

CRM F1 for Microsoft Dynamics ® Installation and Configuration Guide www.crfm1.com

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info@crmf1.com

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Overview

This document gives guidance for deploying CRM F1 solution. CRM F1 is a solution that enhances help capabilities for Microsoft Dynamics CRM.

System Requirements

http://crmf1.com

The solution is compatible with Microsoft Dynamics CRM Online or CRM 2016 (on premise) Firefox, Chrome, Edge and Internet Explorer, latest versions.

Installing and Configuring CRM F1 for Microsoft Dynamics CRM 1

First time Installation- If you do not have an account with us please visit <u>www.crmf1.com</u> and sign-up for a Free 30-day trial account

Upgrade Installation – if you are already a customer please contact <u>info@crmf1.com</u> to obtain latest version.

Log on to your system with admin credentials

In CRM go to Settings ► Solutions ► Import

Microsoft Dy	ynamics CRM	E Settings	 ✓ Solutions 	•	
See how the intera	active service hub can make y	you more productive.	Experience it n	ow	
All Solution	ons ~				
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Browse ► Open and select the demo file you have downloaded

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Click Next

http://crmf1.com

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The solution will be visible in the list of solutions

Microsoft Dyna	amics CRM 🛛 🗏	Settings	↓ ✓ Solutions	~	
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All Solution		🕞 Clone a Patch	Clone Solution	Apply Solution Upgrade	📓 Import Translations
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Name	Display Name	Version	Installed On 🛧	Package Ty Publisher	1
DynamicHelpSolution	DynamicHelpSolution	1.0	9/2/2016	Managed CRMF1	

A short description of the steps can be finding if you double click the solution

STEPS TO ACTIVATE AND REMOVE CRMF1 HELP SOLUTION.

1. Go To Settings-> Administration-> System Settings -> General Tab and scroll until you see "Use custom Help for customizable entities" and select Yes and do the same with "Append parameter to URL" and click OK.

2. Please add the Entity to Sitemap: go to Settings -> Customizations -> Customize the System -> Entities -> CRM Entity and in the General Tab select Settings, then Save and Publish.

3. Go back to Settings -> Customization ->Solutions and double click on DynamicsHelp Solution

4. Enter License by populating CRMX123987 in <u>here</u> then Save & Close

5. Before removing the Solution click here

6. Contact CRM F1 Support here

Go To Settings ► Administration ► System Settings ► General Tab and scroll until you see "Use custom Help for customizable entities" and select Yes and do the same with "Append parameter to URL" and click OK

Micros	oft Dynamics CRM \mid \equiv Settings \mid $ imes$ Adminis	tration	
Apps for	r CRM View CRM information on the go with apps for your phone, tablet, Ou	tlook, and more! Get Apps for CRM	
Adminis	stration		
Which fea	ture would you like to work with?		
Ē	Announcements Create, edit, and delete announcements that appear in the Workplace area.		Auto-Numbering
		System Settings Set system-level settings for Microsoft Dynamics CRM.	
	System Settings Set the format for various values, such as numbers, the calendar, and currency Set Microsoft Dynamics CRM for Outlook options. Manage report categories.	oc system-need settings for microsoft by namics chan.	
R	Privacy Preferences Set the privacy preferences for the organization.	General Calendar Formats Auditing Email Marketing Customization	Outlook Reporting Goals Sales Service
<u>i</u> l 1		Set the telephony provider Select provider for Click to call	
110	Yammer Configuration	Skype Skype for Business / Lync	
y Ę	Connect Microsoft Dynamics CRM to your enterprise Yammer network	Set whether users see CRM for tablets message	
		Users see app download message	Yes O No
		Set custom Help URL	
		Use custom Help for customizable entities	• Yes O No
		Global custom Help URL	Ves No
		Append parameters to URL	

Please add the Entity to Sitemap: go to Settings ► Customizations ► Customize the System ► Entities ► CRM Entity and in the General Tab select Settings, then Save and Publish.

