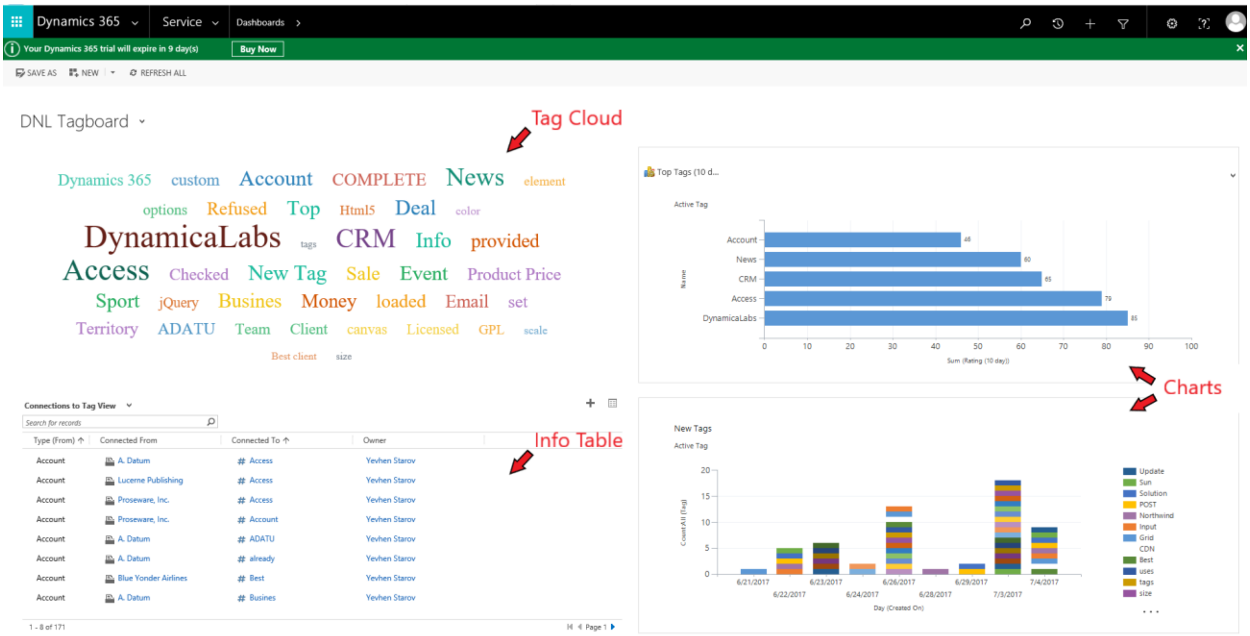
DYNAMICA TAGGING USER GUIDE

Contents

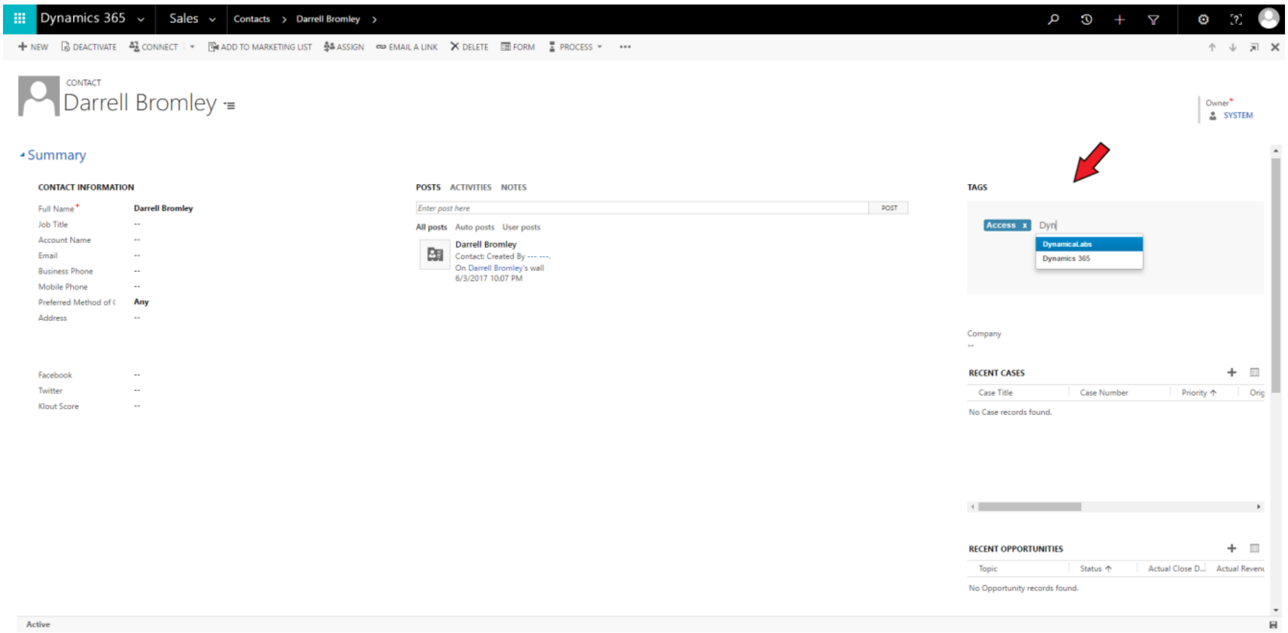
Components

Dashboard – Dynamica Tagboard

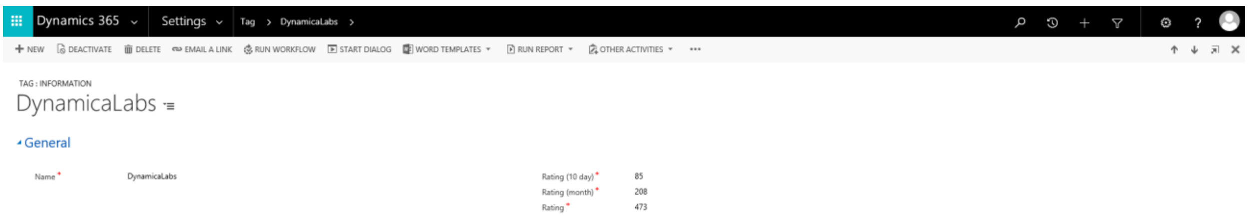
