



CRM F1 for Microsoft Dynamics ® Installation and Configuration Guide

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Table of Contents

Overview	1
System Requirements.....	1
Installing and Configuring CRM F1 for Microsoft Dynamics CRM 1.....	2
Testing the solution	9
Removing the solution	16
Contacting CRM F1 for support	18

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

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

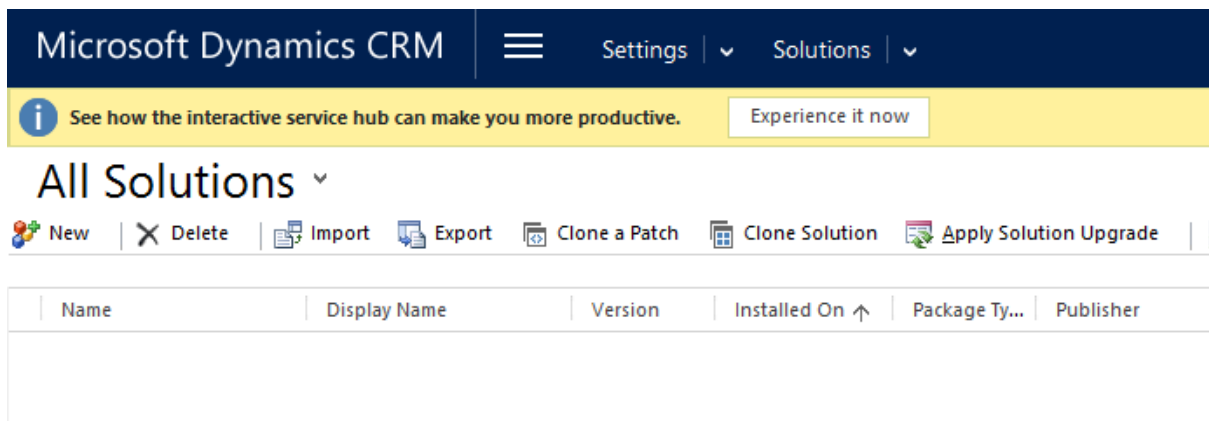
Installing and Configuring CRM F1 for Microsoft Dynamics CRM 1

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

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

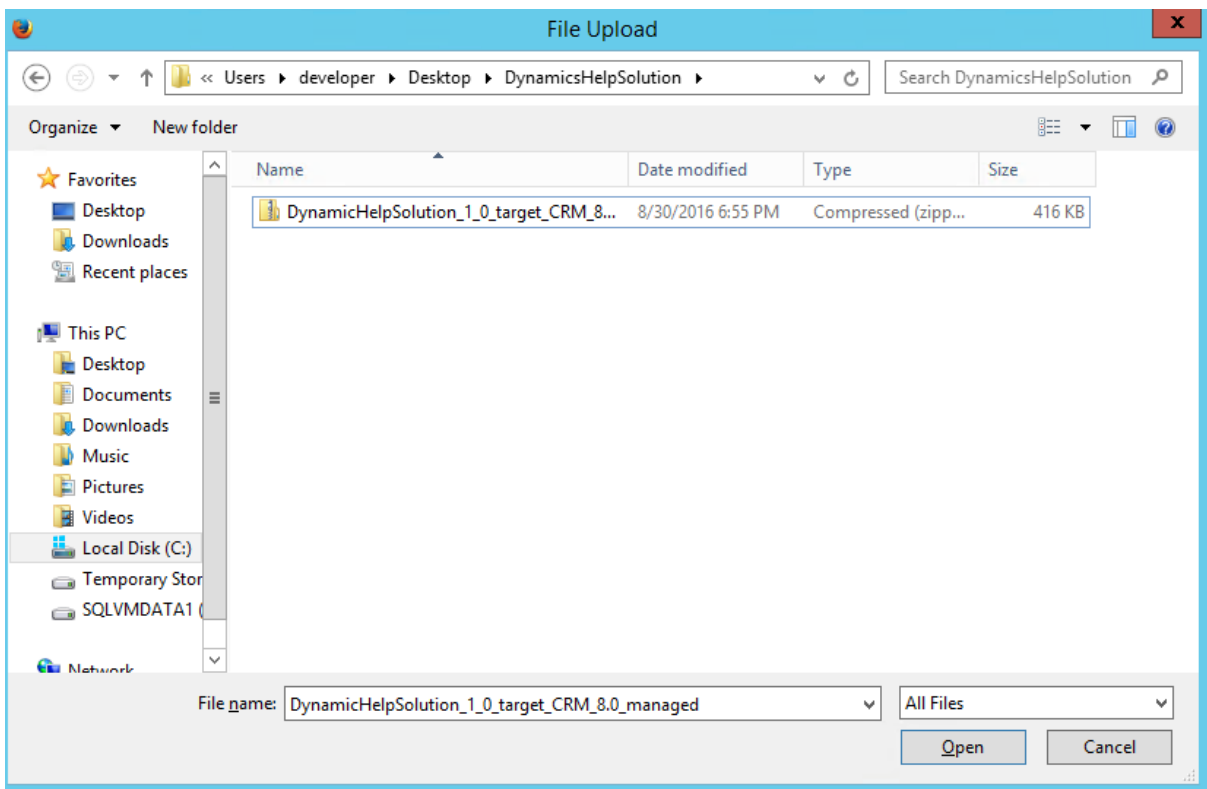
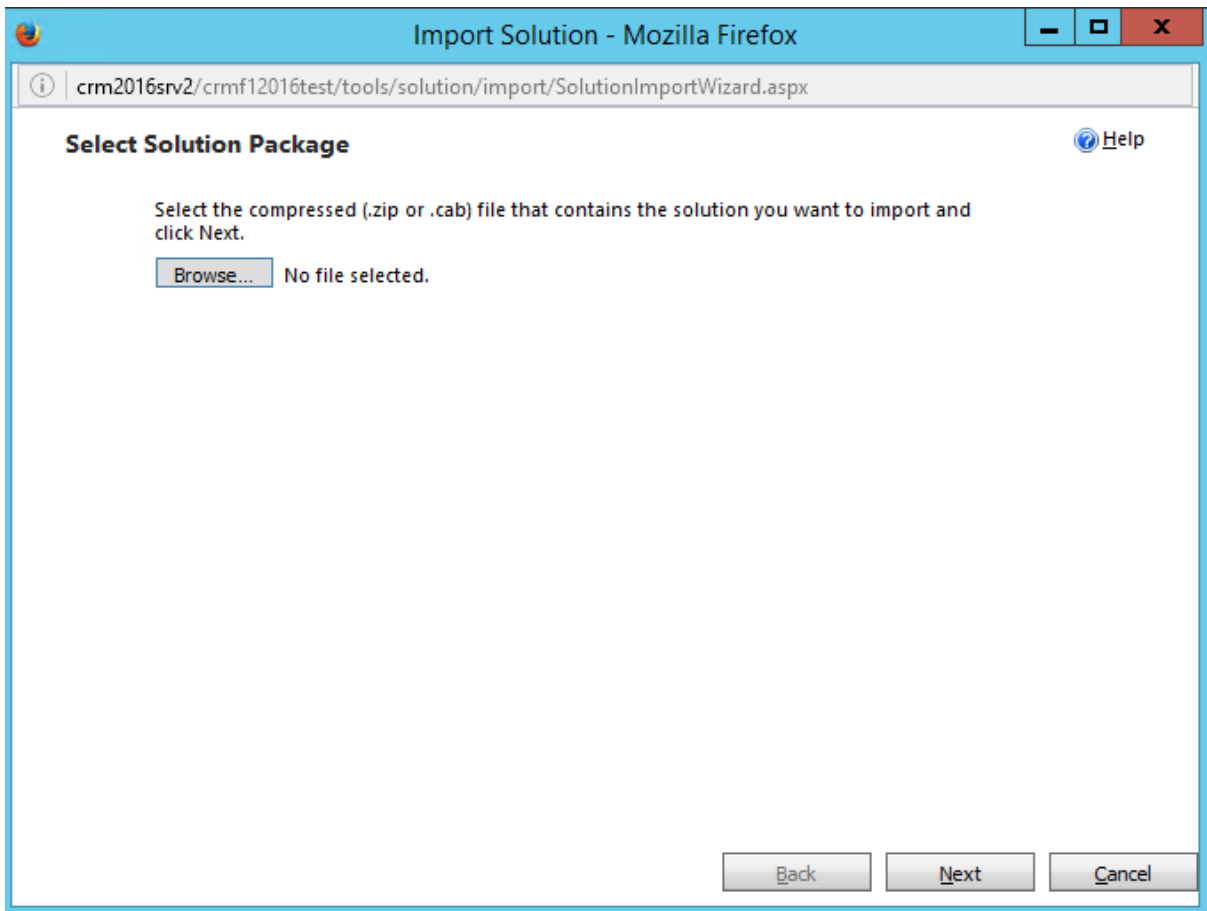
Log on to your system with admin credentials

