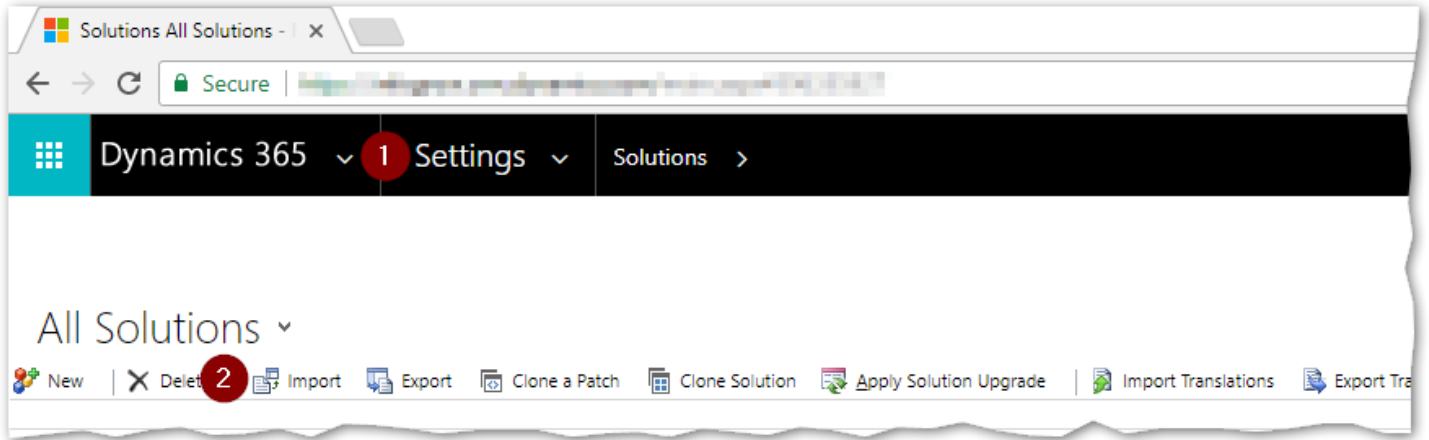


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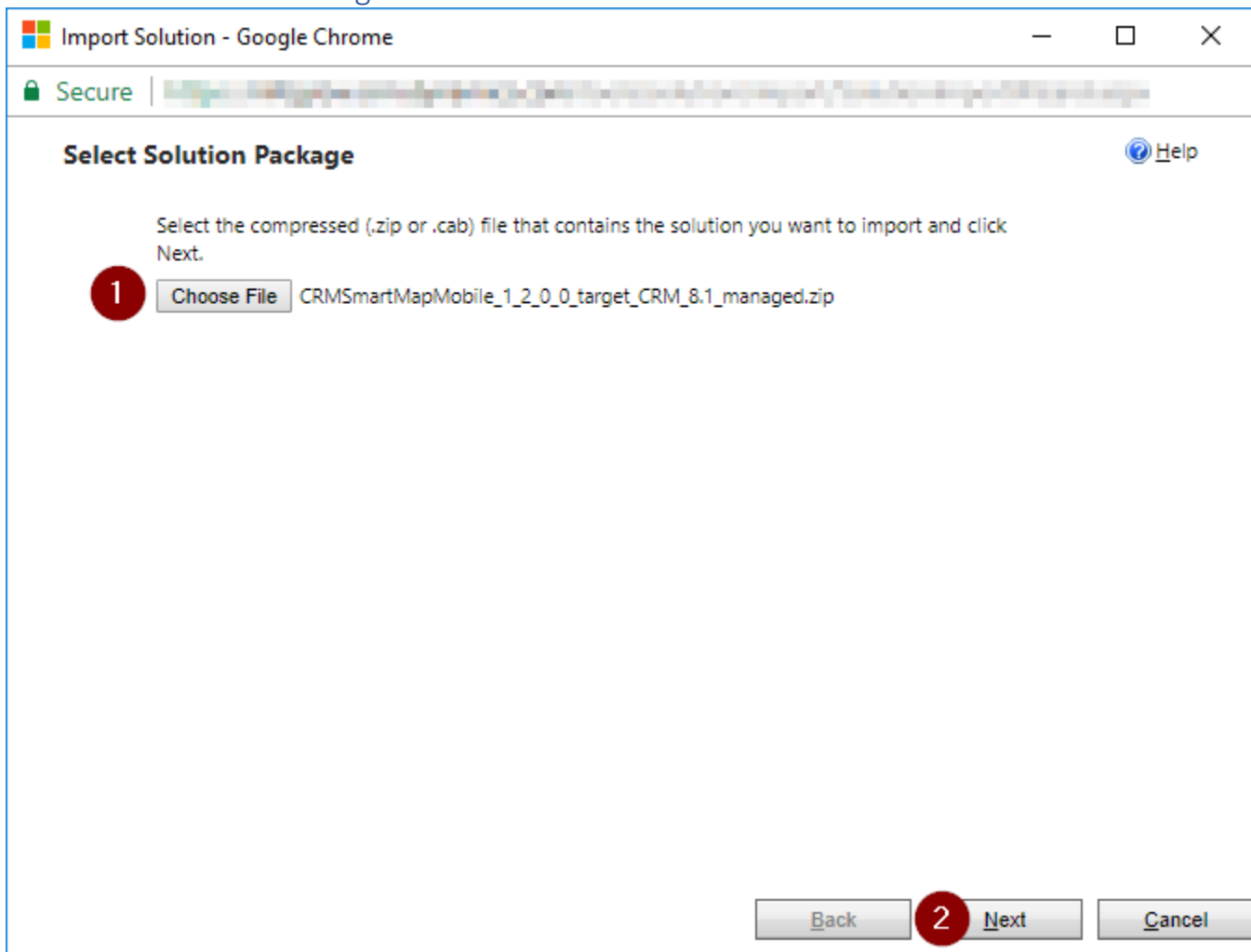
Importing the CRM SmartMap Mobile Dynamics 365 Solution

Open the Solution Import Wizard



1. Navigate to **Settings** → **Solutions**.
2. Click the **Import** button.

Select the Solution Package



Import Solution - Google Chrome

Secure | [\[Redacted URL\]](#)

Select Solution Package [Help](#)

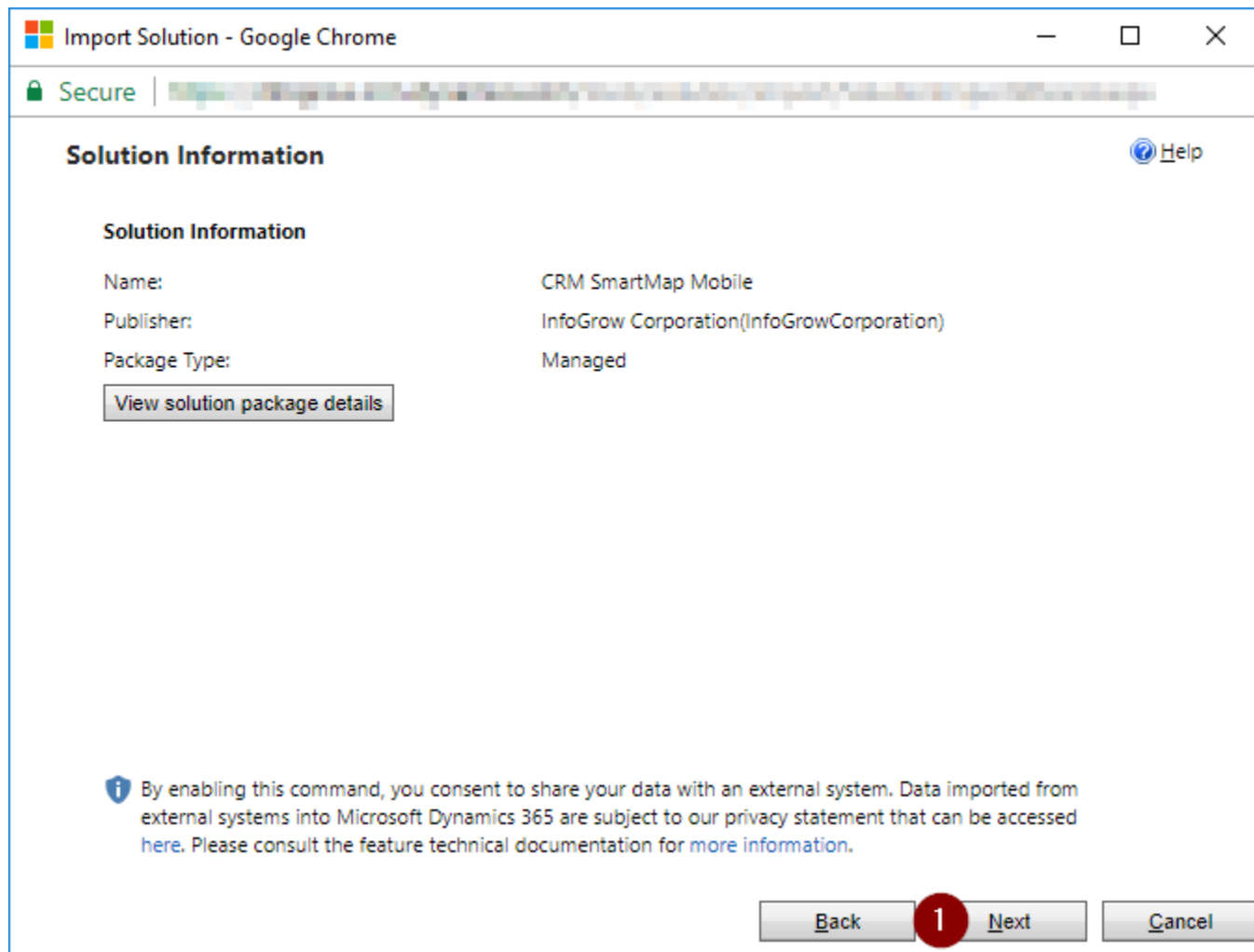
Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

