Service Scheduling Related

Account Name *	Main Phone	Address 1: City	Primary Contact	Email(Contact)	Currency	MultiSelect, Op...	Nu +
▲ New York (Address 1: City)							
▲ Allison Transmission (Account Name)							
Allison Transmission	889080	New York	Abraham McCormick	abraham_mccormick@fabri...	Australian Dollar	Rjy,Hyd,Test	
▲ Los Angele (Address 1: City)							
▲ AM Genera (Account Name)							
AM Genera	345366	Los Angele	Maria Campbell (sample)	someone_d@example.com	रुपया	Hyd,Test,Bang	
▲ Housto (Address 1: City)							
▲ Aqua Hotels and Resorts (Account Name)							
Aqua Hotels and Resorts	34546	Housto	Jim Glynn (sample)	someone_j@example.com			
▲ Chicago (Address 1: City)							
▲ Batesville Casket Company (Account Name)							
Batesville Casket Company	3453266	Chicago	siva prasad		Australian Dollar	Rjy,Hyd,Test,Bang	

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- Click on the Symbol to expand grouping details. (as shown above) On a single click user can modify or change or edit data using Super Grid function.
- User can Add or Delete records accordingly using Super Grid.
- On Right Click user can create a Group or Remove a Group.
- Use also has facility to Sort Ascending or Descending on the Right click
- Click on the Symbol on the Left of the data record enables to show the Grouping details in full