Includes 2 charts with statistics on the use of tags, an information table and a tag cloud.



Tag Input Section



Tag Entity



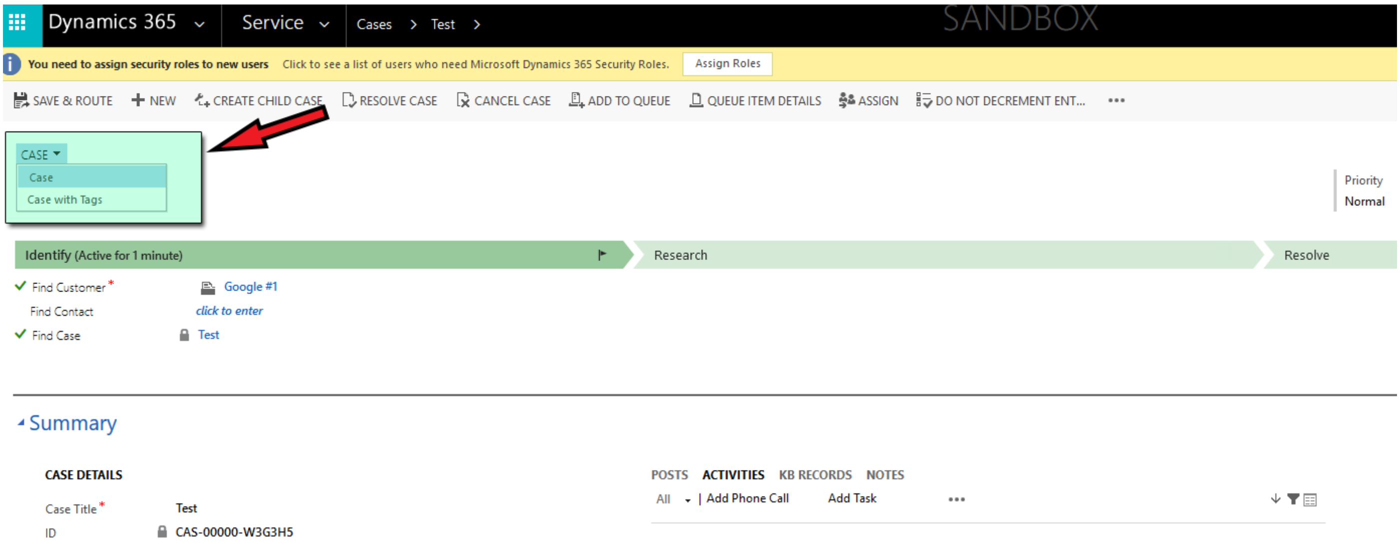
- **Field Name** – name of Tag
- **Rating** – number of use this Tag on different periods (read-only)

