

View Creator – Import and Registration guide

Create personal or system view based on selected entity's form/s

Select the type of view :

- System View Personal View

Select entity :

Account ▼

Select the form/s type for which view is needed :

- | | |
|--|---|
| <input type="checkbox"/> Account (Main) | <input type="checkbox"/> Account Card form (Card) |
| <input type="checkbox"/> Account Hierarchy Tile Form (Quick View Form) | <input type="checkbox"/> Account Quick Create (Quick Create) |
| <input type="checkbox"/> Account Reference Panel (Quick View Form) | <input type="checkbox"/> Account for Interactive experience (Main - Interactive experience) |
| <input type="checkbox"/> Recent Cases and Entitlements (Quick View Form) | <input type="checkbox"/> Social Profiles (Quick View Form) |
| <input type="checkbox"/> account card (Quick View Form) | |

Consider hidden fields :

- Want to consider hidden fields in the view?

Enter the name of view :

Please enter the name of the view to be created

Click on proceed button to create a view in CRM with all the fields present in above selected form/s.

Proceed

Contents

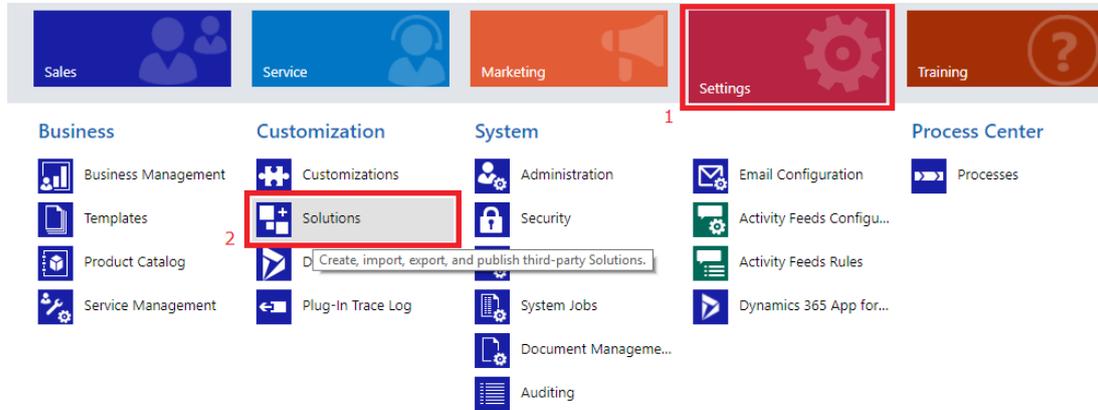
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Import Solution

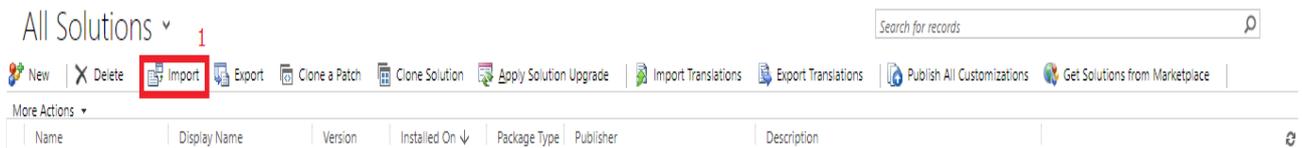
Once you download the ViewCreator package, there will be a CRM solution named as ViewCreator_1_0_managed.zip

