INSIDEVIEW INSIGHTS

Installation Guide

Product Version 4.3

FEBRUARY, 2019

Table of Contents

Chapter 1: Introduction to InsideView Insights

InsideView Insights for Dynamics 365 helps you find more leads, win more deals, grow your business and retain your accounts. It infuses Dynamics 365 with essential company and contact data, business insights and selling triggers; and connects directly to your largest referral networks and social media feeds. The Information in Insights is updated continuously from more than 40,000 financial and social media sources and validated with InsideView's MTV data science technology to ensure that you have the most accurate and complete lead information.

InsideView Insights 4.3 is supported only in Unified Client Interface (UCI) view of Microsoft Dynamics 365 version 9.0.

Note: Throughout this document, you will find the word "Insights." Most of the time it refers to the solution, InsideView Insights. In some instances, "Insights" is used to refer to specific features, such as Tab names and user interface (UI) elements. The context will make it clear.

InsideView Insights provides the following key elements that can help you win more deals:

- **Overview** which include current company news, key business events, and social buzz, helping you to prepare for sales calls with articles from mainstream media, industry-specific publications, and regulatory filings.
- **Relationship Assistant** functionality of Microsoft Dynamics CRM is integrated with Insights to push updates about mergers & acquisitions (M&A) via Relationship Assistant action cards. You can view news about M&A activity related to accounts that you own in your CRM.
- **Insights Dashboard Widget** allows you to customize your Microsoft Dynamics 365 dashboard to view and launch Insights Watchlist Activity Stream function directly from the dashboard. You can use the Insights Dashboard widget to view the latest news for the companies and people you are tracking right from the Dynamics CRM home screen for business opportunities.
- **Research** provides comprehensive and up-to-the-minute information about companies, so you can identify industry information, similar accounts (competitors) and financial data before you approach them for business conversations.
- **Find Contacts** enables you to sell more effectively by helping you find the right contact, identify your mutual connections, and learn more about them so you can quickly and easily establish rapport and build credibility.
- **Start a Conversation** lets you view contact's demographic information, which includes email address, phone number as well as employment details. It also helps you to find out how you are connected with contact's personal connections and previous co-workers so that you can start a business conversation with right contact information.
- **Discovery Center** allows you to research about a company and contact even if that company and contact is not in Dynamics 365. You can view the complete data about contacts and companies. You can also add a company and contact to Dynamics 365 or to a Watchlist from the search results. The Discovery Center also provides an intuitive

"Watchlist" stream that tracks and displays various watchlists based your watchlist agent settings.

- **Family Tree** lets you discover subsidiaries, acquisitions, international divisions, and a host of other corporate relationships.
- **Tech Profiler** empowers you to find new prospects, plan account strategies and keep tabs on key target accounts based on technologies they use that are relevant for your sales and marketing teams. Tech Profiler is an add-on to InsideView Insights. In Insights solution, it appears only when you purchase Tech Profiler add-on for your Insights account separately as an additional tab on the Company Insights page.
- **List Build** lets you identify companies or executives that match a particular set of search criteria. You can view the company and executive's firmographic data, save a search criterion, modify a saved search, and export the list of companies or people in an Excel spreadsheet.
- **Multiple Watchlists** allows you to create multiple Watchlists in the User Settings page. This feature makes your job easy by letting you track companies/contacts in various Watchlists. It gives you the flexibility to keep a watch while using other functions.
- **Add company/contact** lets you add a company/contact that does not exist in the Insights database. If you don't find a company/contact in the search results, you can just add basic company/contact details, which will be verified and included in the Insights database.
- **Custom Agents** allow organizations to extend and personalize the monitoring capabilities of Insights beyond the standard agents provided with the Insights solution. Organizations can create Custom Agents to find media coverage, business events, and discussions using a set of conditions specific to their sales efforts.
- **Team Agents** are available only to users who have purchased Insights Enterprise license directly from InsideView. Team Agents are agents created for you, according to your requirements, by your InsideView customer success manager (CSM), which you can share across your team.

Note: InsideView Insights is included at no additional cost with following subscriptions in the U.S. and Canada: Dynamics 365 Professional and Enterprise, Dynamics 365 Plan 1 and Plan 2, Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Sales – Customer Engagement Plan, Dynamics 365 for Sales – Microsoft Relationship Sales, and Dynamics 365 for Project Service Automation.

What's New in this Release?

The following new features are introduced in this release of InsideView Insights:

- **About Insights** lets you view new features and functionality within Microsoft Dynamics 365 integrated view.

- **Relationship Assistant Integration**: Insights uses Relationship Assistant's artificial intelligence (AI) to send tailored, just-in-time and actionable alerts to CRM users so that they can prioritize and engage with most relevant information.
- **Contact Search in Discovery Center**: lets you search contacts within your CRM for business conversations with complete details.
- **Insights Dashboard** allows you to view your Watchlist Activity Stream and Agents directly from Microsoft Dynamics Home page.
- **Add company/contact** lets you add a company/contact that does not exist in the Insights database.
- **List Build:** identify companies or executives that match a particular set of search criteria.
- **Multiple Watchlists**: Create various Watchlists for companies that you wish to track.
- **Custom Agents:** Find media coverage, business events and discussions using a set of conditions specific to your business.
- **Team Agents**: Available only to users who have purchased Insights Enterprise license directly from InsideView.
- **View Contact/Company**: View an executive as a lead or contact. Allows to view a company in the CRM using the navigation link in the Discovery Center.
- **Expanded CRM Summary View**: Allows you to keep Insights Summary Panel always in expanded view by overriding the settings defined by your administrator for account, contact, lead and opportunity entities.

Chapter 2: Installation and Configuration

Setting Up InsideView Insights

Before you install InsideView Insights, please check the following system and software requirements for your Dynamics 365 version.

Supported Version of Microsoft Dynamics 365 and On-premises

This table shows the supported Microsoft Dynamics 365 and On-premises licenses for InsideView Insights.

Note: If you are using Microsoft Dynamics 365 **version earlier than 9.0**, you should not upgrade or attempt to install InsideView Insights 4.3 solution package.

Dynamics CRM and 365 Versions	Insights 4.x	Insights 3.4	Insight 3.2
Dynamics 365 Plan 1 and 2	✓	✓	✓
Dynamics 365 for Sales	✓	✓	✓
Dynamics 365 for Customer Service	✓	✓	✓
Dynamics 365 for Field Service	✓	✓	✓
Dynamics for Project Service Automation	✓	✓	✓
Microsoft Dynamics CRM Online Enterprise and Professional 2016	✓	✓	✓
Microsoft Dynamics CRM On-premises 2016	✓	✗	✓
Microsoft Dynamics CRM Online 2015 Update 1	✓	✓	✓
Microsoft Dynamics CRM Online 2015 Update	✓	✓	✓
Microsoft Dynamics CRM On-premises 2015	✓	✗	✓
Microsoft Dynamics CRM Online 2013	✗	✓	✓
Microsoft Dynamics CRM On-premises 2013	✗	✗	✓
Microsoft Dynamics CRM Online 2011	✗	✓	✓
Microsoft Dynamics CRM On-premises 2011	✗	✗	✓

Note: If you are using Microsoft Dynamics CRM version prior to 7.0, which is CRM 2015 version, you should not upgrade or attempt to install InsideView Insights solution package.

Supported Version of Microsoft Dynamics CRM via Outlook Client

This table shows the supported Microsoft Dynamics CRM versions via Outlook 2016 and 2013 clients for InsideView Insights:

Product Name	Version	Outlook Versions
Microsoft Dynamics CRM	2016	Microsoft Office 2016
Microsoft Dynamics CRM	2015 Update 1	Microsoft Office 2016, 2015, and 2013
Microsoft Dynamics CRM	2015 Update	Microsoft Office 2013

System and Software Requirements

The following table show InsideView Insights 4.3 system and software requirements for each supported version of Dynamics 365 environment:

Caution: Internet Explorer 8 or Internet Explorer 9 browsers are not supported in Dynamics 365 environment. We recommend you to use Internet Explorer version 10 or newer.

Microsoft Dynamics 365 version 9.x

Operating System	Supported Browsers	Insights 4.3	Supported Microsoft Office Versions
Windows 10	Microsoft Edge Internet Explorer 11 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Supported	Microsoft Office 2016 Microsoft Office 2013
Windows 8.1	Internet Explorer 11 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Supported	Microsoft Office 2016 Microsoft Office 2013
Windows 8	Internet Explorer 10 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Supported	Microsoft Office 2016 Microsoft Office 2013
Windows 7	Internet Explorer 10 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Supported	Microsoft Office 2016 Microsoft Office 2013
Windows Vista / XP	Unsupported	Unsupported	
MAC OS X 10.8 or Higher	Apple Safari Mozilla Firefox (latest publicly released version)	Supported	

	Google Chrome (latest publicly released version)		

Microsoft Dynamics CRM Online - below 9.0 versions

Operating System	**Supported Browsers**	**Insights 4.3**	**Supported Microsoft Office Versions**
Windows 10	Microsoft Edge Internet Explorer 11 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Unsupported	Microsoft Office 2016
Windows 8.1	Internet Explorer 11 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Unsupported	Microsoft Office 2016 Microsoft Office 2013 Microsoft Office 2010
Windows 8	Internet Explorer 10 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Unsupported	Microsoft Office 2016 Microsoft Office 2013 Microsoft Office 2010
Windows 7	Internet Explorer 10 Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Unsupported	Microsoft Office 2016 Microsoft Office 2013 Microsoft Office 2010

Windows Vista / XP	Unsupported	Unsupported	
MAC OS X 10.8 or Higher	Apple Safari Mozilla Firefox (latest publicly released version) Google Chrome (latest publicly released version)	Supported	

Required User Credentials

To install InsideView Insights, you will need to be set up as a global administrator in Office 365, and as a system administrator in Dynamics 365.

Important Notes:

1. If your organization restricts network access by third party applications, please ask your IT administrator to add the following IP address ranges to allow updates from InsideView Insights application:

    - 52.4.63.192 to 52.4.63.223
    - 64.56.203.0 to 64.56.203.255

2. InsideView Insights mashup may not load, and CRM 13 error is displayed if you do not add the following websites to your trusted sites list in your browser settings:

    - *.dynamics.com
    - login.windows.net
    - login.microsoftonline.com

    In **Internet Explorer** web browser, you must add all of the above websites into your Trusted Sites only when Protected Mode is ON in the Internet Zone. By default it is ON.

    To add the website, open the Internet Explorer and go to **Settings > Internet Options > Security > Trusted Sites** and click **Sites**.

Chapter 3: Installing InsideView Insights

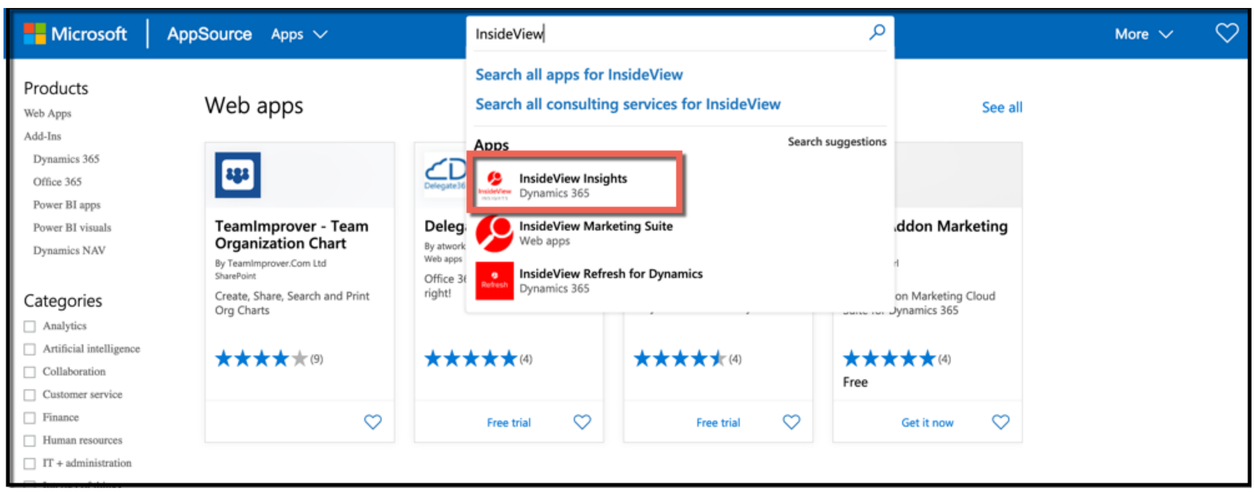
Select and install the latest version of InsideView Insights installation package. Here's how:

Installing InsideView Insights via AppSource Marketplace

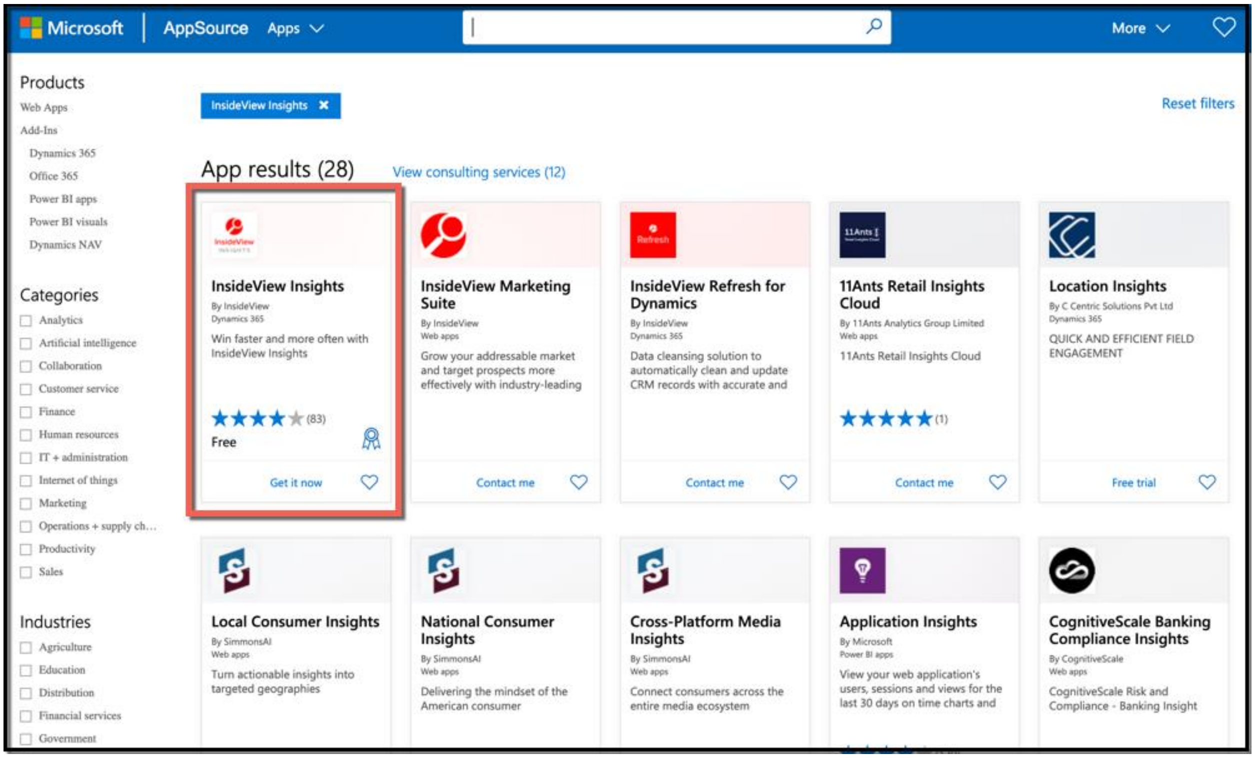
InsideView Insights is now available via Microsoft's AppSource Marketplace and can be installed directly from the marketplace.

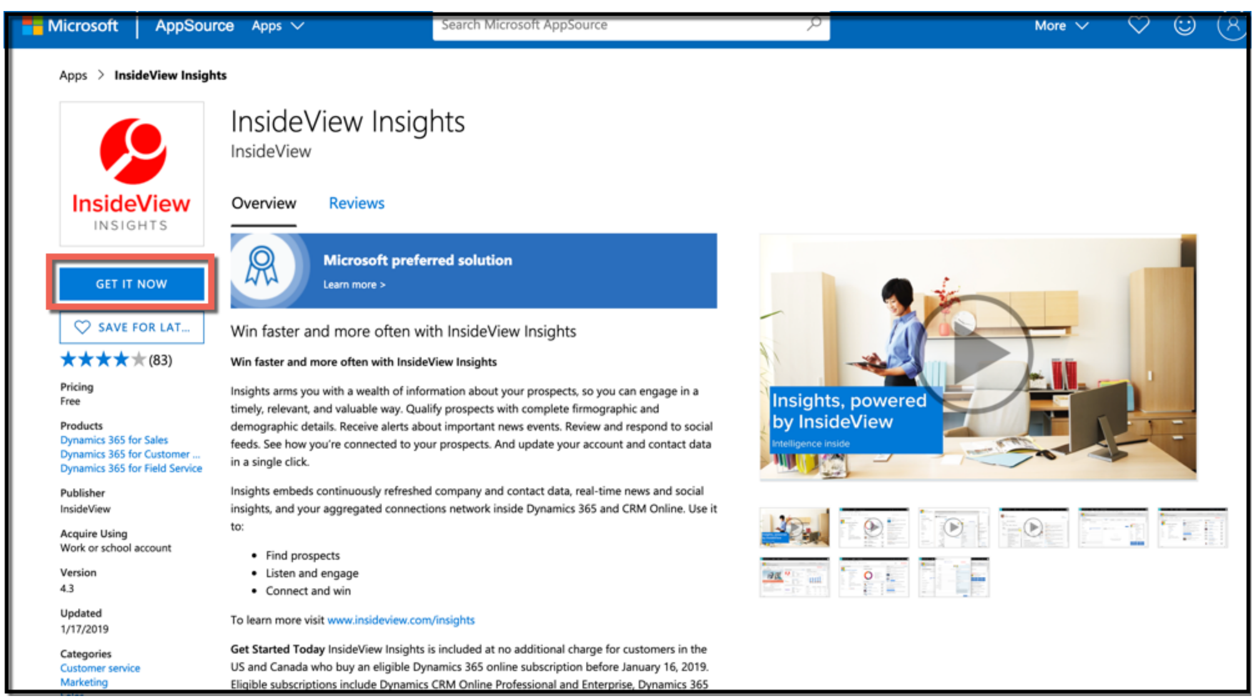
1. Go to the Microsoft's AppSource Market Place: https://appsource.microsoft.com/en-us/marketplace.

2. Enter the product name as **InsideView Insights** in the **Search** field and click the **Search** button.

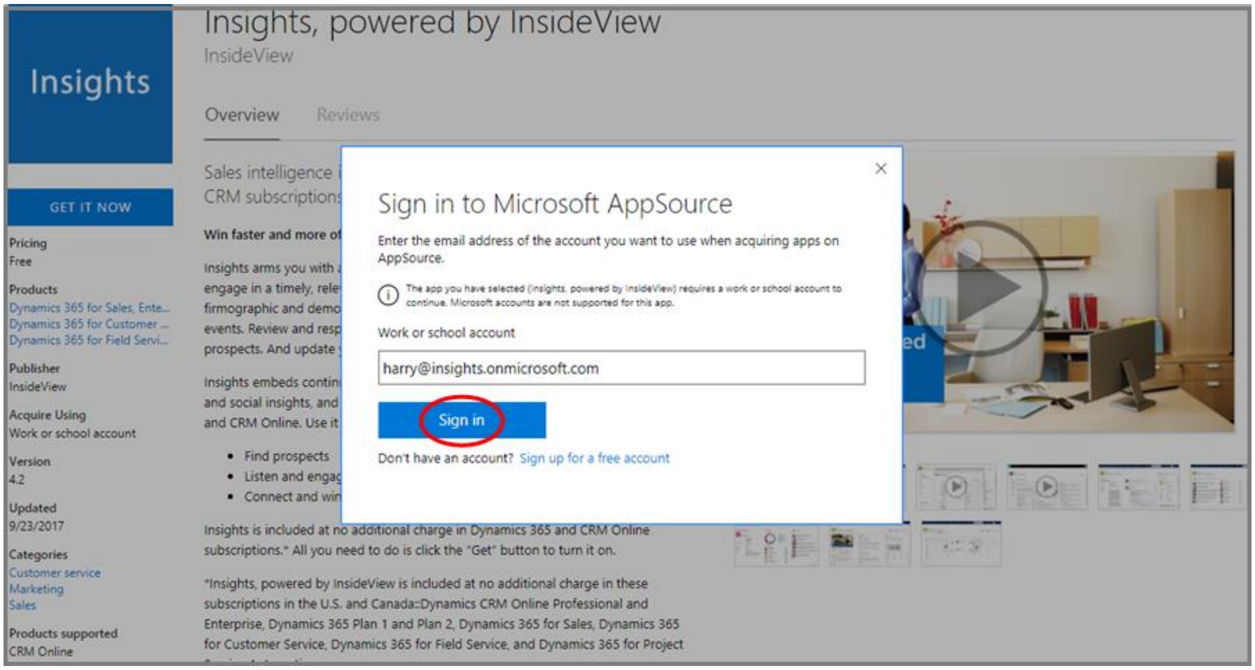


3. In the Search Results page, select the InsideView Insights application and click the **GET IT NOW** button.

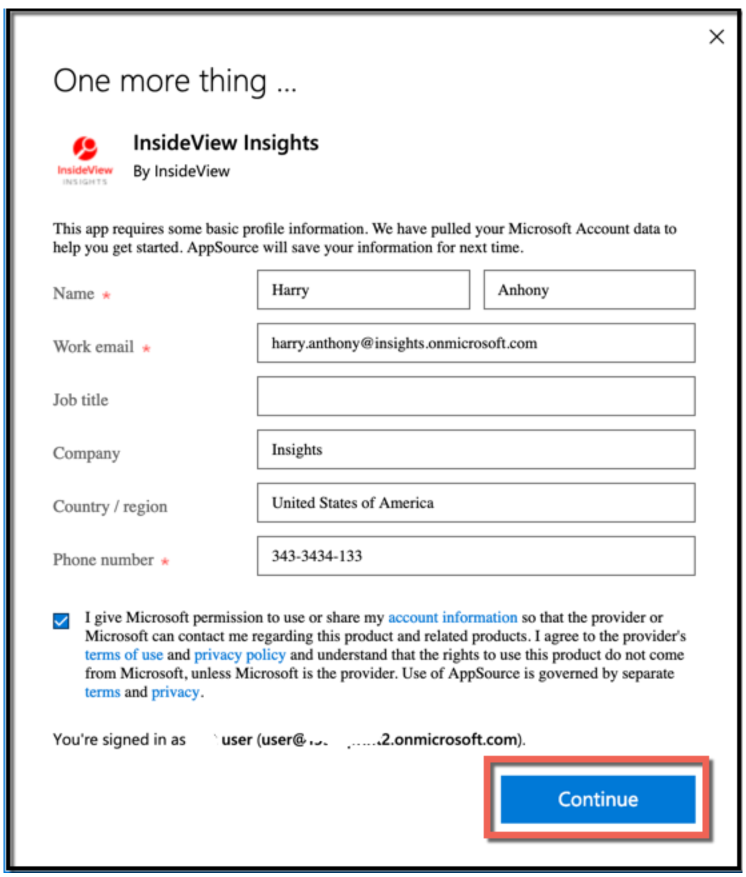




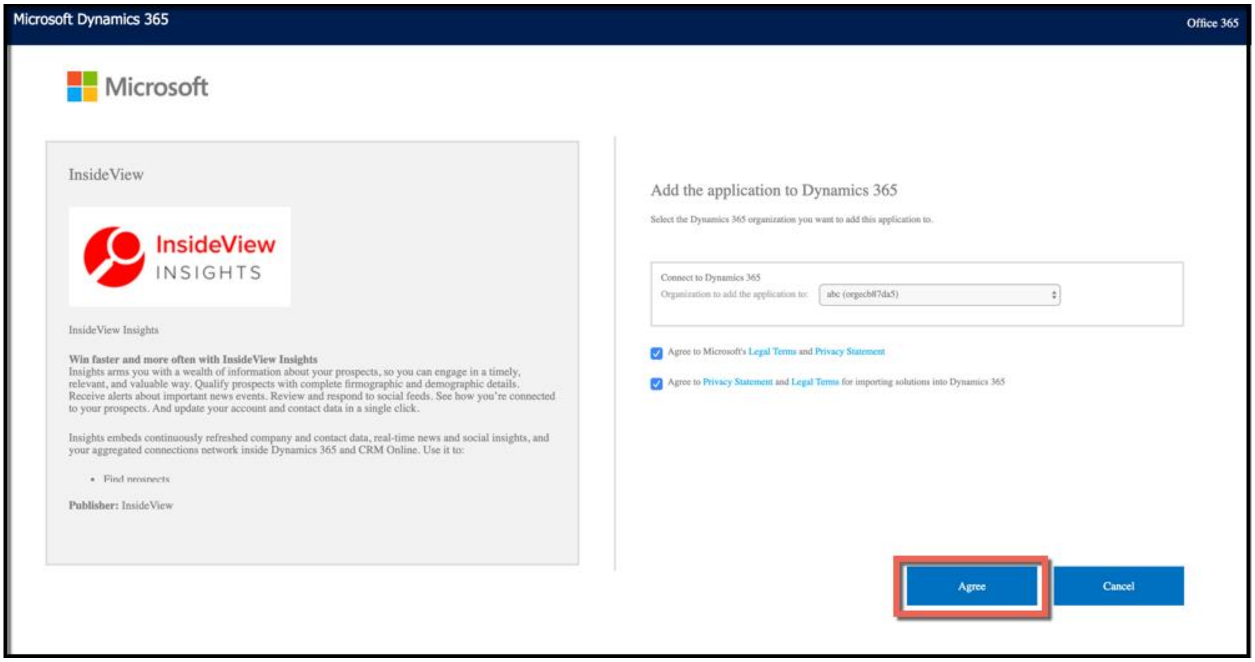
4. Enter your login credentials and click **Sign in** to open Microsoft AppSource.