File 📴 📲 Show Depender	ncies 🚺 Publish	🛙 Update Icons 🛛 🗙 Delete 🛛 🚰 Man	aged Properties	
CRM Entity	3			
Solution Default Solution	General Primary Field	Controls		
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> 🖌 Case	Display Name *	CRM Entity		
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CRM Entity				

Go back to Settings -> Customization ->Solutions and double click on DynamicsHelp Solution. Click in Enter License Key and populate Trial Key CRMX123987 and click Activate

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+ NEW	🗟 DEACTIVATE	<u> </u> DELETE	📲 ASSIGN	🗘 SHARE	🖘 EMAIL A LINK
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License Owner	-	CRMX12398	7 9er developer		

Testing the Solution

Go to CRM ► Settings ► CRM Entities

Microsoft Dynamics (CRM	Settings	~	CRM Entities 🗸				
Business	Cust	omization		System			Process Center	Extensions
Business Management	·H·	Customizations		Administration	M.	Email Configuration	Processes	CRM Entities
Templates	+	Solutions		Security	, S	Activity Feeds Configu		
Product Catalog	4	Dynamics Marketplace		Data Management		Activity Feeds Rules		
Service Management	€∎	Plug-In Trace Log		System Jobs	٤	CRM App for Outlook		
				Document Manageme				
				Auditing				

The Trial is based in Opportunity entity for you to test, first think click Refresh Entity

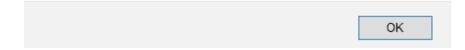
Microsoft Dynamics CRM	Settings 🗸 CRM Entities 🗸
Apps for CRM View CRM information on the go w	ith apps for your phone, tablet, Outlook, and more! Get Apps for CRM
🕂 NEW 🗴 DELETE 🖾 🗸 💋 REFRESH ENTITY	🖘 EMAIL A LINK 🖾 🔹 🕞 RUN REPORT 👻 🗱 EXCEL TEMPLATES 👻 🤹 EXPORT TO EXCEL 🖾
→ Active CRM Entities ~ Entity Display Name ↑	Entity Name Entity Schema Include in Help Created On Add to Favourite?

In the dialog box click OK

Are you sure to refre	sh CRM Entities?

In the following message click OK and later press F5 to refresh the page

CRM Entity Config. Records has been refreshed. Please refresh the grid.



➡ Active CRM Entities ~

✓ Entity Display Name 个	Entity Name	Entity Schema	Include in Help	Created On	Add to Favourite?
Opportunity	opportunity	Opportunity	Yes	9/3/2016 10:14 AM	No

Double click and in the Opportunity form.

In here you can:

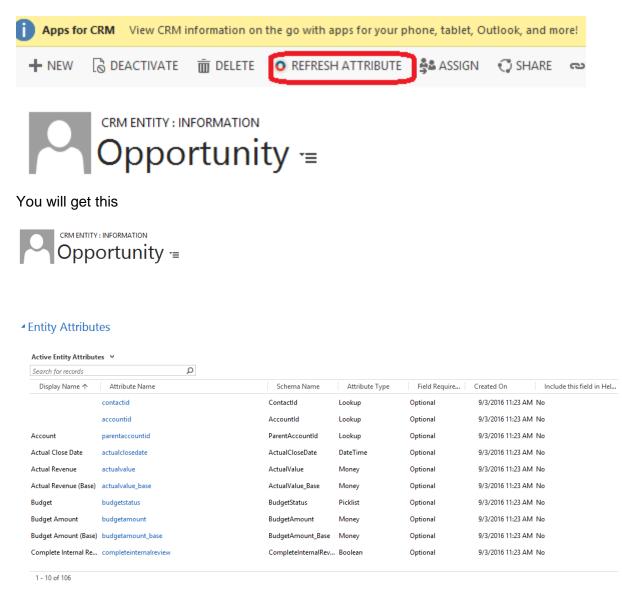
-Include the Entity in Help Index
-Add it to favourites
-Add and internal or external link (if you have your procedures in a BPM system you can populate the url here)