1 CRMSmartMapMobile_1_2_0_0_target_CRM_8.1_managed.zip

2

1. Click the **Choose File** button and locate the CRM SmartMap Mobile solution to import.
2. Click the **Next** button.

Review the Solution Information



The screenshot shows a web browser window titled 'Import Solution - Google Chrome'. The address bar indicates a secure connection. The main content area is titled 'Solution Information' and includes a 'Help' link. Below the title, the following information is displayed:

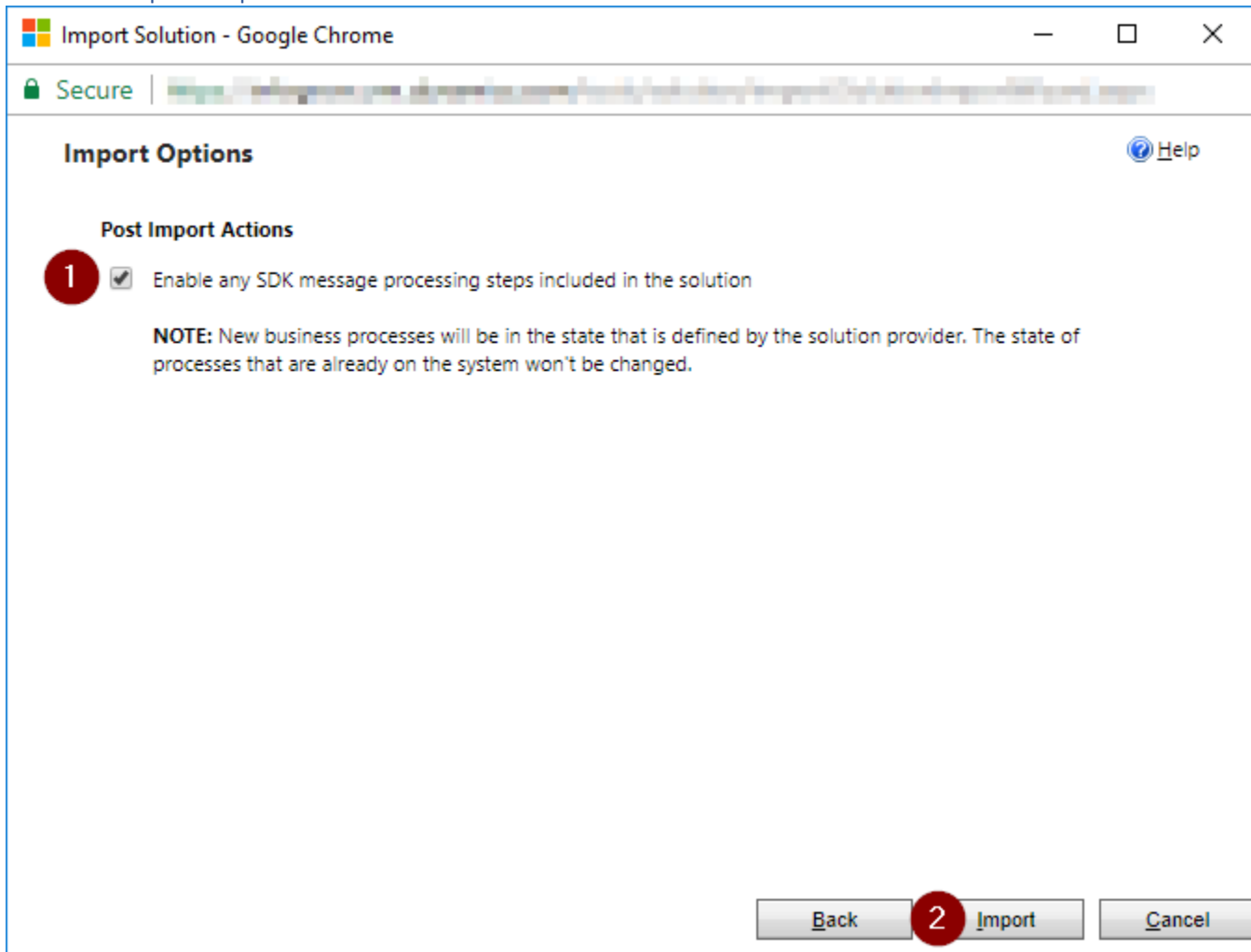
Name:	CRM SmartMap Mobile
Publisher:	InfoGrow Corporation(InfoGrowCorporation)
Package Type:	Managed

A button labeled 'View solution package details' is located below the package type. At the bottom of the window, there is a disclaimer: 'By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).' Below the disclaimer are three buttons: 'Back', 'Next' (which is highlighted with a red circle and the number 1), and 'Cancel'.

1. Click the **Next** button.

If you need assistance with any of these steps or
have questions, please contact us at:
support@infogrowcorp.com

Set the Import Options



Import Solution - Google Chrome

Secure | [https://crm.smartmap.com/Import/Solution/ImportOptions.aspx](#)

Import Options [Help](#)

Post Import Actions

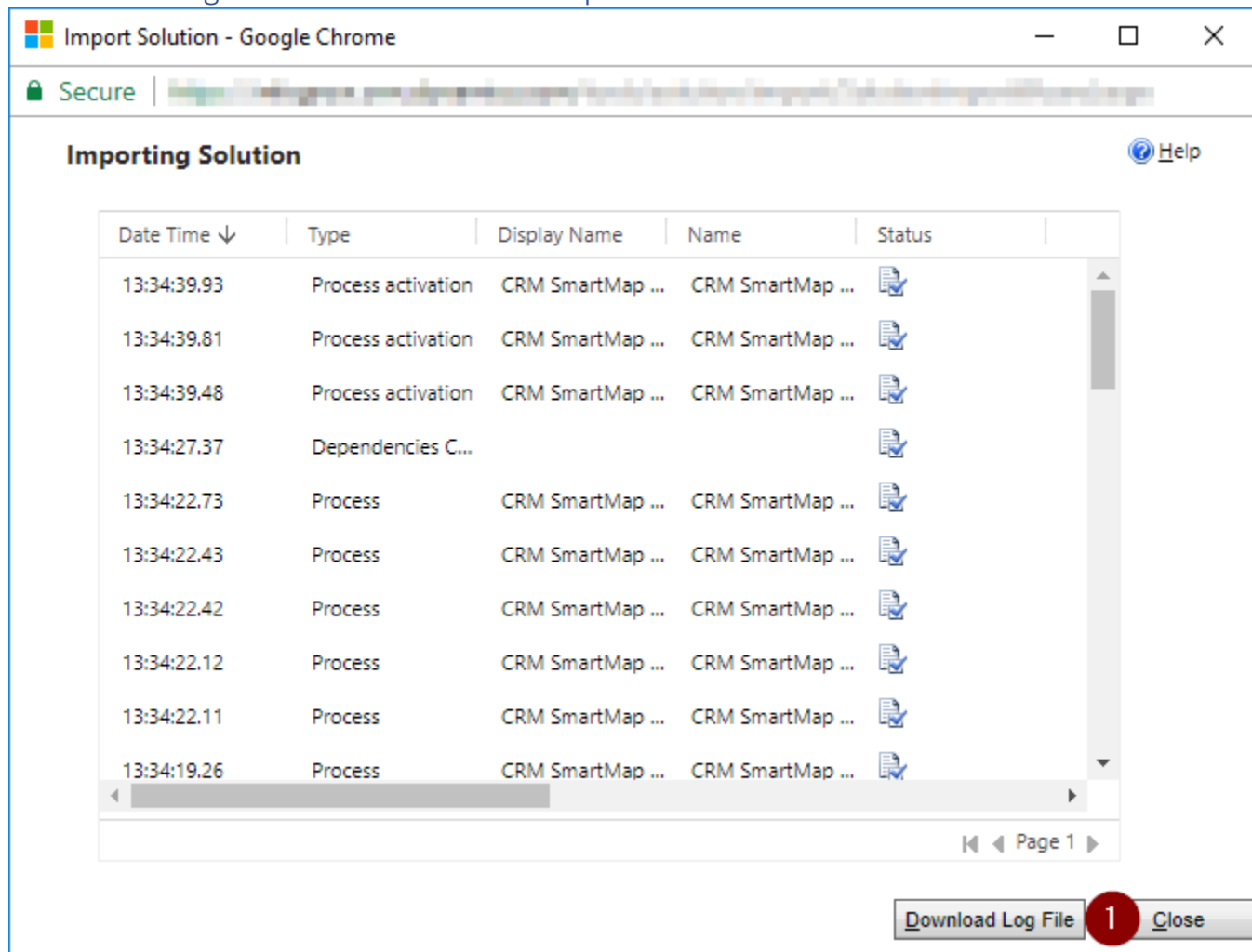
1 ☒ Enable any SDK message processing steps included in the solution

NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.











[Back](#) **2** [Import](#) [Cancel](#)

1. Make sure that the **Enable any SDK message processing steps included in the solution** checkbox is checked.
2. Click the **Import** button.

Review the Log and Close the Solution Import Wizard



Importing Solution [Help](#)

Date Time ↓	Type	Display Name	Name	Status
13:34:39.93	Process activation	CRM SmartMap ...	CRM SmartMap ...	
13:34:39.81	Process activation	CRM SmartMap ...	CRM SmartMap ...	
13:34:39.48	Process activation	CRM SmartMap ...	CRM SmartMap ...	
13:34:27.37	Dependencies C...			
13:34:22.73	Process	CRM SmartMap ...	CRM SmartMap ...	
13:34:22.43	Process	CRM SmartMap ...	CRM SmartMap ...	
13:34:22.42	Process	CRM SmartMap ...	CRM SmartMap ...	
13:34:22.12	Process	CRM SmartMap ...	CRM SmartMap ...	
13:34:22.11	Process	CRM SmartMap ...	CRM SmartMap ...	
13:34:19.26	Process	CRM SmartMap ...	CRM SmartMap ...	

