Execute a CRM Request Activity

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CRM 4.0

Context

Use the Execute a CRM Request Activity to ask Dynamics CRM to execute a request in a dynamic workflow.

Use Cases

- Request that Dynamics CRM assign an entity a new owner.
- Request that Dynamics CRM win an opportunity.

Wizard Tips

1. In the left pane of the Request section, click **Request**.
2. In the right pane of the Request section, from the **Type** drop-down menu, select the request type you want to execute. You can manually select a data source or value for the request, or base the value on a workflow expression. Select **IsNull** to create a request with null values.
3. Expand the **Request** node.
4. Select request parameters, such as *Status,* and define their value. You can manually define the values, by selecting a workflow field, or basing the value on a workflow expression.

CRM 2011/2013

Context

Use the Execute a CRM Request Activity to ask Dynamics CRM to execute a request in a dynamic workflow.

> Note: You can only execute built-in CRM requests. does not support custom requests added to Dynamics CRM.

There are two general options for executing a request:

Entity Option	Description
Typed	You select the entity type from the **Type** drop-down menu, for example, *Contact.* The CRM object displays with the entity-relevant attributes. For list attributes, creates an Enumerable of the attributes in the right-panel tree.
Untyped	Use the default entity **Type** , which is *Entity.* Create the entity attributes and set their types yourself; refer to CRM. This option takes significantly longer than the **Typed** option, and is only appropriate for exceptional circumstances.

Use Cases

- Request that Dynamics CRM assign an entity a new owner.
- Request that Dynamics CRM win an opportunity.

Wizard Tips

1. In the left pane of the Request section, click **Entity**, then from the **Type** drop-down menu, select the entity type you want to create.
2. Expand the **Entity** node, then select and define values for the selected entity fields. You can manually set the values, select it from a workflow field, or base the value on a workflow expression.

If you use the **Typed** option, you cannot create relationships (as properties). To work with relationships, for example, *1:N*, *N:1*, *N:N*, you must use the **Untyped** option, or a dedicated activity.