Below are the steps to import this solution on CRM instance:-

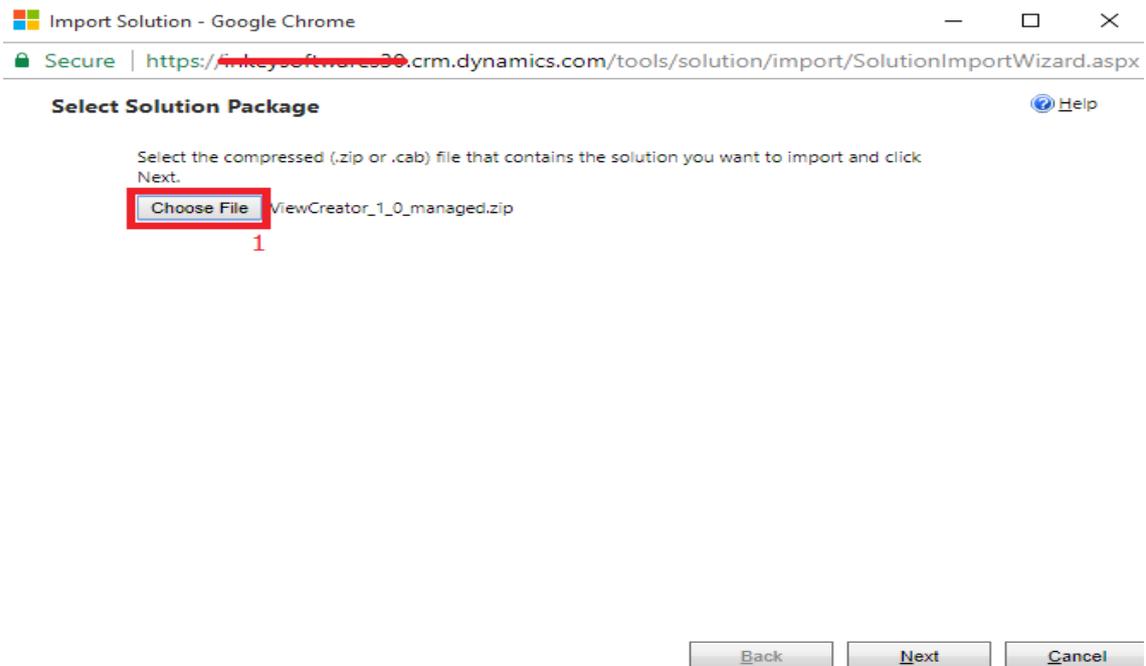
1. Login to your CRM instance.
2. Go to Settings area and select Solutions option.



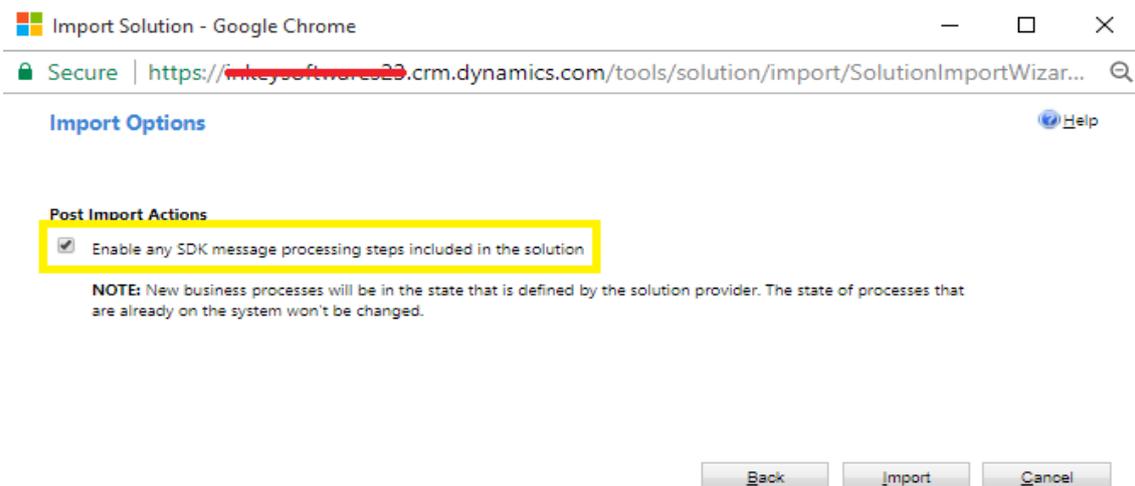
3. Click on Import button



4. Import **ViewCreator_1_0_managed.zip** solution.



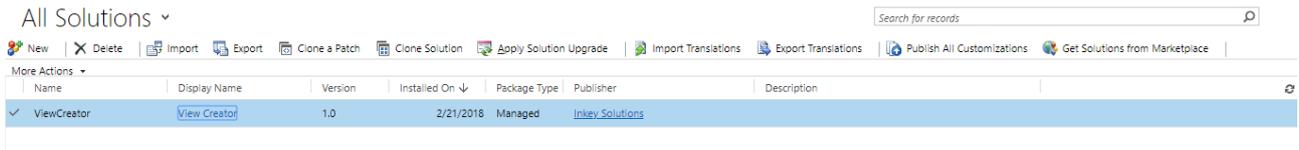
5. Make Sure that you check “Enable any SDK message processing steps included in the solution” while importing this solution.