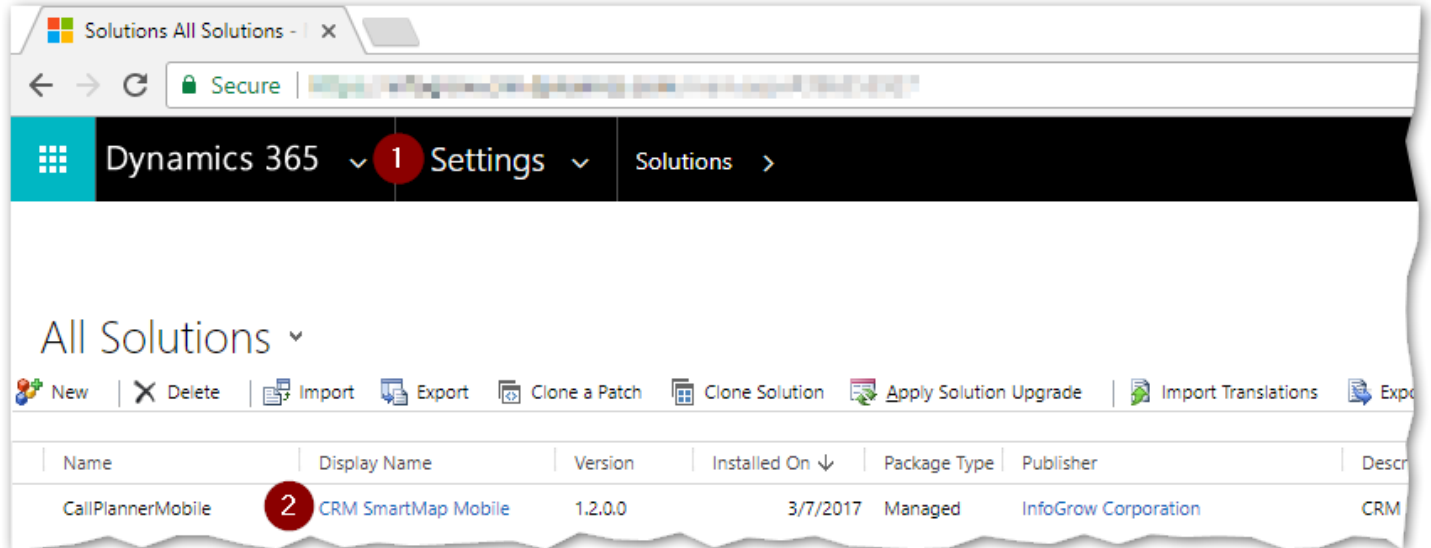
Page 1

[Download Log File](#) **1** [Close](#)

1. Wait for the solution to finish importing and then click the **Close** button.

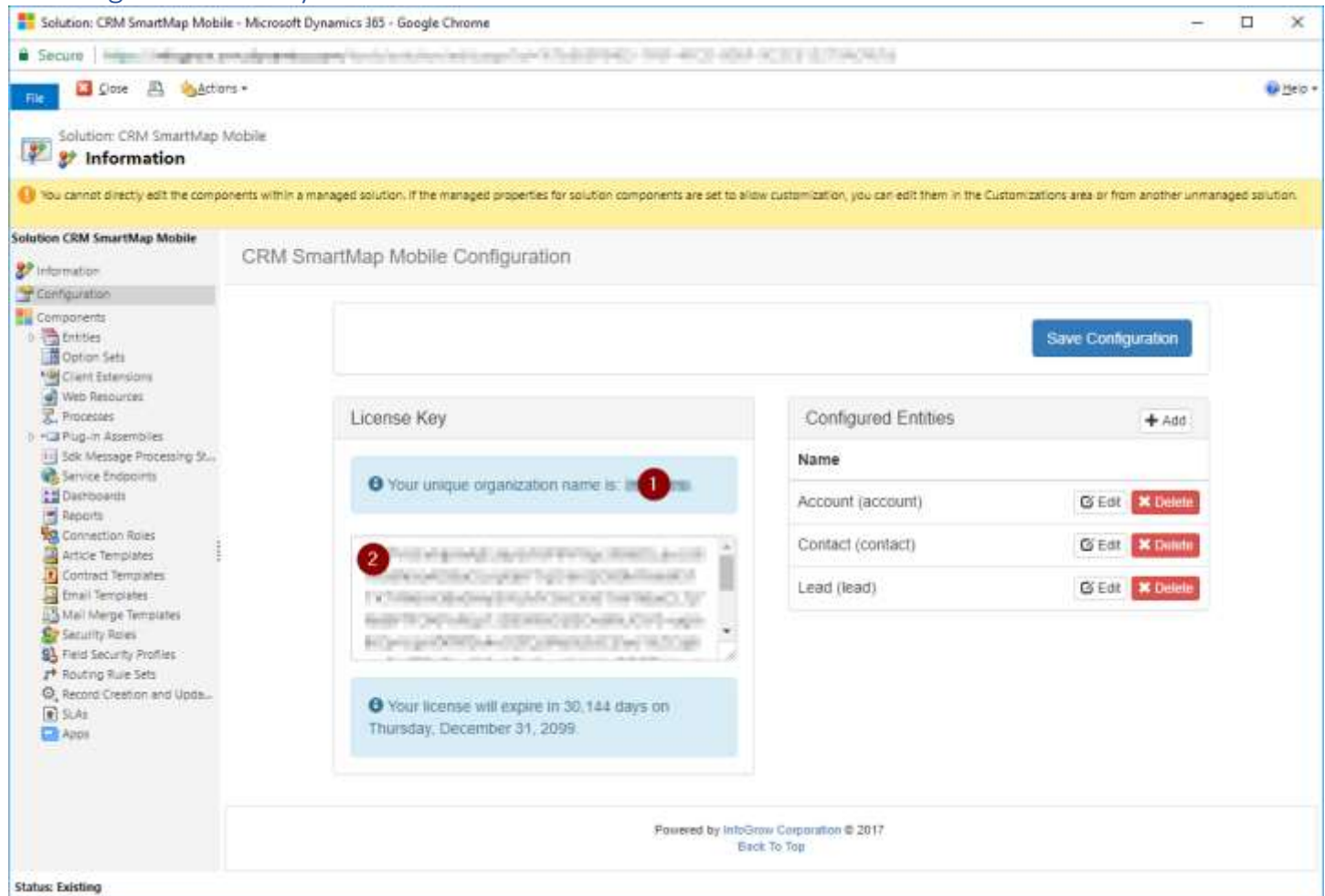
Configuring CRM SmartMap Mobile in Dynamics 365

Opening the Configuration Page



1. Navigate to **Settings** → **Solutions**.
2. Click the CRM **SmartMap Mobile** link.

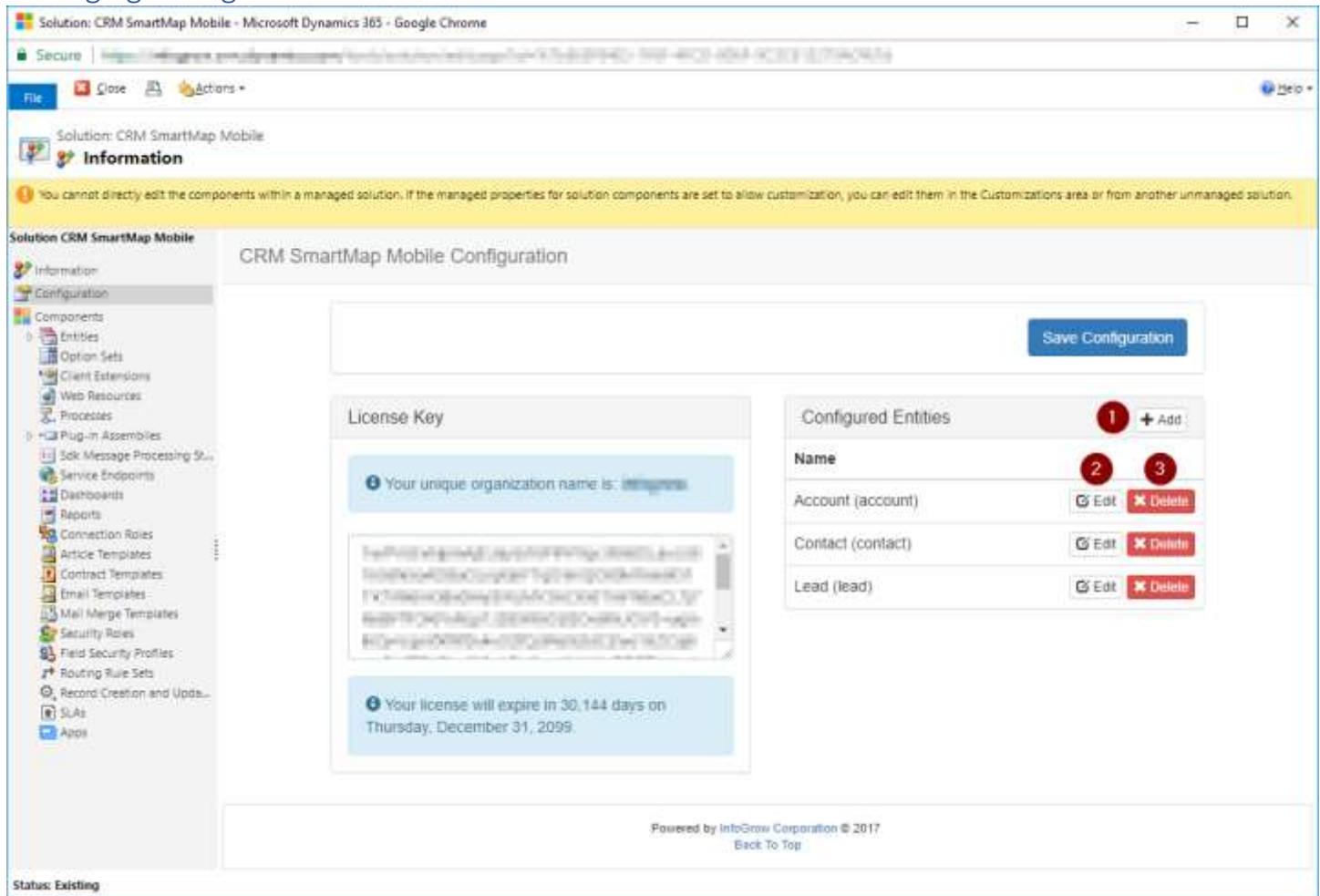
Entering a License Key



Your license information is available in the **License Key** section of the configuration.

