Dynamics 365 Solution Setup Guide

ProWebForm 1.4.x

Version 1.6

Mai, 2019

Table of Contents

List of Figures

1. Setup ProWebForm

Requires: security role "System Customizer"

This section describes how to setup ProWebForm.

1.1.   Importing the solution

Navigate to: The Sitemap / Settings / Solutions

Click "Solutions" to see all the installed solutions in the selected system.
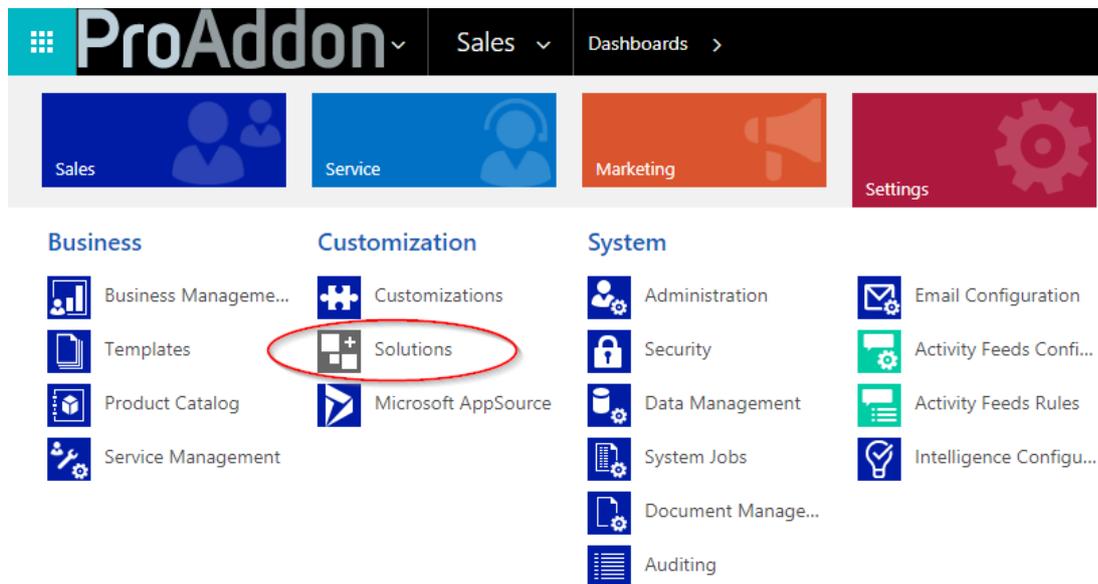
Figure 1: Navigate to solutions

Click "Import" to import the over e-mail received/downloaded CRM solution (ZIP-File). Browse towards the location where the CRM solution has been saved and finish the importing by clicking "next" until the import of the CRM solution starts.
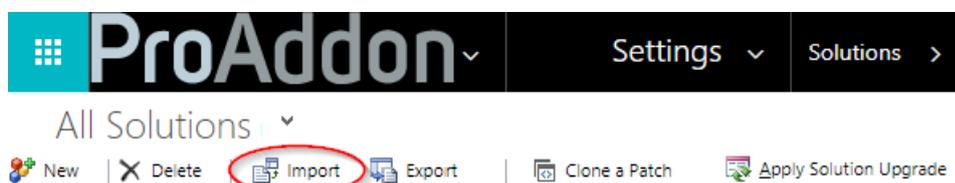
Figure 2: Import the solution

1.2. Activate the solution

Navigate to: The Sitemap / Settings / Solutions

To open the solution, double click on the record named "ProWebForm". Then navigate in the menu at the left to "Configuration".

1.2.1. Request Trial

To Request a trial, press the button "Request trial" and follow the instructions. Fill out all required fields with your company's data. This will open the EULA (End User License Agreement). Please make sure to read through them before continuing the activation process.

