

Updating Default CP Benefits - (FLOW for setting up a Business Rule for Roster Members (CP Companies))

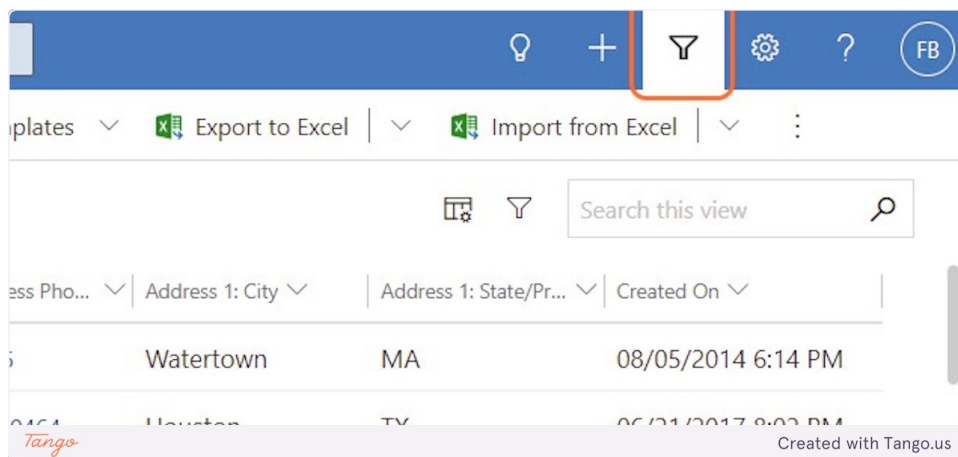
Last Modified on 10/23/2024 10:28 am EDT

FLOW - Setting up a Business Rule for Roster Members (CP Companies)