5. Enter the user details and click **Continue** to open the **Terms of Use** page.

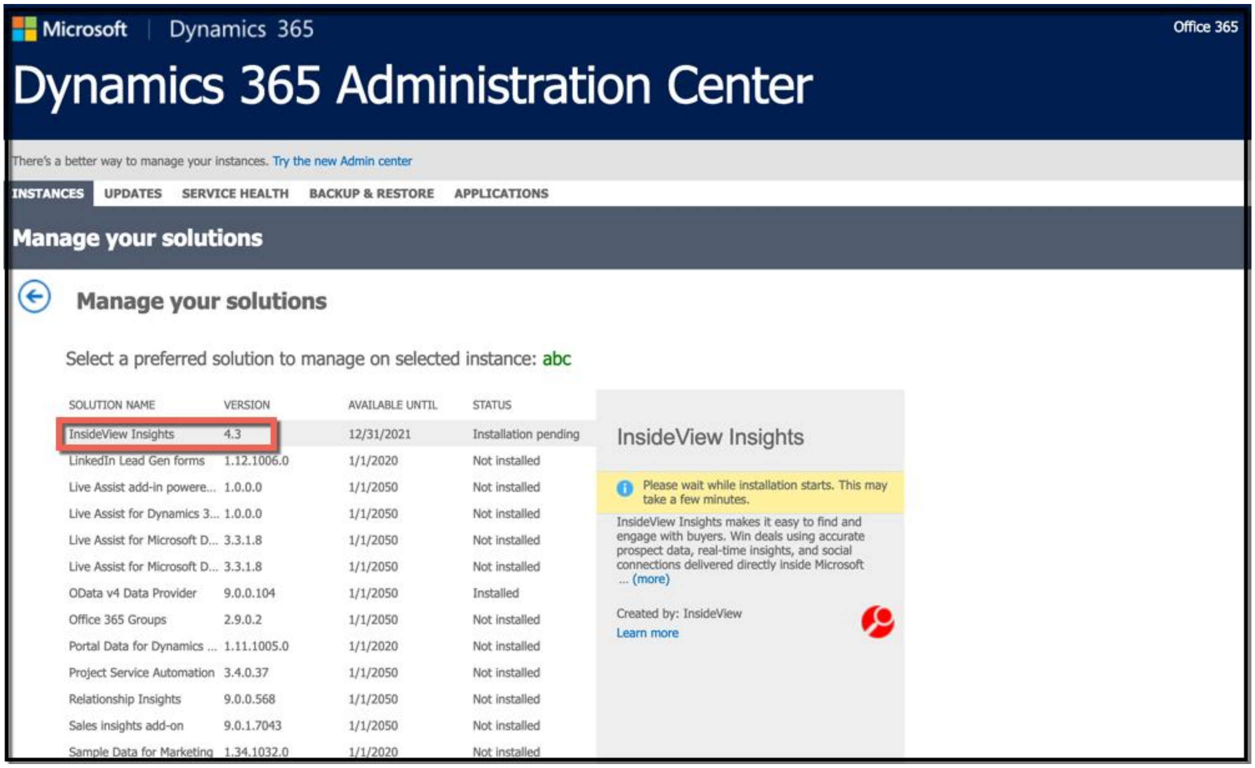


6. On the **Terms of Use** page, select the **Agree to Microsoft's Legal Terms and Privacy Statement** and **Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365** check boxes.

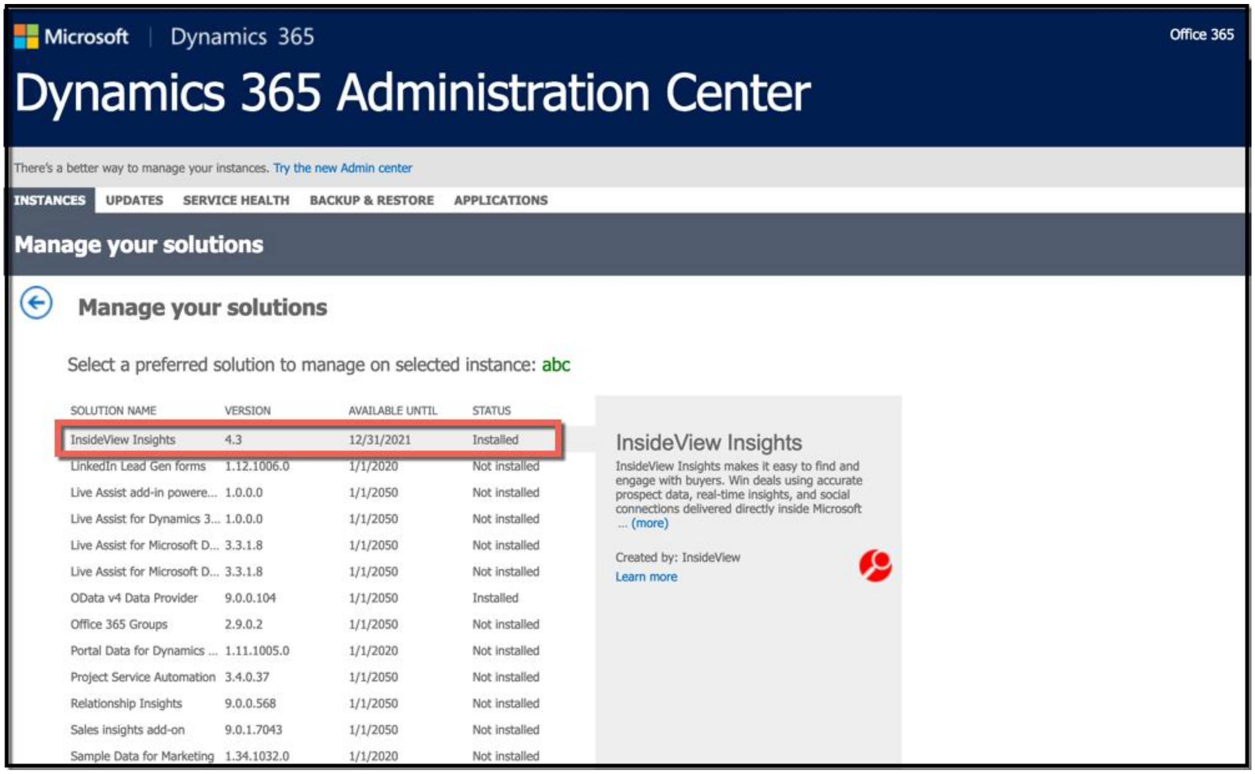


7. Click **Agree.**

8. Verify the status for the InsideView Insights solution is now **Installation pending**, which indicates the installation has started.



9. Once the installation is complete, verify the status for the InsideView Insights solution changes to **Installed**, indicating that installation was successful.



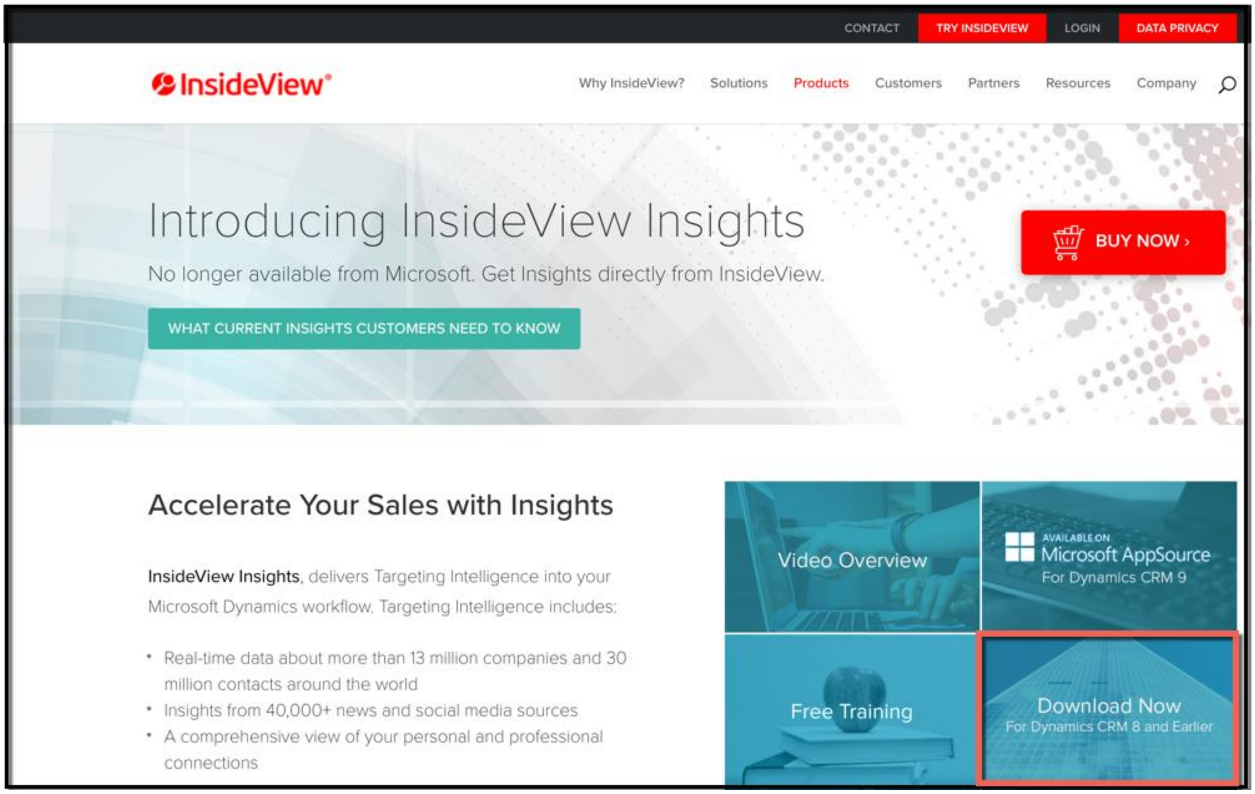
10. Make InsideView Insights available to everyone in your organization. For more information, refer to the next section, [Making InsideView Insights Available through the Dynamics CRM Online Web Client](#).

Installing InsideView Insights in Microsoft Dynamics CRM On-Premises

You can install Insights Enterprise 4.3 in Microsoft Dynamics CRM 2015 version and above. In order to install Insights Enterprise 4.3 in older versions of Microsoft Dynamics CRM, such as 2011 and 2013, it is recommended to upgrade your CRM to a newer version.

Before you begin your installation, please refer to the Admin Notes and ensure that pop-up blockers are turned off in your web browser.

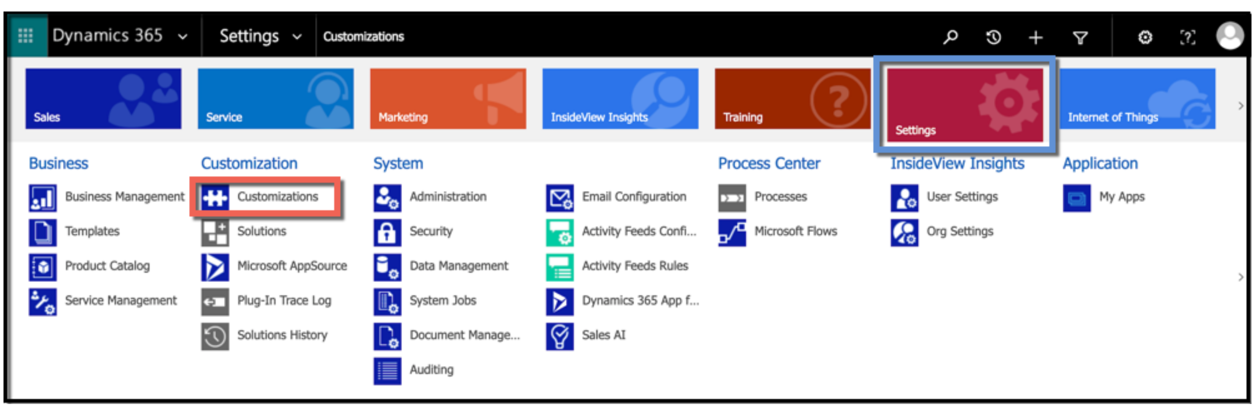
1. Download the Insights 4.3 package from the Insights Enterprise: https://www.insideview.com/insights/ web page.



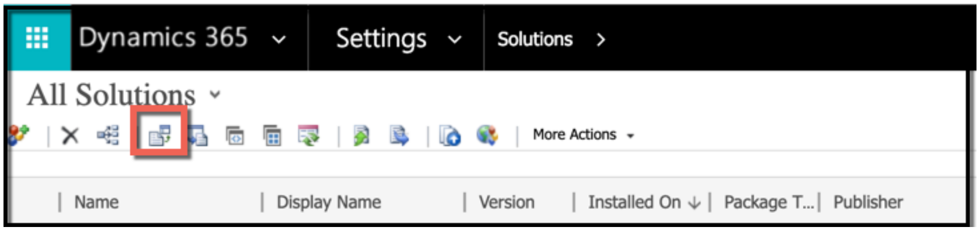
2. Click the **Download Now** link as illustrated above.

3. Log into your Microsoft Dynamics CRM as an Administrator with the "**System Customizer**" role.

4. Navigate to **Settings > Solutions** or **Settings > Customizations > Solutions.**



5. Click the **Import Solution** icon or link and select the downloaded zip file from your local computer.



6. Follow the instructions in the Installation prompts to complete your installation.

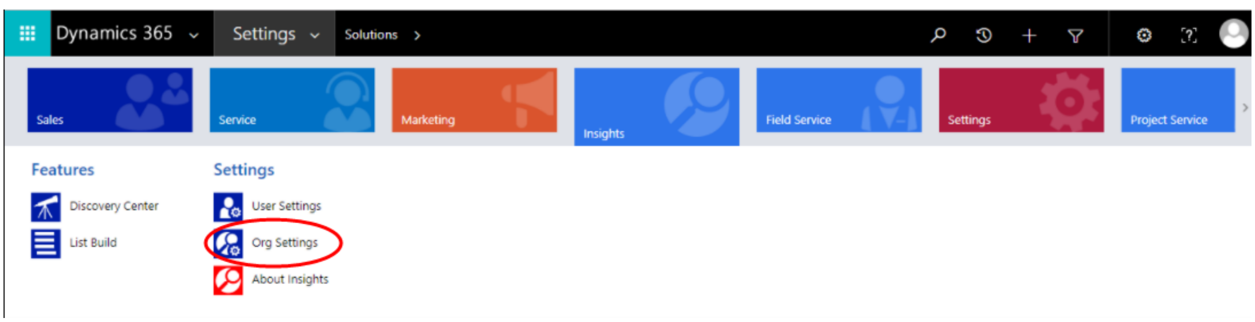
Making InsideView Insights Available through the Dynamics Web Client

Anyone who is set up as an Office 365 global administrator can make InsideView Insights available to all users in the organization. We recommend administrators should grant access via this option which provides the most seamless and managed experience.

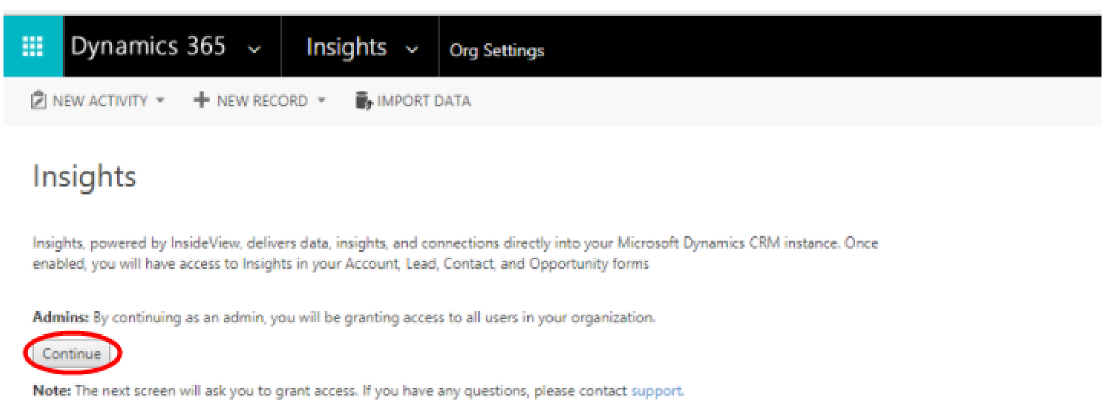
Instructions for CRM Administrators

Be sure you are signed in as an administrator, then follow these steps:

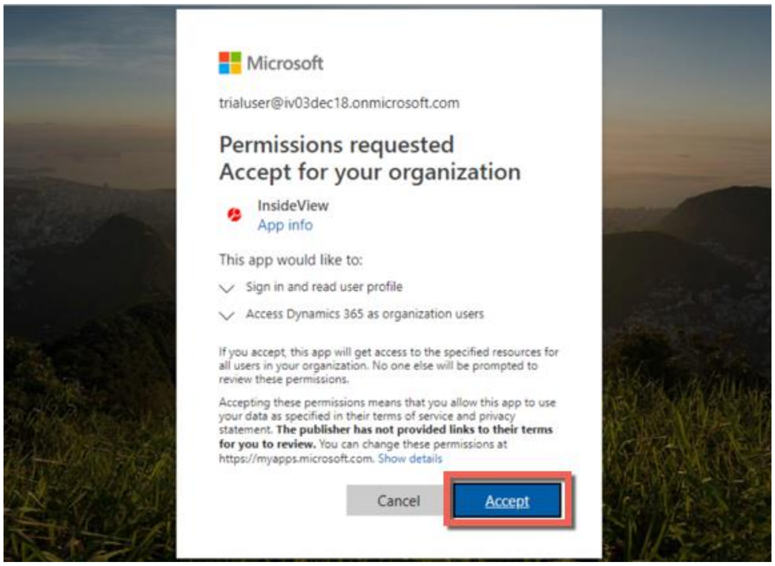
1. Go to **Microsoft Dynamics 365> Insights > Settings > Org Settings**.



2. On the InsideView Insights screen, click **Continue** to enable OAuth for all users in an organization.

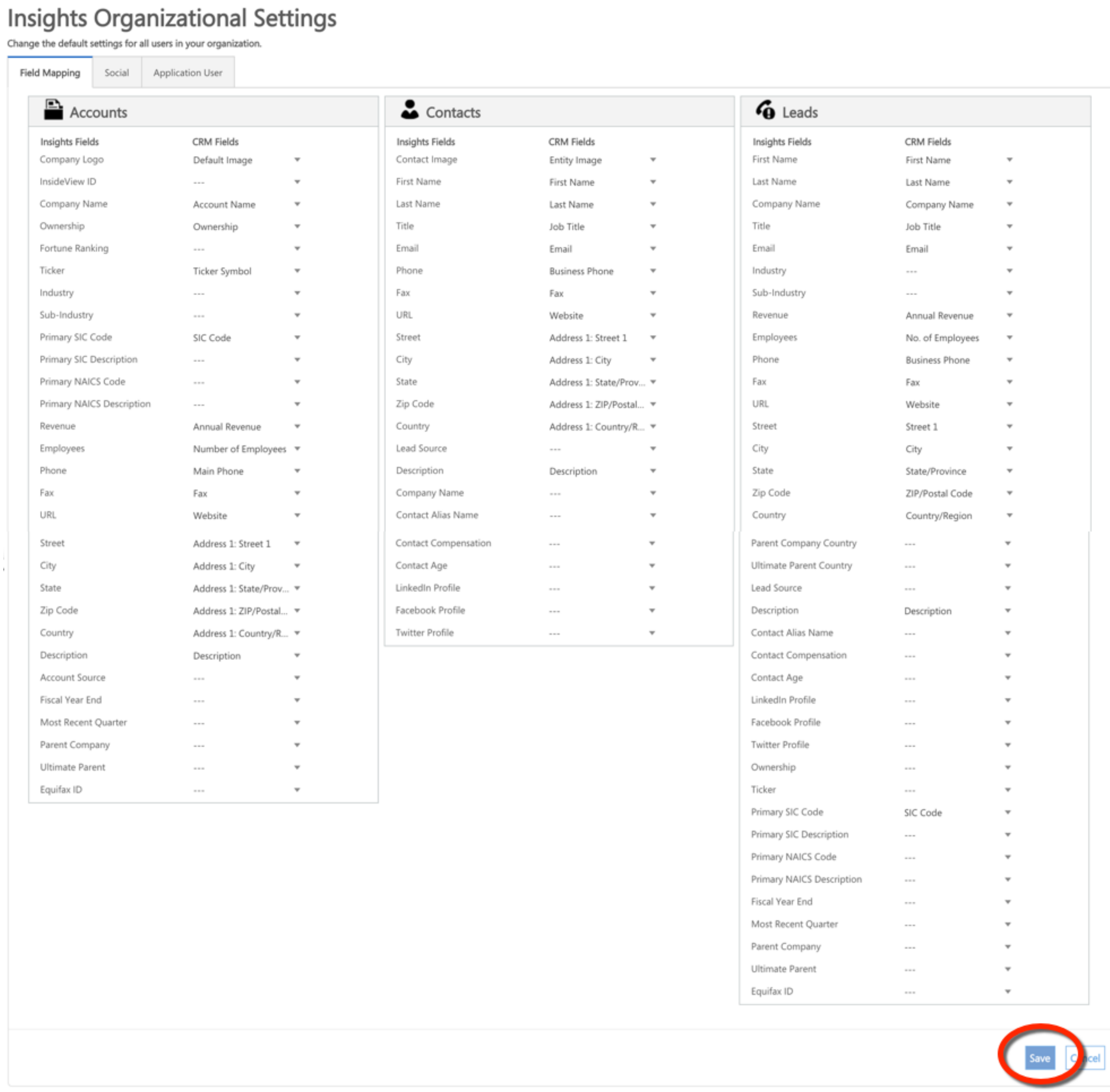


3. When prompted, sign **i**n with your administrator credentials and click **Accept**.



4. The user access request starts automatically, and you will know it is finished when you see the **Insights Organizational Settings** page in the CRM window.

   Note: Only administrators will see this page.

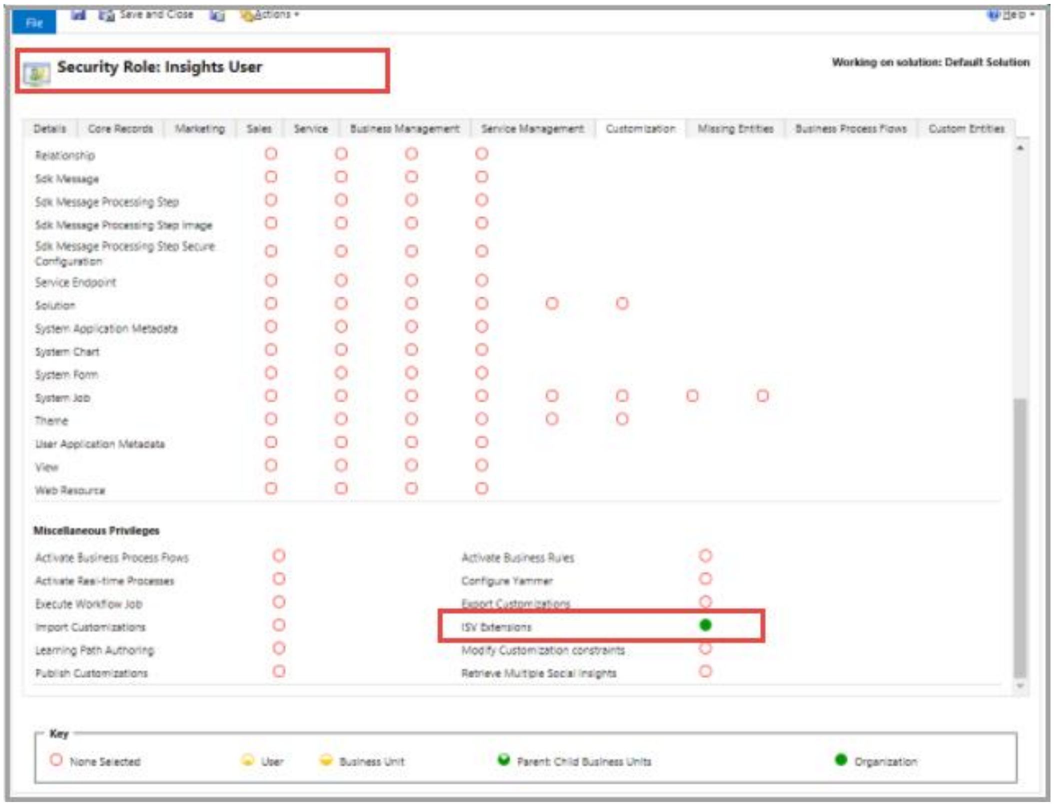


5. InsideView Insights is now available to all users in the organization.

Insights User Role (New Security Role)

An **Insights User** security role is assigned to all users as part of the InsideView Insights installation process.