1. Contact InfoGrow Corporation at support@infogrowcorporation.com for a license key.
Be sure to provide us with your unique organization name.
2. Once you receive your license key copy and paste it into the **License Key** text box.

Managing Configured Entities



The entities available for use within CRM SmartMap Mobile are managed in the **Configured Entities** section of the configuration page. You can:

1. Add a new entity by clicking the **Add** button in the section header.
2. Edit an existing entity by clicking the **Edit** button in the row for the entity.
3. Delete an existing entity by clicking the **Delete** button in the row for the entity.

Adding / Editing an Entity

Adding / editing an entity consists of choosing the entity and its core fields, selecting the display fields, and selecting the filter fields. When you're finished click the OK button to update the list of configured entities or the Cancel button to discard your changes.

Entity & Core Fields

This section is used to select entity that that will be available in CRM SmartMap Mobile and the core fields required for proper operation.

* The following CRM SmartMap Mobile setup steps assume that your organization is using the provided InfoGrow CRM Geocoder Plus or that you've made other arrangements for your records to be accurately geocoded.

Entity & Core Fields

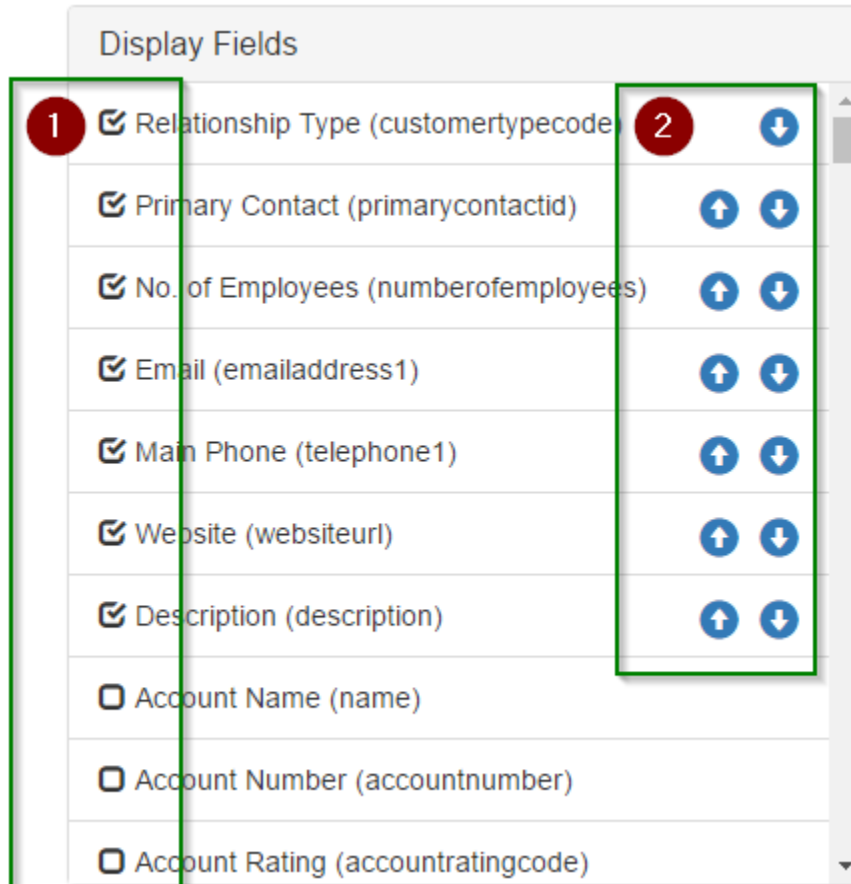
<p>Entity ★ 1</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Account (account) ▼ ?</div> <p>Primary Name Field ★ 2</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Account Name (name) ▼ ?</div> <p>Street 1 Field ★ 3</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Address 1: Street 1 (address1_line1) ▼ ?</div> <p>Street 2 Field 4</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Address 1: Street 2 (address1_line2) ▼ ?</div> <p>City Field ★ 5</p> <div style="border: 1px solid #ccc; padding: 5px;">Address 1: City (address1_city) ▼ ?</div>	<p>State / Province Field ★ 6</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Address 1: State/Province (address1_stateorpro) ▼ ?</div> <p>Postal Code Field ★ 7</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Address 1: ZIP/Postal Code (address1_postalcode) ▼ ?</div> <p>Country Field 8</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Address 1: Country/Region (address1_country) ▼ ?</div> <p>Latitude Field ★ 9</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Address 1: Latitude (address1_latitude) ▼ ?</div> <p>Longitude Field ★ 10</p> <div style="border: 1px solid #ccc; padding: 5px;">Address 1: Longitude (address1_longitude) ▼ ?</div>
---	---

1. **Entity** – Select the entity being configured. This is a required field.
After the entity is selected the system makes a best guess auto-selection of the other fields.
2. **Primary Name Field** – This is read only and will always be the Primary Name of the chosen entity.
3. **Street 1 Field** – Select the field that contains the first line of the street address. You may choose from any "Single Line of Text" fields. This field is required.
4. **Street 2 Field** – Select the field that contains the second line of the street address. You may choose from any "Single Line of Text" fields.
5. **City Field** – Select the field that contains the city. You may choose from any "Single Line of Text" fields. This field is required.
6. **State / Province Field** – Select the field that contains the state or province. You may choose from any "Single Line of Text", "Option Set", and "Lookup" fields. This field is required.
7. **Postal Code Field** – Select the field that contains the postal code. You may choose from any "Single Line of Text", "Option Set", and "Lookup" fields. This field is required.
8. **Country Field** – Select the field that contains the country. You may choose from any "Single Line of Text", "Option Set", and "Lookup" fields.
9. **Latitude Field** – Select the field that contains the latitude. You may choose from any "Floating Point Number" fields. The minimum value for the field should be -90 and the maximum value should be 90. This field is required.
10. **Longitude Field** – Select the field that contains the longitude. You may choose from any "Floating Point Number" fields. The minimum value for the field should be -180 and the maximum value should be 180. This field is required.

Display Fields

This section is used to define the fields that will be displayed when viewing the configured entity in CRM SmartMap Mobile.

Note that the primary name field and the address fields chosen in the Entity & Core Fields section will be displayed in CRM SmartMap Mobile by default. There is no need to select them in this section.



Display Fields	
<input checked="" type="checkbox"/> Relationship Type (customertypecode)	↑ ↓
<input checked="" type="checkbox"/> Primary Contact (primarycontactid)	↑ ↓
<input checked="" type="checkbox"/> No. of Employees (numberofemployees)	↑ ↓
<input checked="" type="checkbox"/> Email (emailaddress1)	↑ ↓
<input checked="" type="checkbox"/> Main Phone (telephone1)	↑ ↓
<input checked="" type="checkbox"/> Website (websiteurl)	↑ ↓
<input checked="" type="checkbox"/> Description (description)	↑ ↓
<input type="checkbox"/> Account Name (name)	
<input type="checkbox"/> Account Number (accountnumber)	
<input type="checkbox"/> Account Rating (accountratingcode)	

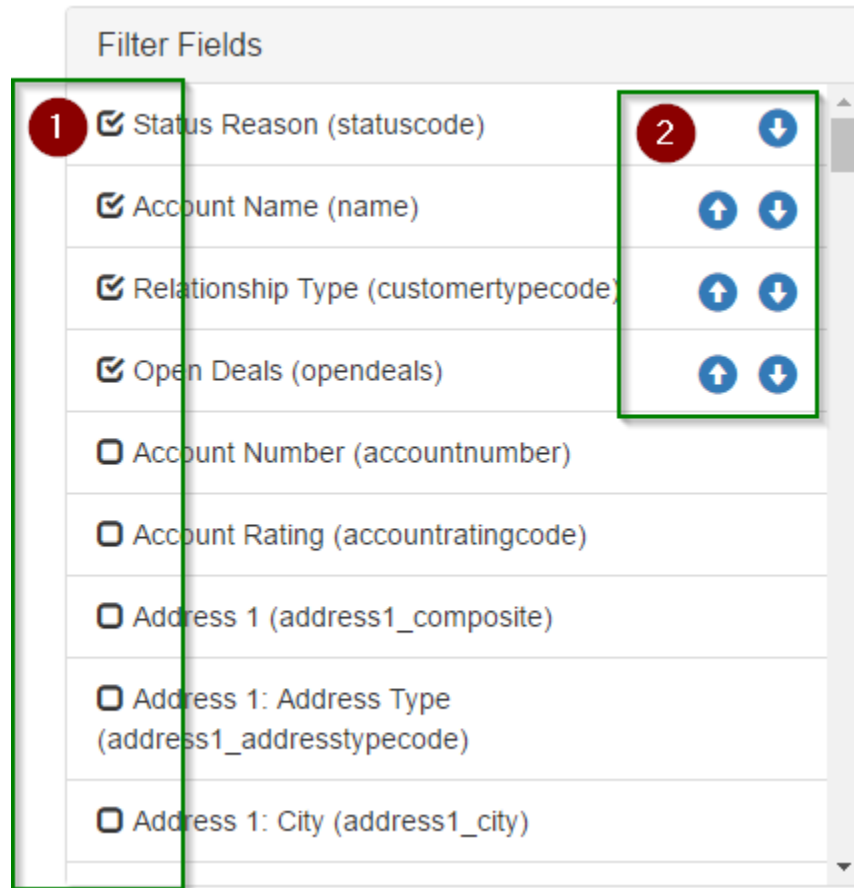
If you need assistance with any of these steps or have questions, please contact us at:

support@infogrowcorp.com

1. Click a row to select / deselect the field for display.
2. Once a field has been selected for display you can adjust its order in the display list by using the up and down arrow buttons.