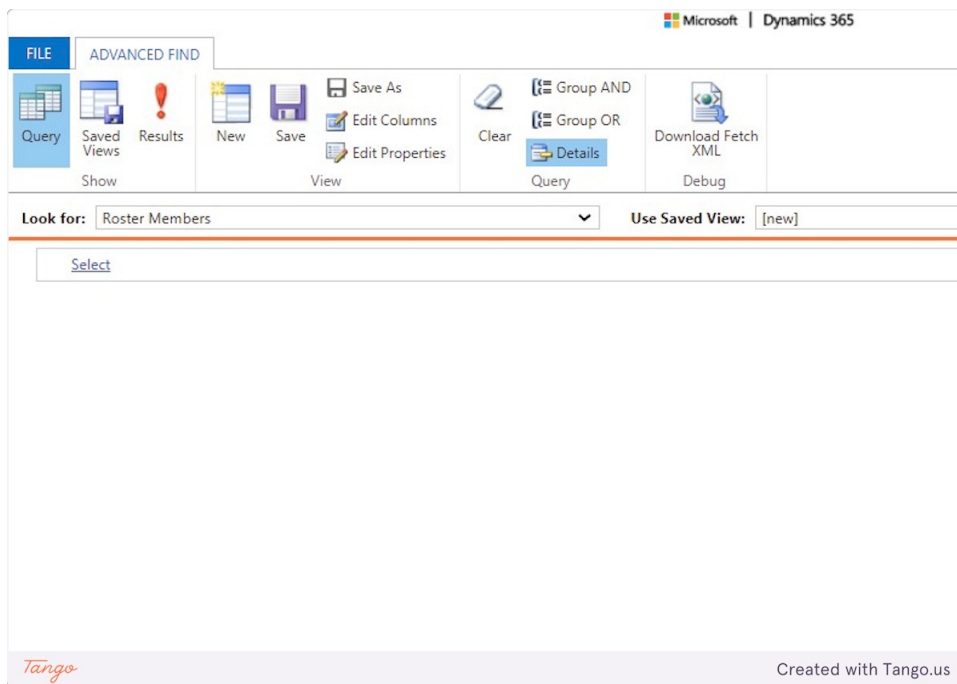
Creation Date: Mar 25, 2022

Created By: Bridget Fairbanks

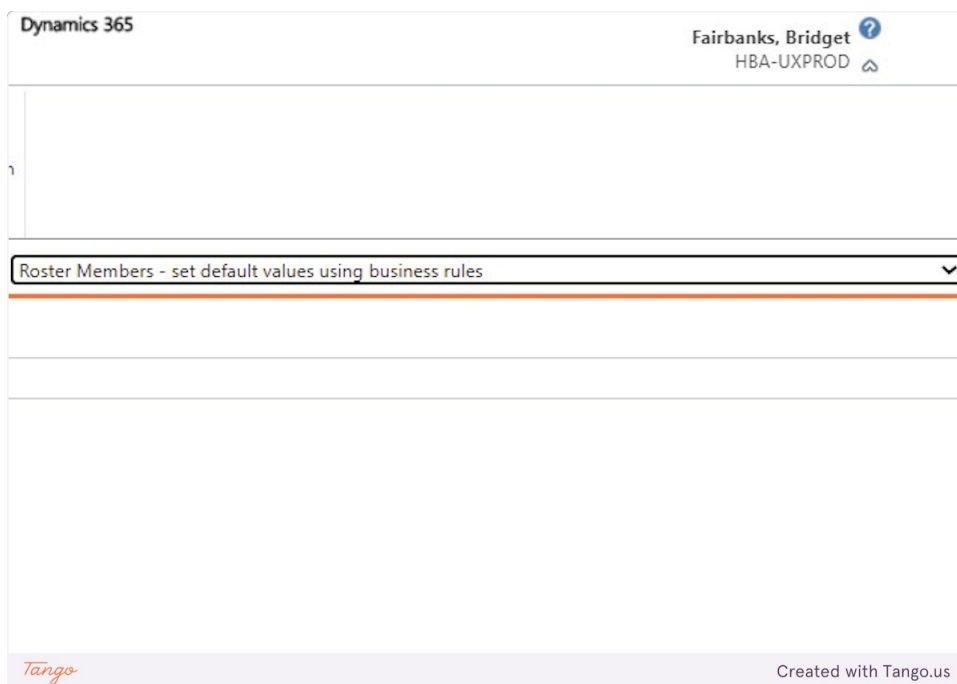
1. CLICK ON ADVANCED FIND



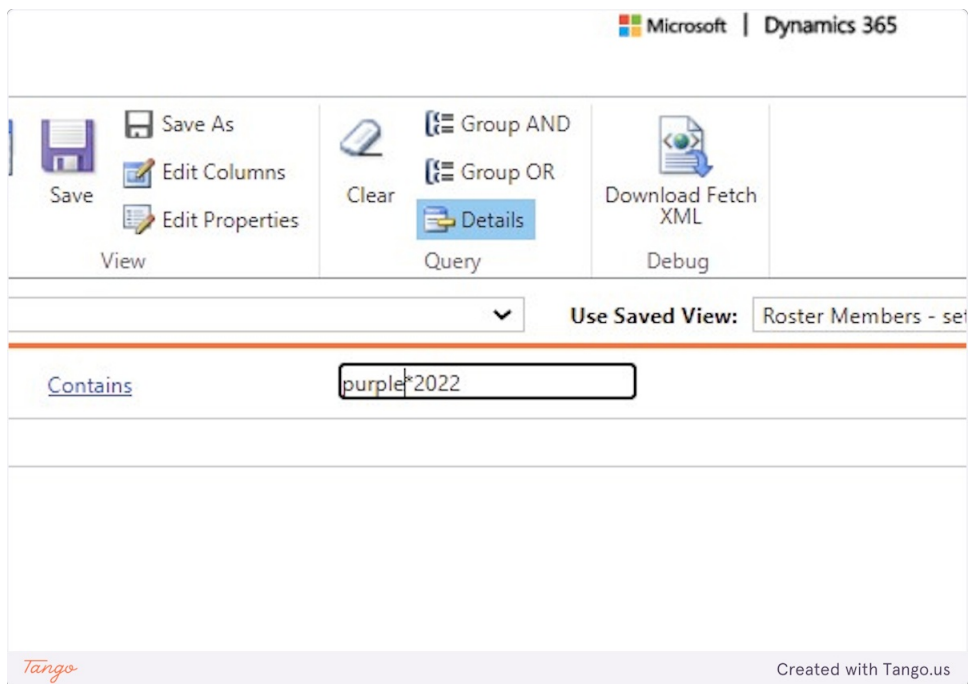
2. CLICK ON ROSTER MEMBERS FROM LOOK FOR:



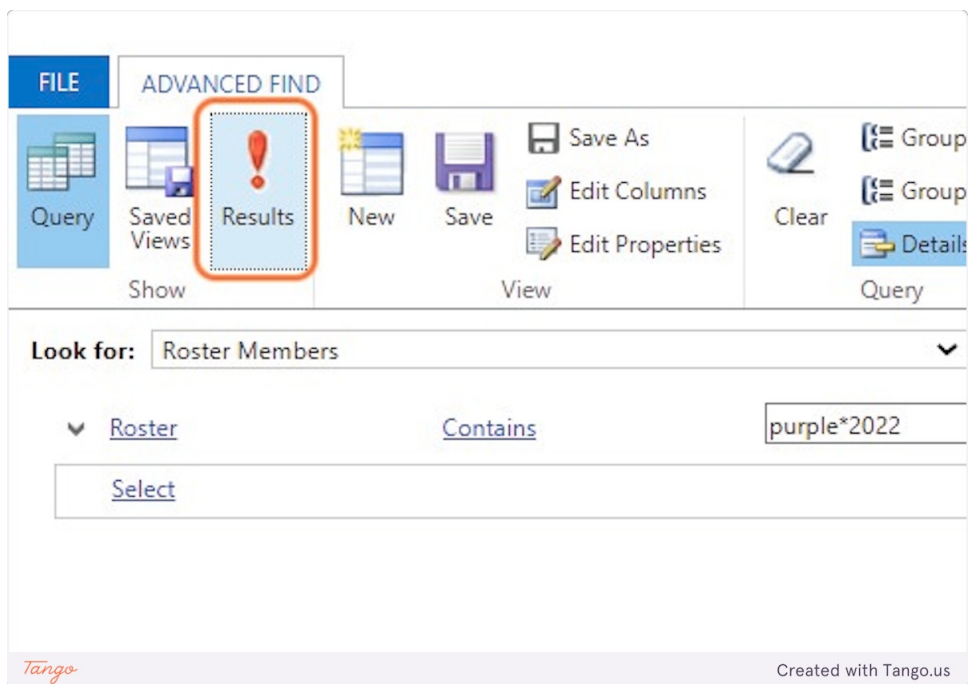
3. CLICK ON ROSTER MEMBERS - SET DEFAULT VALUES USING BUSINESS RULES FROM USE SAVED VIEW:



4. CHANGE THE "COLOR" TO THE CORRECT COLOR OF THE CP COMPANY YOU WANT TO PULL VALUES ON. EXAMPLE: TYPE "PURPLE*2022"



5. CLICK ON RESULTS...



6. REVIEW THE DATA UNDER ALL THE COLUMNS TO FIND THE CORRECT NUMBER TO SET THE FLOW/BUSINESS RULE

Microsoft | Dynamics 365

TOOLS

R MEMBERS

✓ Activate
 ✖ Deactivate
 Show As ▾
 ✖ Delete Roster Member

☆ Follow
 ☆ Unfollow
 Assign Roster Members
 Collaborate

Share
 Copy a Link
 Email a Link

Memberships... | Discount for I... | On-Demand ... | Europe:

9,999	50%	20
150	50%	5
115	50%	5
		0

Tango Created with Tango.us

7. CLICK ON SETTINGS

⚙️ + ▾ ? FB

Export to Excel | Import from Excel

Search this view

Address 1: City ▾ | Address 1: State/Pr... ▾ | Created On ▾

Watertown MA 08/05/2014 6:14 PM

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8. CLICK ON ADVANCED SETTINGS

⚙️ + ▾ ? FB

Export to Excel

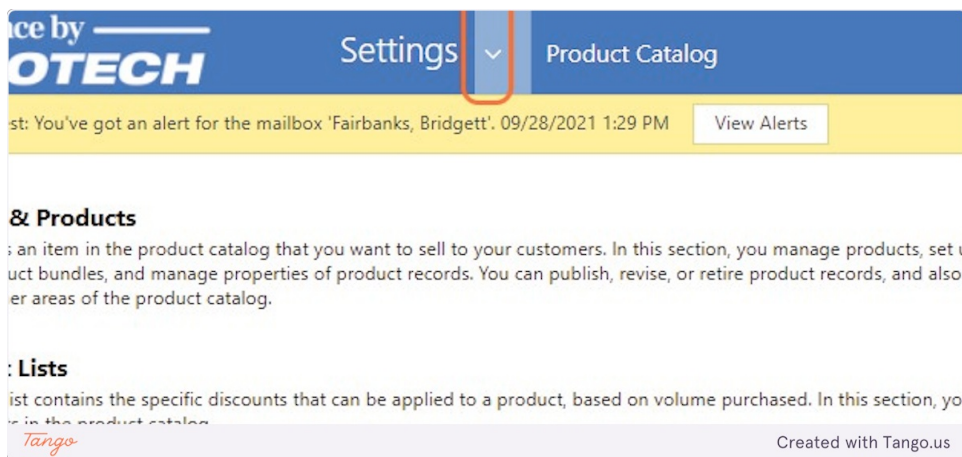
Personalization Settings
 Advanced Settings
 Toast Notification Display T...
 About
 Privacy & Cookies