In CRM go to Settings ► Solutions ► Import

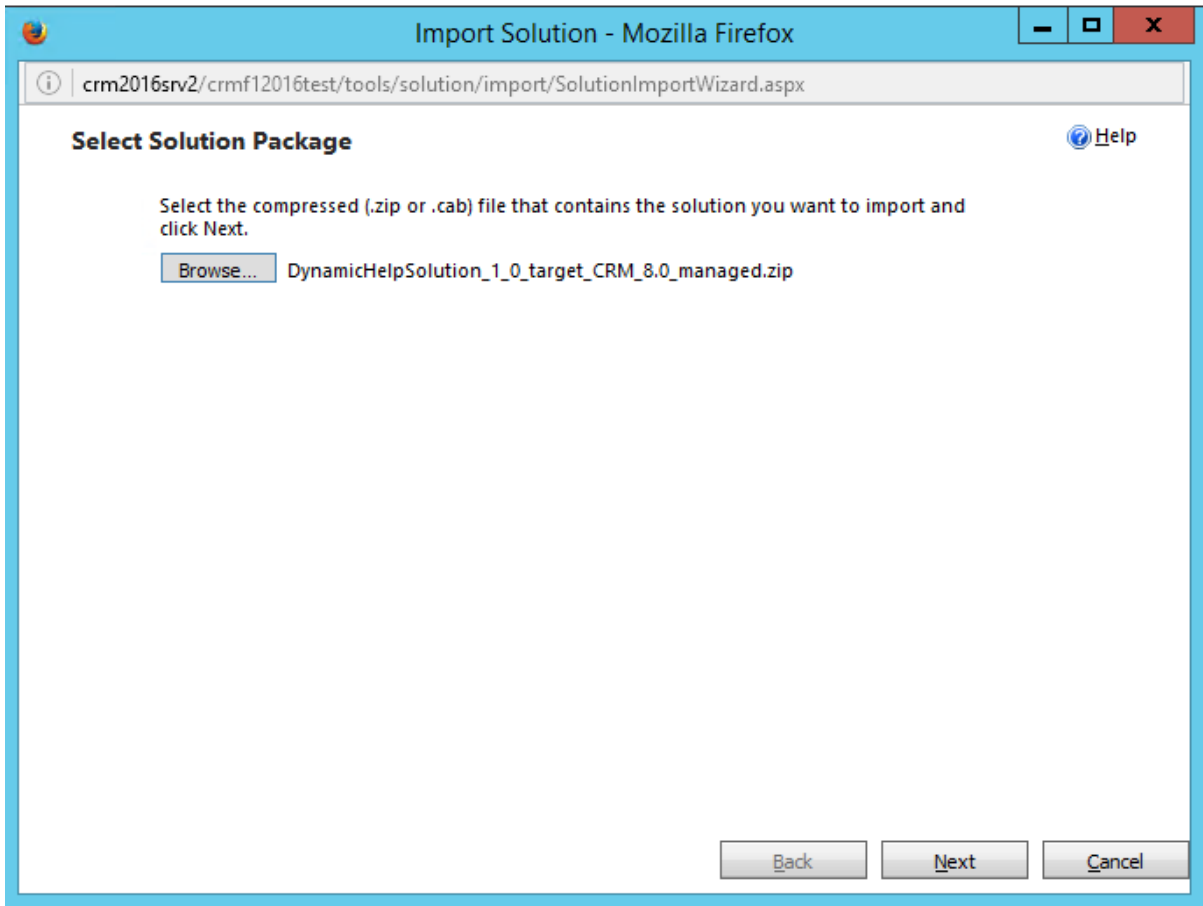


The screenshot shows the Microsoft Dynamics CRM user interface. At the top, there is a dark blue header with the text 'Microsoft Dynamics CRM' and a hamburger menu icon. To the right of the header are 'Settings' and 'Solutions' with dropdown arrows. Below the header is a yellow banner with an information icon and the text 'See how the interactive service hub can make you more productive.' and a button labeled 'Experience it now'. The main content area is titled 'All Solutions' with a dropdown arrow. Below the title is a toolbar with icons for 'New', 'Delete', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', and 'Apply Solution Upgrade'. Below the toolbar is a table with columns: 'Name', 'Display Name', 'Version', 'Installed On' (with an upward arrow), 'Package Ty...', and 'Publisher'. The table is currently empty.