Usage

After installation

After successful installation, Tagging Extension ready to use:

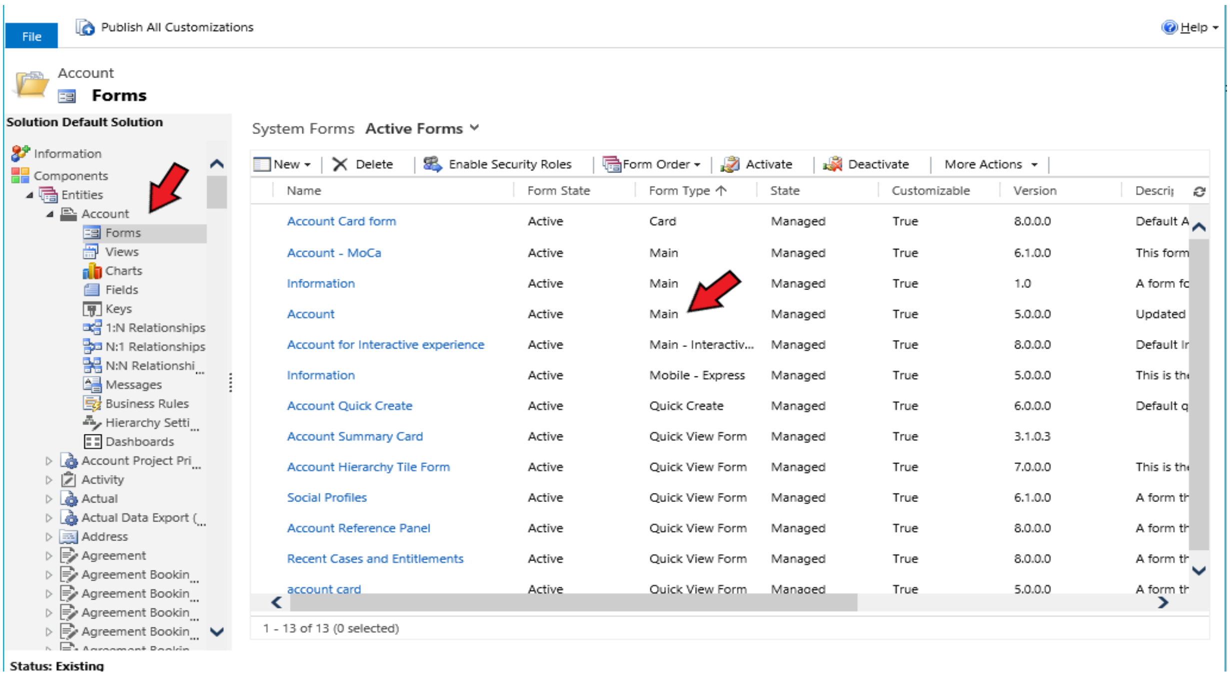
After installation, you will see a new dashboard and new forms with tags section on such entities: Account, Case, Contact, Contract, Email, Fax, Invoice, Lead, Letter, Marketing List, Opportunity, Order, Phone Call and Quote. Forms include a new section with web resource for adding new tags and displaying existing ones.