Address 1: City ▾

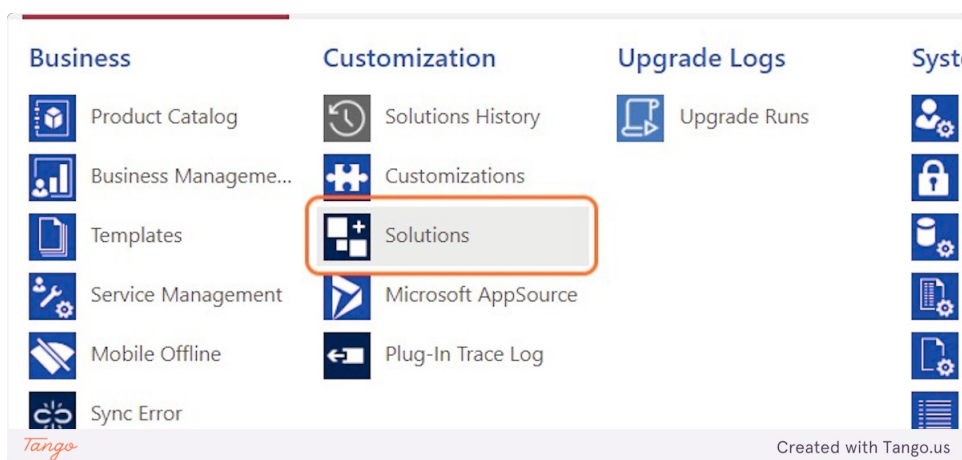
305 Watertown PM
 01-0464 Houston PM

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9. CLICK ON DROPDOWN TRIGGER