The **ISV Extensions** privilege is assigned to all users to enable them to view and use the Navigation buttons in the **Insights Summary** panel, which is the standard customization provided by Insights solution for Account, Contact, Lead, and Opportunity entity. If this privilege is not assigned, then users will not be able to navigate from Summary to Detailed panel. For more information, read the *Getting to InsideView Insights* section in the InsideView Insights User Guide.



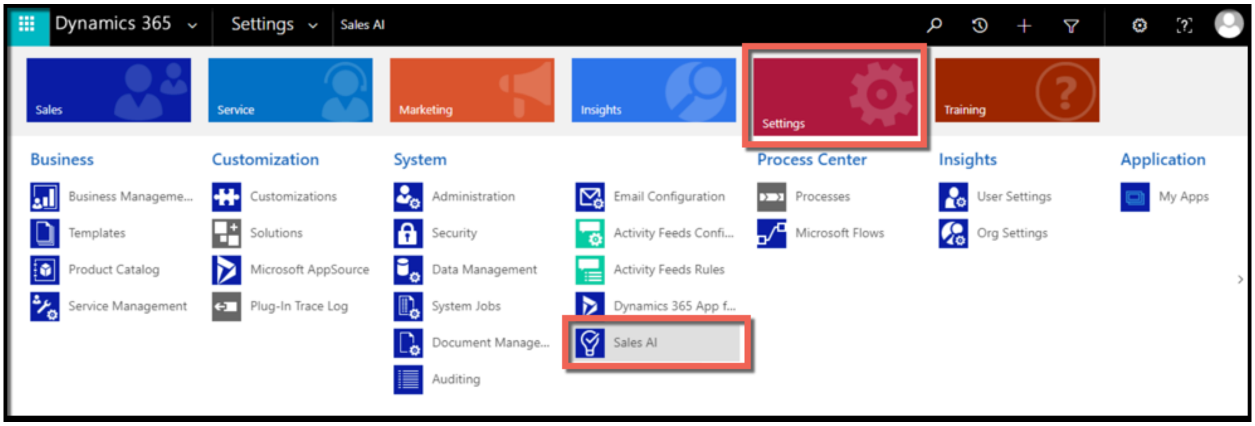
Verify the Insights Acquisition Alert Setting

The **Acquisition Alert** provided by InsideView Insights is enabled in Dynamics 365. An administrator can enable or disable the Acquisition Alert setting at the Organization level. All users of Dynamics 365 can also control this setting at the user-level by enabling or disabling the Acquisition Alert check box to view and use the Relationship Assistant alerts. Currently, the Acquisition Alert is enabled only for the Account Object in the Unified Client Interface view.

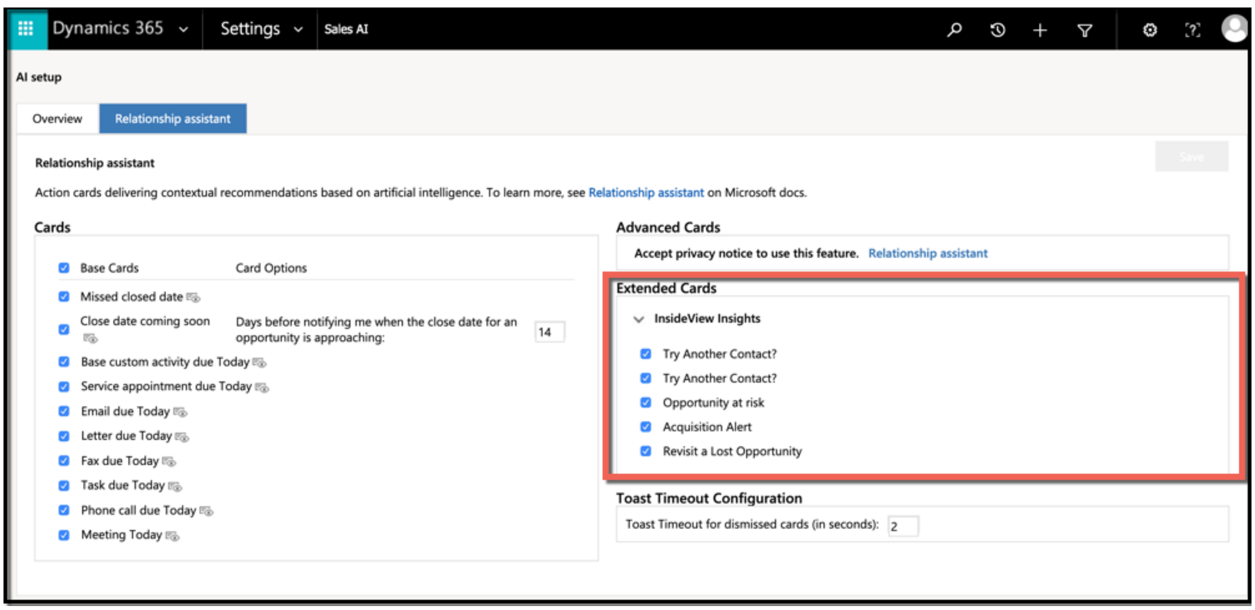
If this **Acquisition Alert** check box is not enabled, then users will not be able to view Relationship Agent cards. For more information, read the **Getting to the Insights Relationship Assistant Card** section in the *InsideView Insights User Guide*.

To verify the status of the Insights Acquisition Alert, follow these steps:

1. Go to **Settings > Sales AI**

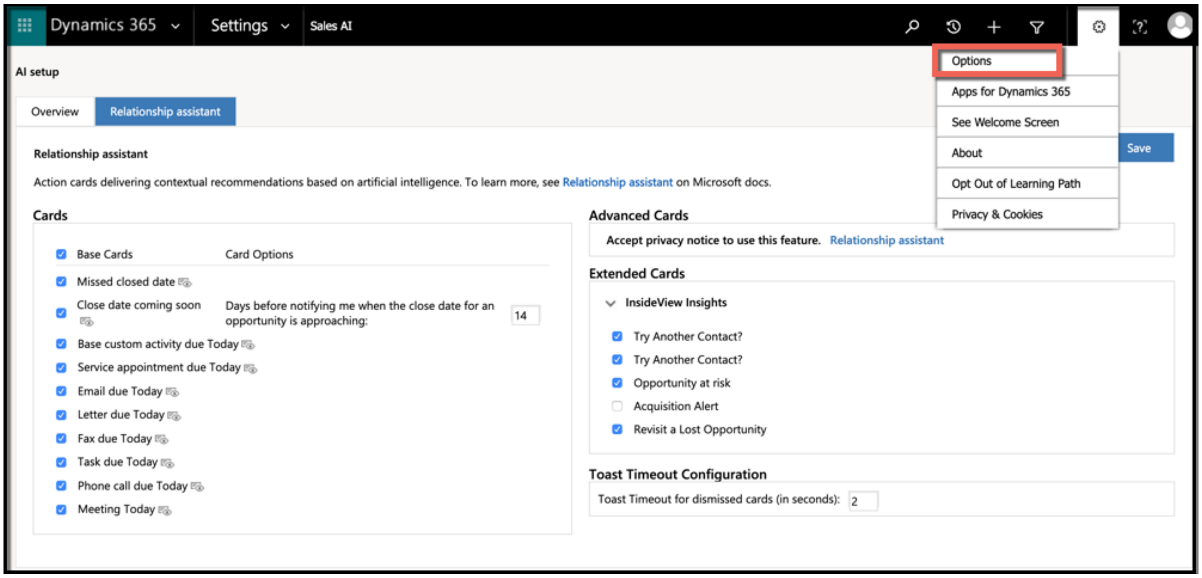


2. In the Sales AI page, click the **Relationship Assistant** tab and expand the Extended Card section and verify that the **Acquisition Alert** is enabled under the **InsideView Insights**.

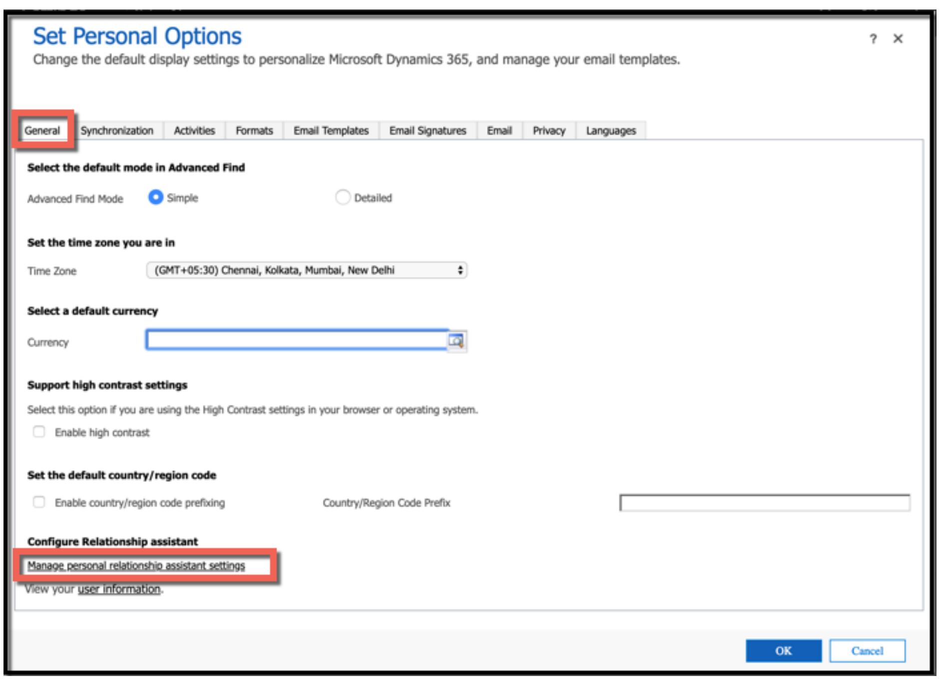


By default, All **InsideView Insights Alert** check boxes are enabled for Insights admin user when you install Insights solution in Dynamics 365. If it is disabled, you must enable it.

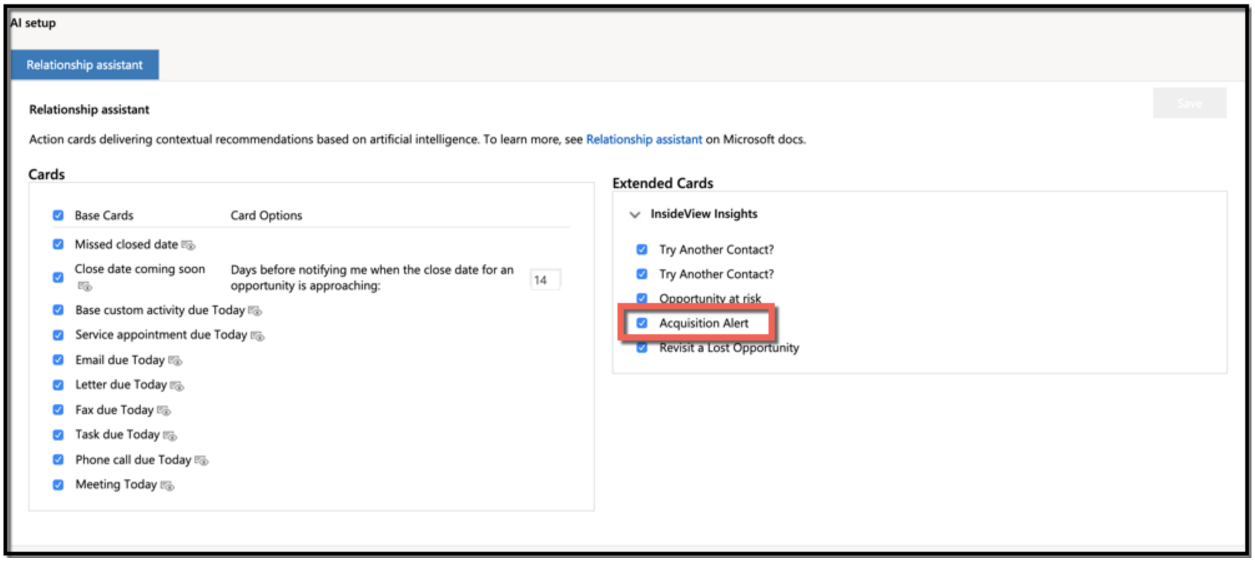
3. To enable the **Acquisition Alert** setting at the user-level, click the **Settings** icon and select the **Options** item.



4. In the General tab, click the **Manage personal relationship assistant settings** link under the **Configure Relationship assistant** region.



5. In the Relationship Assistant tab, verify that the **Acquisition Alert** check box is enabled for **InsideView Insights** under the Extended Cards region.



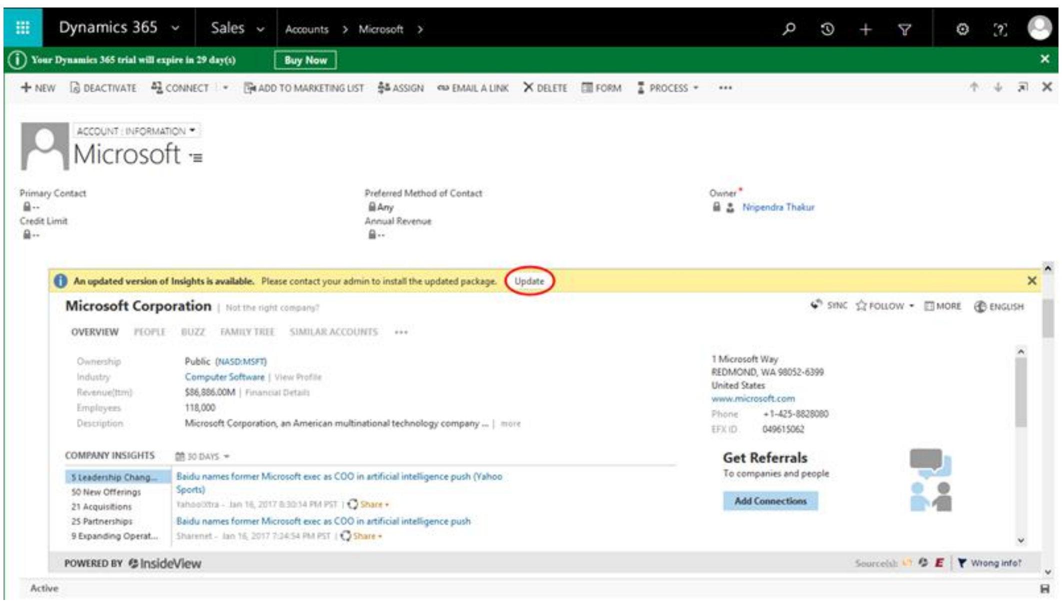
6. Click **OK** and then click **Save**.

Chapter 4: Upgrading from an Older InsideView Insights Version to Insights 4.3

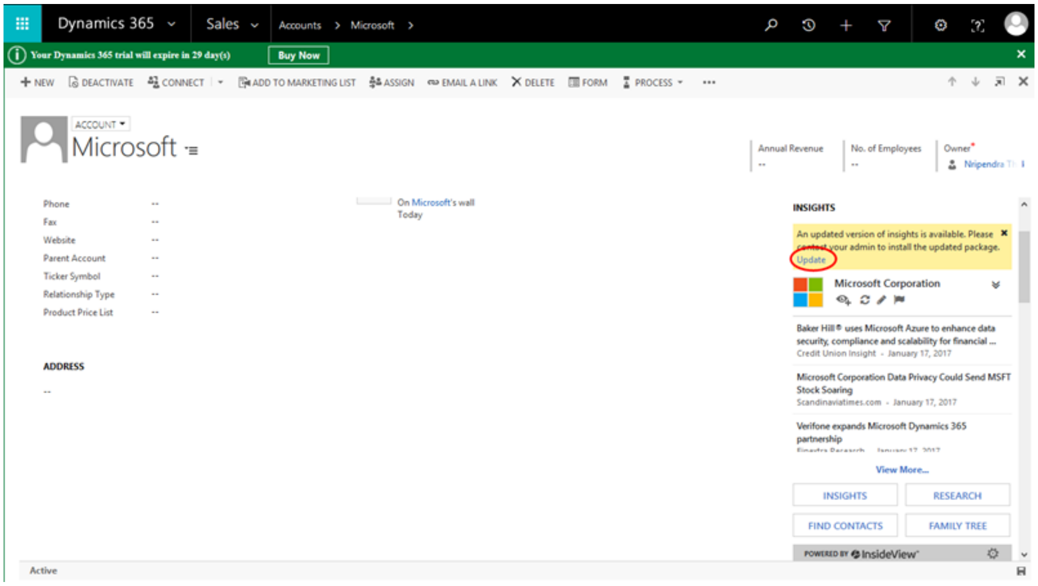
Customers who are using an older version of InsideView Insights can upgrade to latest Insights 4.3 package Microsoft's AppSource Marketplace. Here's how:

1. Sign in to https://portal.office.com with your Office 365 global administrator credentials.

2. Once the user logs in to the CRM, when you open an account, a contact, a lead an opportunity, or discovery center form the following alert with the **Update** link appears asking you to upgrade to latest Insights package.

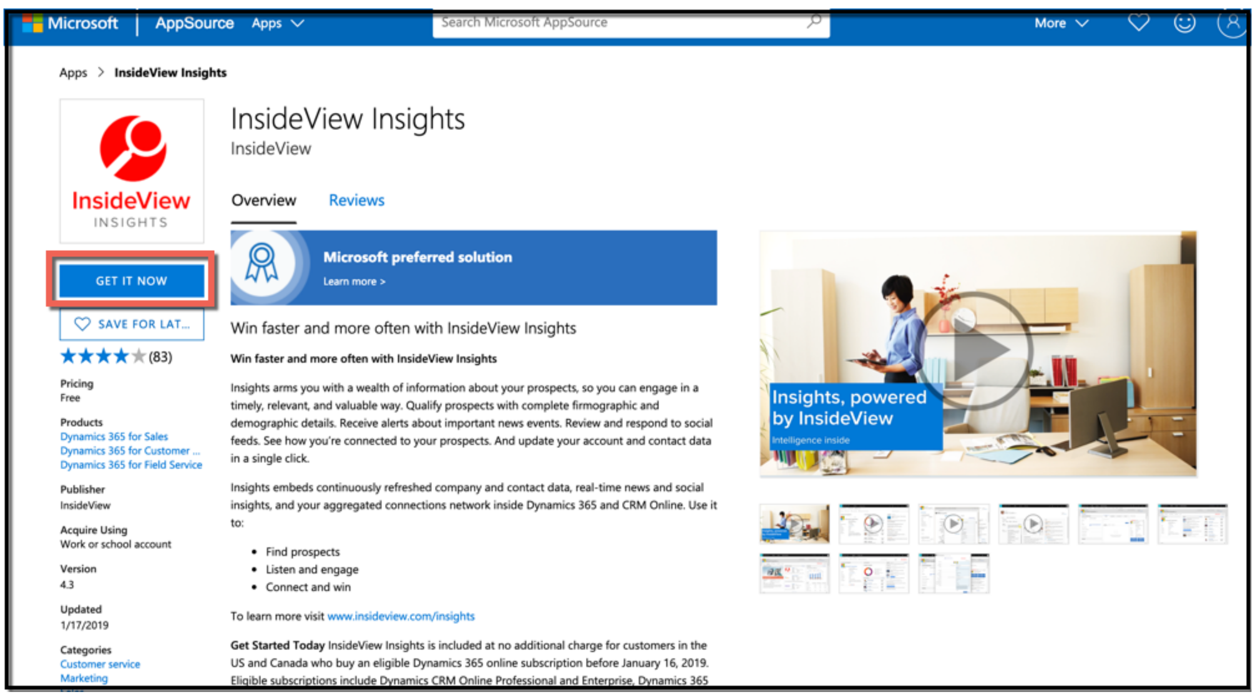


3. The following upgrade message is also visible in the **Summary** panel when you open an account, contact, lead or opportunity object. Click **Update** to upgrade to latest Insights solution package.

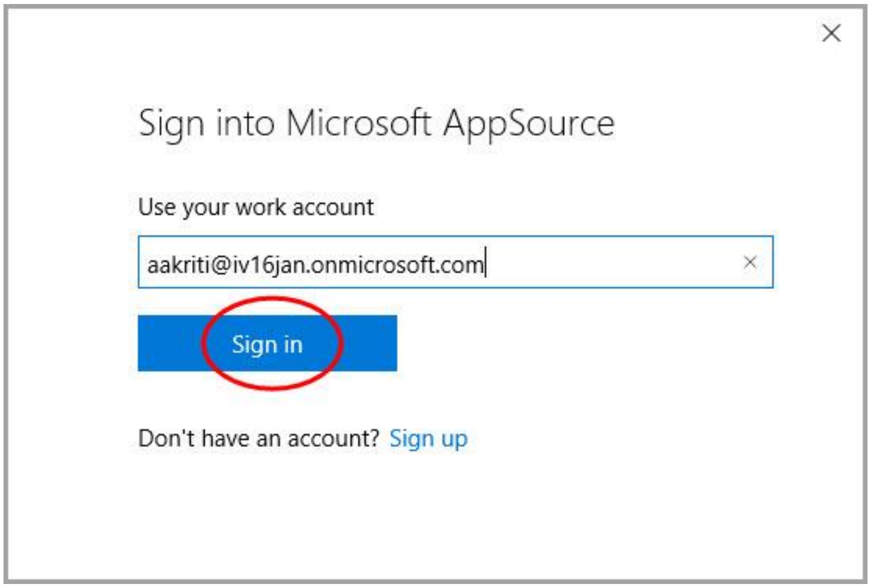


4. You can also go to the Microsoft's [AppSource Marketplace]() web page appears search for the latest InsideView Insights package.

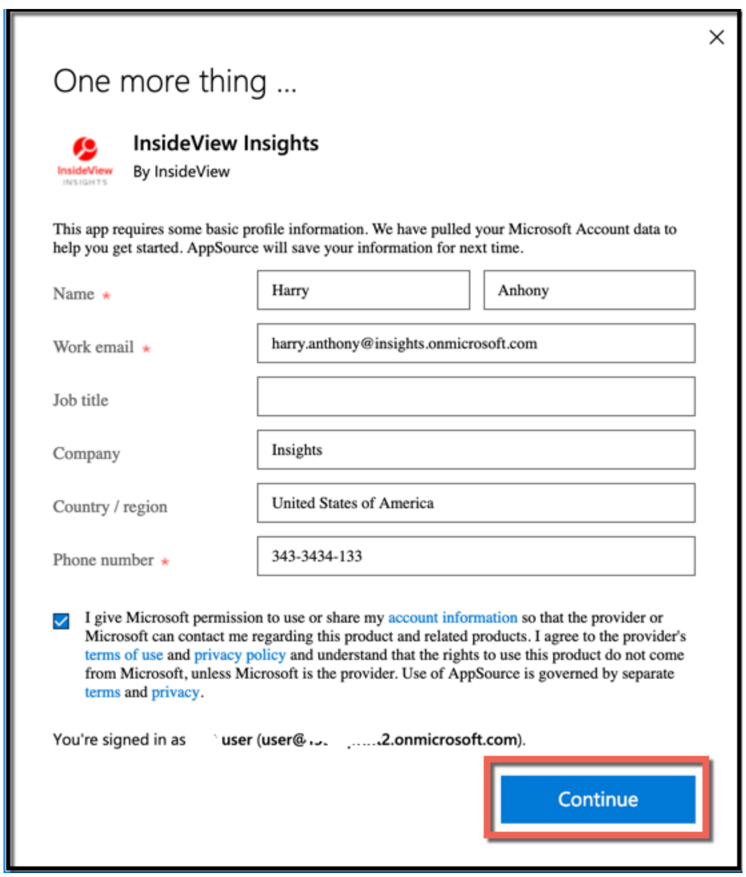
5. On the AppSource page, select the InsideView Insights 4.3 package and then click **GET IT NOW**.