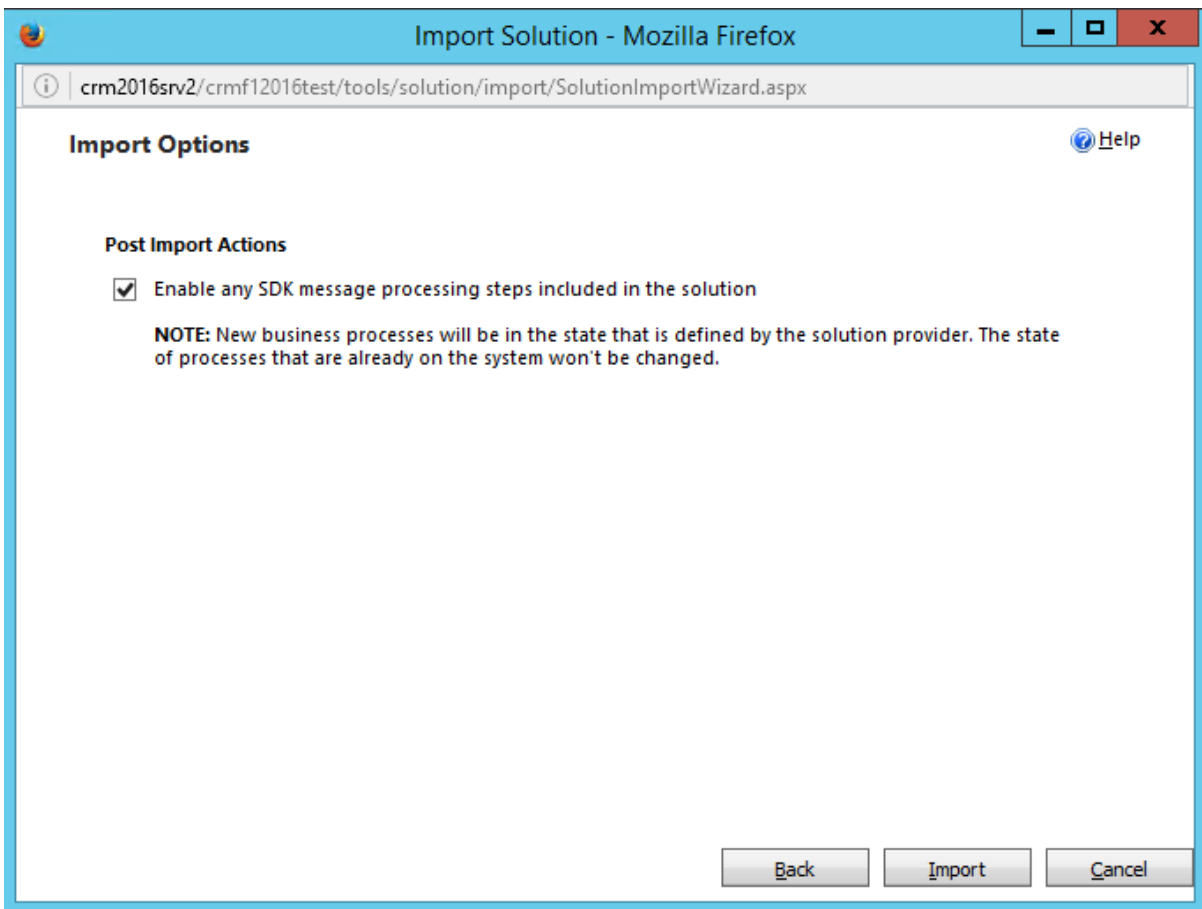
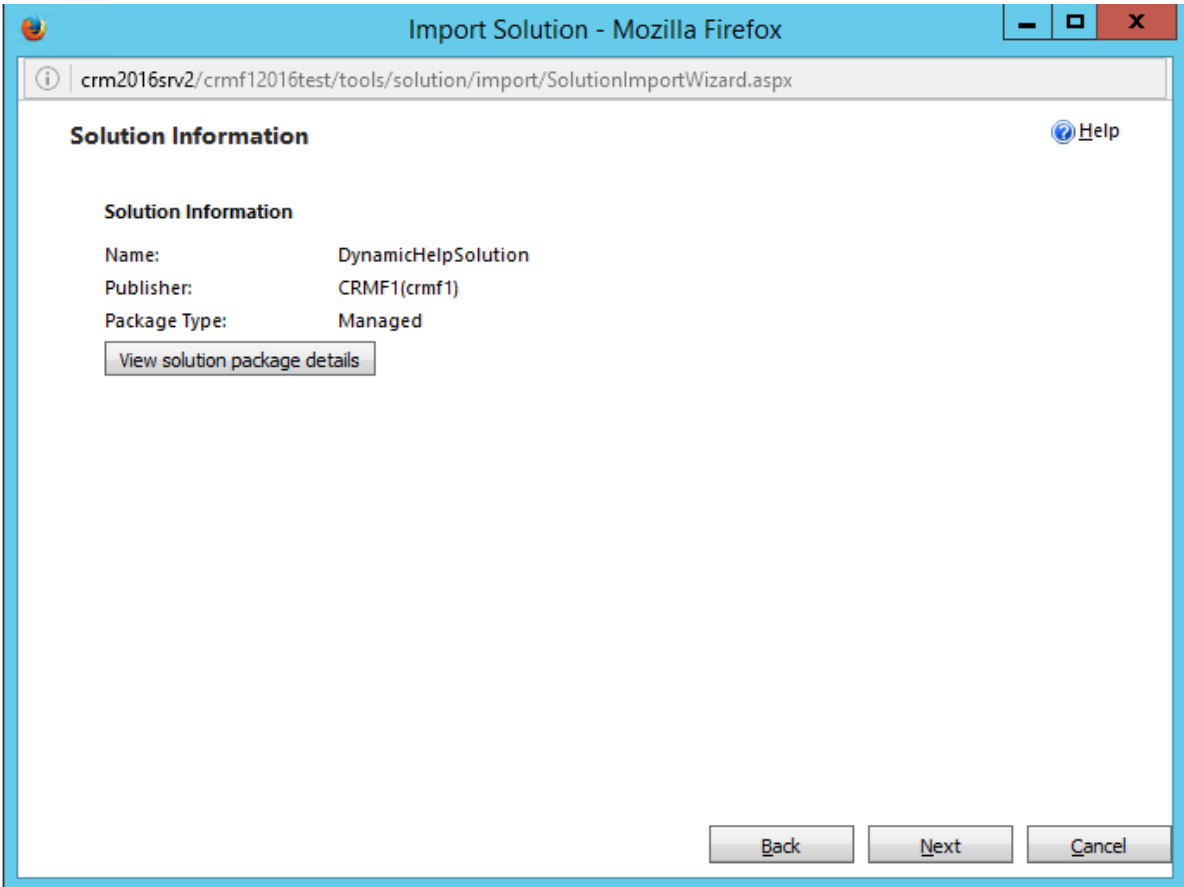
Browse ► Open and select the demo file you have downloaded