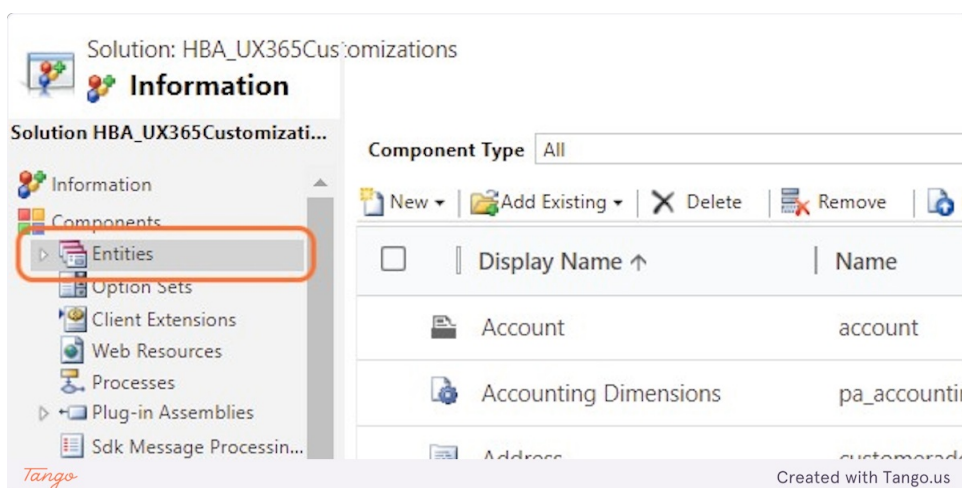


10. CLICK ON SOLUTIONS

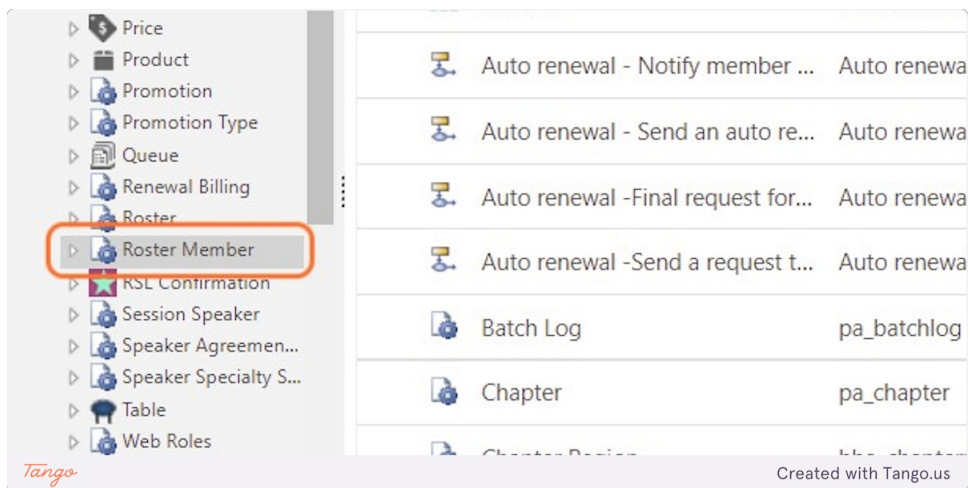


11. CLICK ON HBA_UX365CUSTOMIZATIONS

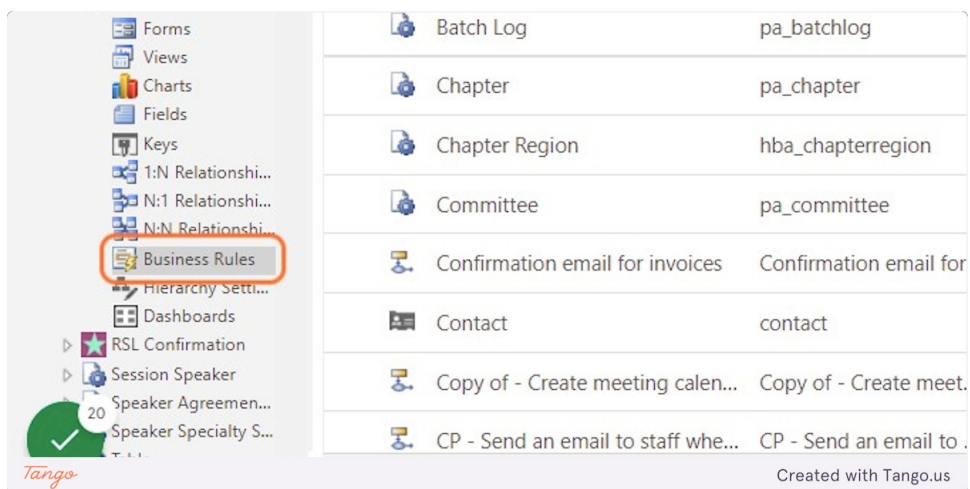
12. CLICK ON COLLAPSED ARROW NEXT TO ENTITIES, CLICK TO EXPAND