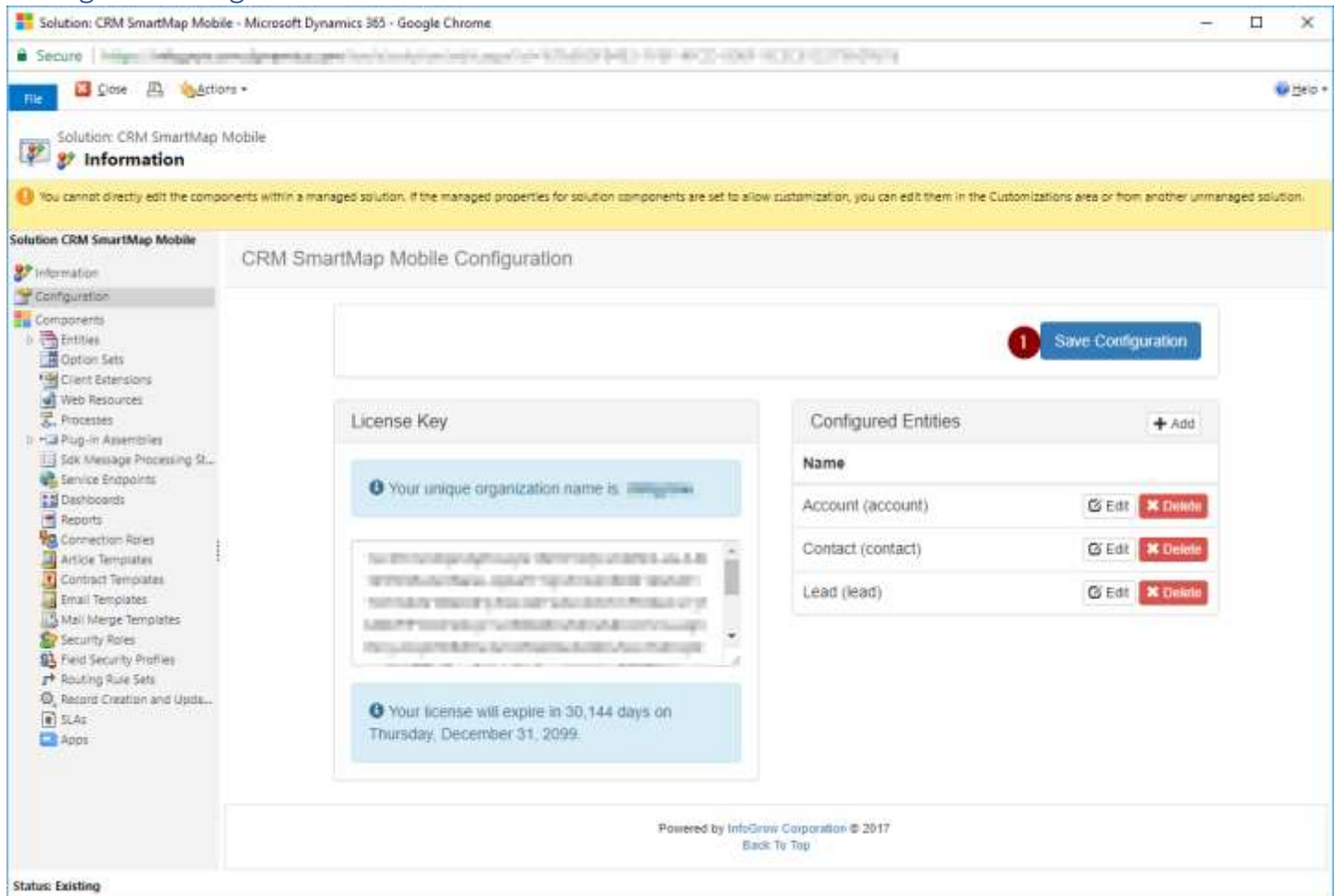
Filter Fields

This section is used to define the fields that can be used when searching for the configured entity in CRM SmartMap Mobile.



1. Click a row to select / deselect the field for use as a filter when searching.
2. Once a field has been selected you can adjust its order in the filtering list by using the up and down arrow buttons.

Saving the Configuration



1. After you have finished entering your license key and configuring the entities click the Save Configuration button to save all of your changes.

Enabling Dynamics 365 Access

Your Dynamics 365 / Network administrator must go through the following steps to allow CRM SmartMap Mobile access to Dynamics 365.

Dynamics 365 On-Premises

If you are using Dynamics 365 On-Premises, follow these steps to enable access.

Note that AD FS on Windows Server 2012 R2 (or higher) is required.

Enable oAuth

1. Log on to the Dynamics 365 server hosting the deployment service role as an administrator.
2. Open a Windows PowerShell window.
3. Add the Dynamics 365 PowerShell snap-in by executing the following command.



Add-PSSnapin Microsoft.Crm.Powershell

4. Enable oAuth by executing the following commands.

```
$setting = Get-CrmSetting -SettingType OAuthClaimsSettings
```

```
$setting.Enabled = $true
```

```
Set-CrmSetting $setting
```

5. Close the PowerShell window.
6. Log off of the server.

Register the App with AD FS

1. Log on to the AD FS server as an administrator.
2. Open Windows PowerShell.
3. Register the app by executing the following command.

```
Add-AdfsClient -ClientId "3F63759C-7571-4C26-A907-F2E08FAE3303" -Name "CRM SmartMap Mobile" -RedirectUri "app://3F63759C-7571-4C26-A907-F2E08FAE3303"
```

4. Close the PowerShell window.
5. Log off of the server.

Dynamics 365 Online

If you are using Dynamics 365 Online follow these steps to enable access.

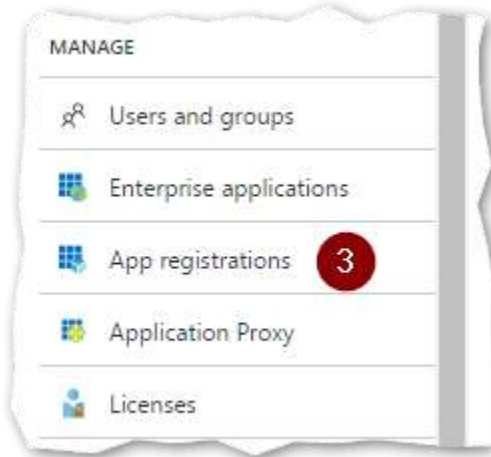
1. Sign in to the [Microsoft Azure Portal](#).



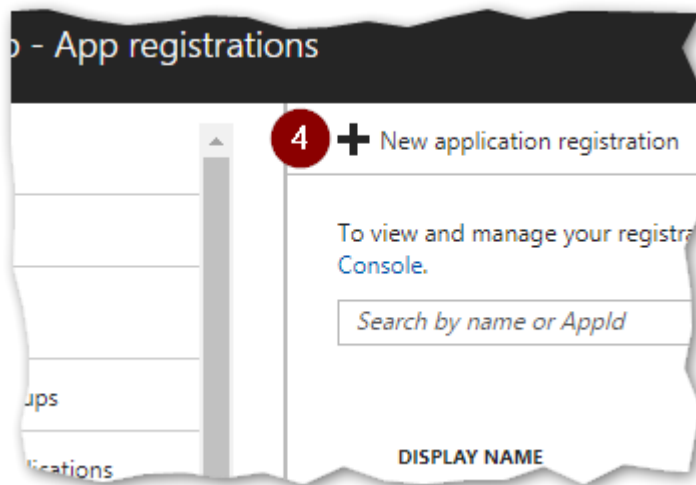
2. Click on **Azure Active Directory** in the menu.

If you need assistance with any of these steps or have questions, please contact us at:

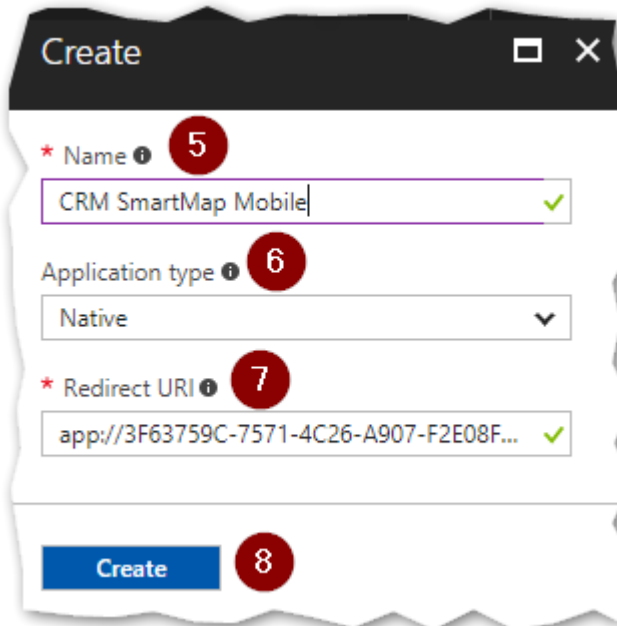
support@infogrowcorp.com



3. Click **App registrations** in Manage section of the Azure Active Directory Menu.



4. Click the **New application registration** button to add a new app registration.



Create

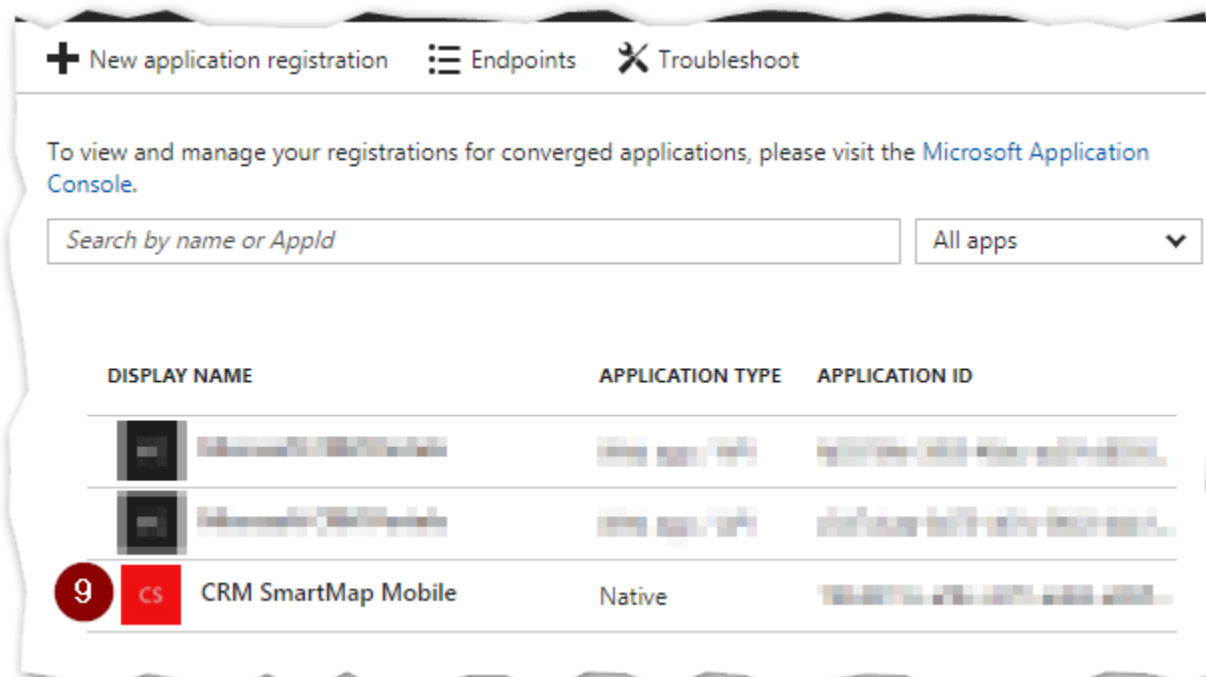
* Name 5
CRM SmartMap Mobile ✓

Application type 6
Native ▼

* Redirect URI 7
app://3F63759C-7571-4C26-A907-F2E08F... ✓

Create 8




5. Enter *CRM SmartMap Mobile* for the **Name**.
6. Choose *Native* as the **Application Type**.
7. Enter *app://3F63759C-7571-4C26-A907-F2E08FAE3303* as the **Redirect URI**.
8. Click the **Create** button.



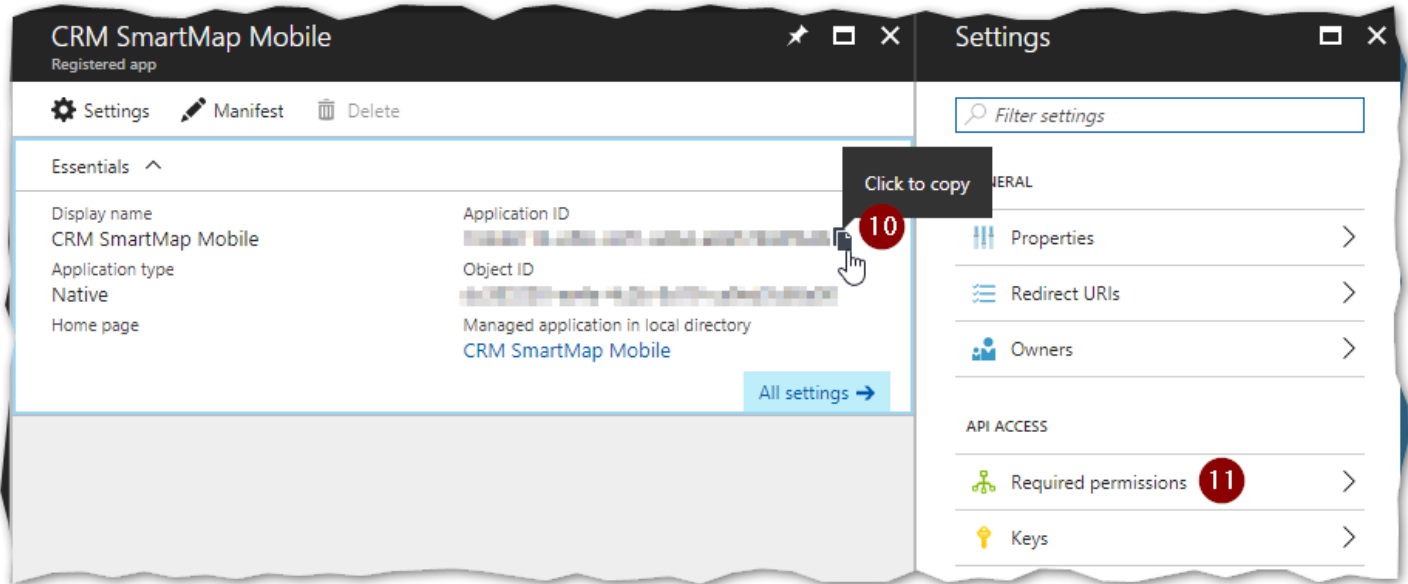
+ New application registration **Endpoints** **Troubleshoot**

To view and manage your registrations for converged applications, please visit the [Microsoft Application Console](#).

Search by name or Appld All apps ▼

DISPLAY NAME	APPLICATION TYPE	APPLICATION ID
 [Blurred Name]	[Blurred Type]	[Blurred ID]
 [Blurred Name]	[Blurred Type]	[Blurred ID]
9  CRM SmartMap Mobile	Native	[Blurred ID]

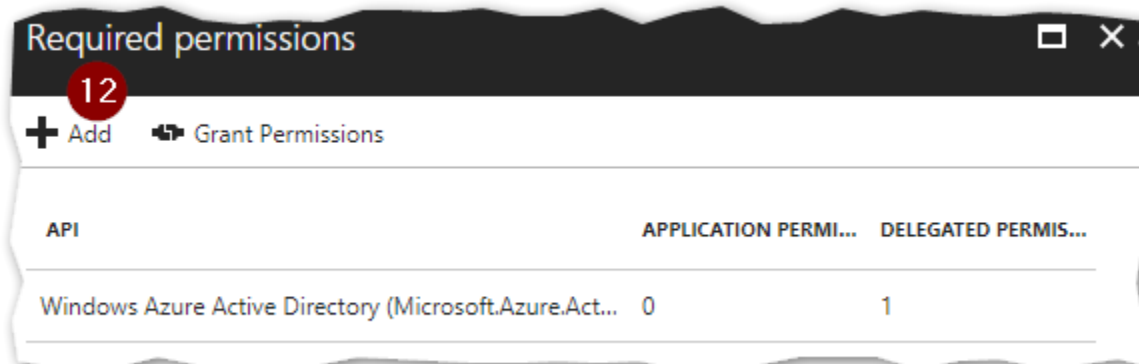
9. Click on **CRM SmartMap Mobile** in the app list.



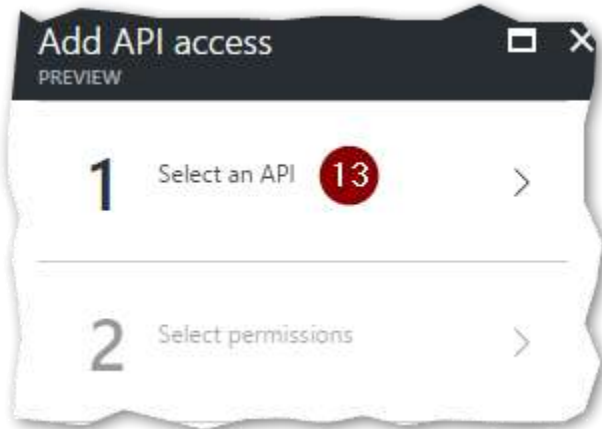
10. Make note of the **Application ID** as this will need to be distributed to the CRM SmartMap Mobile App users so they can enter it in their device.

You can click the icon as displayed above to copy the Application ID.

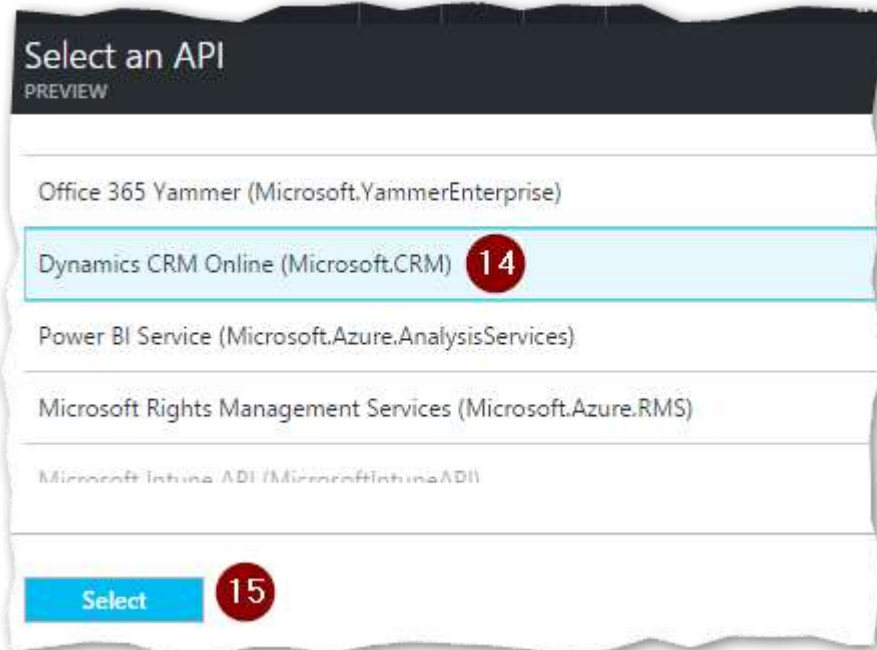
11. Click on **Required permissions**.