Request a trial
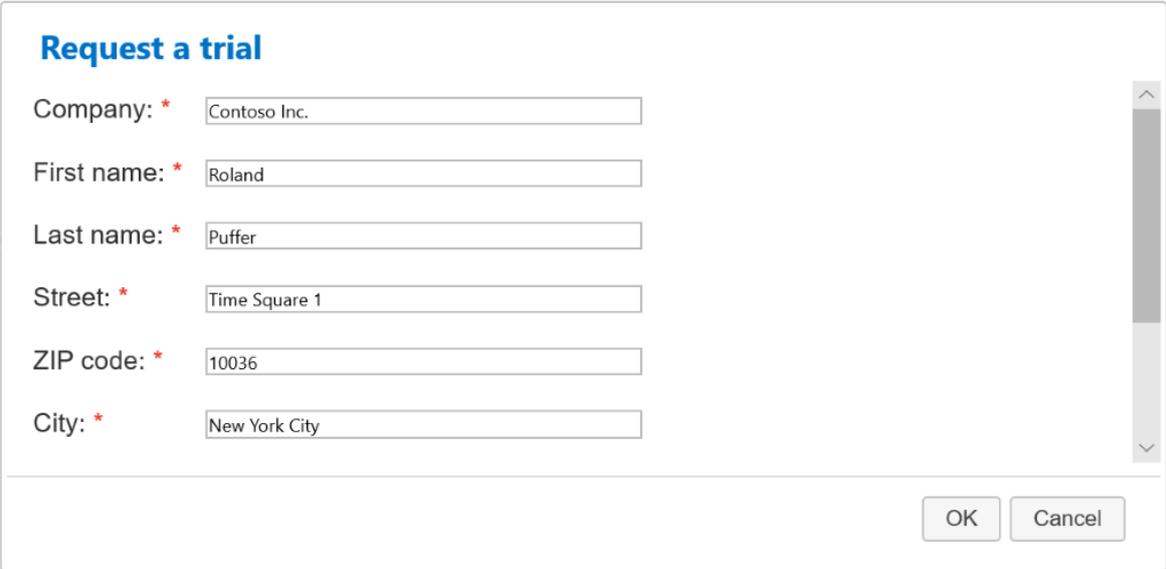
Company: *	Contoso Inc.
First name: *	Roland
Last name: *	Puffer
Street: *	Time Square 1
ZIP code: *	10036
City: *	New York City

OK   Cancel

Figure 3 Request information for the trial

Please check "I accept the terms in the License Agreement and authorize the actions listed above." and click "OK".

Figure 4 Accept EULA

You will receive a trial license and the license information will be shown on the configuration page.

1.2.2.   Converting a trial to an unlimited version

If you want to continue using ProMailChimp after the end of the trial period, please buy the license by clicking on the "Buy"-button.

Enter your credit card details and click on "Pay" to subscribe.
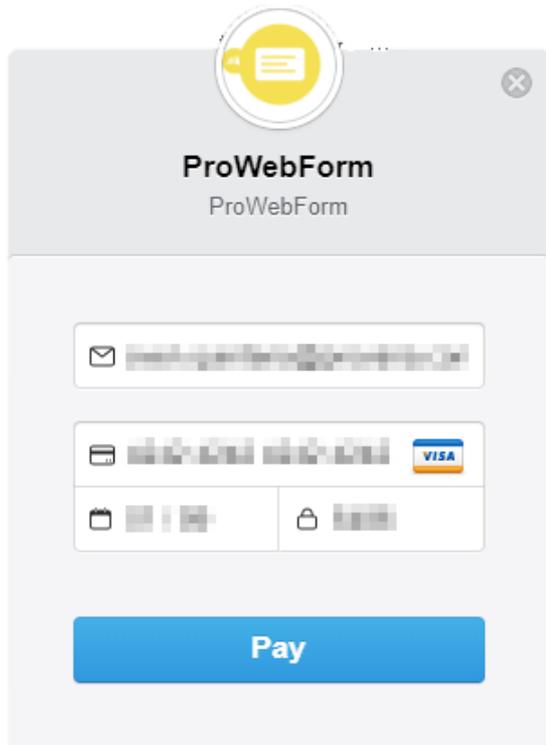
Figure 5 Payment dialog

1.2.3. Activate with a serial key

If you already have an activation key and you do not need a trial, you can activate the solution by entering your personal activation key and your company name and clicking on "Activate".

When credit card is the chosen payment type, a payment dialog will be shown. Fill in the credit card details and click on "PAY" to continue the process.
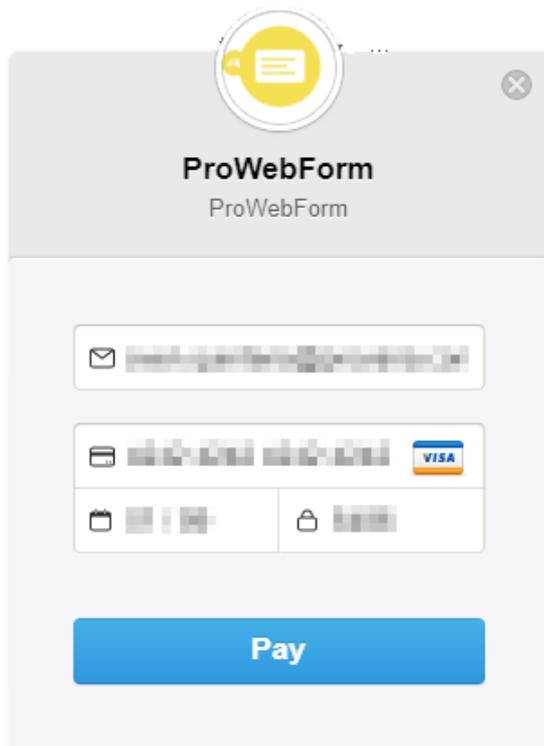
Figure 6 Payment dialog

Note: This must only be filled in once, afterwards the billing will happen automatically.