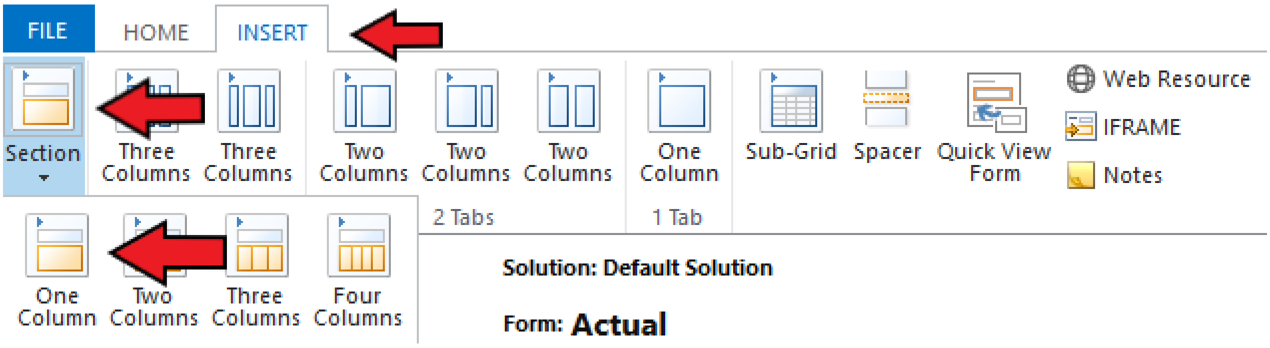
Using tags on custom entities

If you want to customize another entity to use tags, complete simple instruction below:

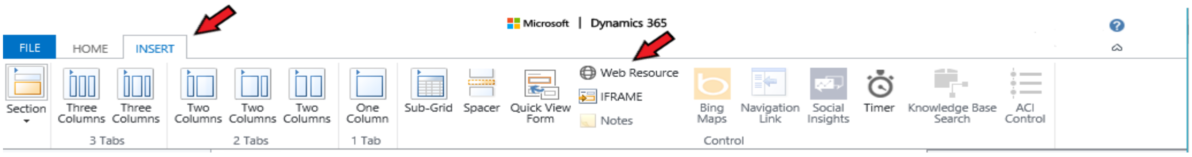
1. Open the Form of the Entity which you want to customize.
   - *Go to the tab: Dynamics 365 → Settings → Customization and choose to **Customize the System**. Then choose entity, click **Forms** and open any Main Form.*