12. Click the **Add** button.



13. Click on **Select an API**.

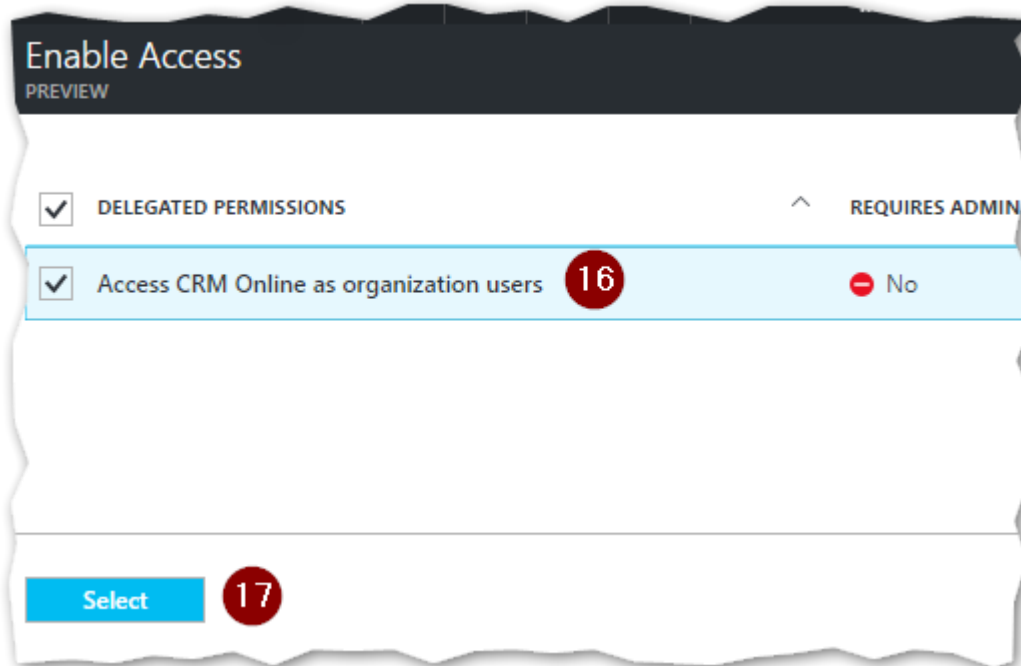


14. Click on **Dynamics CRM Online (Microsoft.CRM)** to highlight it in the list.

15. Click on the **Select** button.

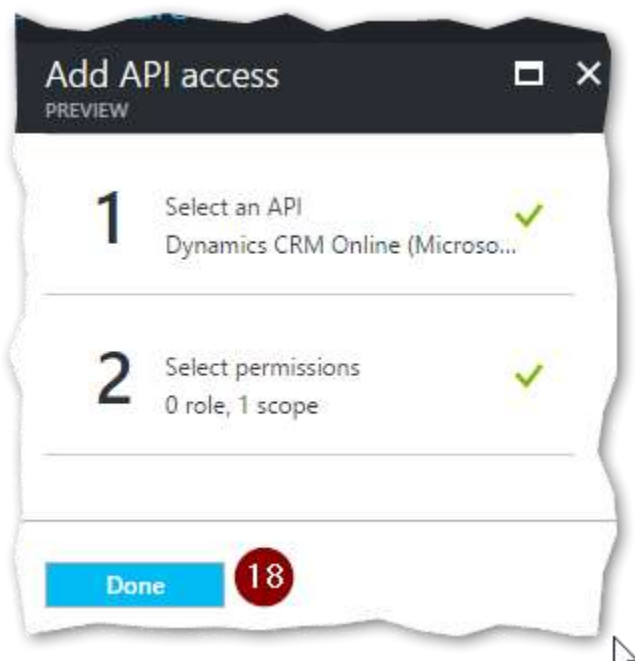
If you need assistance with any of these steps or have questions, please contact us at:

support@infogrowcorp.com



16. Check the **Access CRM Online as organization users** permission.

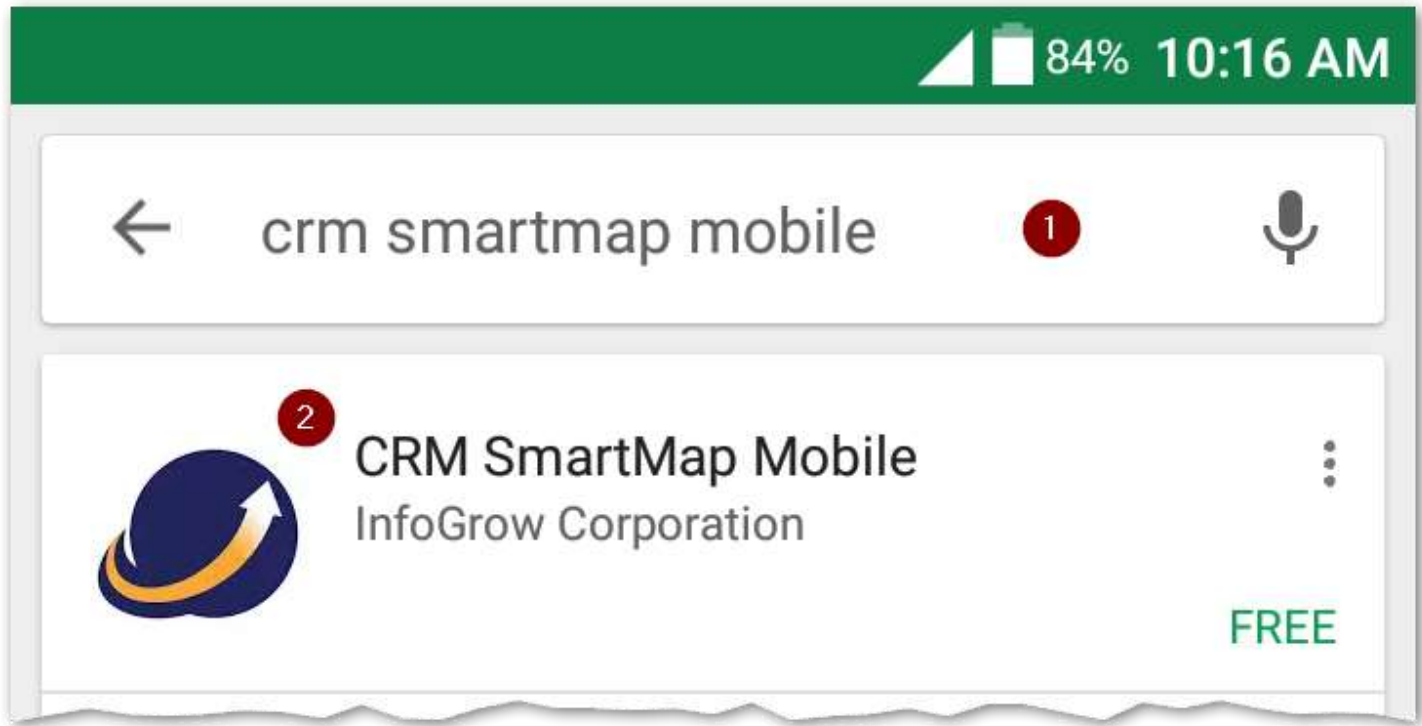
17. Click the **Select** button.



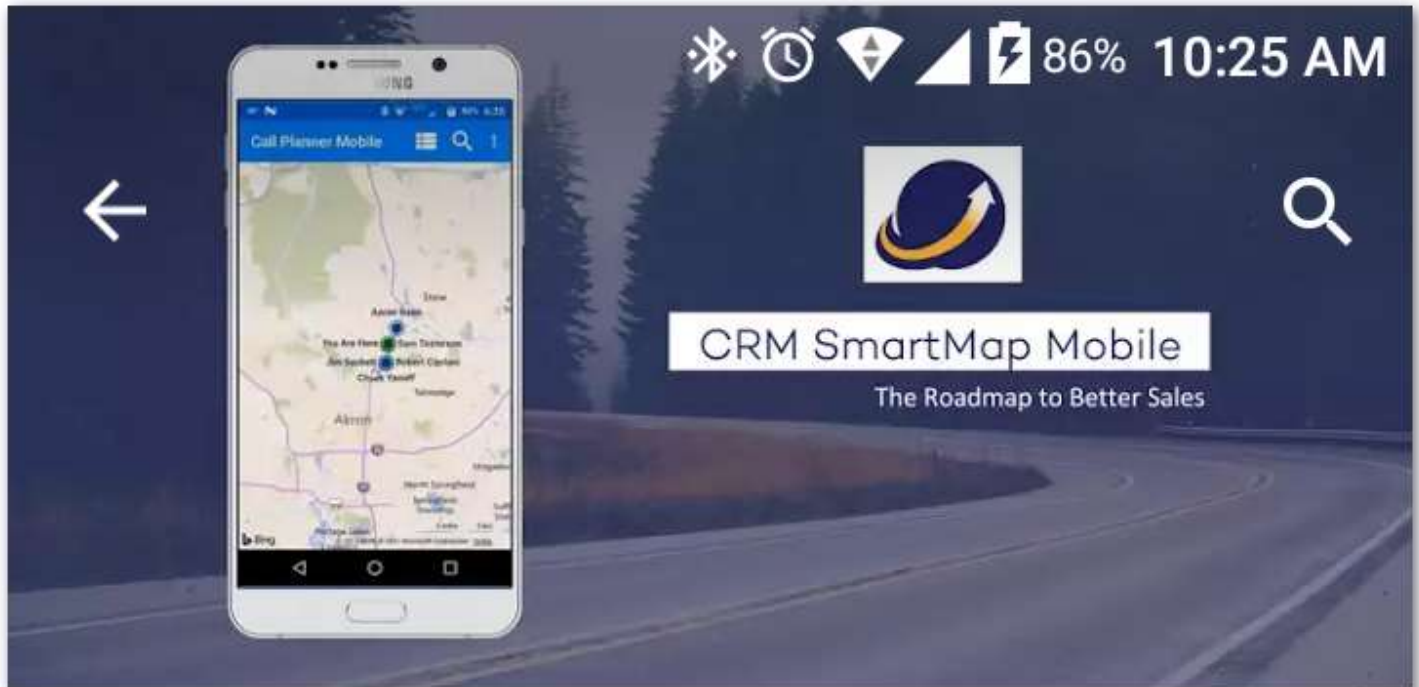
18. Click the **Done** button.