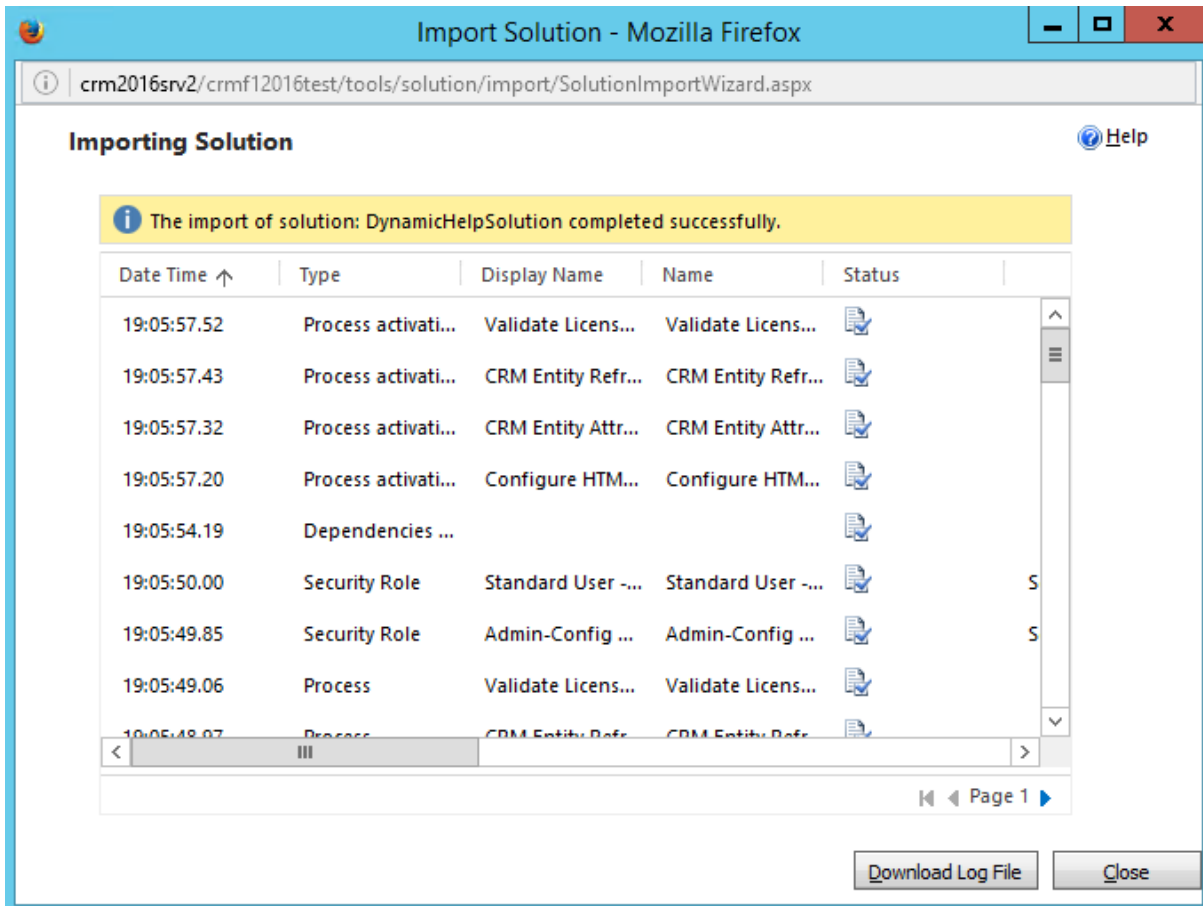
Click Next



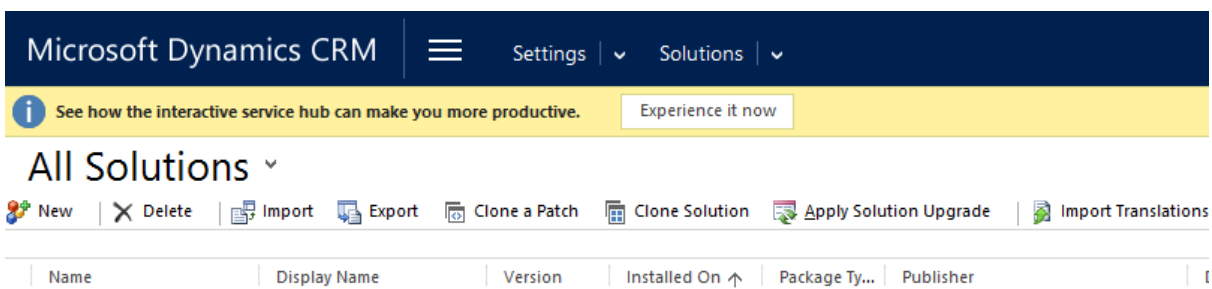
Next and Import



Close



The solution will be visible in the list of solutions



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

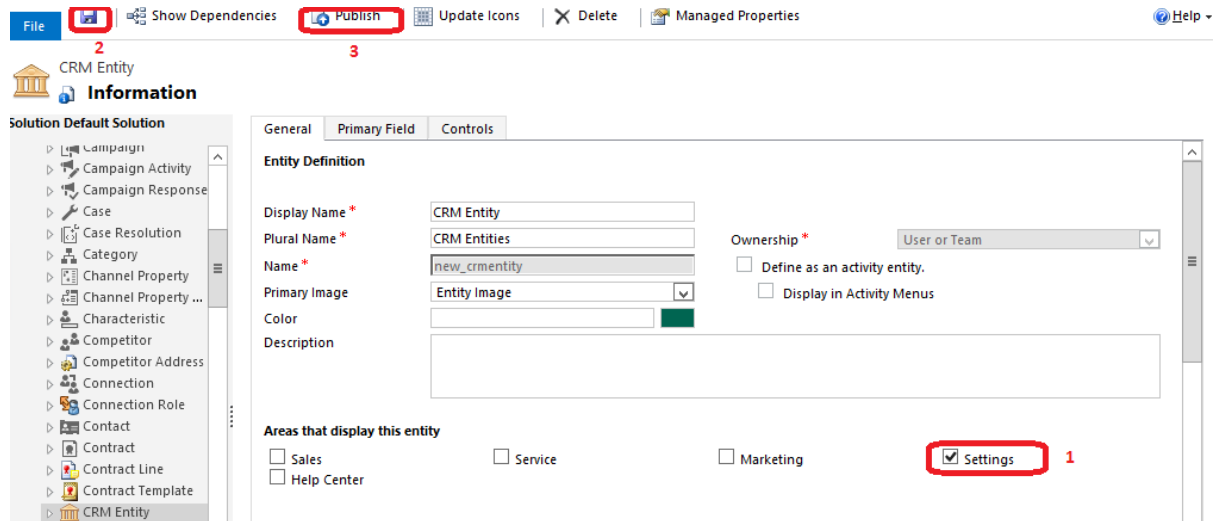
STEPS TO ACTIVATE AND REMOVE CRMF1 HELP SOLUTION.

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 [here](#) then Save & Close
5. Before removing the Solution click [here](#)
6. Contact CRM F1 Support [here](#)

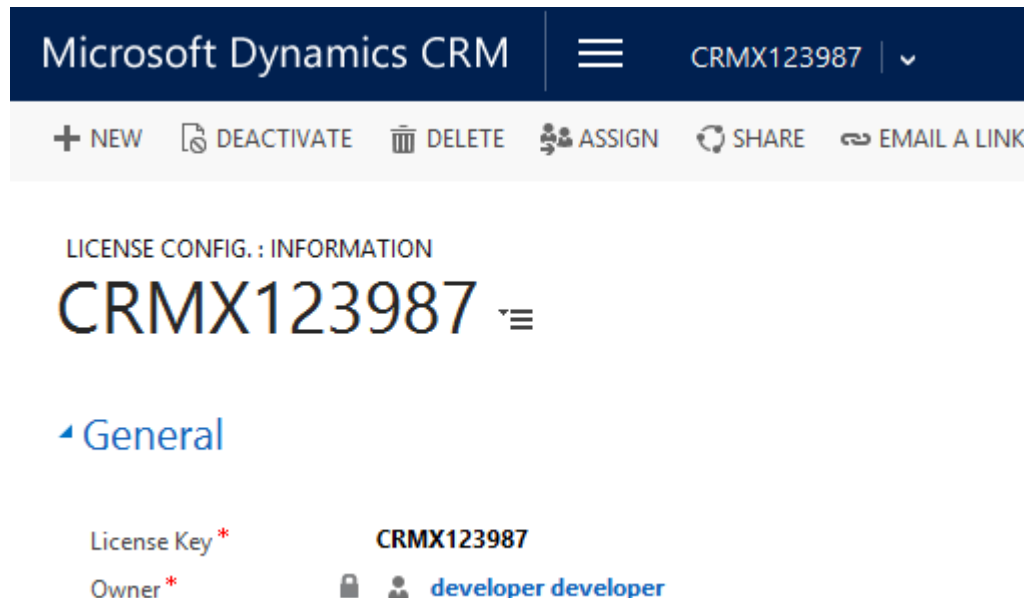
Go To Settings ► Administration ► System Settings ► General Tab and scroll until you see "Use custom Help for customizable entities" and select Yes and do the same with "Append parameter to URL" and click OK

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'Settings', and 'Administration'. Below this is the 'Administration' section with a sidebar listing 'Announcements', 