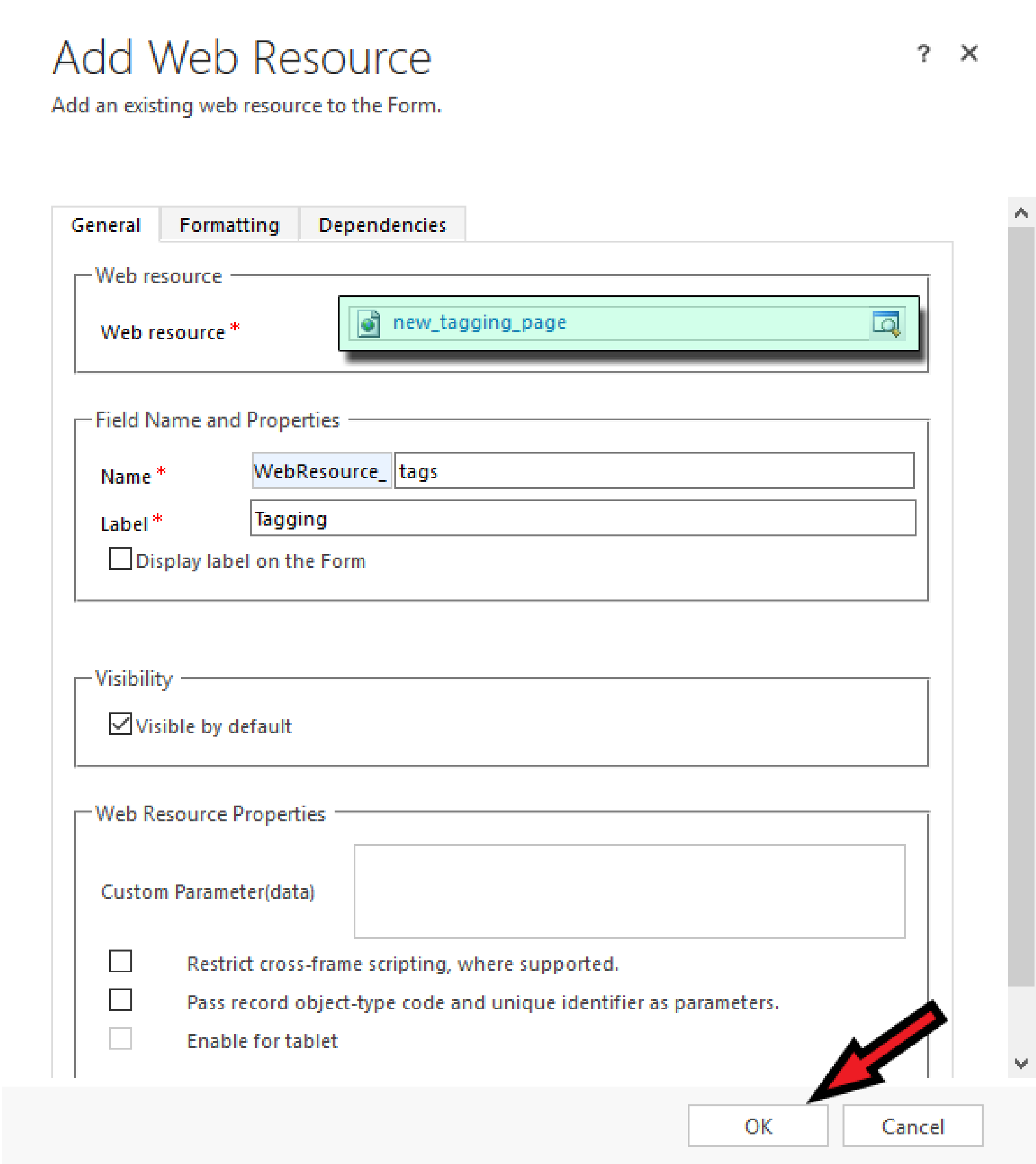


2. Add new section to the Form
   - *To do this, go to the tab **Insert** and click **Section** and choose **one column:***

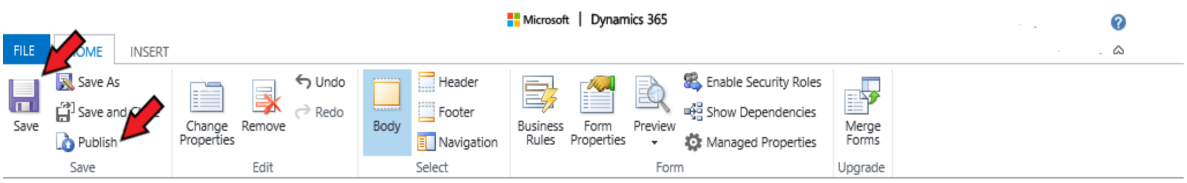


3. Add Tag Input Section (Web Resource -> **new_tagging_page**) at any place on the Form.
   - *To do this, go to the tab Insert and click Web Resource:*





- *After that click **Save** and then **Publish**:*



4. That is all to do. Open or create any record of this entity and start adding tags. All information about the tags and their use will be available on the Dashboard.