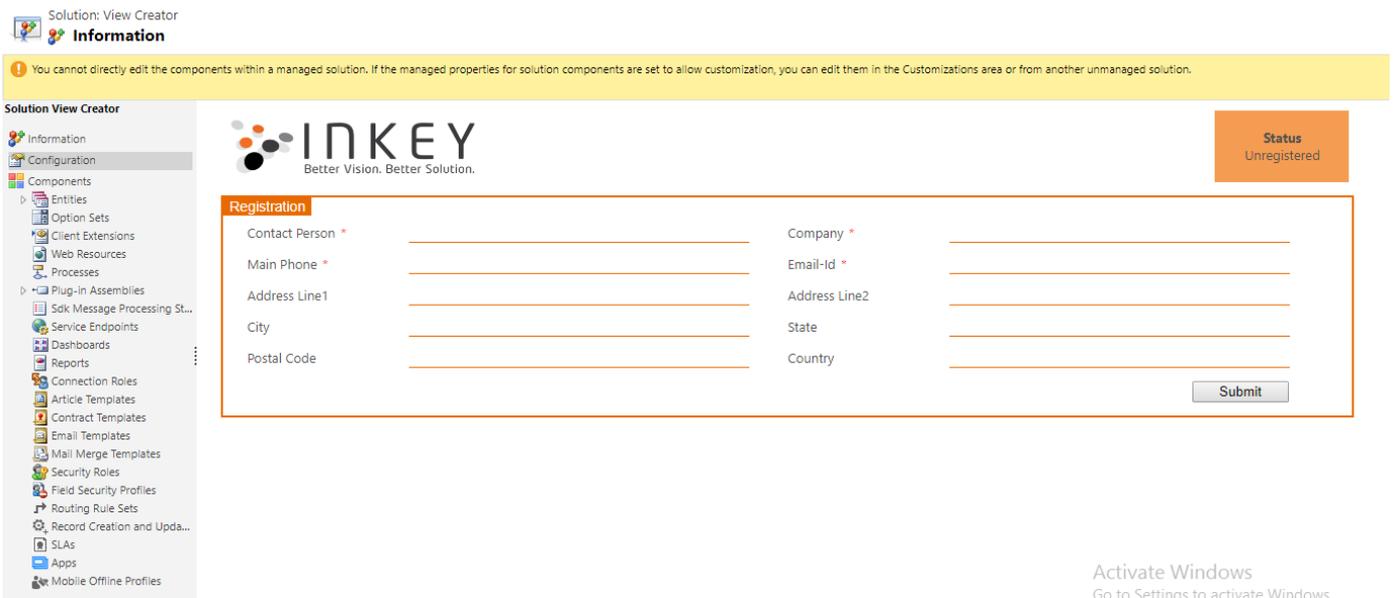
6. Finally, click on Import button. If everything goes well, then, it means that you have deployed the add-on successfully.

Register View Creator Add-on

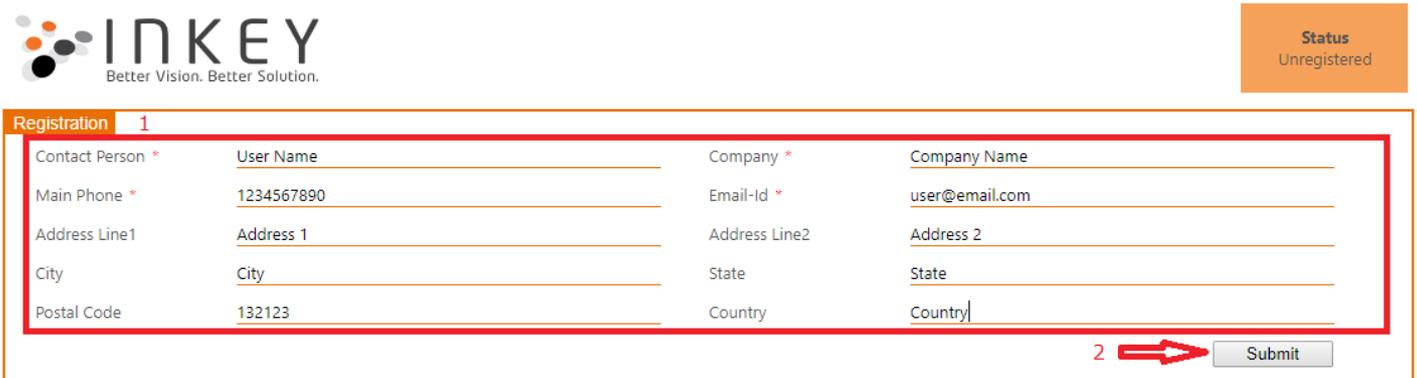
1. Open the View Creator managed solution by navigating Settings -> Solutions -> View Creator.