'System Settings', 'Privacy Preferences', and 'Yammer Configuration'. The main content area is titled 'System Settings' and contains a tabbed interface with 'General', 'Calendar', 'Formats', 'Auditing', 'Email', 'Marketing', 'Customization', 'Outlook', 'Reporting', 'Goals', 'Sales', and 'Service' tabs. The 'General' tab is active, showing several settings. The 'Set custom Help URL' section has two radio buttons: 'Yes' (selected) and 'No'. The 'Append parameters to URL' section also has two radio buttons: 'Yes' (selected) and 'No'. Both 'Yes' options are highlighted with red boxes. The 'Global custom Help URL' field is empty.

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.

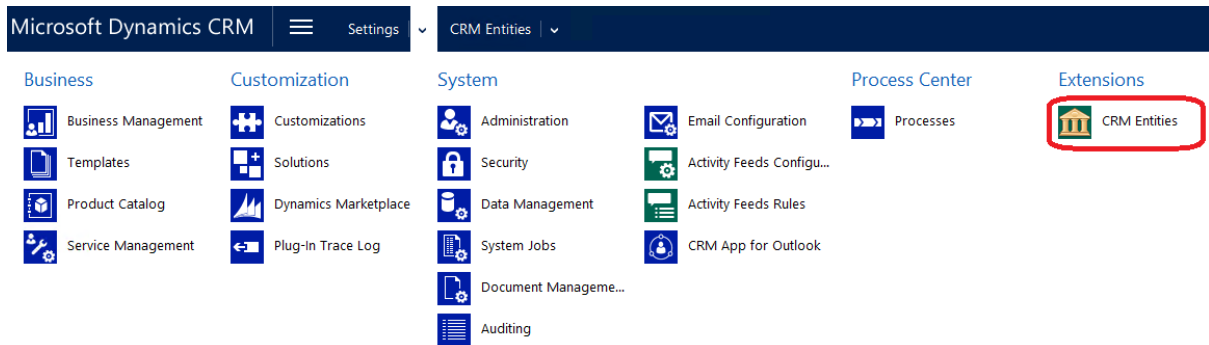


Go back to Settings -> Customization ->Solutions and double click on DynamicsHelp Solution. Click in Enter License Key and populate Trial Key CRMX123987 and click Activate