13. CLICK ON COLLAPSED, CLICK TO EXPAND

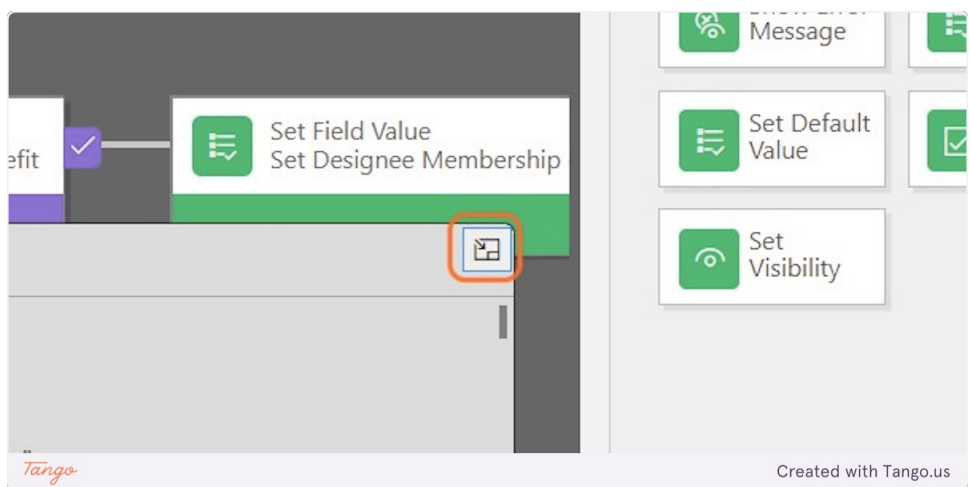


14. CLICK ON BUSINESS RULES

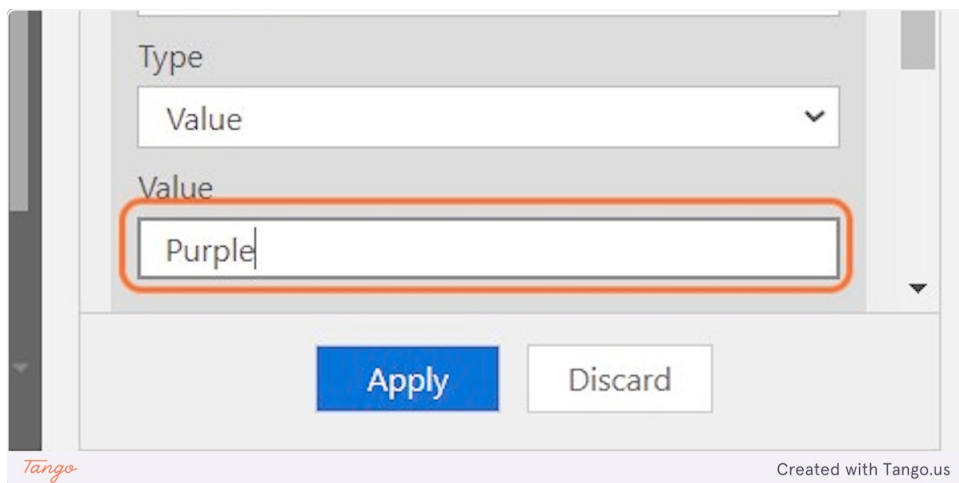


15. CLICK ON HBA PROD - SET ROSTER MEMBER DEFAULT VALUES

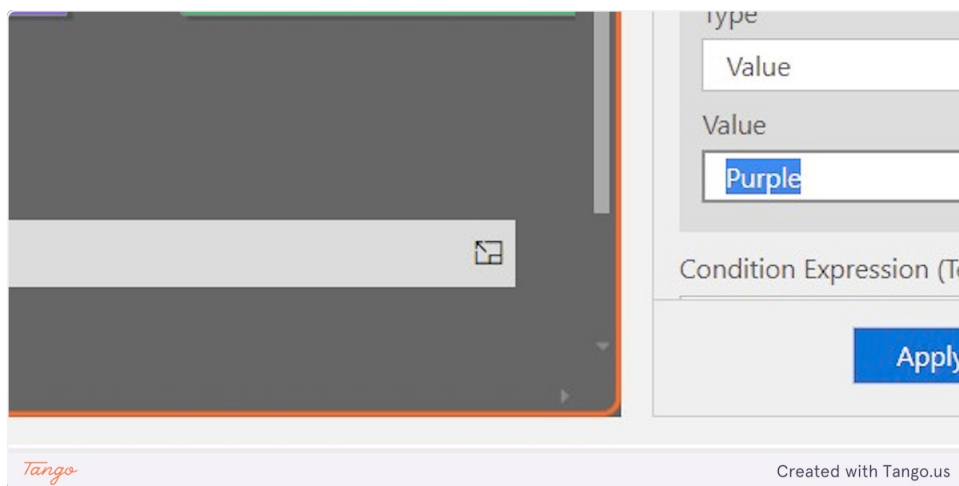
16. CLICK ON CLOSE