Installing the CRM SmartMap Mobile App

The CRM SmartMap Mobile app is installed from your device's app store. The following directions illustrate the installation from Google Play. The process will be similar when installing it from Apple's app store.



1. Search for "CRM SmartMap Mobile" in the app store.
2. Scroll through the results to locate CRM SmartMap Mobile and tap it to view the details.



CRM SmartMap Mobile

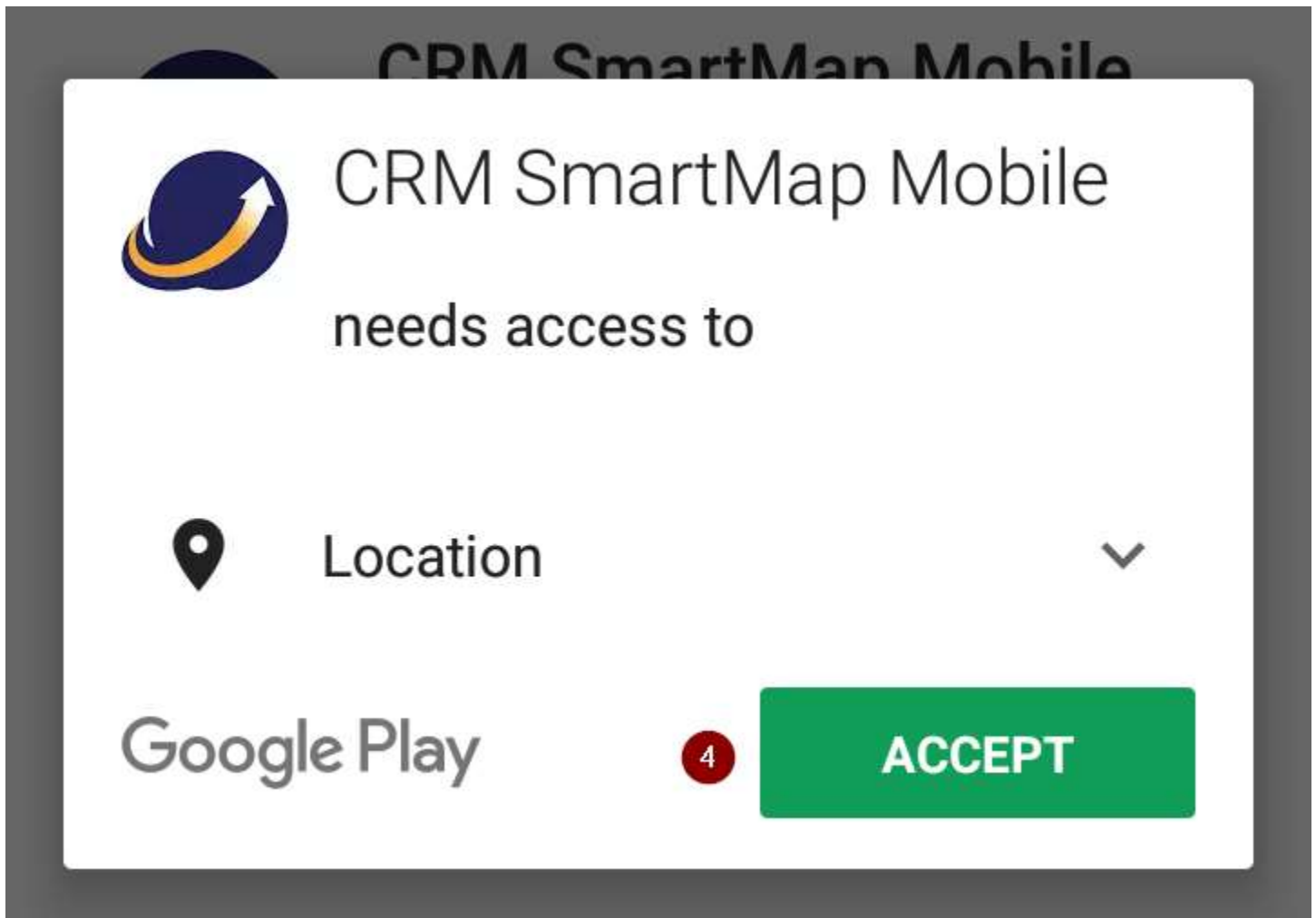
InfoGrow Corporation

E Everyone

3

INSTALL

3. Tap the Install button.

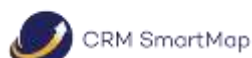


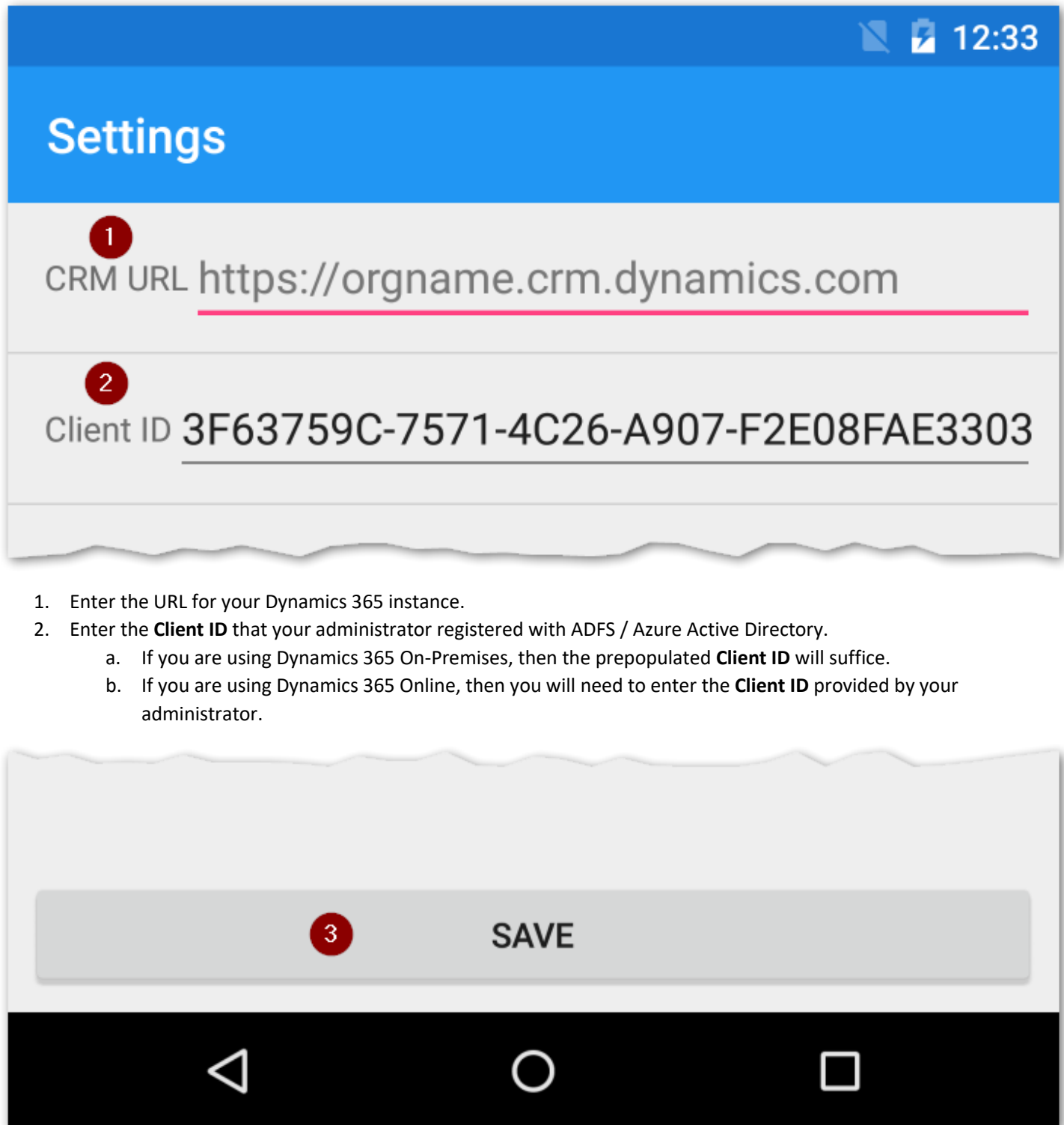
4. Tap the Accept button to accept the permissions required by the application.

Configuring the CRM SmartMap Mobile App

When you first open CRM SmartMap Mobile a few pieces of information must be entered before the app can be used.

If you need assistance with any of these steps or
have questions, please contact us at:
support@infogrowcorp.com





1. Enter the URL for your Dynamics 365 instance.
2. Enter the **Client ID** that your administrator registered with ADFS / Azure Active Directory.
 - a. If you are using Dynamics 365 On-Premises, then the prepopulated **Client ID** will suffice.
 - b. If you are using Dynamics 365 Online, then you will need to enter the **Client ID** provided by your administrator.

3. Tap the **Save** button.
4. You will now be presented with the sign in page for your organization.
Enter your credentials and begin using CRM SmartMap Mobile.

Product Support

The organization's CRM Administrator is entitled to unlimited email support through support@infogrowcorp.com. Maintaining the CRM Administrator's contact information, including an email address, with InfoGrow will make it possible for us to share product update information, usage tips, and end user training videos.