2. In the solution pop-up window, navigate to the 'Configuration' tab to provide necessary details for Add-on registration.



3. Fill all the required details as specified in the 'Configuration' and click on the 'Submit' button.



4. If everything goes well, the add-on will get registered successfully and you would be able to see the window as below:



Registration

✔ Addon registered successfully.

License Key *	v/PSW7QtZ3dzu7aQPIn087lZuEmJohaCVDEC2RMs2LLdT2xw3ctbjxod5jOL3wjkmK6nV2JKFFjVc3flVsfXg==		
Contact Person *	User Name	Company *	Company Name
Main Phone *	1234567890	Email-Id *	user@email.com
Address Line1	Address1	Address Line2	Address2
City	City	State	State
Postal Code	132123	Country	Country

Security Role Privilege

To configure and access this tool, the user must have the role of **View Creator**.

Security Roles

Business Unit: [Redacted]

 New |
  |
  |
  |
 More Actions ▾

✓	Name ↑	Business Unit
	Activity Feeds	inkeysoftwares32
	CEO-Business Manager	inkeysoftwares32
	CSR Manager	inkeysoftwares32
	Customer Service Representative	inkeysoftwares32
	Delegate	inkeysoftwares32
	Knowledge Manager	inkeysoftwares32
	Marketing Manager	inkeysoftwares32
	Marketing Professional	inkeysoftwares32
	Sales Manager	inkeysoftwares32
	Salesperson	inkeysoftwares32
	Schedule Manager	inkeysoftwares32
	Scheduler	inkeysoftwares32
	System Administrator	inkeysoftwares32
	System Customizer	inkeysoftwares32
	Vice President of Marketing	inkeysoftwares32
	Vice President of Sales	inkeysoftwares32
<input checked="" type="checkbox"/>	View Creator	inkeysoftwares32

And, in order to create a System view, user must have the permission for it.
 In order to provide rights to the user for creating a System view:-

1. Go to System -> Security -> Security Roles
2. Click on the Security role of the user.
3. Go to Customization tab and ensure that the radio button for 'Create', against 'View' is selected.

Security Role: System Customizer

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Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Plug-in Assembly					○	●	○			
Plug-in Trace Log					●	●	●			
Plug-in Type					○	●	○			
Process					●	●	●	●	●	●
Process Configuration					●	●	●			
Process Session					⚠	⚠	⚠	⚠	⚠	⚠
Publisher					●	●	●	●		
Relationship					●	●	●			
Sdk Message					●	●	●			
Sdk Message Processing Step					○	●	○			
Sdk Message Processing Step Image					○	●	○			
Sdk Message Processing Step Secure Configuration					○	●	○			
Service Endpoint					○	●	○			
Solution					●	●	●	●	●	
System Application Metadata					●	●	●			
System Chart					●	●	●			
System Form					●	●	●			
System Job					○	●	○	○	●	○
Theme					●	●	●	●	●	
User Application Metadata					⚠	⚠	⚠	⚠		
View					●	●	●			
Web Resource					○	●	○			

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Uninstalling View Creator

You can uninstall the View Creator add-on as usual, by deleting the solution

Known Issues

1. This add-on does not support,
 - a. **Microsoft dynamics CRM app** for tablet and mobiles for version 8.2 and below.

View Creator App for V9.0(UI interface)

1. We also provide the view creator app which can be accessed in web, mobile or tablet.
2. But the registration for the add-on has to be done from crm web, if the customer want to access the “View Creator” app, by installing the managed solution.
3. Provide permission to the user to access the app, under “Managed Roles” of the app.

Points to keep in mind

1. User must have the privilege to create the view(System or personal view)
2. Register the trial and contact us at sales@inkeysolutions.com to purchase a licensed copy.
3. User can create 2 views for trial.
4. The views created by this tool will not be deleted, when you uninstall the tool.
5. You can uninstall the View Creator add-on as usual, by deleting the solution. But, uninstalling the solution, does not unsubscribe the solution. If you’re discontinuing use of the add-on, you must first unsubscribe the solution.