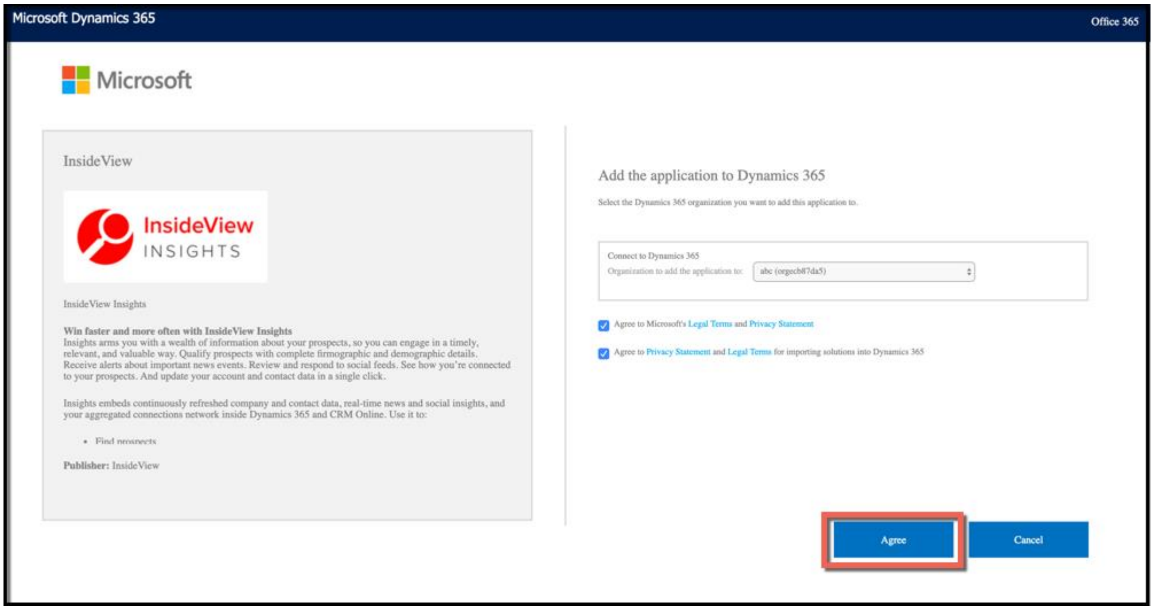
6. When prompted, enter your user credentials and click **Sign In**.



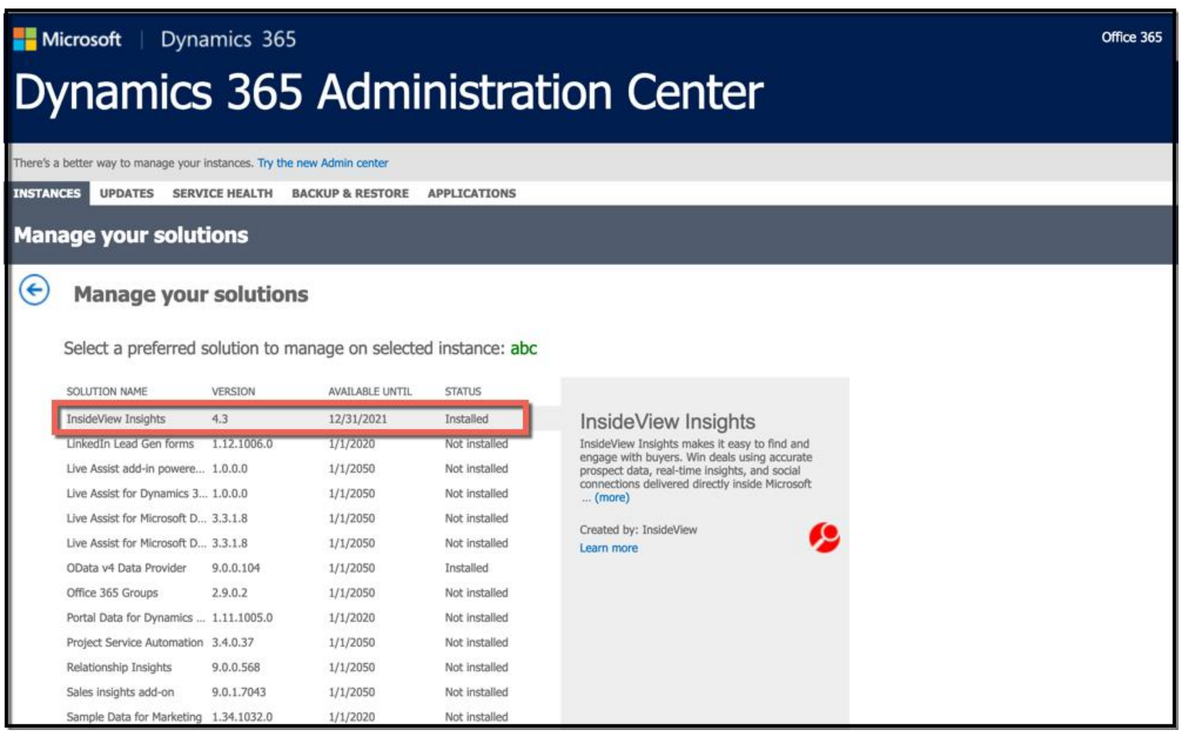
7. On the Insights page, enter the user details and click **Continue** to open the Terms of Use page.



8. On the **Terms of Use** page, select the **Agree to Microsoft's Legal Terms and Privacy Statement** and **Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365** check boxes and click **Agree**.



9. Once the installation is complete, the following message appears.



10. Follow instructions in the [Installing InsideView Insights via AppSource Marketplace] section.

Chapter 5: Managing Organizational Settings

Insights allows administrators to manage organizational settings such as Insight-to-CRM field mappings and social media feeds. These settings affect all users in the organization.

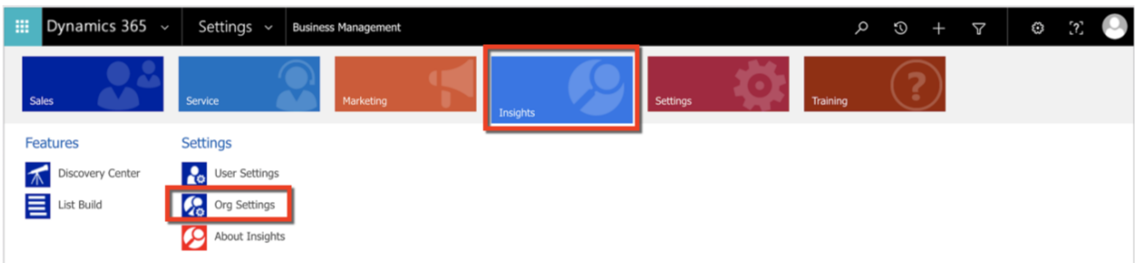
Configure Field Mapping

Map Insights data fields with CRM fields to retrieve data that is relevant for your business and enable your CRM users to update their CRM records with one click.

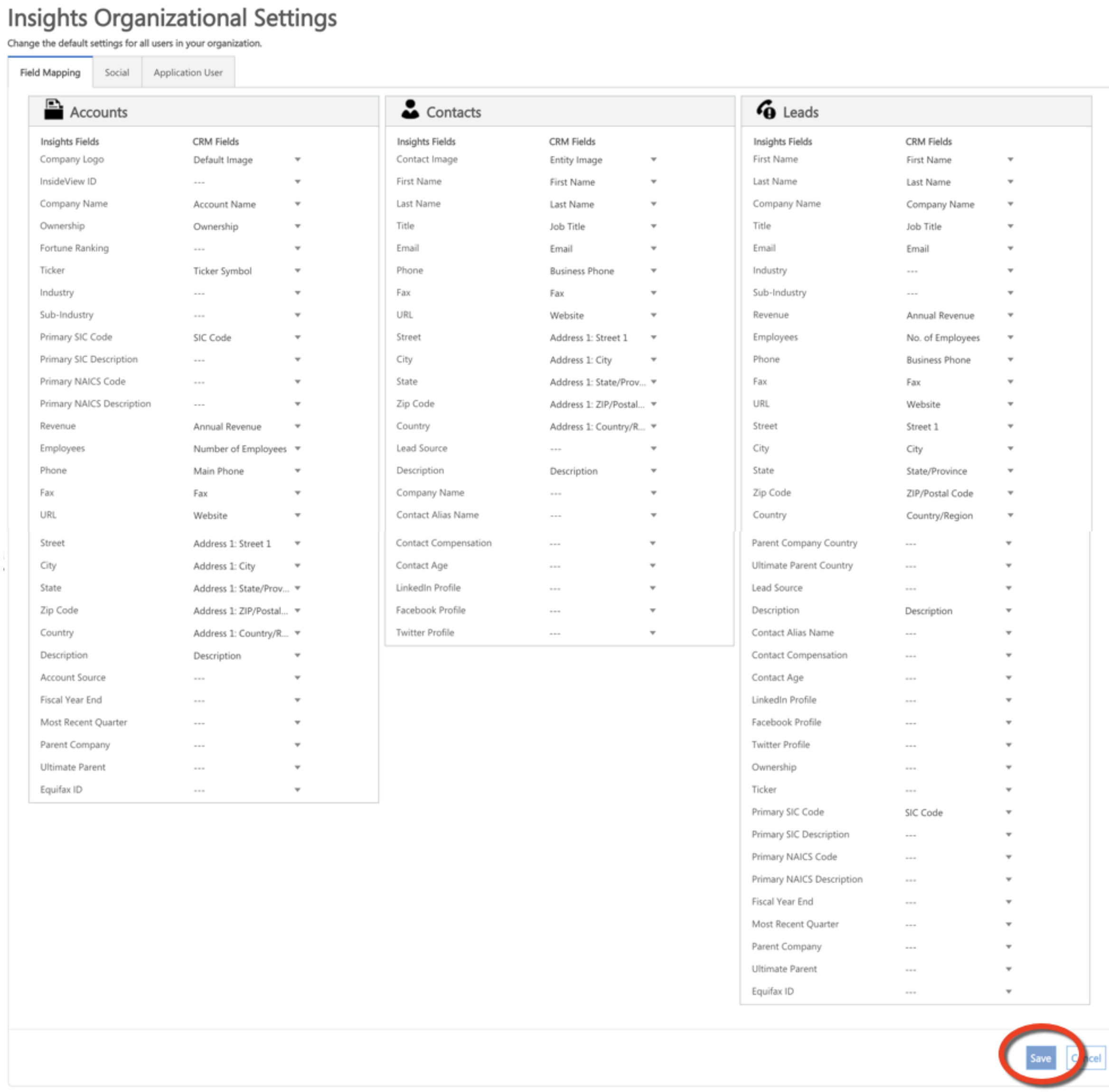
Follow these steps to configure field mappings for your organization:

1. Sign in to Microsoft Dynamics 365.

2. Go to **CRM > Settings > Insights > Org Settings**.



3. On the Insights Organizational Settings page, click the **Field Mapping** tab.



4. Map Insights field to CRM's field in the Accounts, Contacts, and Leads areas as needed for your business.

   Note: CRM fields that are mapped against fields in Insights should use same datatypes. For example, the 'Revenue' field, which uses 'Currency' datatype in Insights can be mapped to fields that have 'Currency' as the datatype in your CRM.

5. Click **Save**.

Create an Application User

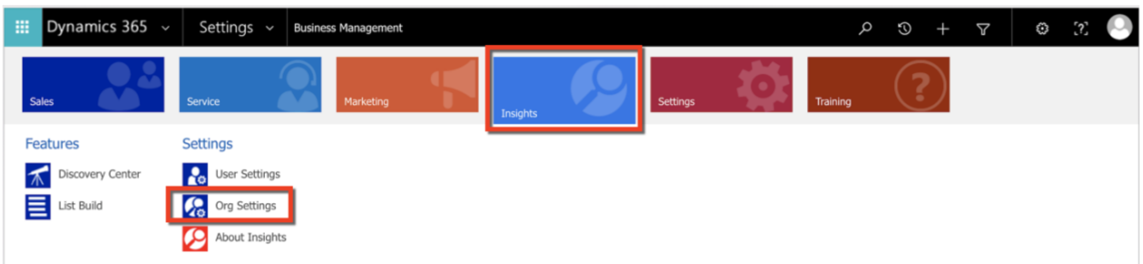
An application user is required by an organization to create a communication channel between InsideView Insights and their Microsoft Dynamics 365 instance to push the Relationship Assistant alerts for your account based on acquisitions agent setting.

Note: Insights allows only Microsoft Dynamics System Administrator to create an application user and configured it.

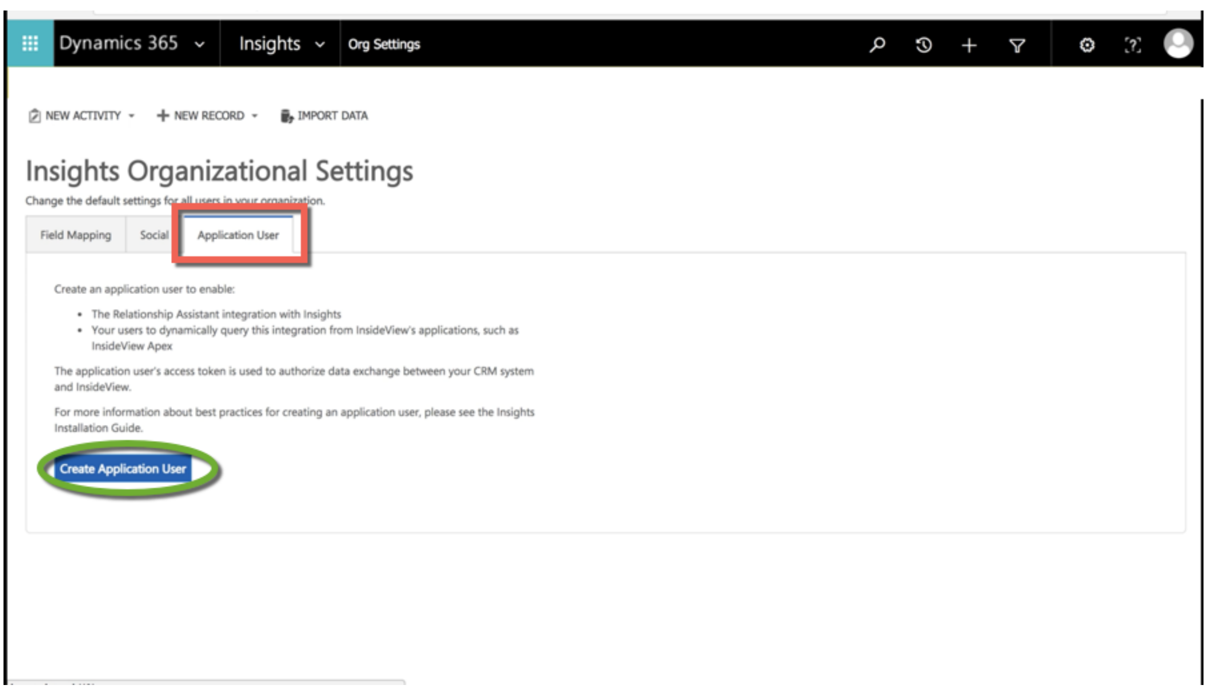
Follow these steps to create an application user for your organization:

1. Sign in to Microsoft Dynamics 365.

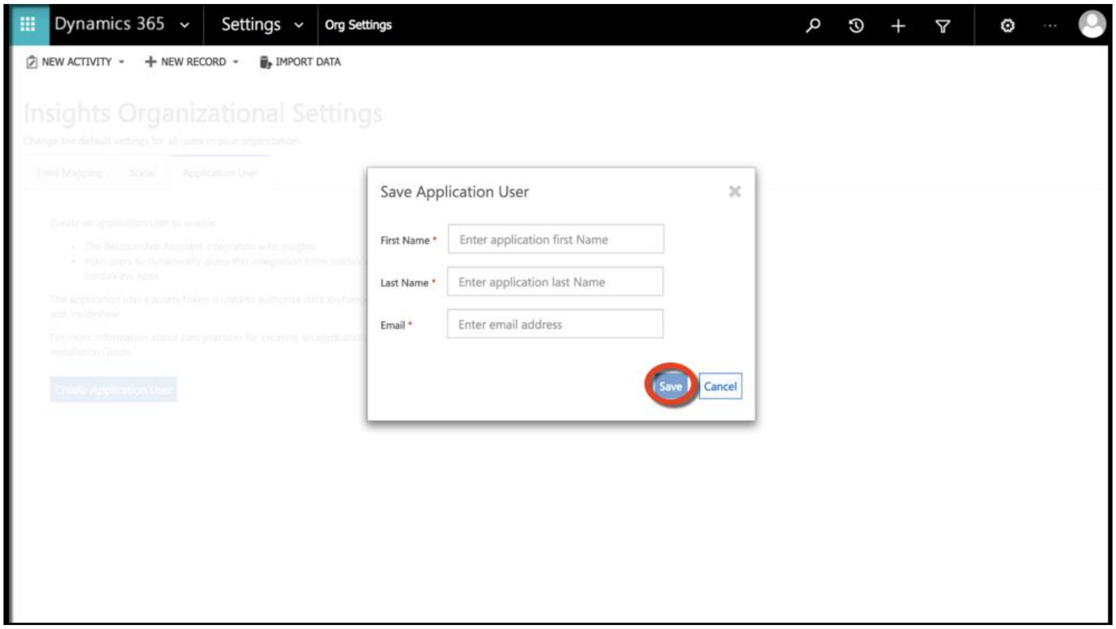
2. Go to **CRM > Settings > Insights > Org Settings**.



3. On the Insights Organizational Settings page, select the **Application User** tab and then click the **Create Application User** button.

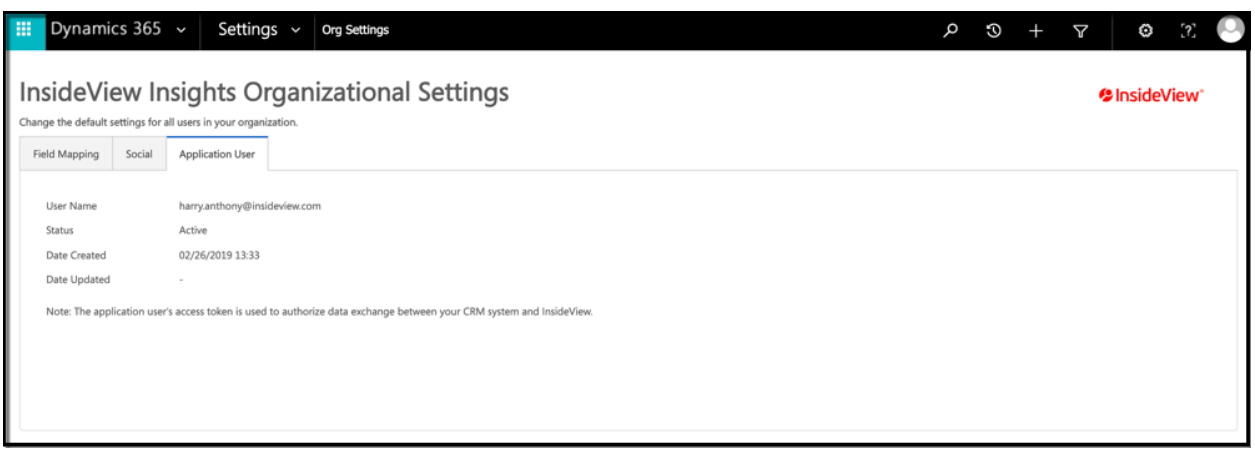


4. In the Save Application User window, enter the following details:
    - First Name
    - Last Name
    - Email Address

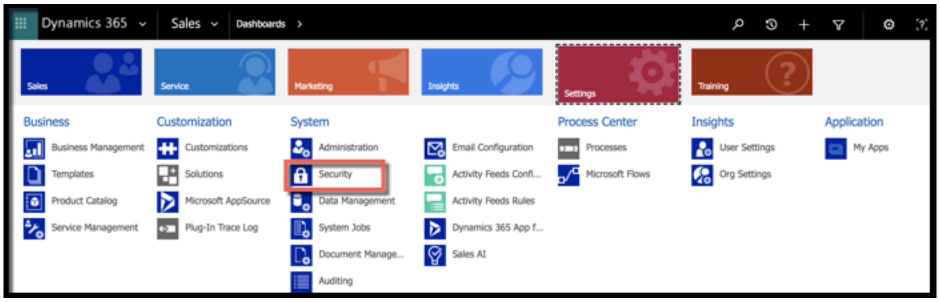


5. Click the **Save** button.

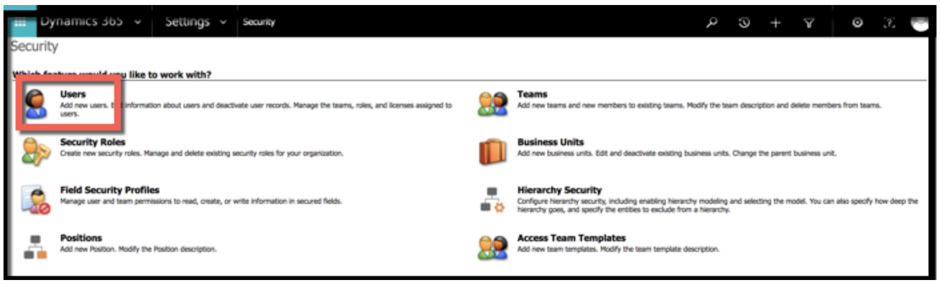
6. Once the application user is created, the following confirmation screen appears.



7. To verify that the application user is created, go to **Dynamics 365 > Settings > Security**.



8. Click the **Users** link.



9. Check for the application username that you have saved earlier.

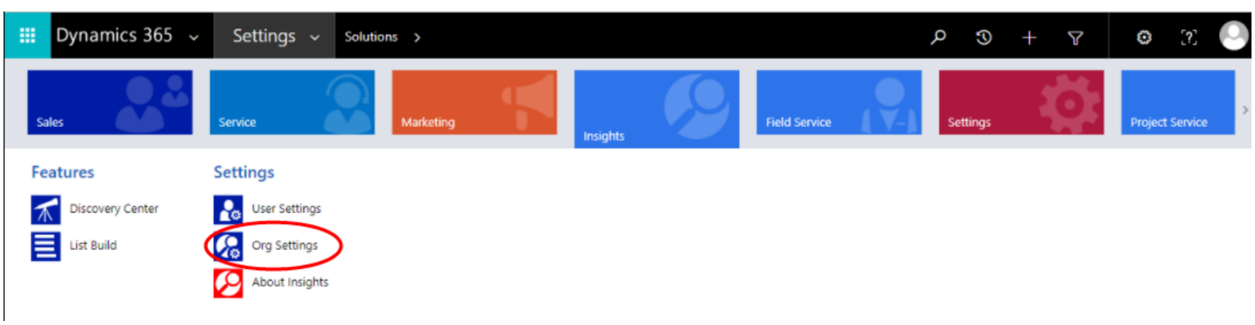
Review and Update Social Media Feeds Settings

With Insights you can enable or disable social media feeds for your entire organization to track the latest news and events on sites such as Twitter, Facebook and company blogs.

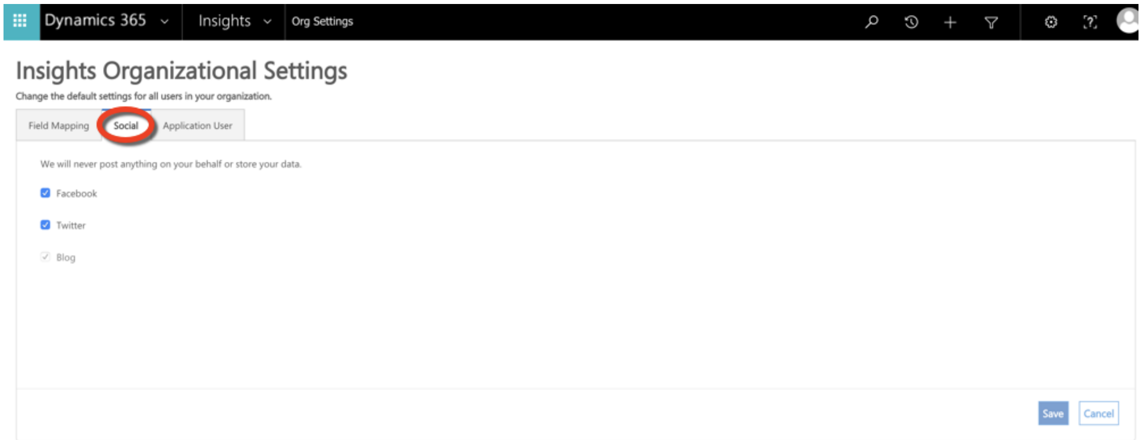
Follow these steps to review and update social media settings:

1. Sign in to Microsoft Dynamics 365.

2. Go to **CRM > Settings > Insights > Org Settings**.



3. On the Insights Organizational Settings page, click the **Social** tab.



4. By default, all check boxes are selected, which lets users see **Facebook** and **Twitter** news feeds, as well as company blogs.

5. If you do not want users in your organization to see social media feeds, clear the **Facebook** or **Twitter** check boxes (or both). The blog setting cannot be cleared.

6. Click **Save**.

Configure Insights Web Resource in Dynamics 365 Custom Forms

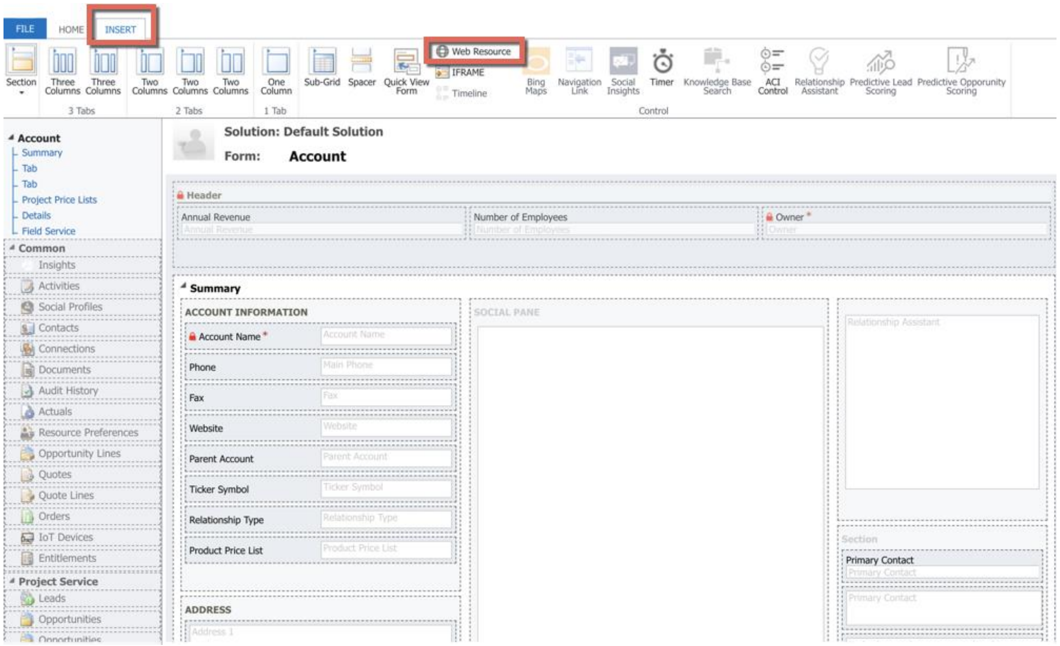
Customize your Microsoft Dynamics 365 custom form to view and launch Insights Summary panel directly when you open an account, contact, lead or opportunity.