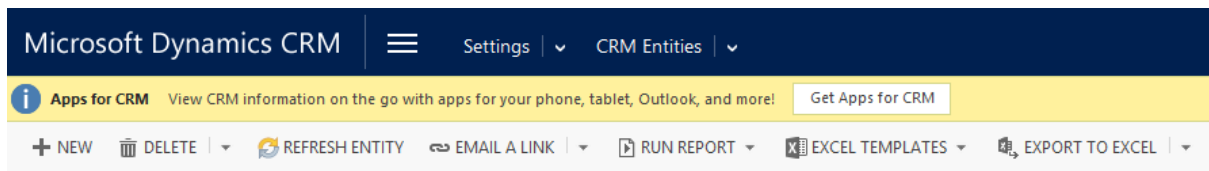


Testing the Solution

Go to CRM ► Settings ► CRM Entities



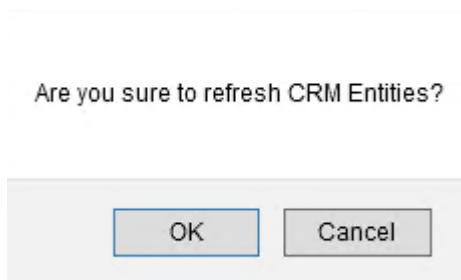
The Trial is based in Opportunity entity for you to test, first think click Refresh Entity



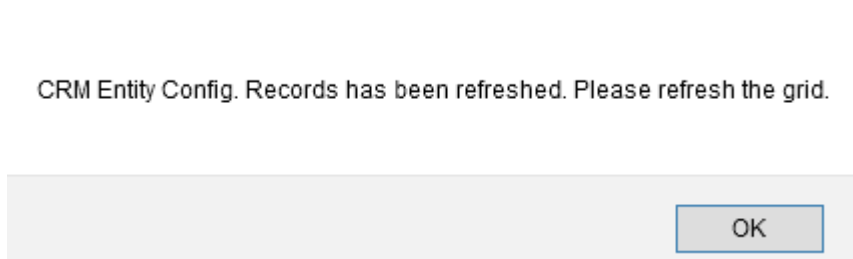
Active CRM Entities

Entity Display Name ↑	Entity Name	Entity Schema ...	Include in Help ...	Created On	Add to Favourite?
-----------------------	-------------	-------------------	---------------------	------------	-------------------

In the dialog box click OK



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



➔ Active CRM Entities ▾

Entity Display Name ↑	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 ASSIGN

CRM ENTITY : INFORMATION Opportunity

↳ General

Entity Display Name *	Opportunity
Entity Name	opportunity
Entity Schema Name	Opportunity
Include in Help Index?	<input checked="" type="checkbox"/>
Add to Favourite?	<input checked="" type="checkbox"/>
Owner *	developer developer
Additional Help	http://www.promapp.com

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

ACTIVITIES **NOTES**

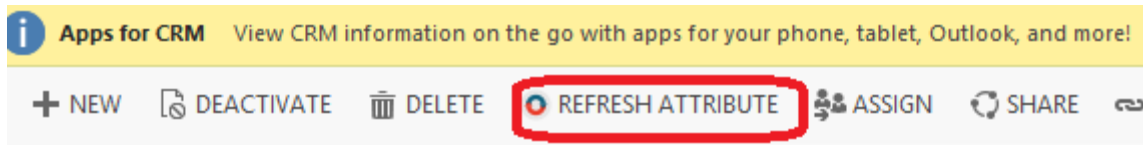
Title

Enter a note

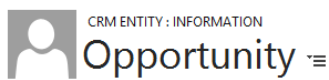
Sales Process.png

No Notes found.

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



You will get this



Entity Attributes

Active Entity Attributes ▾

Display Name ↑	Attribute Name	Schema Name	Attribute Type	Field Require...	Created On	Include this field in Hel...
	contactid	ContactId	Lookup	Optional	9/3/2016 11:23 AM	No
	accountid	AccountId	Lookup	Optional	9/3/2016 11:23 AM	No
Account	parentaccountid	ParentAccountId	Lookup	Optional	9/3/2016 11:23 AM	No
Actual Close Date	actualclosedate	ActualCloseDate	DateTime	Optional	9/3/2016 11:23 AM	No
Actual Revenue	actualvalue	ActualValue	Money	Optional	9/3/2016 11:23 AM	No
Actual Revenue (Base)	actualvalue_base	ActualValue_Base	Money	Optional	9/3/2016 11:23 AM	No
Budget	budgetstatus	BudgetStatus	Picklist	Optional	9/3/2016 11:23 AM	No
Budget Amount	budgetamount	BudgetAmount	Money	Optional	9/3/2016 11:23 AM	No
Budget Amount (Base)	budgetamount_base	BudgetAmount_Base	Money	Optional	9/3/2016 11:23 AM	No
Complete Internal Re...	completeinternalreview	CompleteInternalRev...	Boolean	Optional	9/3/2016 11:23 AM	No

1 - 10 of 106

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

Entity Attributes

Active Entity Attributes

Search for records

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

81 - 90 of 106

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

General

Display Name	SLA
Attribute Name*	new_sla
Schema Name	new_SLA
Attribute Type	String
Field Requirement	Optional
Include this field in Help?	<input checked="" type="checkbox"/>
Description	Please select for this field one of the agreements we offer: 1) Customer service level agreement (for maintenance 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

OPPORTUNITY		Organisation: DEVCRM2016	Customize Help
Display Name	Attribute Type	Description	
SLA	String	Please select for this field one of the agreements we offer: 1) Customer service level agreement (for maintenance services) 2) Internal service level agreement (maintenance for the department in our company) 3) Vendor service level agreement (support notebook series)	

[Click here to show image](#)

Select Click here to show or hide image

[Click here to hide image](#)