If the activation process has been successful, the information seen in Figure 7 License information will be visible in the top right corner of the configuration page.

Figure 7 License information

1.2.4. Cancel a subscription

If you want to cancel a paid subscription of ProMailChimp, just click the "Cancel subscription" button.

1.2.5. Renew payment details

If you want to update your payment details for your active ProMailChimp subscription, please click the "Renew credit card" button.

Enter your credit card details and click on "Pay" to update your payment details.

1.3. Configure the solution

Navigate to: The Sitemap / Settings / Solutions

Double clicking on the record with name "ProWebForm" will open the solution, navigate in the menu at the left to "Configuration".

For the connection between the WebApp and the CRM system, the solution allows to choose between 2 options: "Authentication with a CRM user" or "Server 2 Server authentication". The first option will be explained here, more information on the second option can be found in point 1.4.

To use a CRM user as authentication type, fill in the "Username" and "Password" of an existing CRM user and fill in the "Organization-URL" for the used organization. As seen in *Figure 8: Configure the solution – CRM Account, Localizations and license,* marked with "1".

The connection between WebApp and organization, can be tested by clicking on "Test connection". A successful connection will result in "Successful".

Fill in the "Submit notification sender", as seen in *Figure 8: Configure the solution – CRM Account, Localizations and license*, marked with "2". Clicking this input will open a dialog to select an existing user account from CRM.

Clicking on the "Load localizations" button will load the missing translations for labels, buttons, etc. As seen in *Figure 8: Configure the solution – CRM Account, Localizations and license*, marked with "3".
Note: Before you can load the localizations, you must enter valid authentication credentials. The localizations are loaded in the background, which may take some time.

Fill in the "Activation Key" and the "Company, both provided with the license by ProAddon. You can find the corresponding fields found in the "License" section, as seen in *Figure 8: Configure the solution – CRM Account, Localizations and license*, marked with "4".

Figure 8: Configure the solution – CRM Account, Localizations and license

Clicking "Save" will save all made changes into the configurations.

1.4.   Server 2 Server Authentication

Note: this is an optional option.

To connect the WebApp with the CRM, you can also use Server 2 Server Authentication (S2S). If configured, the WebApp does not require the credentials of an existing CRM user with the required rights. Instead it will connect with an application user configured on the CRM.

1.4.1.   Configure Server 2 Server Authentication

Select the "Server to Server authentication" option as *Authentication type*. The *Username* and *Password* fields will disappear since the user credentials are not needed for this connection. Instead the authentication will work with a public and private key to connect.
A new button will be visible "Accept S2S Permissions", permissions need to be granted to the application since this lay in another tenant (Provaria.com).

Figure 9: Configure the solution - Server 2 Server authentication

By clicking this button, a Microsoft Authentication screen will pop-up. Enter the credentials from a global Azure Active Directory Administrator, who owns sufficient rights to assign rights to applications.

When logged in as a user with sufficient rights, the screen seen in *Figure 10: Configure the solution - Server 2 Server authentication, permissions* will pop up.

Figure 10: Configure the solution - Server 2 Server authentication, permissions

After accepting, the application is registered in the Azure Active Directory and permissions have been granted.

To test the connection between the entered credentials and the organization-URL simply click on "Test connection". A successful connection will result in "Successful".

Note: Testing the connection is only possible after point 1.4.2 has been completed.

1.4.2. Setup application user

The next step is to create an application user for S2S.
By clicking the "Create S2S User" button, an application user will be created in your system.
Note: It can take some time until the permissions from point 1.4.1 are set.

To test the connection between the entered credentials and the organization-URL simply click on "Test connection". A successful connection will result in "Successful".

1.5.   Configure Captcha

Note: This is an optional option.

When Configured the end-user will be asked to click on "I'm not a robot" or click the requested images. Depending on the used Captcha.

Fill in the fields "Captcha Site key" and "Captcha Secret Key" with the reCAPTCHA API key retrieved from www.google.com/recaptcha.