Follow the instructions in this section, based on your system administrator's decision under these scenarios:

- By default, Insights solution provides the web resource customization for the standard form. If you wish to move the **Insights** web resource to different location within the form, you don't need do anything.
- You must not have two **Insights** web resources within the Standard or Custom form to avoid the errors due to multiple versions.
- If you are moving **Insights** web resource to a different standard form, you must follow the instructions in this section to configure that form to display the Insights Summary panel.
- If you are using custom forms to work in your CRM instance, complete the instructions in this section.

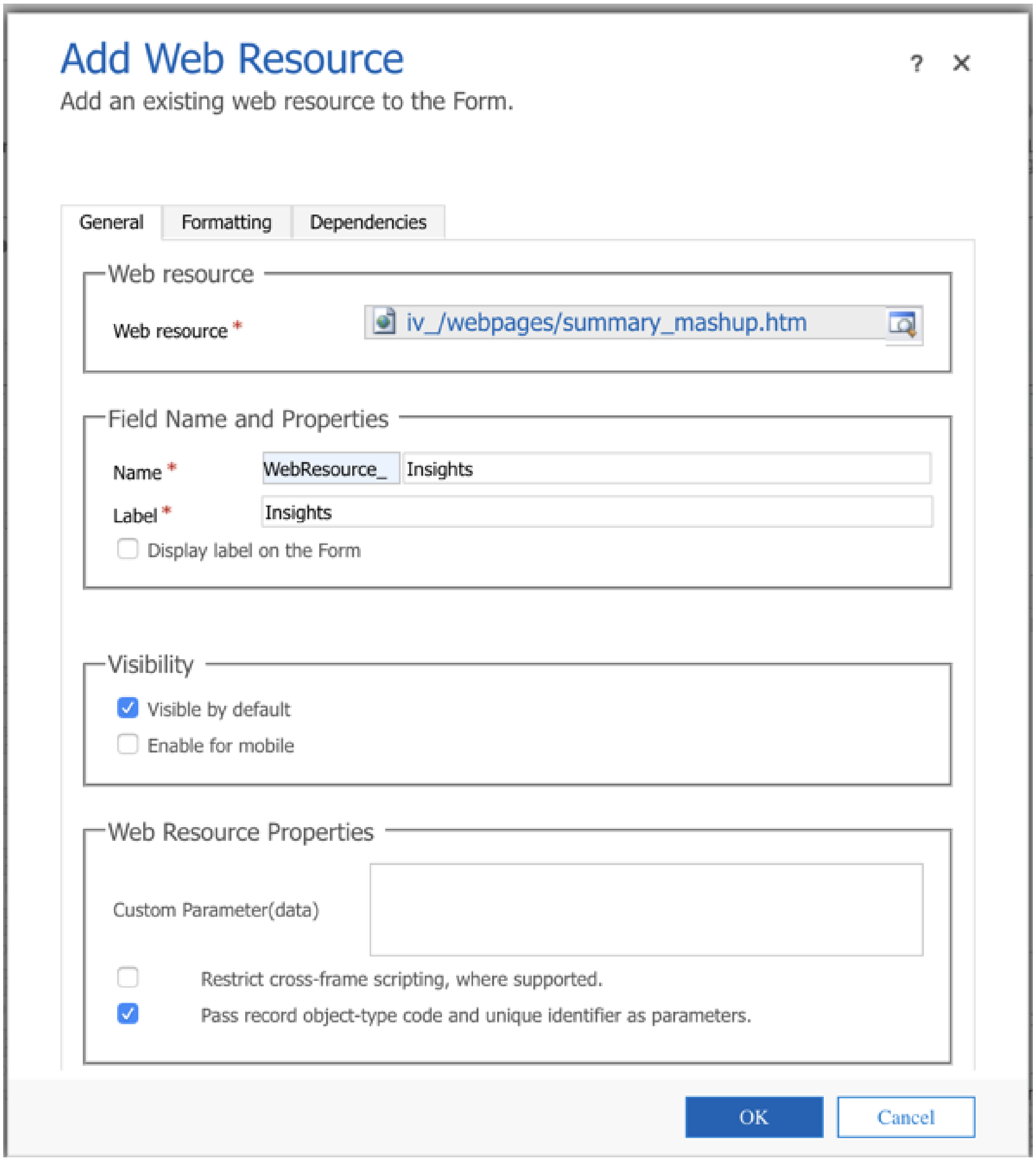
Here's how:

1. To edit the form to which you want to add Insights connector, navigate to **Settings -> Customization -> Customize the System -> Entities -> Account -> Form** and select the form. Refer to the image below for example.
2. In the "Three Columns" tab, click the **Insert** tab in the ribbon and select the "**One Column**" tab.
3. Under the tab, select the Section and click the "**Web Resource**" button in the ribbon.



4. The Add Web Resource window pops up.
5. In the **Web Resource** field, type “**iv**” and click the **Search** button to select the IV Web Resource from the CRM. You should see something like “**iv_/webpages/summary_mashup.htm**”. Select that entry in the search result.
6. Enter “Insights” in the **Name** and **Label** fields. The name and label values are case-sensitive enter them as shown in the screen.

7. Select the **Visible by default** and **Pass record object-type code and unique identifier as parameters** check boxes in the same window as illustrated below:

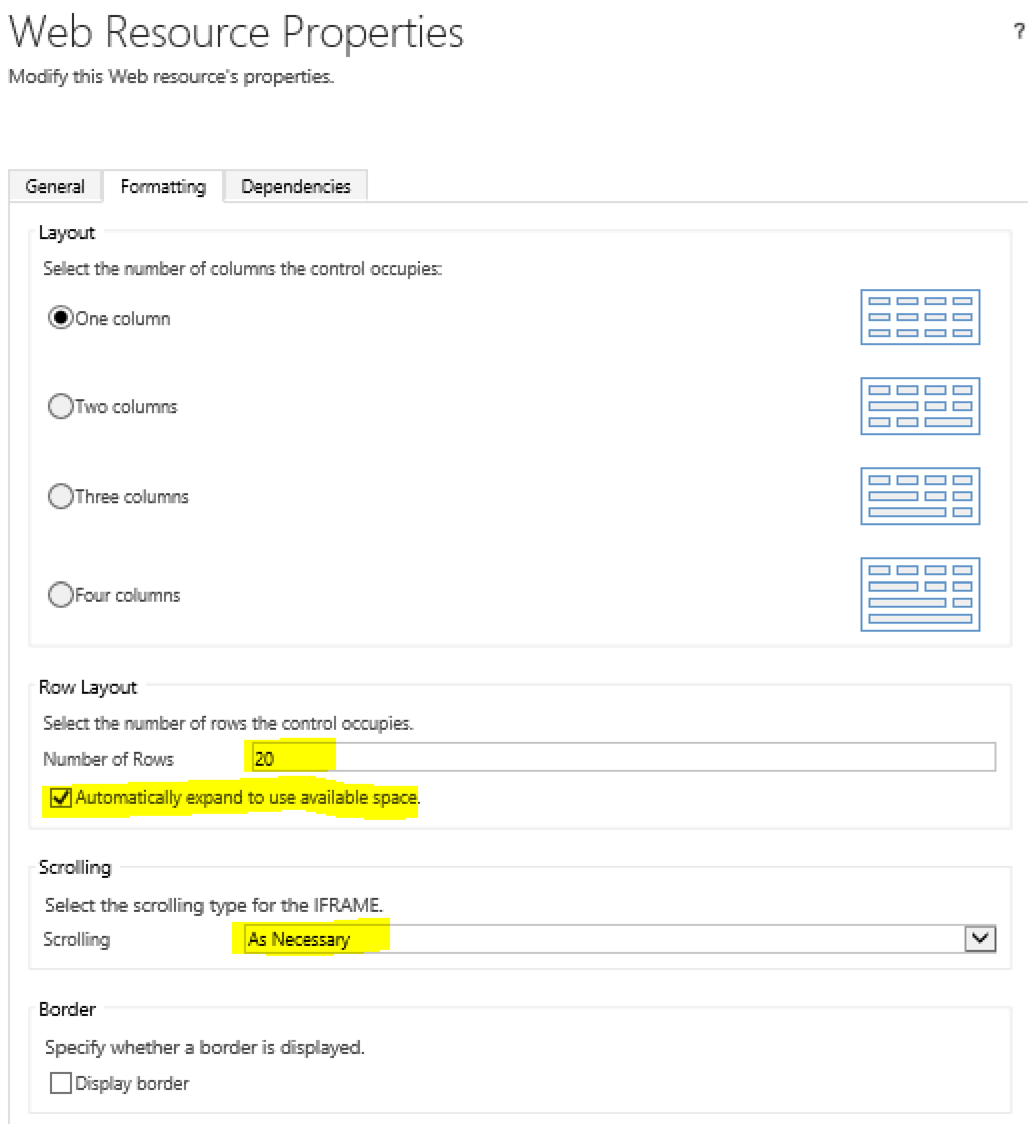


Notes:

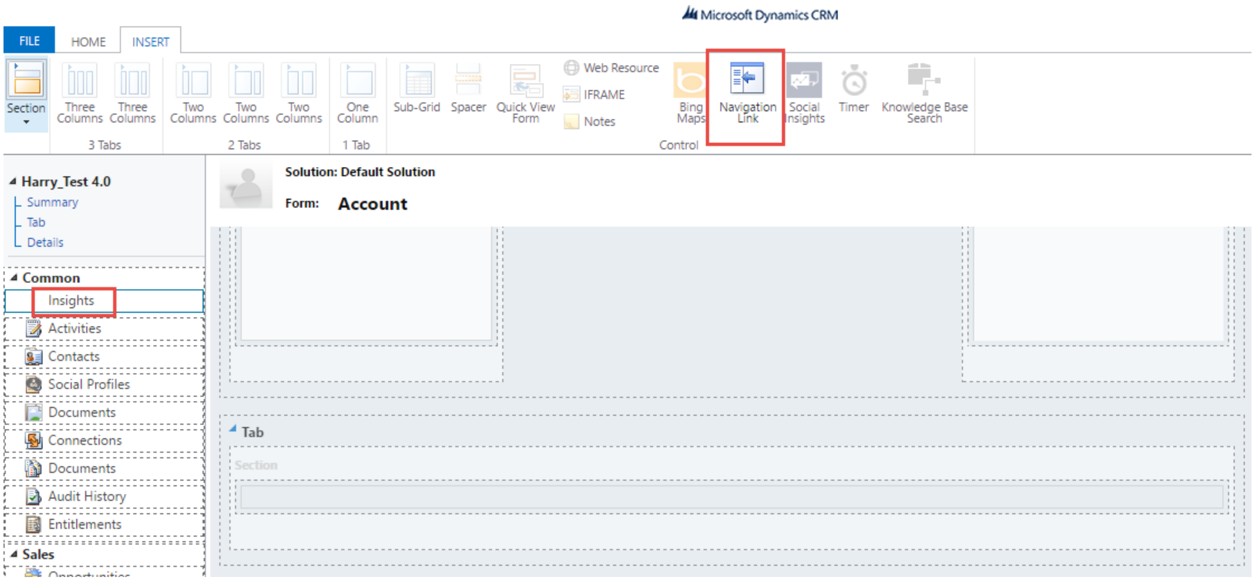
- Selecting the **Pass record object-type code and unique identifier as parameters** check box is mandatory. If this option is not selected, no Insights content will be displayed in the CRM panel.
- If you are using Insights 4.2 version, provide **Custom Parameter** as "*solutionVersion=4.2&crm_version=v140*". Make sure there is no extra space or any special characters such as new line in the **Custom Parameter** field after you have entered the above value.

8. In the same window, click the **Formatting** tab on top.

9. Enter “Number of rows” as 20 and select the **Automatically expand to use available space** check box under Row Layout.
10. Select the **As necessary** option from the **Scrolling** drop-down menu as illustrated below:



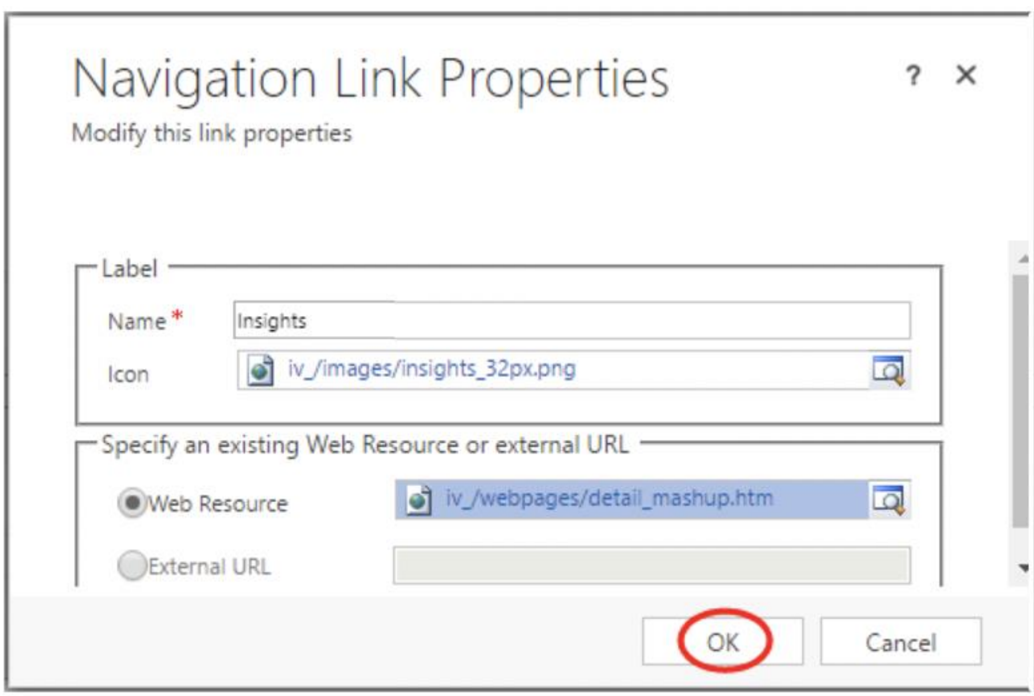
11. Once this customization is done, click **Save** to save the customization.
12. To create the Insights Navigation Link page, double-click on the **Common** tile to make it editable. In the Custom Form page, select **Insights** in the left pane and click the **Navigation Link** icon.



Note: If the Insights link does not exist under the Common tile, create a new **Navigation Link**.

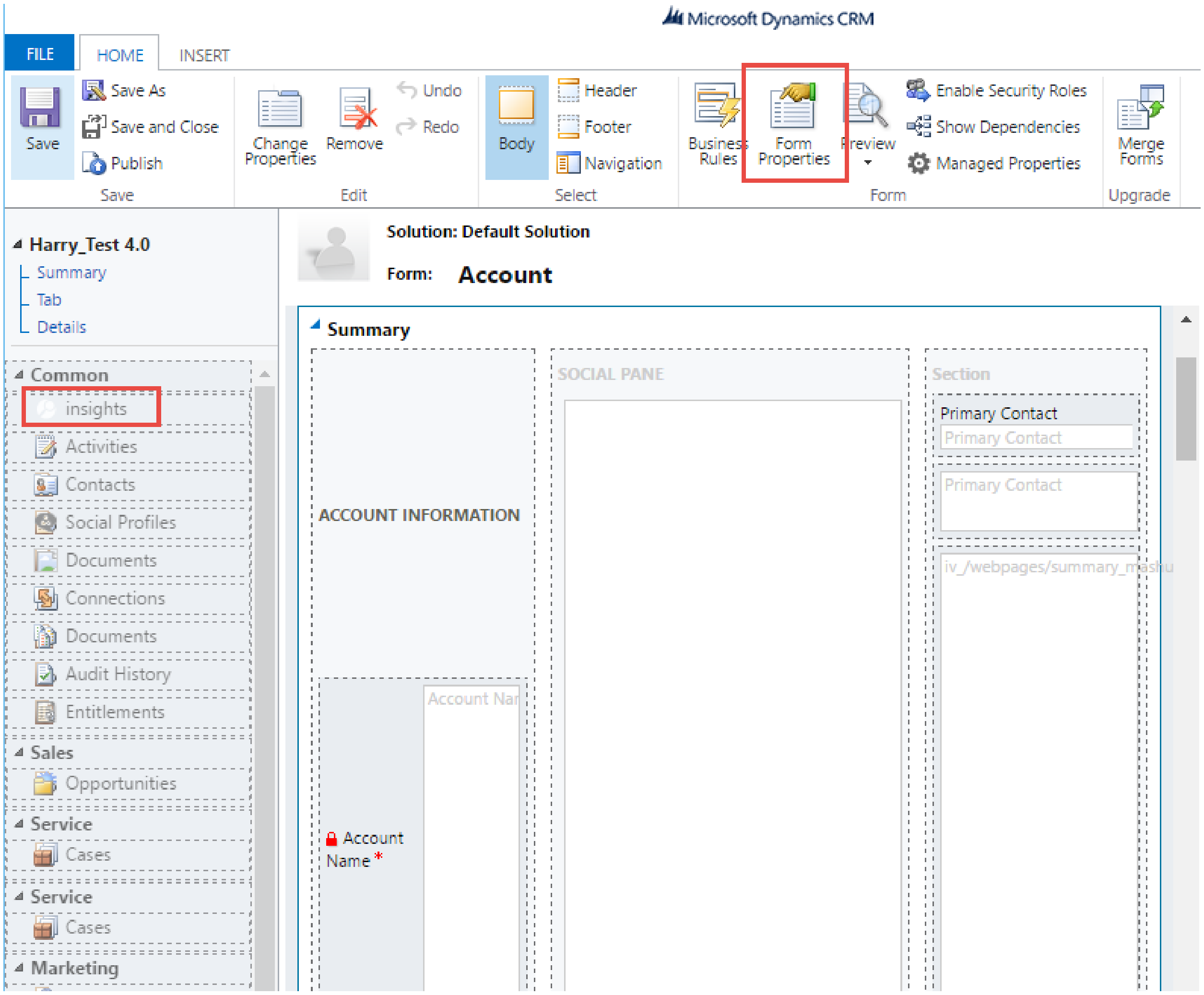
13. On the Navigation Link dialog box, enter the following navigation properties:

- **Name** as Insights.
- **Icon** as iv_/images/insights_32px.png
- Search and select the **Web Resource URL** as iv_/webpages/detail_mashup.htm.

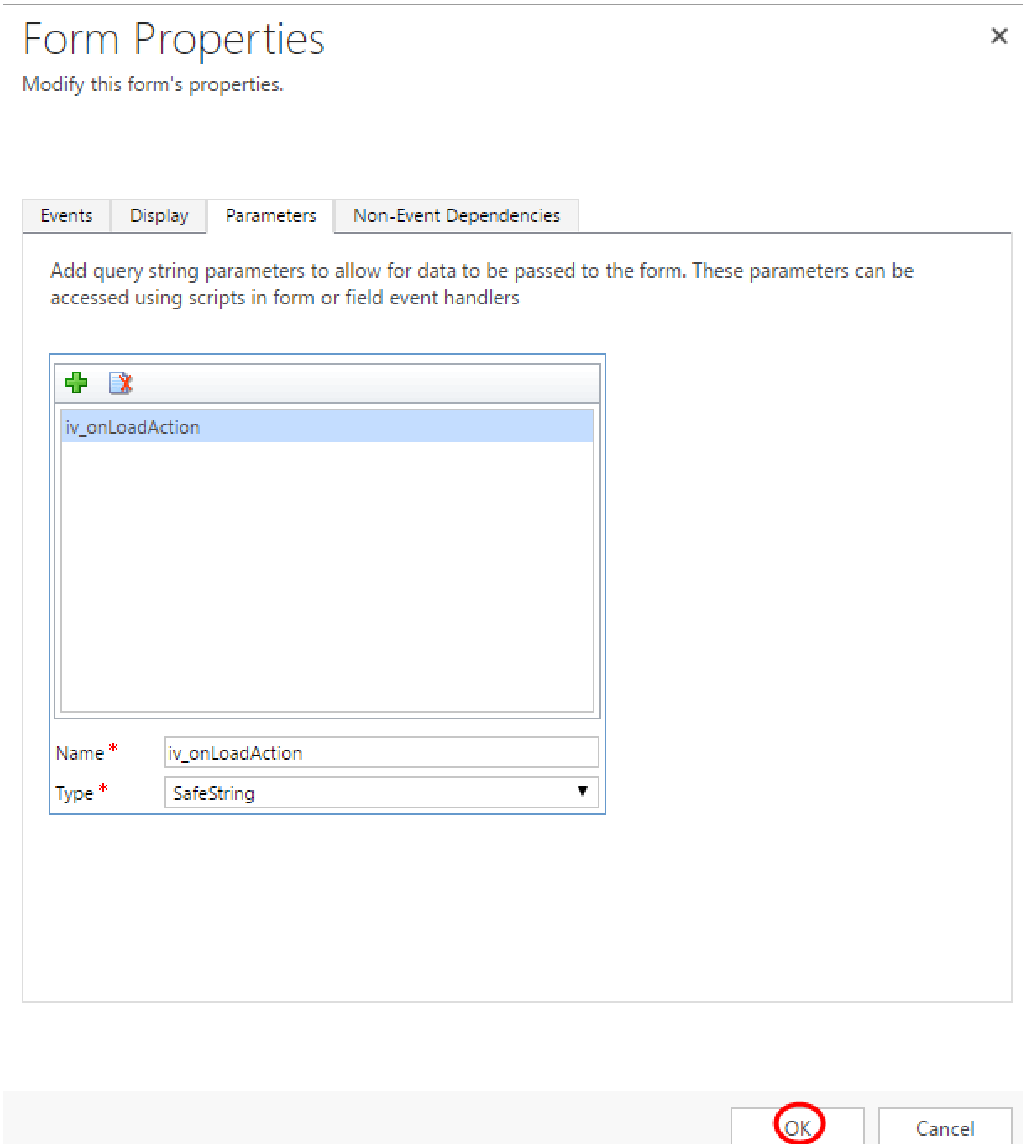


- Click **OK**.

14. Select the **Insights** tab and click the **Form Properties** icon to bring up the **Form Properties** page.



15. To modify the form properties, in the Form Properties page, select the **Parameters** tab and enter the following information:
    - Click the **+ Add** icon.
    - Enter the **Name** as *iv_onLoadAction*.
    - Enter the **Type** as *SafeString*.



16. Click **Save**, then click **Publish** to publish your customization changes.

    Note: Repeat steps 1-17 for *Contact*, *Opportunity*, and *Lead* Microsoft Dynamic CRM entities.

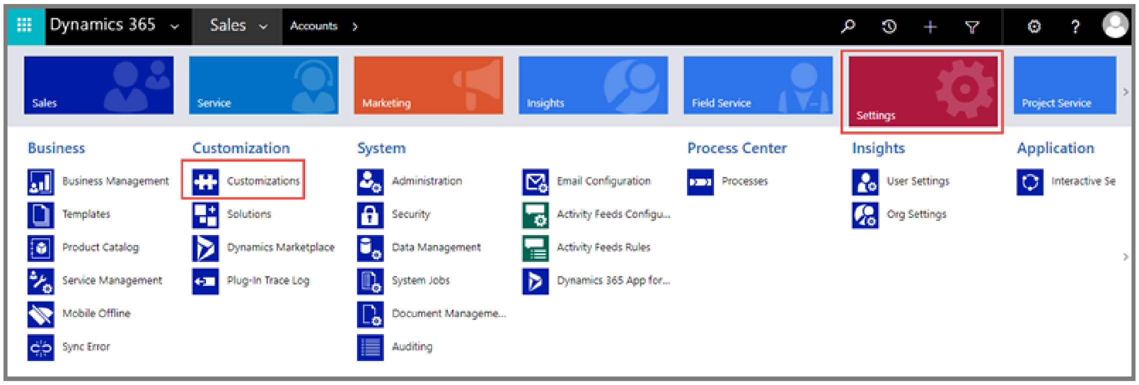
Add Insights Dashboard Widget in the Microsoft Dynamics CRM Dashboard

Customize your Microsoft Dynamics 365 or CRM Online dashboard to view and launch Insights Watchlist Activity Stream function directly from the dashboard. Use the Insights Dashboard widget to view the latest news for the companies and people you are tracking right from the Dynamics CRM home screen for business opportunities.