Title: null
Description: null

MVA

Microsoft Virtual Academy

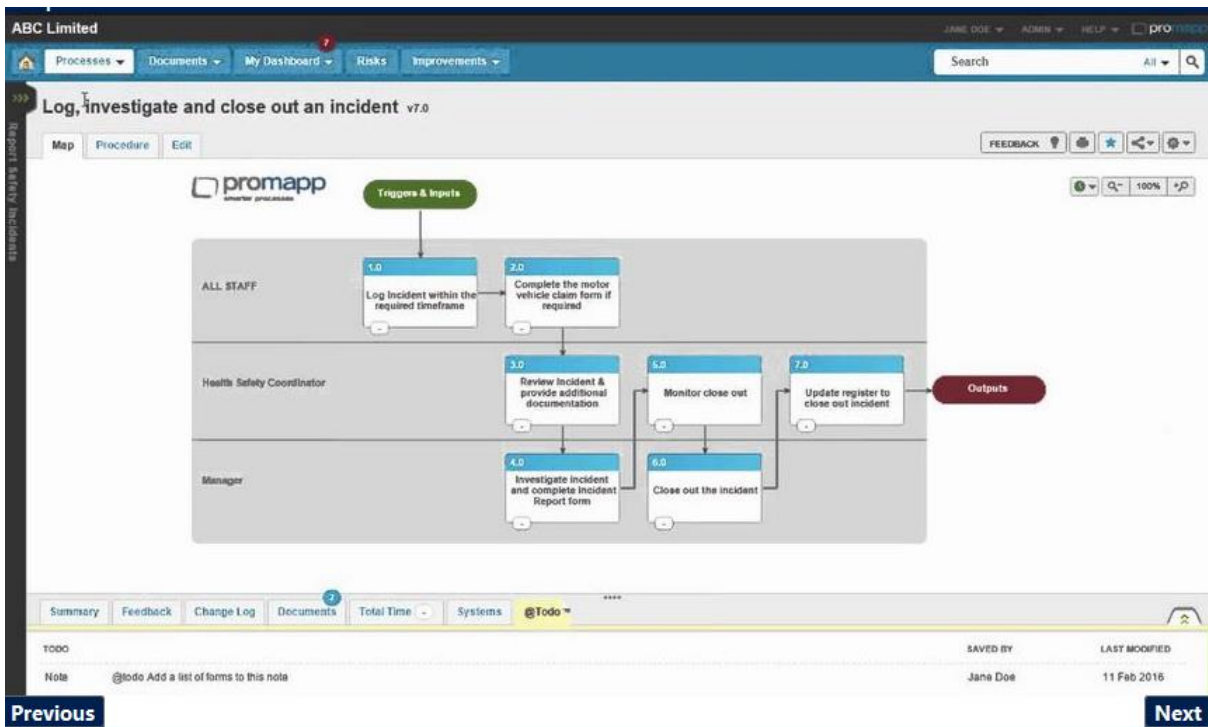
Sales Process

Sales Management Process

```

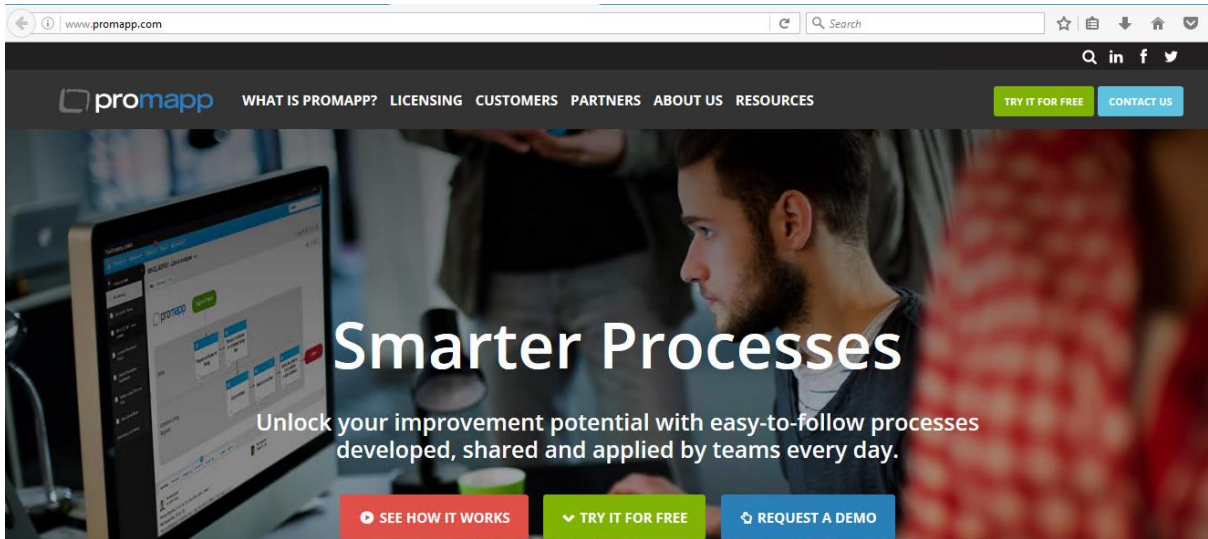
graph TD
    A[Create Lead] --> B[Qualify]
    B --> C[Convert to Opportunity]
    C --> D[Apply Sales Process Rules]
    C --> E[Add Product]
    C --> F[Create Quote]
    F --> G[Create Order]
    G --> H[Create Invoice]
  