Figure 11: Configure captcha

1.6.   Assign Security Role to Users

Navigate to: Settings / Security / Users

ProWebForm has been delivered together with a new Security Role. This Security Role contains all the needed privileges for the usage of *ProWebForm*.

Note: when this role has not been assigned to the User, this user <u>cannot</u> use *ProWebForm*.

Select the user you want to give the privileges to and click on "Manage Roles". As the dialog has opened, select the "ProWebForm User" security role from the list. As displayed in *Figure 12: Assign ProWebForm Security Role*.
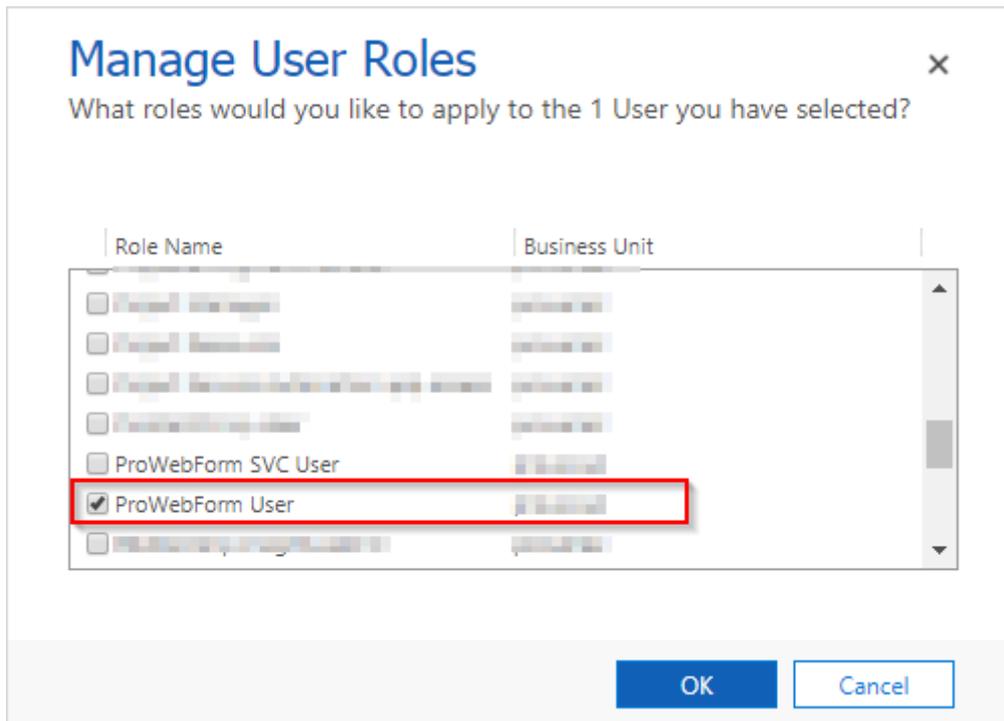
Figure 12: Assign ProWebForm Security Role

Note: When assigning the security role to an application user, for this user only "ProWebForm SVC User" is needed and not "ProWebForm User".

2. WordPress plugin setup

This section describes how to install and setup the ProWebForm WordPress plugin.

2.1. Installation

To install the provided WordPress plugin, navigate to the admin panel of your word press page.
Here select "Plugins/Add New"
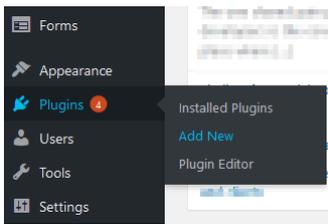
Figure 13 WP: Add New Plugin selection

At the "Add Plugins" page click on the "Upload Plugin" Button.
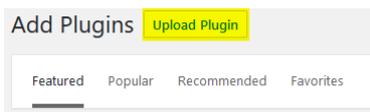
Figure 14 WP: Upload Plugin button

A new section that enables you to select the provided ProWebform-Wordpress.zip file, appears.
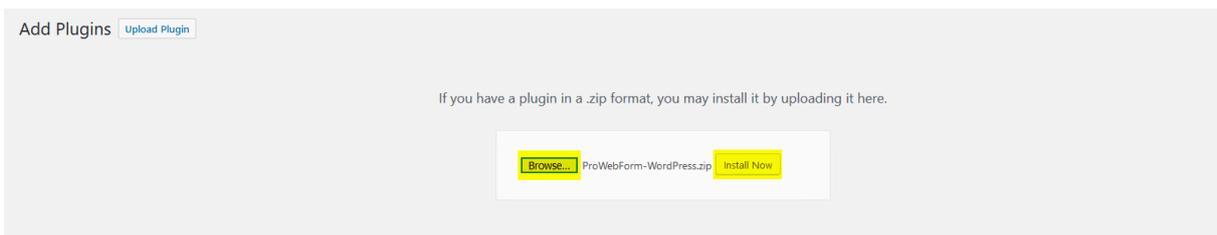
Figure 15 WP: Select and install the plugin