➡ NEW	🔓 DEACTIVATE	🛅 DELETE	REFRESH ATTRIBUTE	뤜 🕹 ASSIGN		
CRM ENTITY : INFORMATION Opportunity *=						
▲ Gen	eral					
Entity	Display Name * Name	Opportunit opportunit	-			
Entity	Schema Name	Opportunit	-			
	e in Help Index?) Favourite?	 ✓ 				

You can add multiple images, like Sales Process, etc, That is done uploading images from the Notes section (at entity level)

ACTI	VITIES NOTES	
Tit	e	
Ent	er a note	
	Browse Sales Process.png	
U	browse Sales Process.png	Done
No N	otes found.	

-also you can add Description for all the fields you are interested. To do that pleases Refresh Attributes and refresh browser with F5



Select a field you want to include in Help and double click

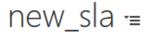


Entity Attributes

Search for records	Q				
Display Name 🛧	Attribute Name	Schema Name	Attribute Type	Field Require	Created On Include this field in Hel
Scheduled Follow up	schedulefollowup_prospect	ScheduleFollowup_P	DateTime	Optional	9/3/2016 11:23 AM No
Scheduled Follow up	schedulefollowup_qualify	ScheduleFollowup_Q	DateTime	Optional	9/3/2016 11:23 AM No
Send Thank You Note	sendthankyounote	SendThankYouNote	Boolean	Optional	9/3/2016 11:23 AM No
SLA	slaid	SLAId	Lookup	Optional	9/3/2016 11:23 AM No
Source Campaign	campaignid	CampaignId	Lookup	Optional	9/3/2016 11:23 AM No
Status	statecode	StateCode	State	Business Recom	9/3/2016 11:23 AM No
Status Reason	statuscode	StatusCode	Status	Optional	9/3/2016 11:23 AM No
Step	stepid	StepId	Uniqueidentifier	Optional	9/3/2016 11:23 AM No
Time Zone Rule Versi	timezoneruleversionnumber	TimeZoneRuleVersio	Integer	Optional	9/3/2016 11:23 AM No
Timeline	timeline	TimeLine	Picklist	Optional	9/3/2016 11:23 AM No

In this example we will populate the agreements we have in the company and we will include that in the Help Page

ENTITY ATTRIBUTE : INFORMATION



General

Display Name	SLA
Attribute Name $*$	new_sla
Schema Name	new_SLA
Attribute Type	String
Field Requirement	Optional
Include this field in Help?	
Description	Please select for this field one of the agreements we offer: 1) Customer service level agreement (for maitenance services) 2) Internal service level agreement (maintenance for the department in our company) 3) Vendor service level agreement (support notebook serices)

To see the Help Page for Opportunities please go to Opportunities and click '?'



And you will get this

http://crmf1.com

OPPORTUNITY		Organisation: DEVCRM2016	Customize Help		
Display Name	Attribute Type	Description			
SLA	String		r: 1) Customer service level agreement (for maitenance services) 2)Internal service level agreement our company) 3) Vendor service level agreement (support notebook serices)		
	^		Click here to show image		
			Click here to show image		

Select Click here to show or hide image



ABC Limited	JANE DOE + ADMIN +	Heur + 🖸 promapp
Processes - Documents - My Dashboard - Risks Improvements -	Search	All - Q
Log, Investigate and close out an incident v7.0		
Map Procedure Edit	FEEDBACK	• * <- •
Map Procedure Edit		● • Q- 100% +P
ALL STAFF		
Health Safety Coordinator	Outputs	
Menager		
Summary Feedback Change Log Documents Total Time - Systems @Todo *		
1000	SAVED BY	LAST MODIFIED
Note @todo Add a list of forms to this note	Jane Doe	11 Feb 2016
Previous		Next

Click Additional Help to see your BPM system, Visio or anything you are interested in (it should have a url format)





And you have a direct access to configure the Entity again



Removing the solution

Please remove the CRM Entity from Sitemap: go to Settings ► Customizations ► Customize the System ► Entities ► CRM Entity and in the General Tab select untick Settings, then Save and Publish.