```

The Sales Process



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



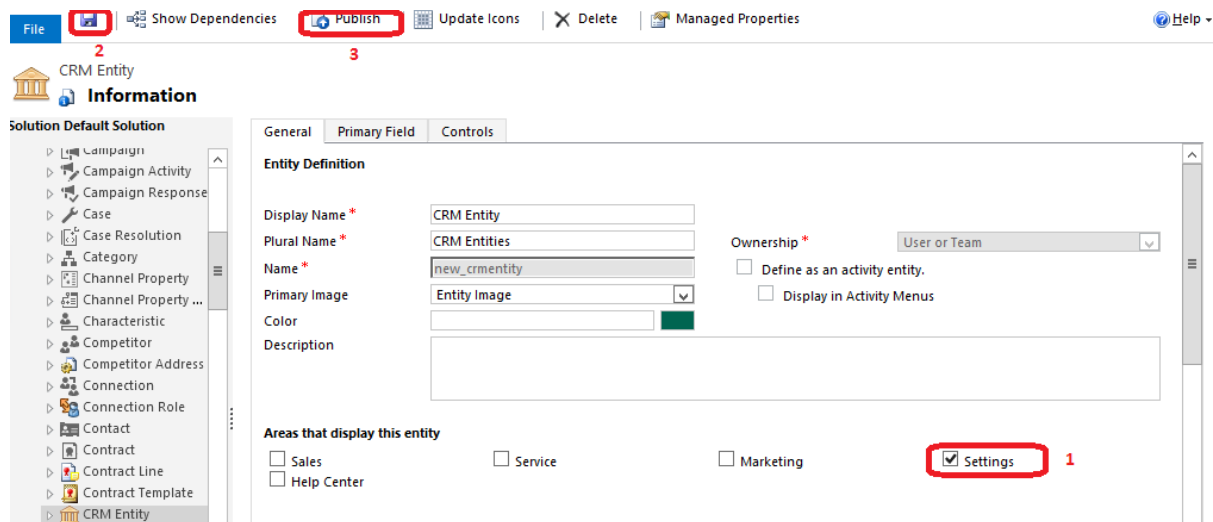


And you have a direct access to configure the Entity again



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.



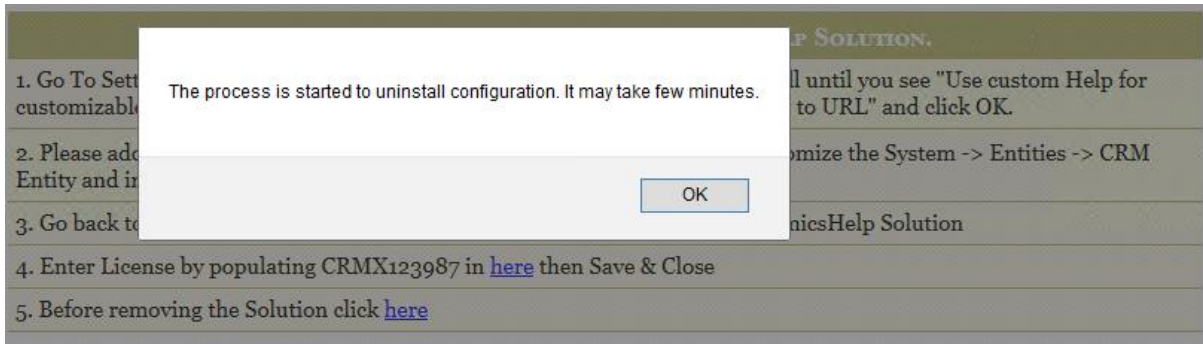
In CRM go to Settings ► Solutions ► double click DynamicHelpSolution

Go to step 5 and click “here”

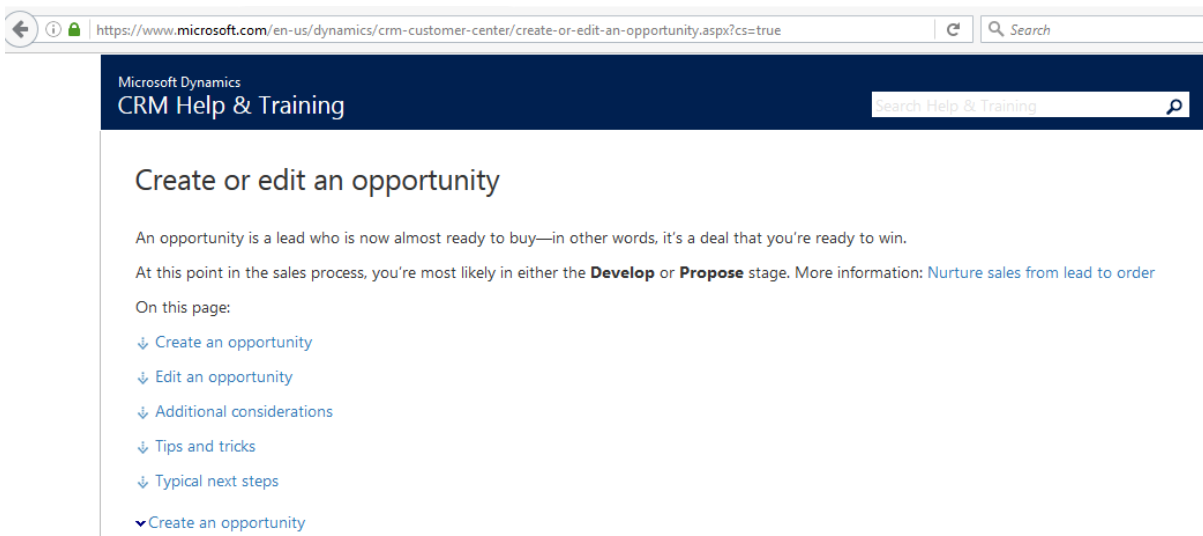
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And OK

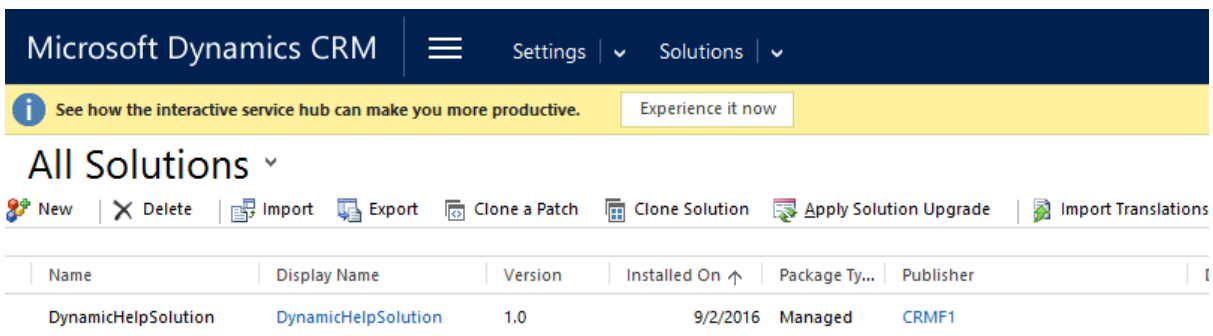


After few minutes if you go to Opportunity Entity and click “?” you will see the customizations has been deleted and you will have the out of the box help.



now you can remove the solution without leaving any customization:

to Settings ► Solutions ► select DynamicHelpSolution and click Delete



Contacting CRM F1 for support

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

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