Tag records

To add tags to a record:

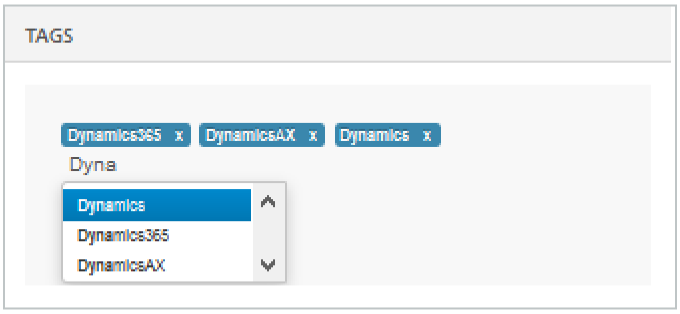
1. Open a Record;

**If you are creating a new record you must save it first before Tags input section will become active;*

2. Click on Tag input section;

3. Start typing: matching tags, that already exist in the system, will appear in drop-down list;

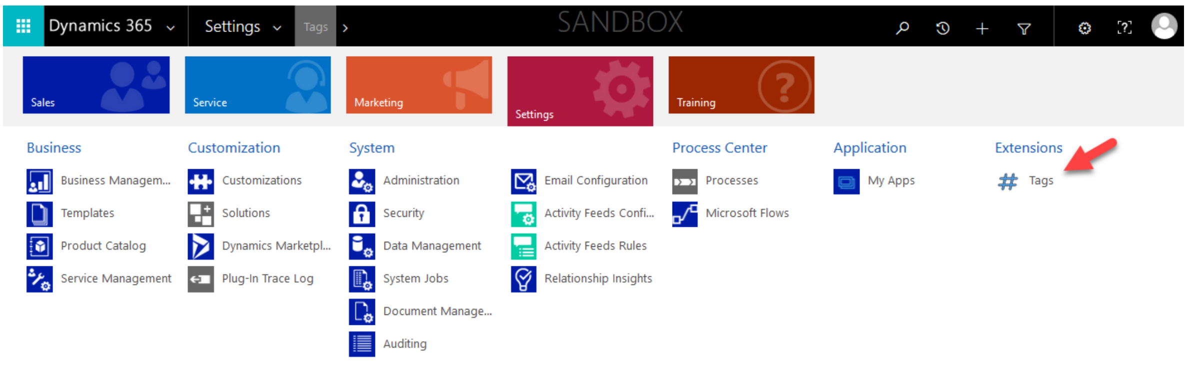
4. Select an appropriate tag from drop-down list OR Click Enter if you want to create a new Tag.



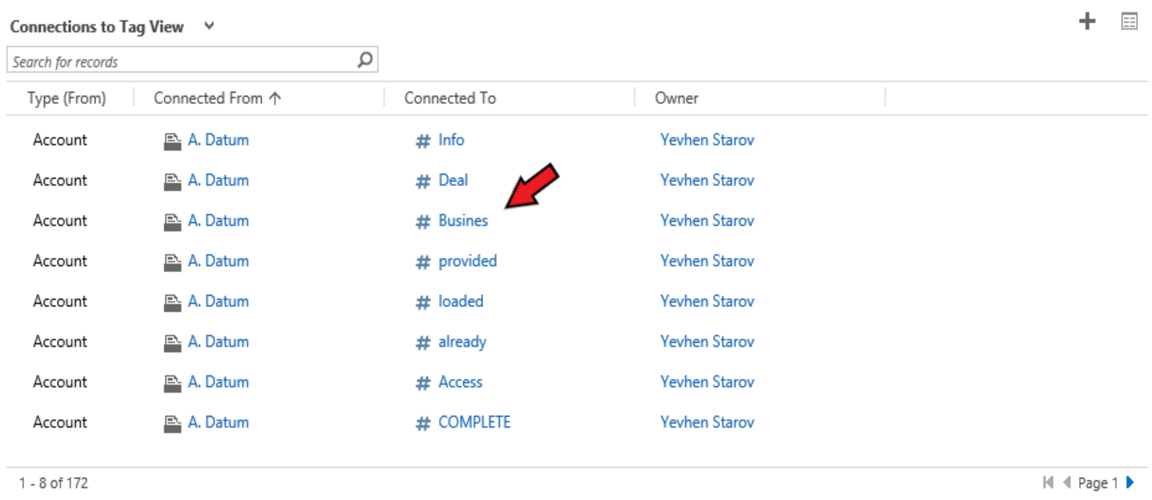
Change or Delete tags

If you want to change or delete Tags:

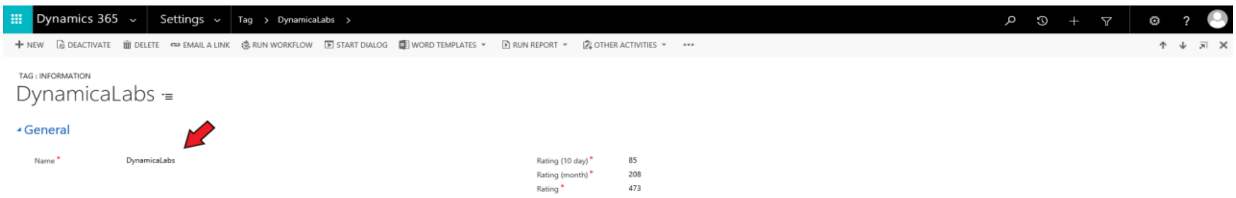
1. Choose Tag.
   - *Go to the tab: Dynamics 365→ Settings→ Tag:*



- Or choose Tag on information table on the dashboard:



2. Change Tag name or delete Tag.



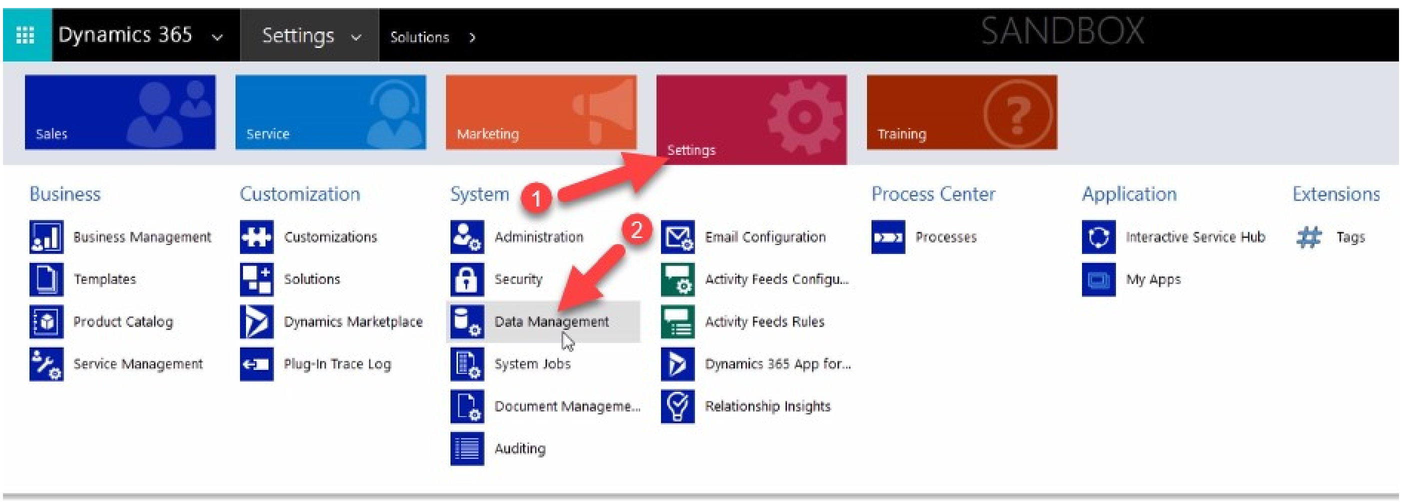
Uninstallation

Before uninstallation Dynamica Tagging solution – be sure to remove all existing connections first!