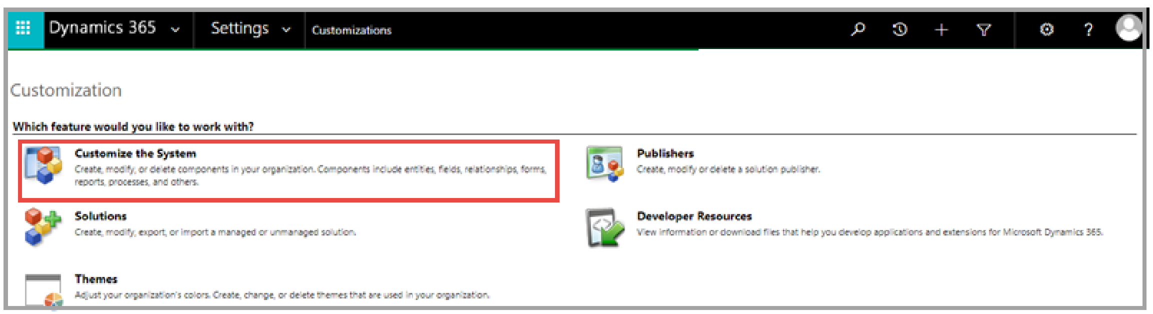
Note: The Insights Dashboard widget can be configured and accessed only your Microsoft Dynamics CRM administrator.

Here's how:

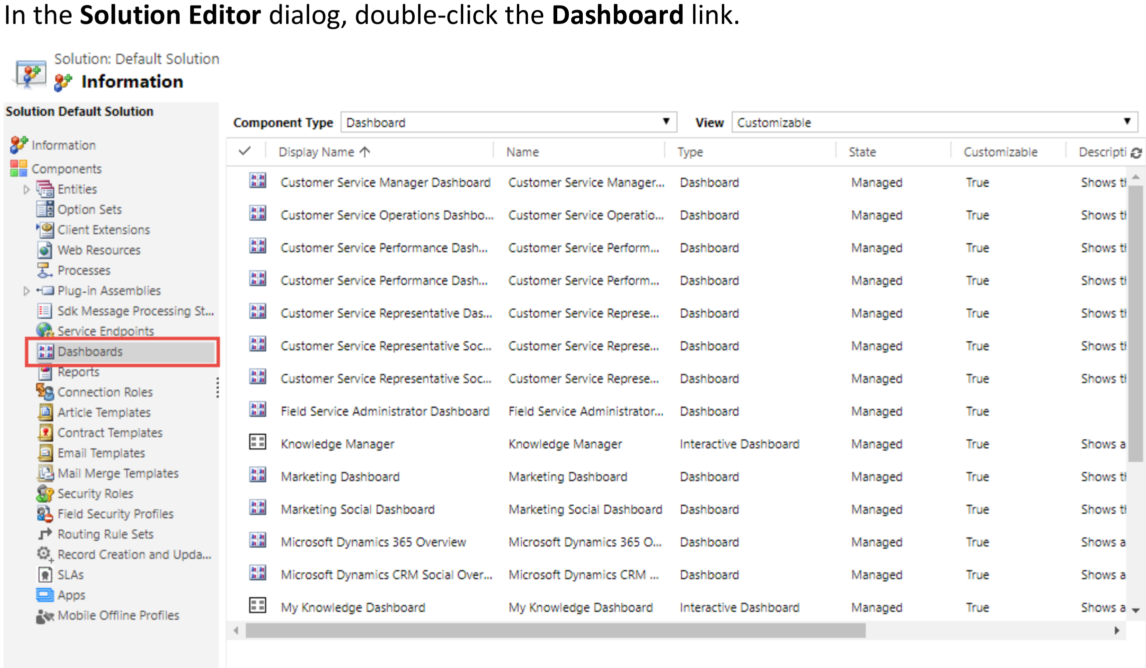
1. Go to the **Settings > Customizations**.



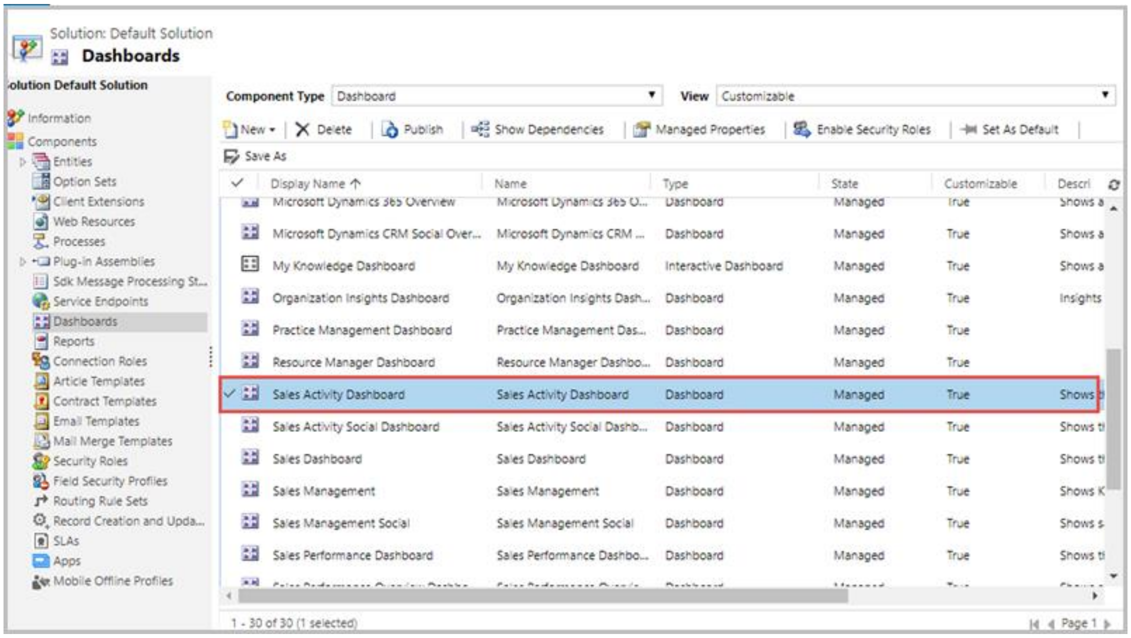
2. In the Customization page, click the **Customize the System** link.



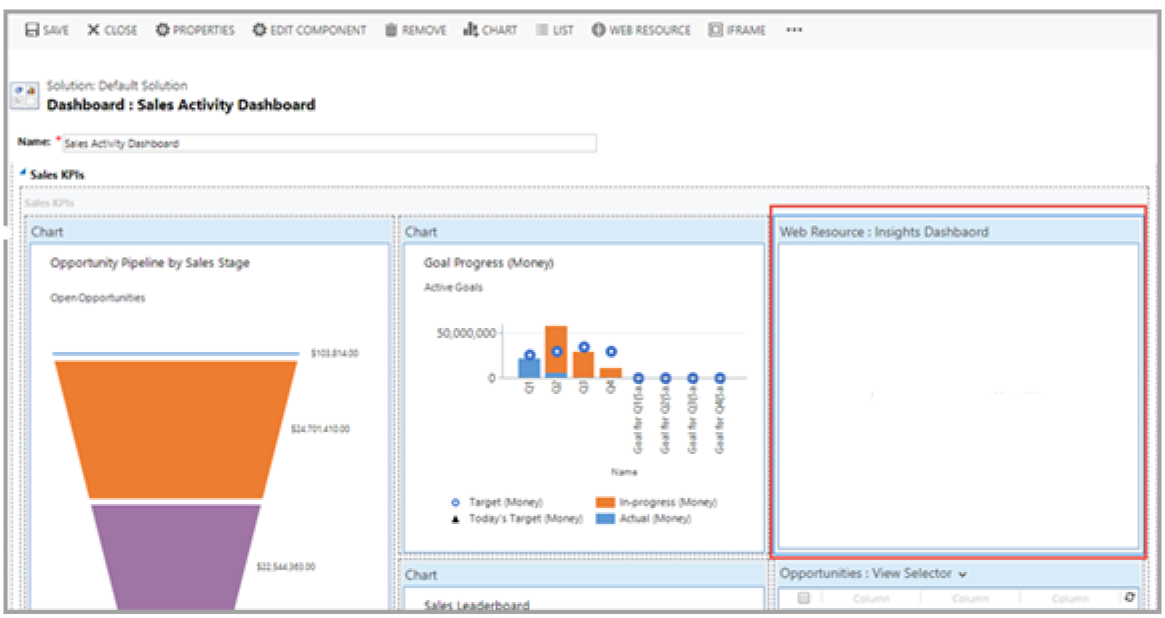
3. In the **Solution Editor** dialog, double-click the **Dashboard** link.



4. Scroll down and select the **Web Resource** in which you want to configure the Insights application. For example, scroll down and double-click on the **Sales Activity Dashboard** or **Any** other dashboard web resource an administrator selects to place Insights widget. This action opens the **Dashboard** editor for Sales Activity.

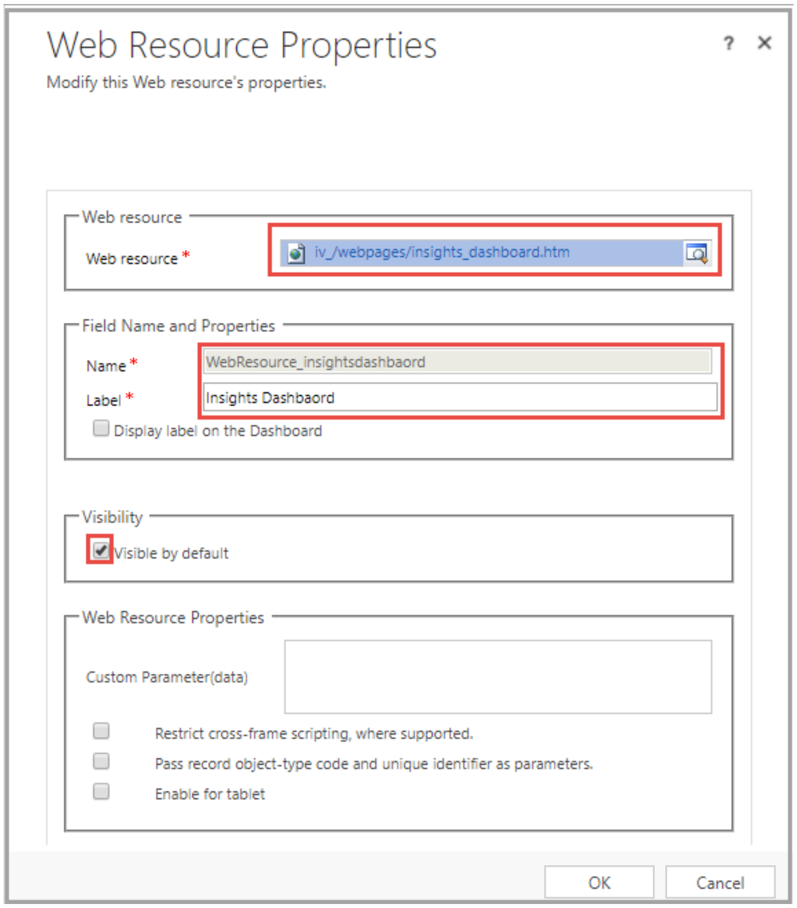


5. In the Dashboard Editor, add the **Web Resource: Insights Dashboard** widget.

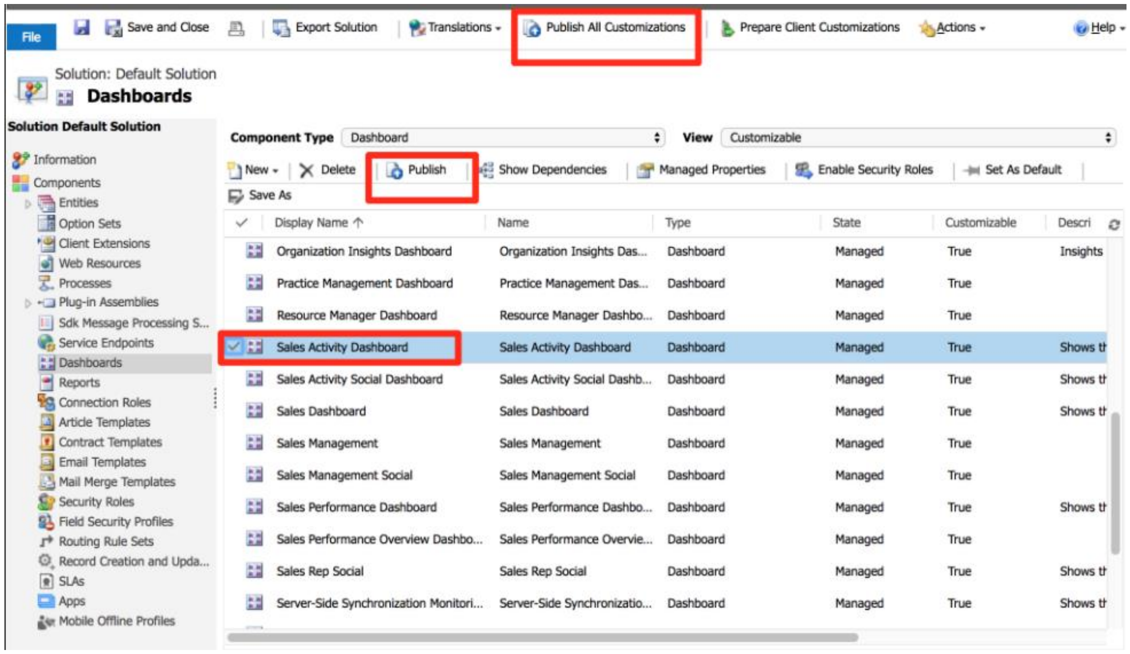


6. Double-click the **Web Resource: Insights Dashboard** widget to open the Web Resource Properties window and enter the following details:

- For the Web Resource, type "**iv**" and click the **Search** button to select the **Insights Dashboard** from the CRM. You should see something like "**iv_/webpages/insights_dashboard.htm**". Select this entry in the search result.
- Enter "WebResource_insightdashboard" in the **Name** and "Insights Dashboard" in the **Label** fields.
- Select the **Visible by default** check box.
- Click **OK**.



7. In the Dashboard Editor, click **Save** to save all changes.
8. Select the **Publish All Customizations** tab and then select the **Sales Activity Dashboard** check box or any web resource that you have customized and click **Publish**.



9. Click **Close** and return to Microsoft Dynamics CRM's dashboard you will see your Watchlist activity stream in the home page.

Chapter 6: Managing InsideView Insights in Custom Sales UCI App

InsideView Insights 4.3 package includes a UCI app called as **Sales Hub with InsideView Insights**. The sitemap of this app is similar to the Sales Hub UCI app with the addition of InsideView Insights features navigation.

The **Sales Hub with InsideView Insights** UCI app allows you to access and manage sales workflows with exclusive features such as Discovery Center and List Build, which is used to find and target right business prospects at the right time.

Note: If you wish to use the **Sales Hub with InsideView Insights UCI** app to access InsideView features, go to the *Navigating to InsideView Insights Features* section directly.

Accessing InsideView Insights via any Custom UCI App

This section provides instructions to create a new UCI app and configure the InsideView Insights features in Dynamics 365.

To configure InsideView Insights in any UCI app, you must complete the following tasks:

- Create a new UCI app in Dynamics 365. Read Microsoft's Online Help document for more information.
- Configure InsideView Insights features in the UCI App Sitemap. Read the *Configuring InsideView Insights Features in the UCI App* section.
- Navigate to InsideView Insights Feature via Sales Hub UCI Sitemap

Configuring InsideView Insights Features in the UCI App Sitemap

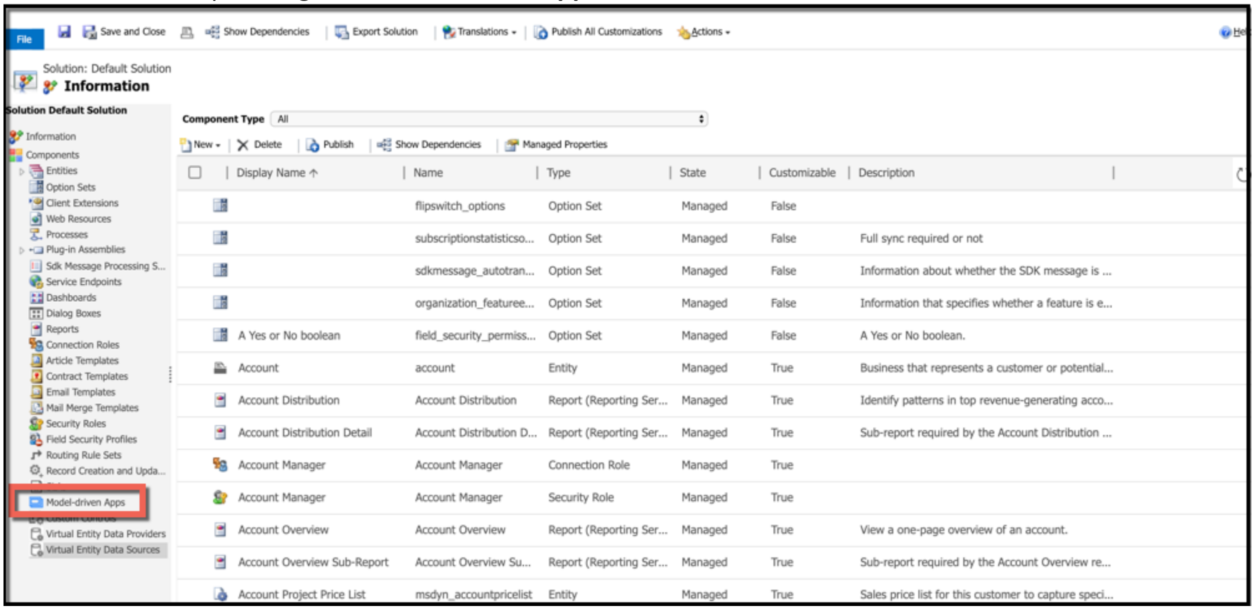
These steps are required if the user wants to configure any **UCI** sitemap (default Sales Hub App or any other custom UCI sitemap) to use InsideView Insights features navigation tiles.

Follow these instructions to enable the InsideView Insights features navigation tile on any UCI App's sitemap:

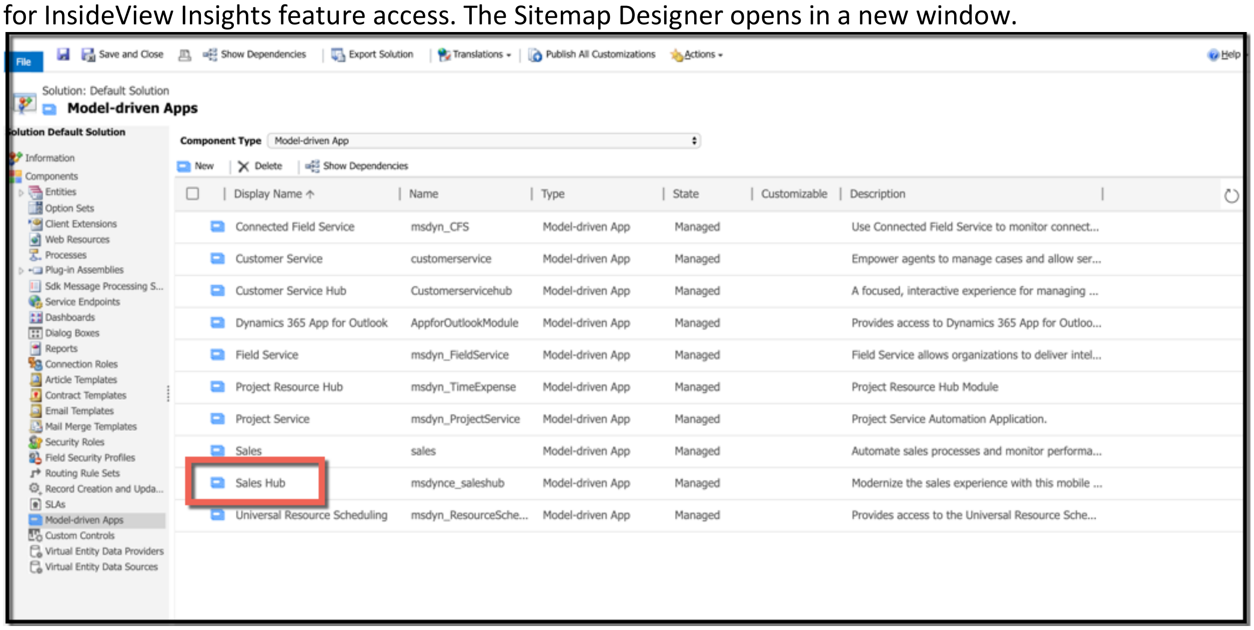
Log in to Dynamics CRM with System Administrator or System Customizer credentials.

1. Go to **Settings** > **Customization** > **Customize the System**.

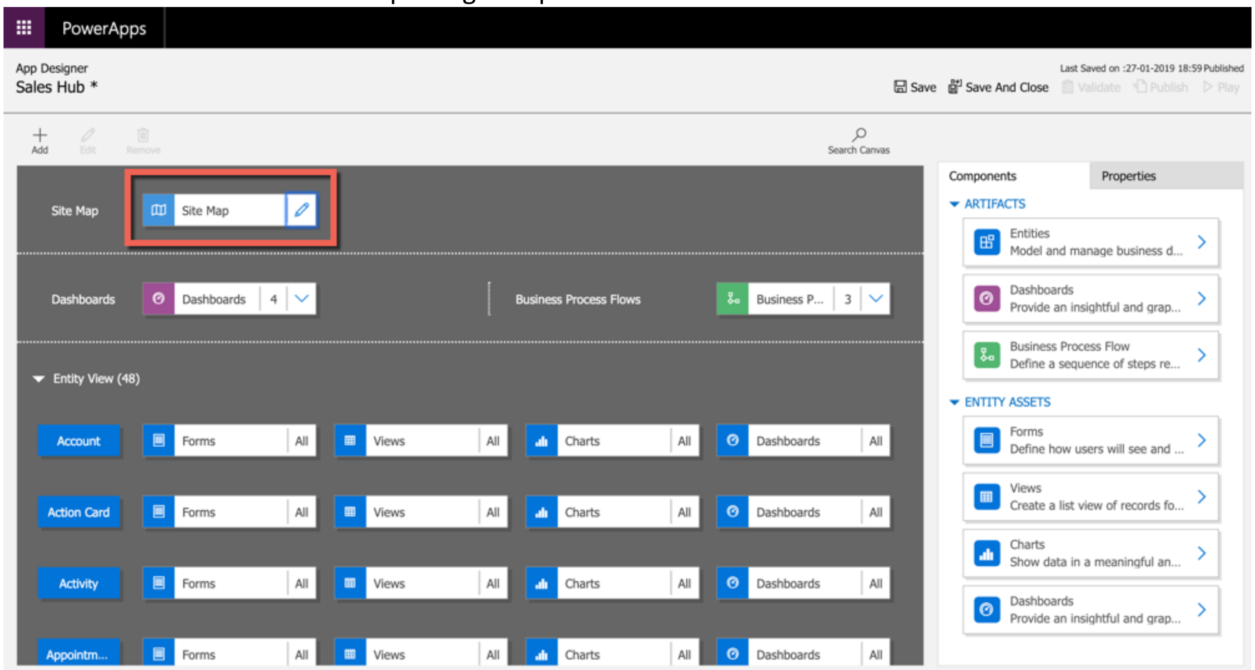
2. In the Solution Explorer, go to **Model-driven Apps**.



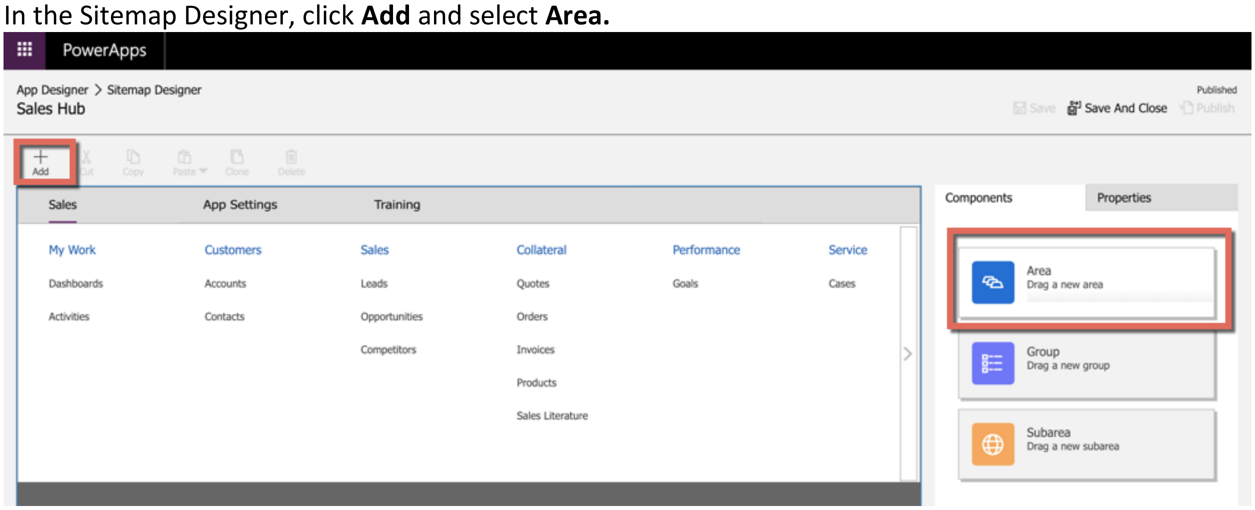
3. In the Model-driven Apps page, double-click on any custom **UCI** app that you wish to configure for InsideView Insights feature access. The Sitemap Designer opens in a new window.



