

The Largest Independent Gathering
of the Microsoft User Ecosystem



Business Rules, Business Process Flows, Calculated & Rollup Columns in Dynamics 365/CRM

Decrease Complexities,
Deliver Results.

@ 2022 Dynamic Communities



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| Agenda

- What are these things?
- Practical application
- Demo
- Q&A



For Users, By Users

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Server-side logic that is used with canvas or model-driven apps to set or clear values in one or more columns in a table.

- Show or hide columns
- Enable or disable columns
- Create recommendations

Allows for custom configuration without the use of code.

Logic built into a given table to ensure that users complete records by updating columns in the correct order.

A business process flow is arranged into stages and each stage defines the columns that must be completed before moving onto the next stage.

Available for almost 30 OOB tables and all custom tables.

Automates manual calculations

Can contain values resulting from simple math operations, or conditional operations, such as greater than or if-else, and many others.

Available on these columns: Text, Choice, Yes/No, Whole Number, Decimal Number, Currency and Date/Time

Designed to help users obtain insights into data by monitoring key business metrics.

Contains an aggregate value computed over the records related to a specified record.

Rollups are calculated by scheduled system jobs that run asynchronously in the background. These run 12 hours after an update is made to the field.

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Business Scenario #1



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| Weighted Revenue

Determine the weighted revenue of the opportunity based on close probability.



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| Weighted Revenue

Determine the weighted
revenue of the op
based on clo

Calculated
column

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Business Requirements

Reasoning:

Calculated columns allow for simple math operations.

Solution:

Create a calculated columns to multiply Est. Revenue by Close Probability.

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Business Scenario #2



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| Open Revenue

View open revenue for an account and all child accounts.



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| Open Revenue

View open revenue for an account and all sub-accounts.

Rollup Column

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Business Requirements

Reasoning:

Aggregates values from related records to a specified record.

Solution:

Create a rollup column, using the account hierarchy, to display the Est. Revenue of related opportunities.

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Business Scenario #3



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| Require fields

Show and require fields based on opportunity type selection.



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Require fields

Show and require fields based
on opportunity

Business
Rule

Business Requirements

Reasoning:

Logic to set data without the use of custom code.

Solution:

Create a business rule to show/hide and require/unrequire fields based on opportunity type selection.

Pro Tip: Use conditions to limit number of business rules.

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Business Scenario #4



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Identify next steps

Assist users by clearly defining
the next steps of
working on a

Business
Process
FLOW

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Business Requirements

Reasoning:

Provides a way to logically place columns in a process to complete steps in a specified order.

Solution:

Create (or edit existing) business process flow including the necessary fields to complete a process.

| Demo

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Questions?

Please take the survey
and provide feedback!



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podcasts on Dynamics 365
and the Power Platform



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