Retrieve Multiple CRM Entities Activity

CRM 4.0

Context

Use the Retrieve a CRM Entity Activity to retrieve a CRM entity as an object that you can use in a dynamic workflow.

Wizard Tips

1. In the left pane of the Request section, expand the **QueryBase** node.
2. Configure the activity parameters.

Retrieve Multiple CRM Entities Activity Parameters

Parameter	Action
entityName	1. From the **QueryBase** tree, click **entityName**. 2. In the right pane of the Request section, in the **Value** text box, enter the type of enter you want to retrieve. You can define the entity name manually, select it from a workflow field, or base the value on a workflow expression.
ColumnSetBase	1. From the **QueryBase** tree, click **ColumnSetBase.** 2. From the **Type** drop-down menu in the right pane of the Request section, select either **AllColumns** to retrieve all of this entity's columns, or **ColumnSet** to retrieve a specific set of columns. If you select **ColumnSet**, click **string[]** and in the **Length** text box, enter the number of columns you want to retrieve. 3. Expand the **ColumnSet** node and enter the attribute name of each column you want to retrieve. You can manually enter the value, select it from a workflow field, or base the value on a workflow expression.
FilterExpressionCriteria	1. From the **QueryBase** tree, click **FilterExpressionCriteria**. 2. Define that only records that satisfy specific conditions are retrieved.

3. (Optional) Define parameters to receive additional information about the retrieved objects.

Additional Parameters

Parameter	Description
Distinct	Retrieves a value that indicates whether the query results contain duplicate entity instances.
LinkEntity	Retrieves the links between multiple entity types.
PagingInfo	Retrieves the number of pages and the number of entity instances for each page returned in the query.

Parameter	Description
Orders	Retrieves the order in which the entity instances are returned from the query.

CRM 2011/2013

Context

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Wizard Tips

1. In the left pane of the Request section, expand the **QueryBase** node.
2. In the right pane of the Request section, from the **Type** drop-down menu, click **entityName**.
3. In the right pane of the Request section, in the **Value** text box, enter the type of enter you want to retrieve. You can define the entity name manually, select it from a workflow field, or base the value on a workflow expression.
4. In the right pane of the Request section, define the GUID of the entity you want to retrieve. You can define the GUID manually, select it from a workflow field, or base the value on a workflow expression.
5. In the left pane of the Request section, click **columnSet**.
6. From the **Type** drop-down menu in the right pane of the Request section, select either **AllColumns** to retrieve all of this entity's columns, or **ColumnSet** to retrieve a specific set of columns. If you select **ColumnSet**, click **string[]** and in the **Length** text box, enter the number of columns you want to retrieve.
7. Expand the **ColumnSet** node and enter the attribute name of each column you want to retrieve. You can manually enter the value, select it from a workflow field, or base the value on a workflow expression.
8. Configure the activity parameters.

Retrieve Multiple CRM Entities Activity Parameters

Parameter	Action
entityName	1. From the **QueryBase** tree, click **entityName**. 2. In the right pane of the Request section, in the **Value** text box, enter the type of enter you want to retrieve. You can define the entity name manually, select it from a workflow field, or base the value on a workflow expression. 3. In the right pane of the Request section, select a type from the **Type** drop-down menu. ▪ **QueryExpression**: create the query based on a complex expression. ▪ **FetchExpression**: create the query using FetchXML. ▪ **QueryByAttribute**: create query that is comprised of a set of attributes and value pairs. (Optional) You can define the query based on a *DataSource* or *Value* from the workflow.

Parameter	Action
ColumnSetBase	1. From the **QueryBase** tree, click **ColumnSetBase.** 2. Clear the **isNull** check box. 3. From the **Type** drop-down menu in the right pane of the Request section, select either **AllColumns** to retrieve all of this entity's columns, or **ColumnSet** to retrieve a specific set of columns. If you select **ColumnSet**, click **string[]** and in the **Length** text box, enter the number of columns you want to retrieve. 4. Expand the **ColumnSet** node and enter the attribute name of each column you want to retrieve. You can manually enter the value, select it from a workflow field, or base the value on a workflow expression.
FilterExpressionCriteria	1. From the **QueryBase** tree, click **FilterExpressionCriteria**. 2. Define that only records that satisfy specific conditions are retrieved.

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