4. In the PowerApps Designer, select the **Site Map** you would like to add the InsideView Insights tile on and click **Edit**. The Sitemap Designer opens in a new window.

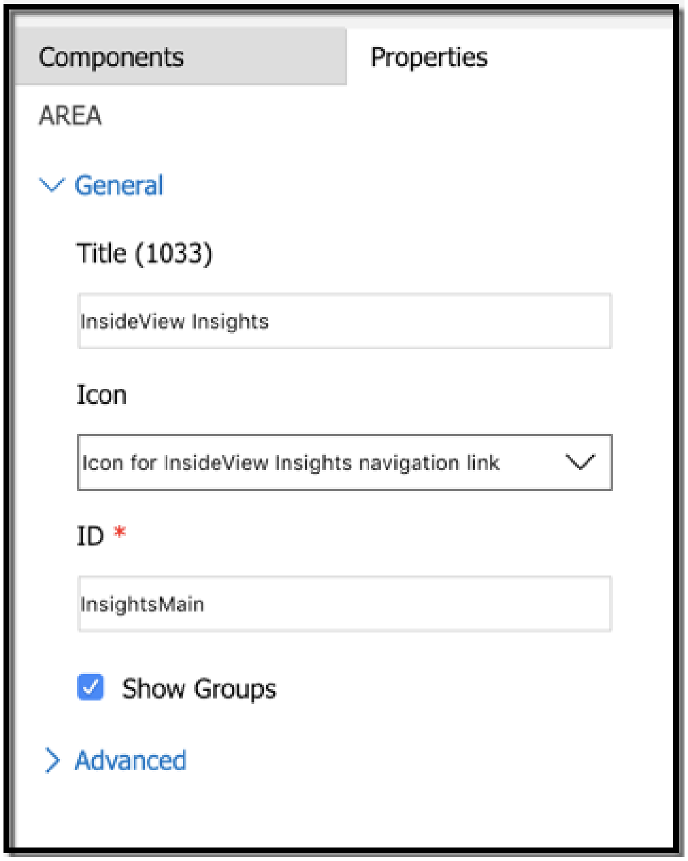


5. In the Sitemap Designer, click **Add** and select **Area.**



A new area is added on the sitemap. Enter the following properties:

- Enter the **Title** property value as *InsideView Insights*.
- Select **Icon for InsideView Insights navigation** link option for the **Icon** property value
- Enter the **ID** property value as *InsideMain*.
- Select the **Show Groups** check box.

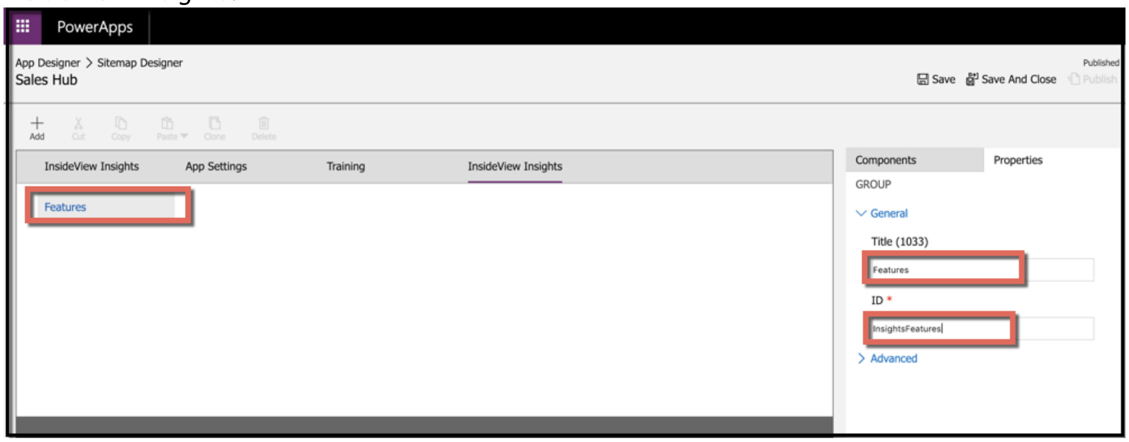


6. Select the **InsideView Insights** area and drag and drop two **groups** from the **Components** panel, into the area.

Enter the property values for each group:

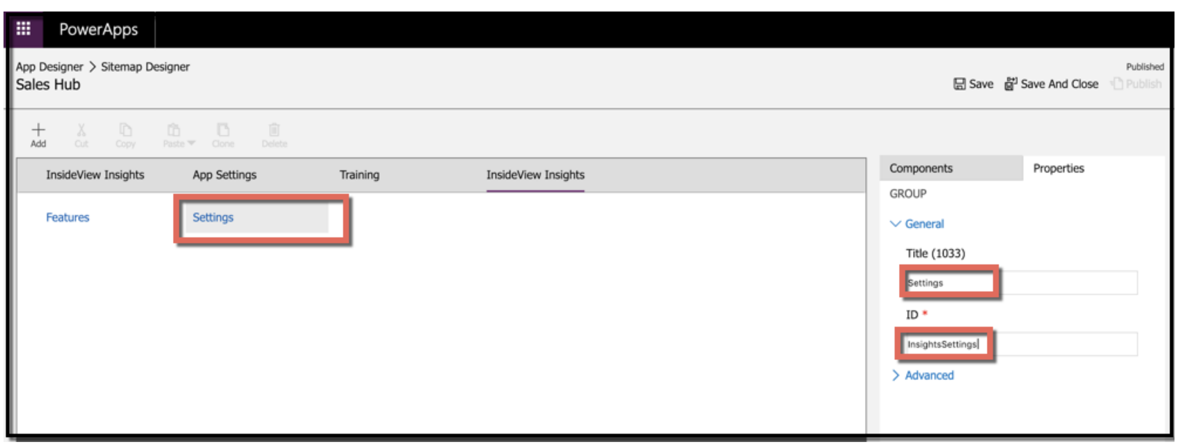
Group 1 – Features

- Enter the **Title** property value as *Features*
- Enter the **ID** property value as *InsightsFeatures*
- Enter the value in the **Advanced > More Descriptions** field as *Access Various Features of InsideView Insights*.



Group 2 - Settings

- Enter the **Title** property value as *Settings*.
- Enter the **ID** property value as *InsightsSettings*
- Enter the value in the **Advanced > More Descriptions** field as *Configure InsideView Insights Preferences*.



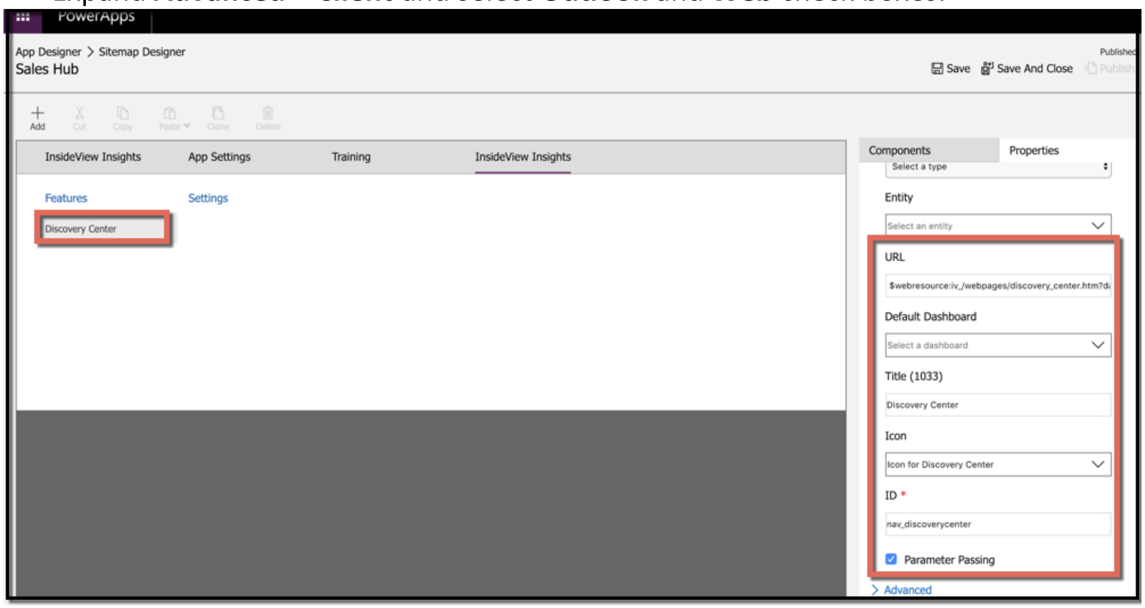
7. Select the group to which you want to add a subarea and click **Add** > **Subarea**. Add **two** subareas to the **Features** group and **three** subareas to the **Settings** group.

Enter the following property values for each subarea:

Sub Area 1 under **Features** group: property values for subarea **Discovery Center**:

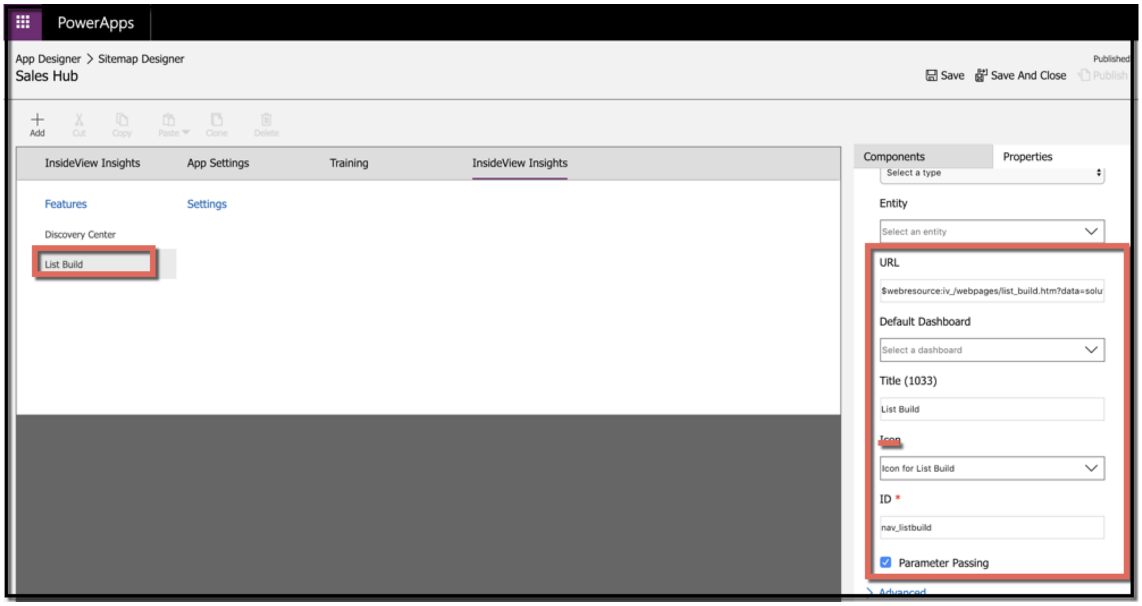
- **Type**: Select the **Web Resource** option.

- **URL**: Enter this URL: *$webresource:iv_/webpages/discovery_center.htm* or enter the keyword Discovery Center and select the *InsideView Insights Discovery Center* option.
- **Title**: *Discovery Center*.
- **Icon**: *Icon for Discovery Center*.
- **ID**: *nav_discoverycenter*.
- Select the **Parameter Passing** check box.
- Expand **Advanced > SKUs** and select all check boxes.
- Expand **Advanced > Client** and select **Outlook** and **Web** check boxes.



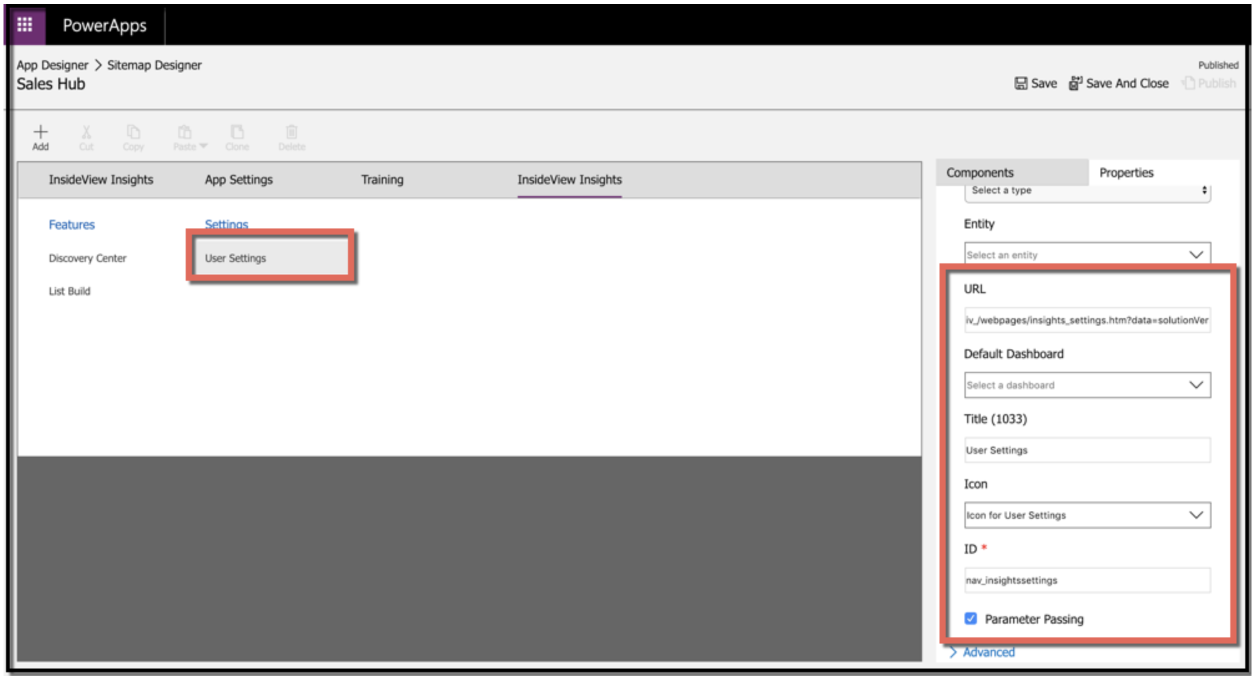
Sub Area 2 under **Features** group**:** property values for subarea **List Build**:

- **Type**: Select the **Web Resources** option.
- **URL**: Enter this URL: *$webresource:iv_/webpages/list_build.htm* or enter the keyword List Build to select *InsideView Insights List Build*.
- **Title**: *List Build*.
- **Icon**: *Icon for List Build*.
- **ID**: *nav_listbuild*.
- Select the **Parameter Passing** check box.
- Expand **Advanced > SKUs** and select all check boxes.
- Expand **Advanced > Client** and select **Outlook** and **Web** check boxes.



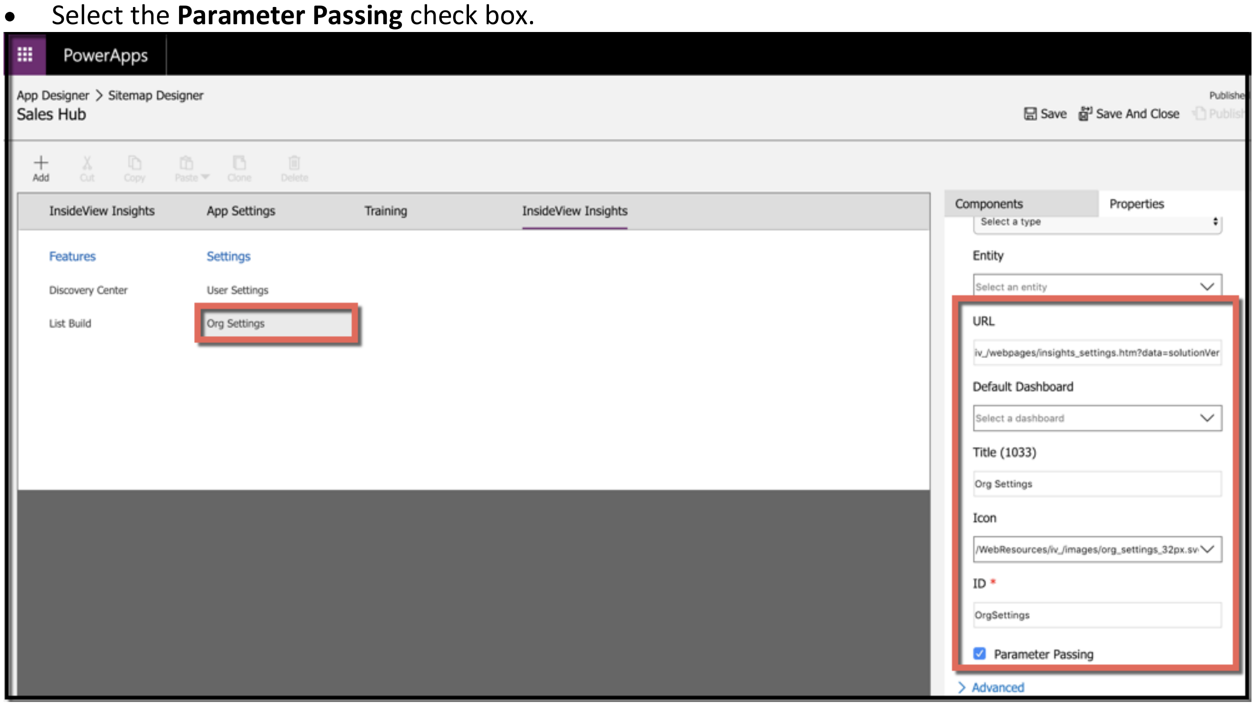
Sub Area 3 under **Settings** group: Property values for subarea **User Settings**:

- **URL**:$webresource:iv_/webpages/insights_settings.htm?data=settingsType=user
- **Title**: *User Settings*.
- **Icon**: *Icon for User Settings*.
- **ID**: *nav_insightssettings*.
- Select the **Parameter Passing** check box.
- Expand **Advanced > SKUs** and select all check boxes.
- Expand **Advanced > Client** and select **Outlook** and **Web** check boxes.

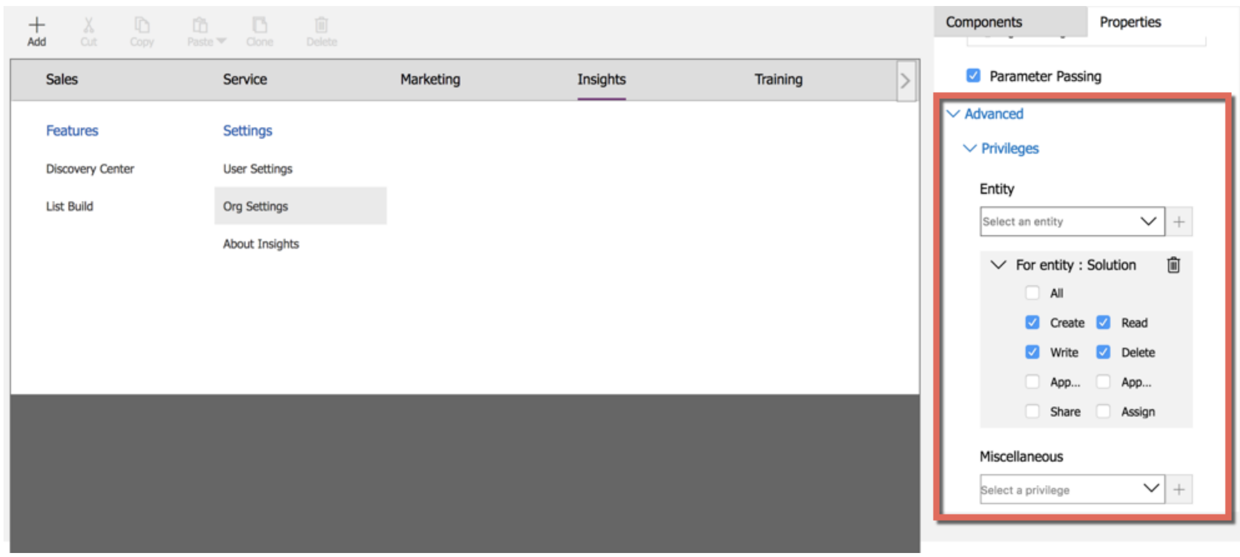


Sub Area 4 under **Settings** group: property values for subarea **Org Settings**:

- **URL**: $webresource:iv_/webpages/insights_settings.htm?data=settingsType=admin.
- **Title**: *Org Settings*.
- **Icon**: *Icon for Org Settings*.
- **ID**: *nav_insightssettingsadmin*.
- Select the **Parameter Passing** check box.

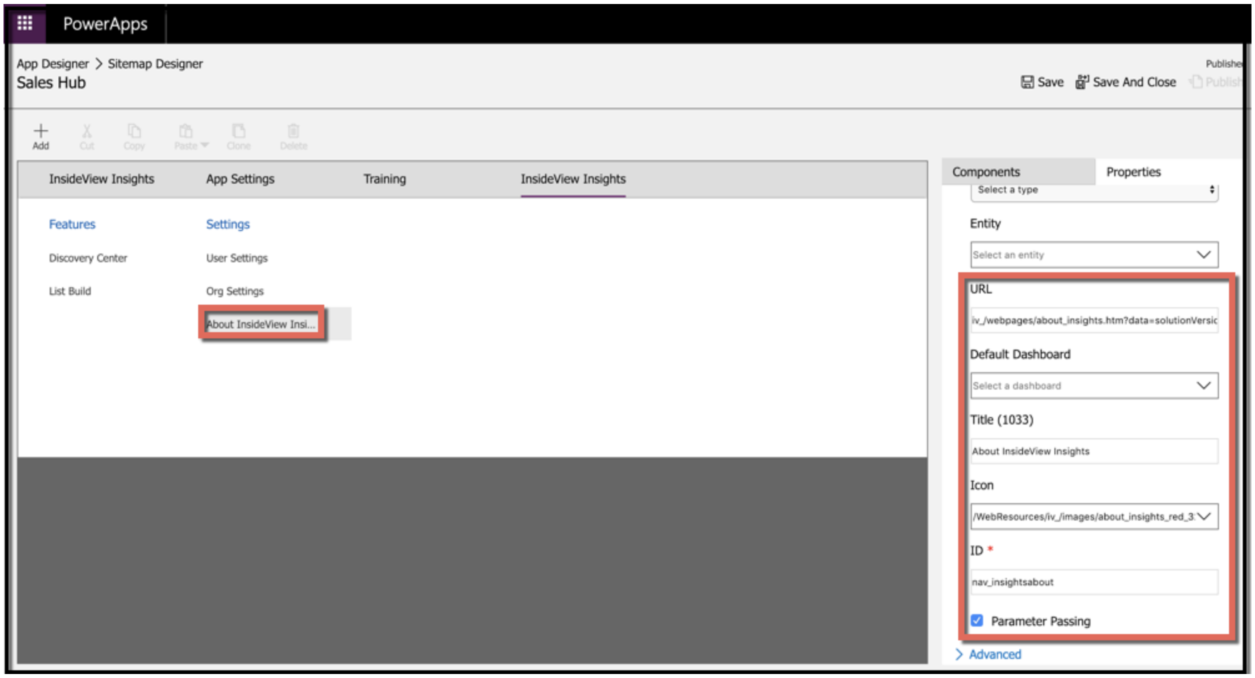


- Expand the **Advanced** link and select **Privileges.**
- In the **Entity** drop-down, select the **Solution** item and click **Add +.**
- Click **>** to **Expand** the Privileges for Solution entity and select the *create*, *read*, *write* and *delete* check boxes.
- Deselect remaining check boxes.
- Expand **Advanced > SKUs** and select all check boxes.
- Expand **Advanced > Client** and select **Outlook** and **Web** check boxes.