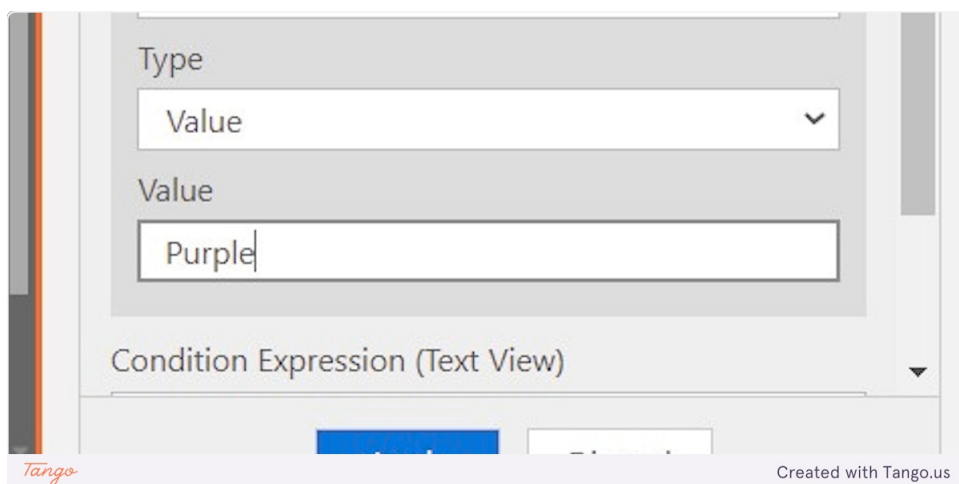
17. CLICK ON VALUE



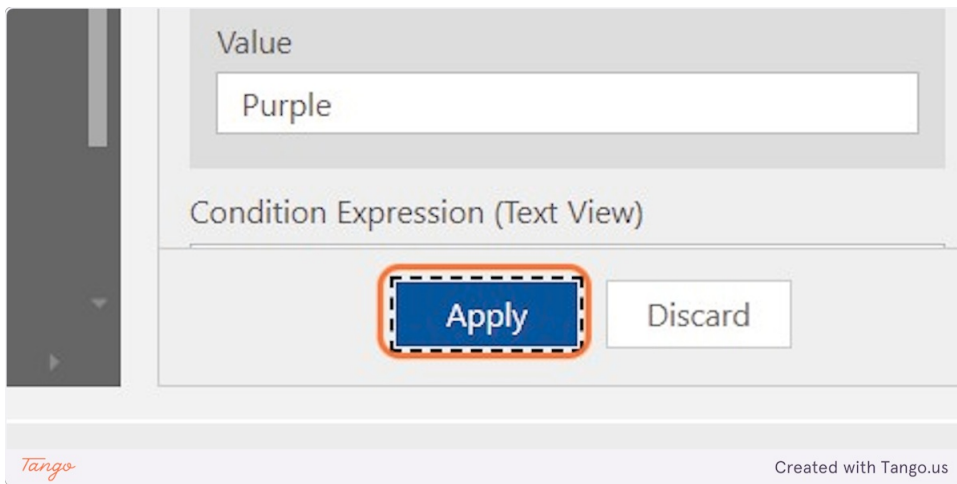
18. DRAG HIGHLIGHTED BUTTON



19. TYPE "PURPLE"

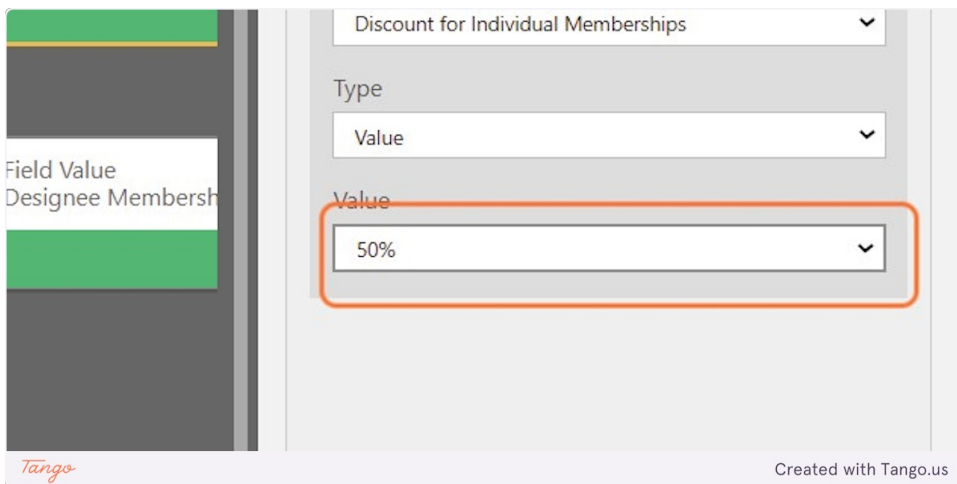


20. CLICK ON APPLY

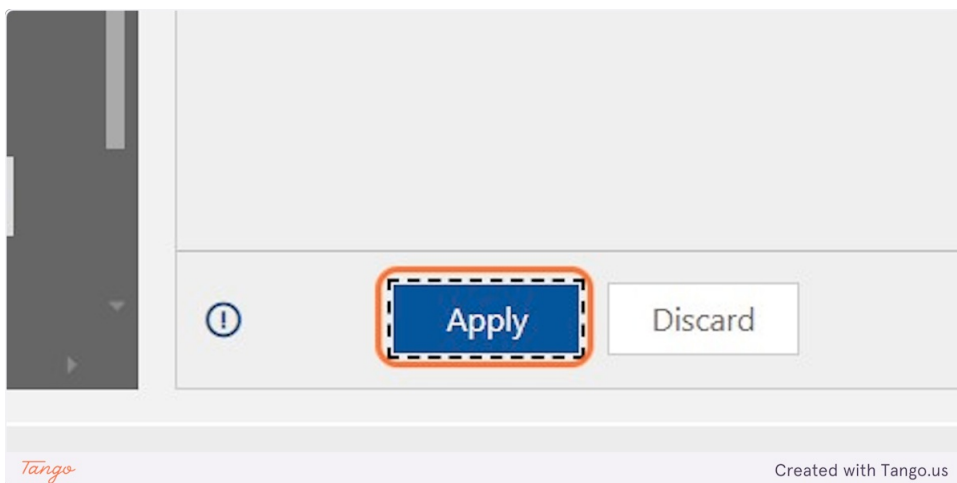


21. CLICK ON APPLICATION