After selecting the zip file, click on the "Install Now" button.
Afterwards a summary of the installation of the plugin appears.
Finally activate the plugin by clicking on the "Activate Plugin" button.
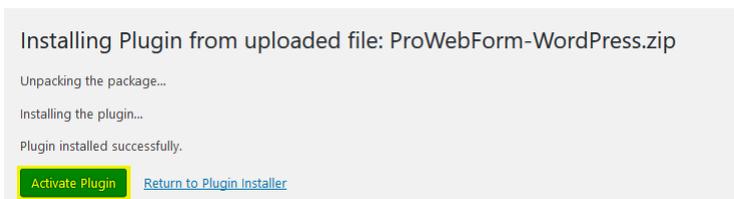
Figure 16 WP: Summary and activate plugin page

If the activation was successful, a notification appears.

Figure 17 WP: Success notification

2.2. Setup

To finish the setup of the plugin navigate to "Settings/ProWebForm".
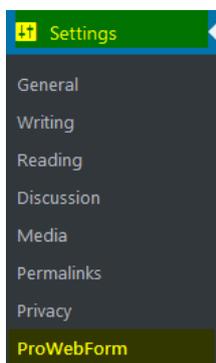
Figure 18 WP: ProWebForm settings selection

At the settings page, please enter the "Service URL".

If no other URL has been provided, please enter this URL:
https://app4.proaddon.com/ProWebForm.aspx?fid=.

Figure 19 WP: Settings page

After saving the settings, a new ProWebForm can be added.

Please view the User Guide to see how to configure the plugin.

3.　Frequent Problems

In this topic we will discuss the most frequent problems and provide a solution to these problems.

3.1.　Configure the solution

3.1.1.　Test Connection fails continuously

If the *Authentication type* is configured as "Server 2 Server", make sure an application user has been defined as described in 1.4.2.

If the *Authentication type* is configured as "CRM User" then make sure the entered credentials are valid credentials for a CRM user and the organization-URL is valid for your CRM.

3.2.　Server 2 Server authentication

3.2.1.　Missing Application User form

This is a default form of CRM, however it is also disabled by default by Microsoft. To enable the form, go to *Settings / Customizations / Customize the system.* After the new screen has loaded go to the following location *Entities / User / Forms*.
Then change the filter from "Active Forms" into "All Forms" to make the *Application User* form visible. Activate this form.
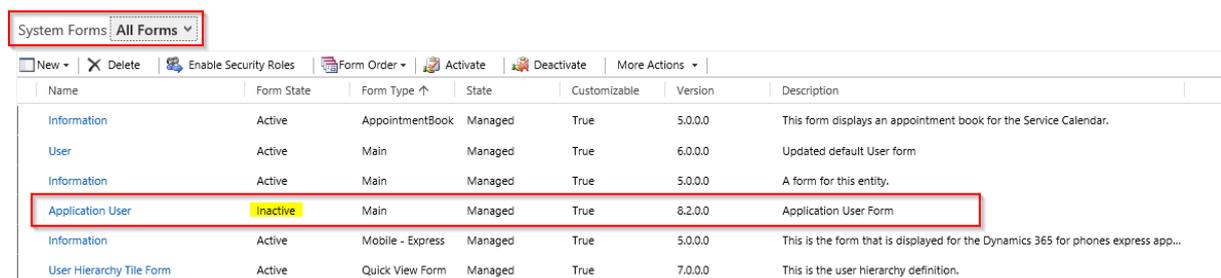
Name	Form State	Form Type ↑	State	Customizable	Version	Description
Information	Active	AppointmentBook	Managed	True	5.0.0.0	This form displays an appointment book for the Service Calendar.
User	Active	Main	Managed	True	6.0.0.0	Updated default User form
Information	Active	Main	Managed	True	5.0.0.0	A form for this entity.
Application User	Inactive	Main	Managed	True	8.2.0.0	Application User Form
Information	Active	Mobile - Express	Managed	True	5.0.0.0	This is the form that is displayed for the Dynamics 365 for phones express app...
User Hierarchy Tile Form	Active	Quick View Form	Managed	True	7.0.0.0	This is the user hierarchy definition.

Figure 20: Frequent Problems - S2S, inactive Application User form

4. Support, Feedback

We are happy to hear from you! If you have any questions, don't hesitate to contact us: support@proaddon.com