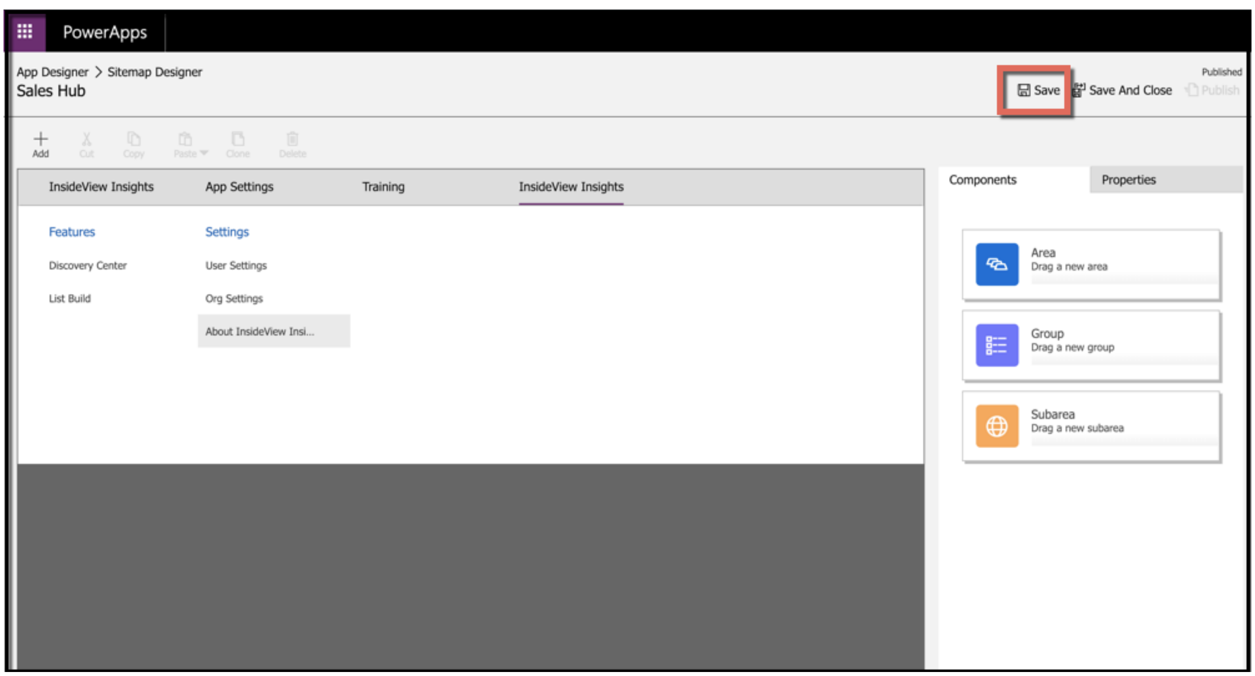


Sub Area 5 under the **Settings Group**: property values for subarea **About InsideView Insights**:

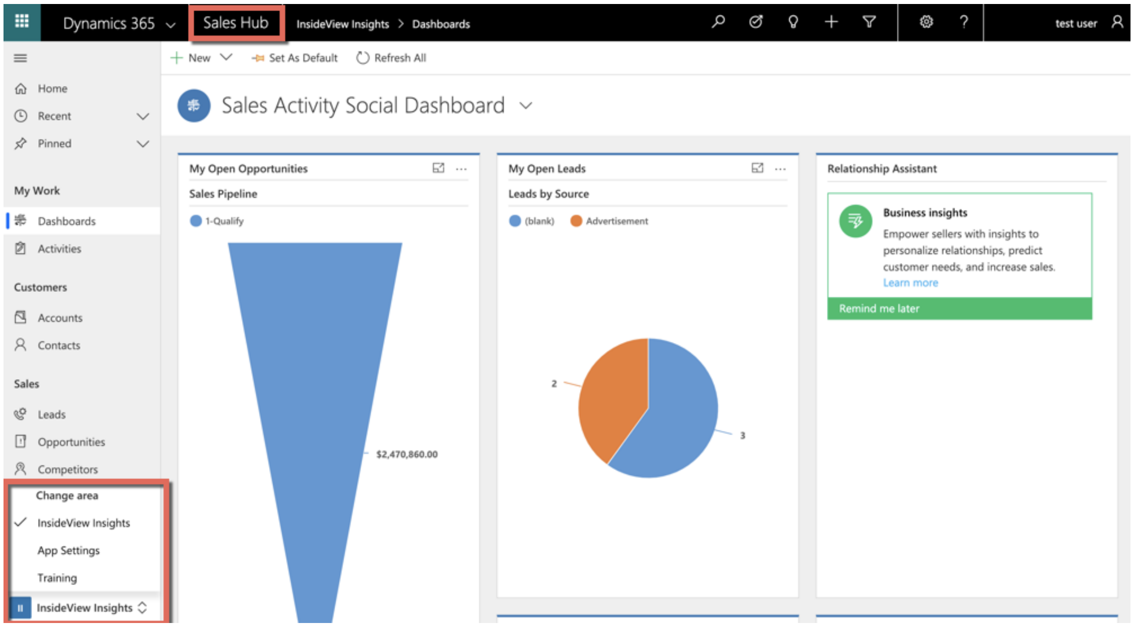
- **URL**: *$webresource:iv_/webpages/about_insights.htm*.
- **Title**: *About Insights.*
- **Icon**: *Icon for About InsideView Insights.*
- **ID**: *nav_insightsabout.*
- Select the **Parameter Passing** check box.
- Expand **Advanced > SKUs** and select all check boxes.
- Expand **Advanced > Client** and select **Outlook** and **Web** check boxes.



8. Click **Save.**



9. Once the changes are saved, click **Publish**. Now, you can see the **InsideView Insights** tile on the custom sitemap.



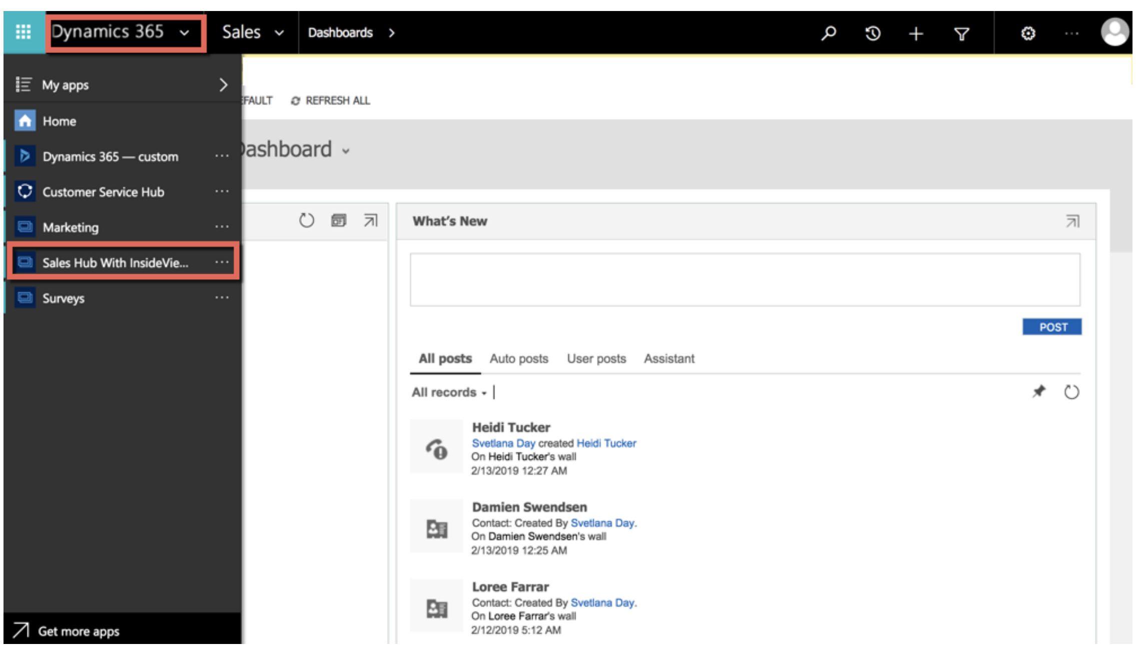
If you face any issues, submit a request for [technical support](). InsideView's support team will contact you to address your problem.

Navigating to InsideView Insights Features Using the UCI App Sitemap

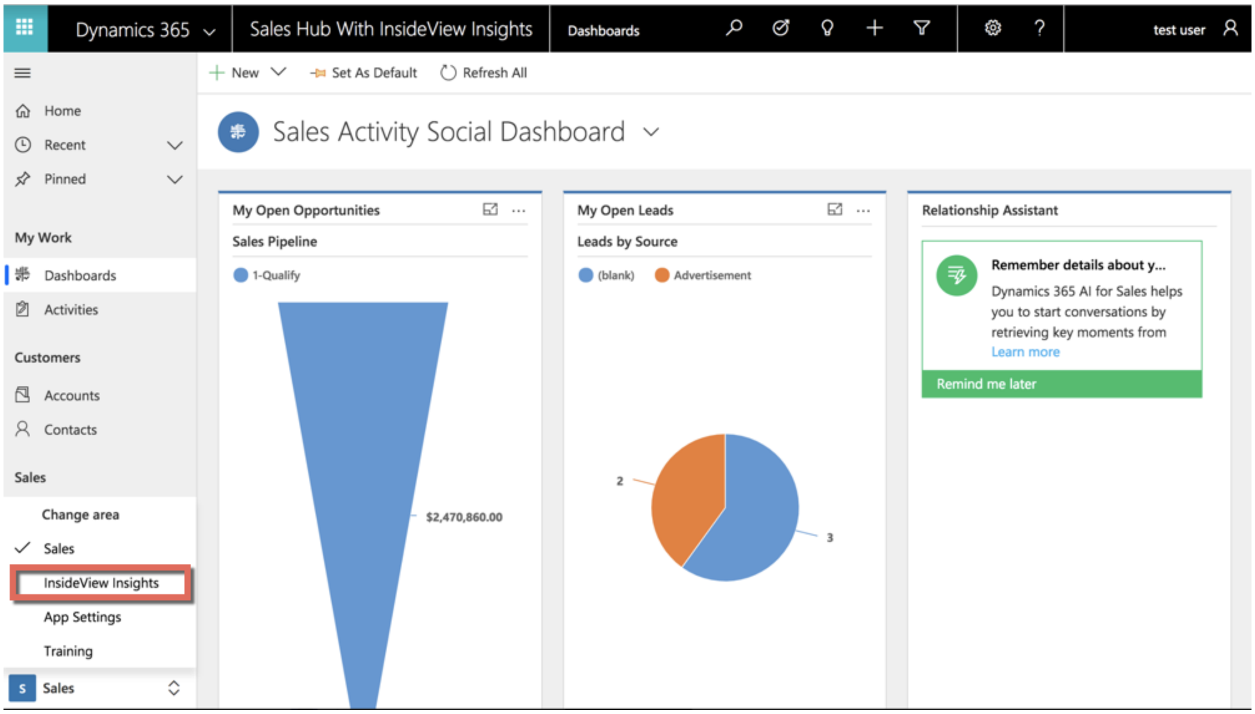
You can navigate to InsideView Insights features in any UCI app using the sitemap that is configured with all InsideView Insights features.

To access features with default **Sales Hub with InsideView Insights** sitemap, follow these steps:

1. Navigate to the **Dynamics 365 > Sales Hub with InsideView Insights**.

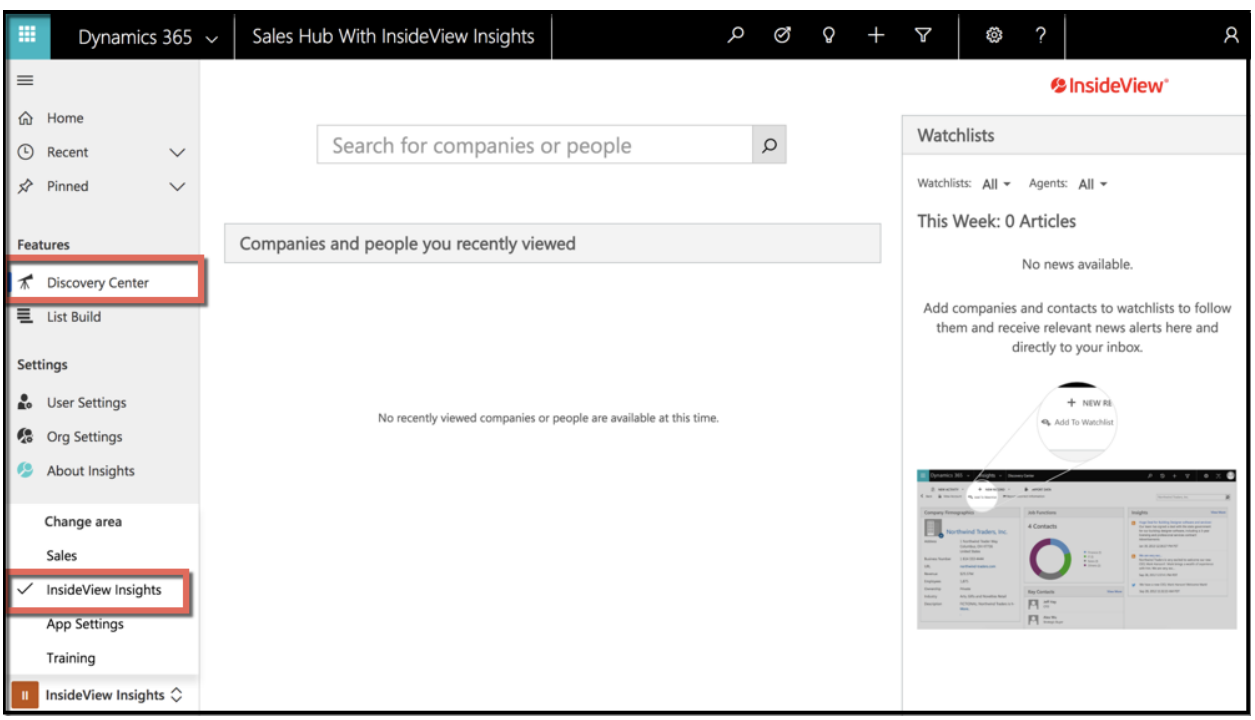


2. Click the **Sales** link and select the **InsideView Insights** sitemap.



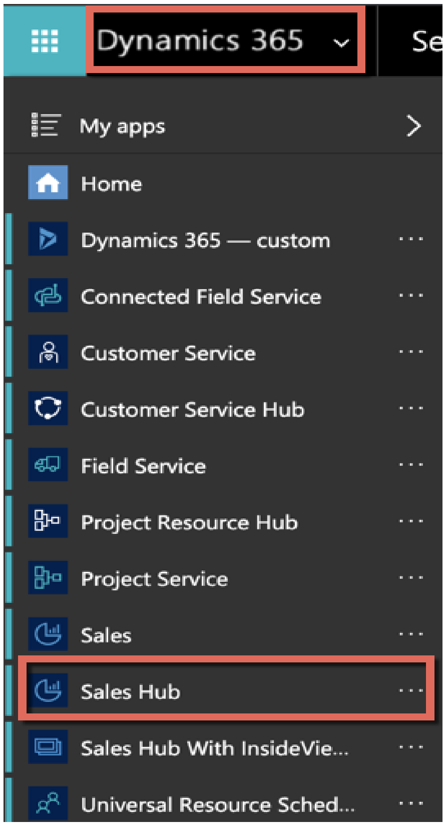
3. Once you select the **InsideView Insights** sitemap, all the **Features** and **Settings** that are configured earlier will be visible in the Navigation pane.

4. Click on any option under the **Features** or **Settings** menu to open the respective InsideView Insights page.

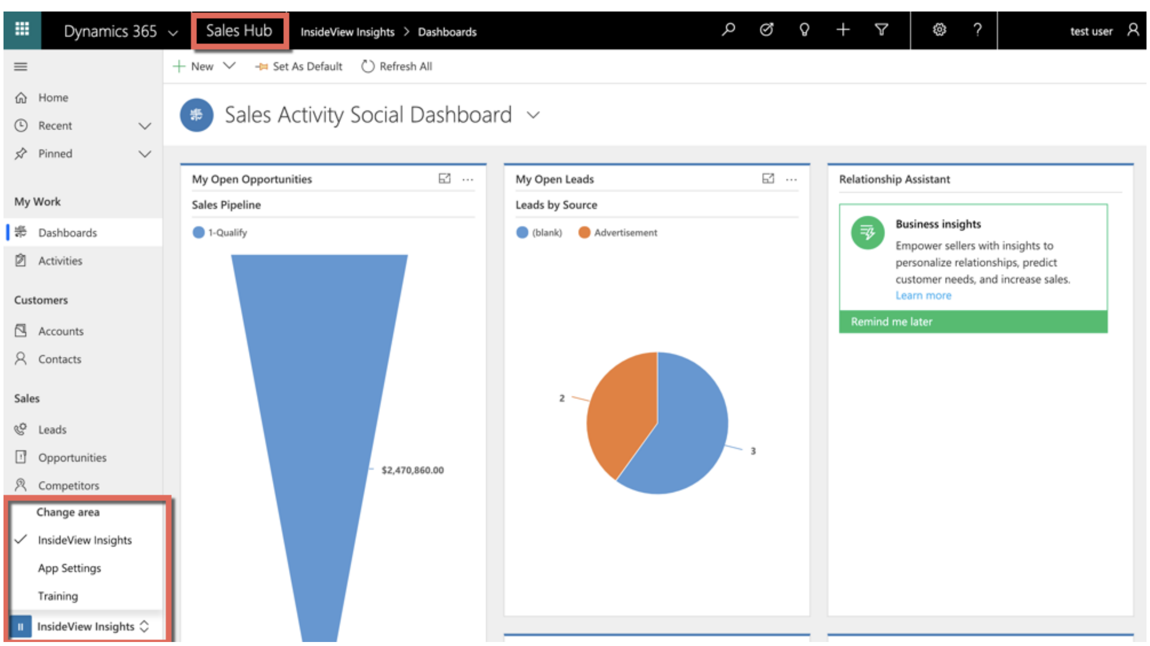


Note: Once you have configured custom Sales Hub or any UCI, you can navigate to InsideView Insights features by selecting the site map. To do so, follow these steps:

- Navigate to the **Dynamics 365 > Sales Hub.**



- Select the InsideView Insights item in the sitemap as illustrated below:



Chapter 7: Managing User Settings

Insights users can manage some of their own settings for accounts, contacts, and leads in CRM. The User Settings page provides options to change and manage Company Insights agents, Watchlists settings, email notifications, and connections.

For more information on user settings, see **Chapter 10: User Preferences** in the *InsideView Insights for Dynamics CRM Online User Guide.*

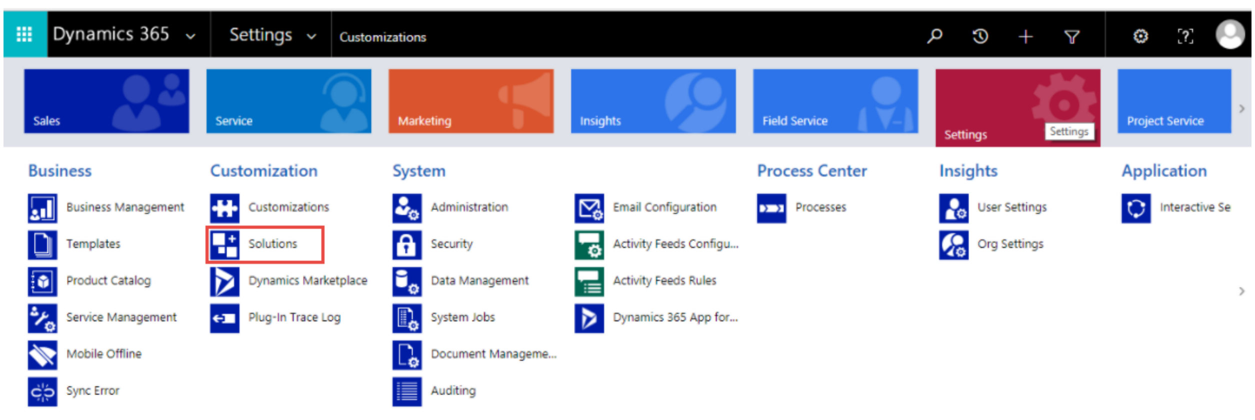
Chapter 8: Troubleshooting

The User Guide will answer many of your questions. If you need more help with InsideView Insights for Dynamics 365, you or your CRM Administrator can contact the Microsoft CRM Support Team: http://go.microsoft.com/fwlink/p/?LinkId=620732.

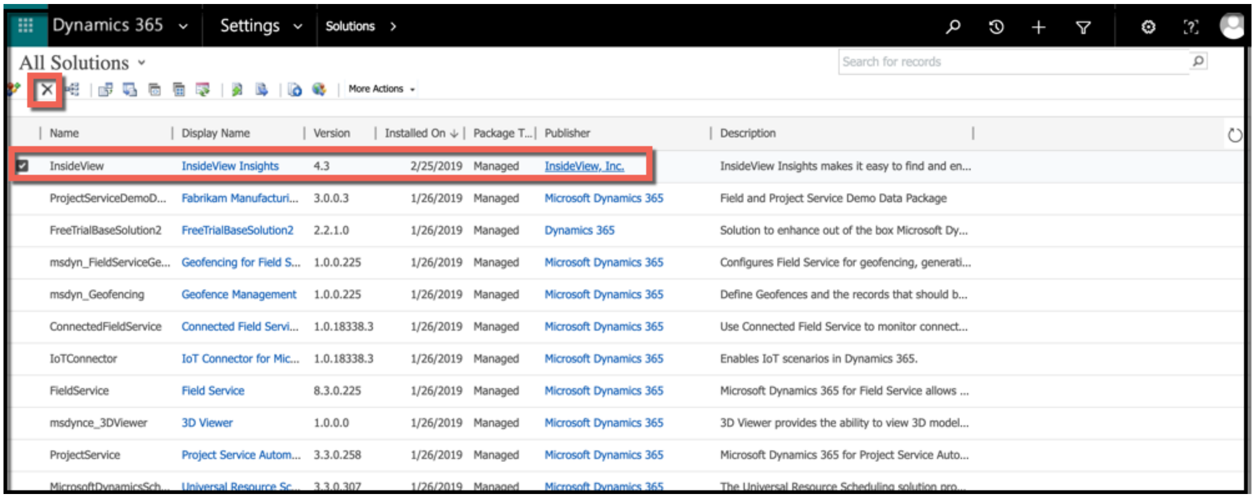
Chapter 9: Uninstalling InsideView Insights

You can uninstall the InsideView Insights package from the Solutions dashboard. Here's how:

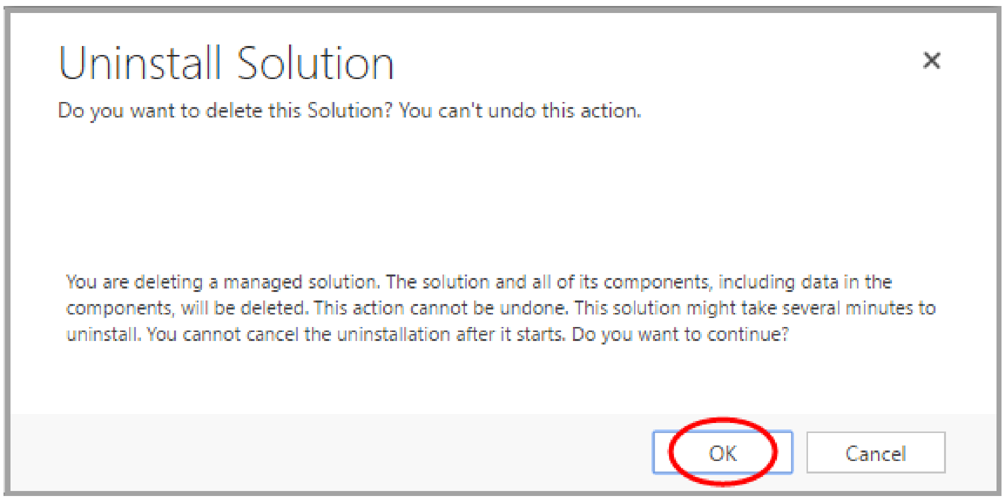
1. Log in to your CRM with your global administrator credentials.
2. Go to **Dynamics 365 > Settings > Solutions**.



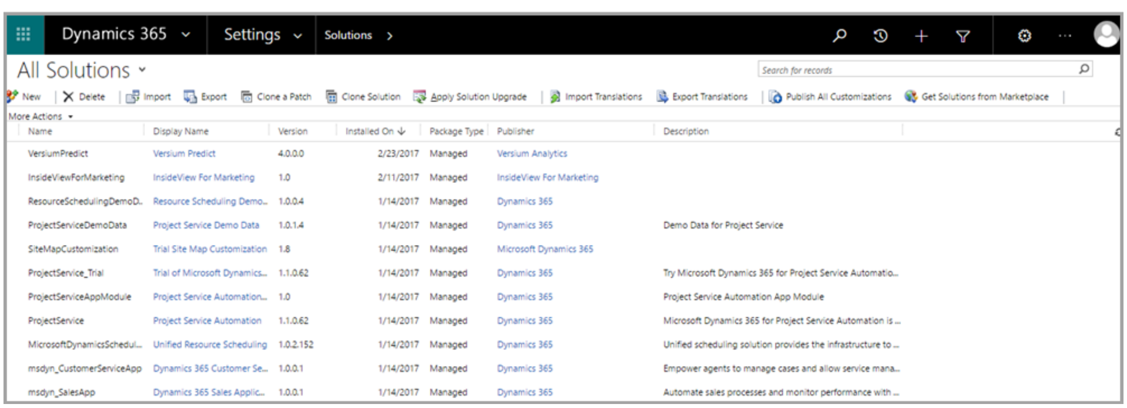
3. On the Solutions page, select the *InsideView Insights* version that you have installed and click the **Delete** button.



4. On the Uninstallation Solution page, click **OK** to uninstall Insights package.



5. Once the Insights solution is uninstalled, the package is removed from the Solutions page.



When you uninstall InsideView Insights 4.3, the **Insights User** role is automatically removed from CRM.