File	🚺 📑 Show Dep	ende	ncies [Publish	Update Icons	🗙 Delete 🛛 😭 Mar	aged Properties		(⊘ <u>H</u> elp) +
â	2 CRM Entity Information			3						
Solutio	n Default Solution		General	Primary Field	Controls					
D	Campaign	^	Entity Def	finition					^	
	Case		Display Na	ame *	CRM Entity					
D	Case Resolution		Plural Nan	me *	CRM Entities		Ownership *	User or Team		
	Category	=	Name *		new_crmentity		Define as an acti		=	
	े देखें Channel Property		Primary Im	nage	Entity Image	×	Display in Ad	ivity Menus		
D	🛓 🚣 Characteristic		Color							
D	🚓 🖧 Competitor		Descriptio	on						
	🧑 👩 Competitor Address									4
D	🖧 Connection									
D	Section Role									
D	Contact	1	Areas that	t display this ent	itv					
D	Contract		Sales		Sen		Marketing	Settings 1		
D	🛛 🚯 Contract Line		Help		L Sen	nce		Settings 1		
D	🖸 Contract Template		пер	center						
D	CRM Entity									

In CRM go to Settings ► Solutions ► double click DynamicHelpSolution

Go to step 5 and click "here"

STEPS TO ACTIVATE AND REMOVE CRMF1 HELP SOLUTION.

1. Go To Settings-> Administration-> System Settings -> General Tab and scroll until you see "Use custom Help for customizable entities" and select Yes and do the same with "Append parameter to URL" and click OK.

2. Please add the Entity to Sitemap: go to Settings -> Customizations -> Customize the System -> Entities -> CRM Entity and in the General Tab select Settings, then Save and Publish.

3. Go back to Settings -> Customization ->Solutions and double click on DynamicsHelp Solution

4. Enter License by populating CRMX123987 in <u>here</u> then Save & Close

5. Before removing the Solution click \underline{here}

6. Contact CRM F1 Support here

And OK

1. Go To Sett customizable 2. Please add	The process is started to uninstall configuration. It may take few minutes.	P SOLUTION. l until you see "Use custom Help for to URL" and click OK. mize the System -> Entities -> CRM
Entity and in 3. Go back to	ОК	nicsHelp Solution
4. Enter Licen	se by populating CRMX123987 in <u>here</u> then Save & Close	
5. Before remo	wing the Solution click <u>here</u>	

After few minutes if you go to Opportunity Entity and click "?" you will see the customizatios has been deleted and you will have the out of the box help.

https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-or-edit-an-opportunity.aspx?cs=true	G	Q Search	
Microsoft Dynamics CRM Help & Training	Search Help 8	. Training	
Create or edit an opportunity			
An opportunity is a lead who is now almost ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy—in other words, it's a deal that you're ready to buy words.	ady to win.		
At this point in the sales process, you're most likely in either the Develop or Propose stage. More	information: Nurtur	e sales from lead	to orde
On this page:			
Create an opportunity			
Edit an opportunity			
Additional considerations			
↓ Tips and tricks			
Typical next steps			

now you can remove the solution without leaving any customization:

to Settings ► Solutions ► select DynamicHelpSolution and click Delete

Microsoft Dynai	mics CRM \mid \equiv	Settings	↓ ✓ Solutions	~	
See how the interactive	service hub can make you mo	re productive.	Experience it not	w	
All Solutions		Clone a Patch	Clone Solution	या दिल्ला स्ट्रि Apply Solution Upgrade	Minimizer Translations
Name	Display Name	Version	Installed On 🛧	Package Ty Publisher	[
DynamicHelpSolution	DynamicHelpSolution	1.0	9/2/2016	Managed CRMF1	

Contacting CRM F1 for support

If you find any difficulties, please contact our Support Team.

STEPS TO ACTIVATE AND REMOVE CRMF1 HELP SOLUTION.

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6. Contact CRM F1 Support here