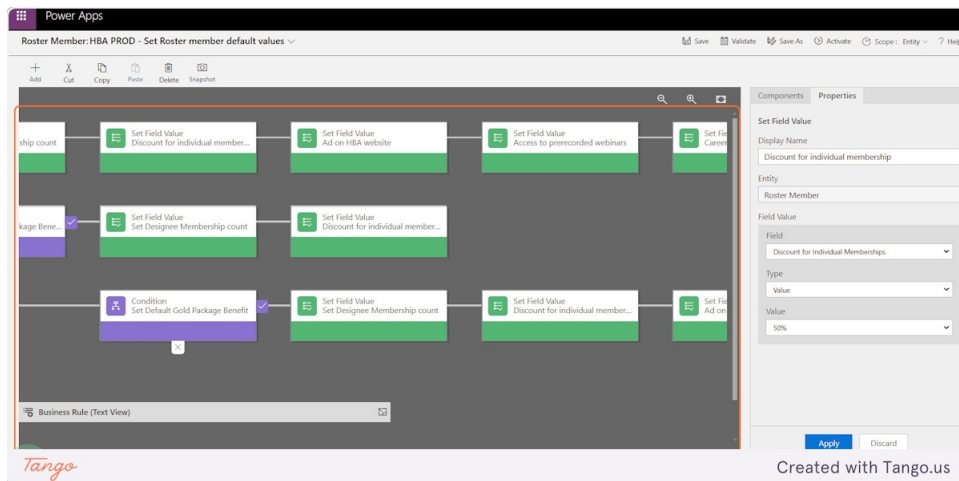
22. SELECT 50%



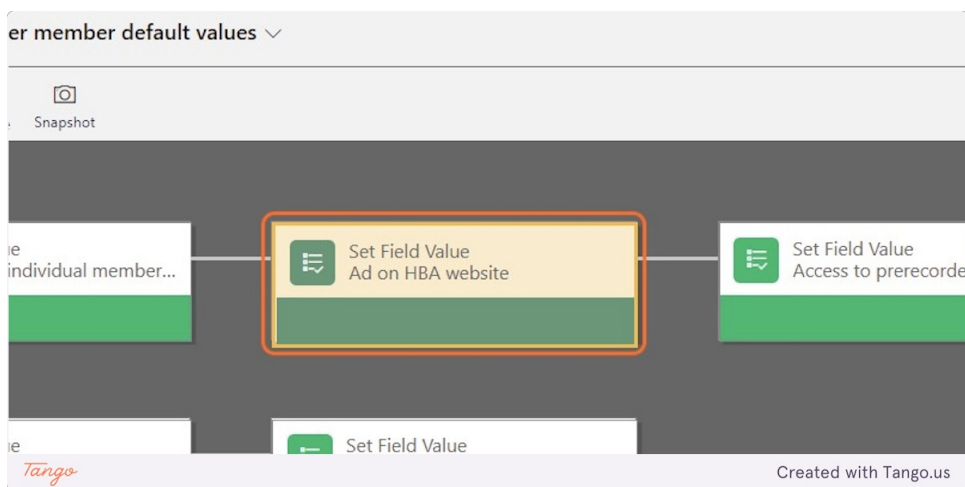
23. CLICK ON BUTTON



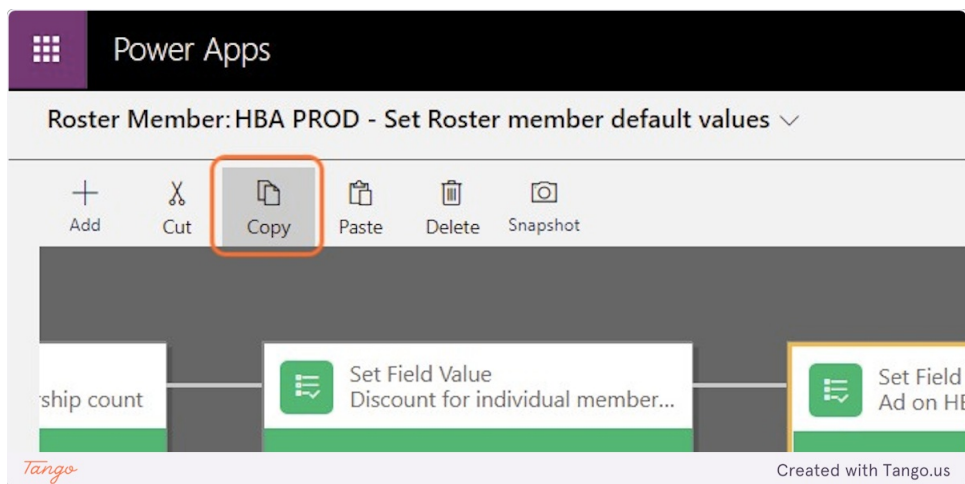
24. DRAG HIGHLIGHTED ELEMENT



25. RIGHT CLICK ON SET FIELD VALUE



26. CLICK ON COPY



27. CLICK ON APPLICATION