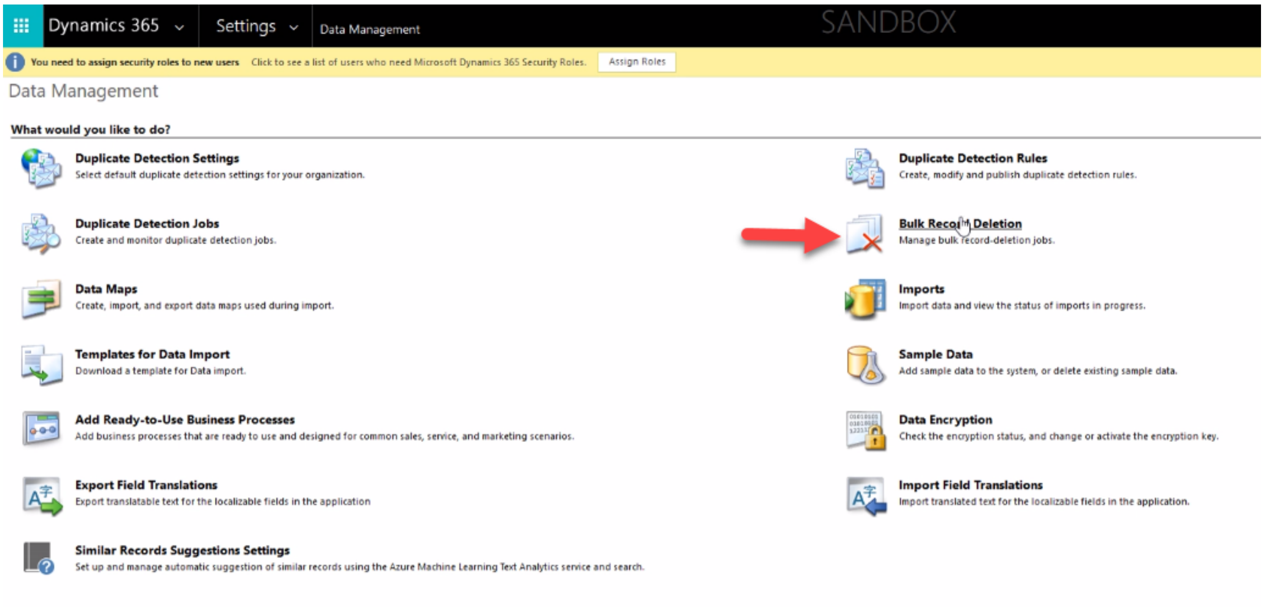
Remove connections

The fastest way to remove connections is Bulk Record Deletion:

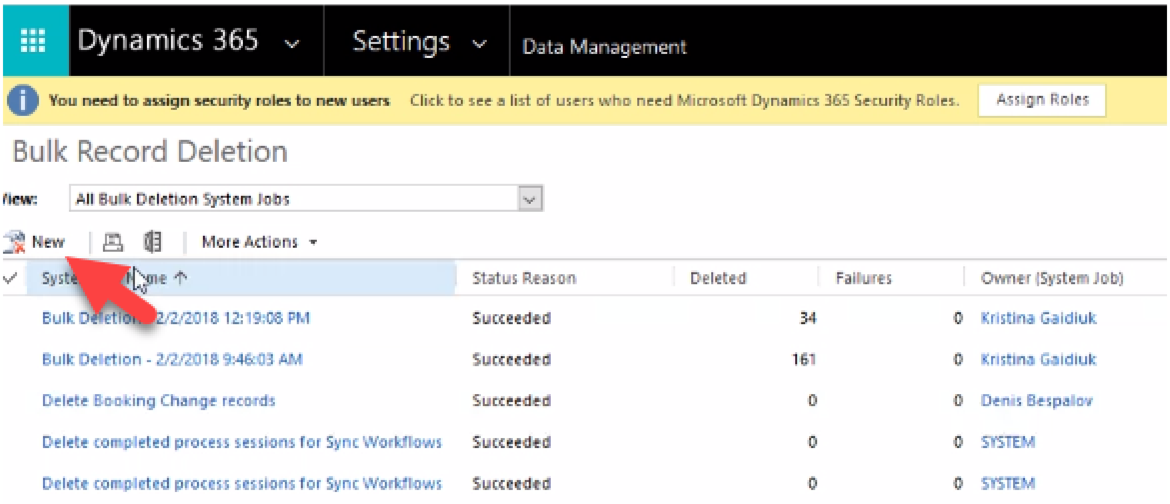
1. Go to **Setting -> Data Management**



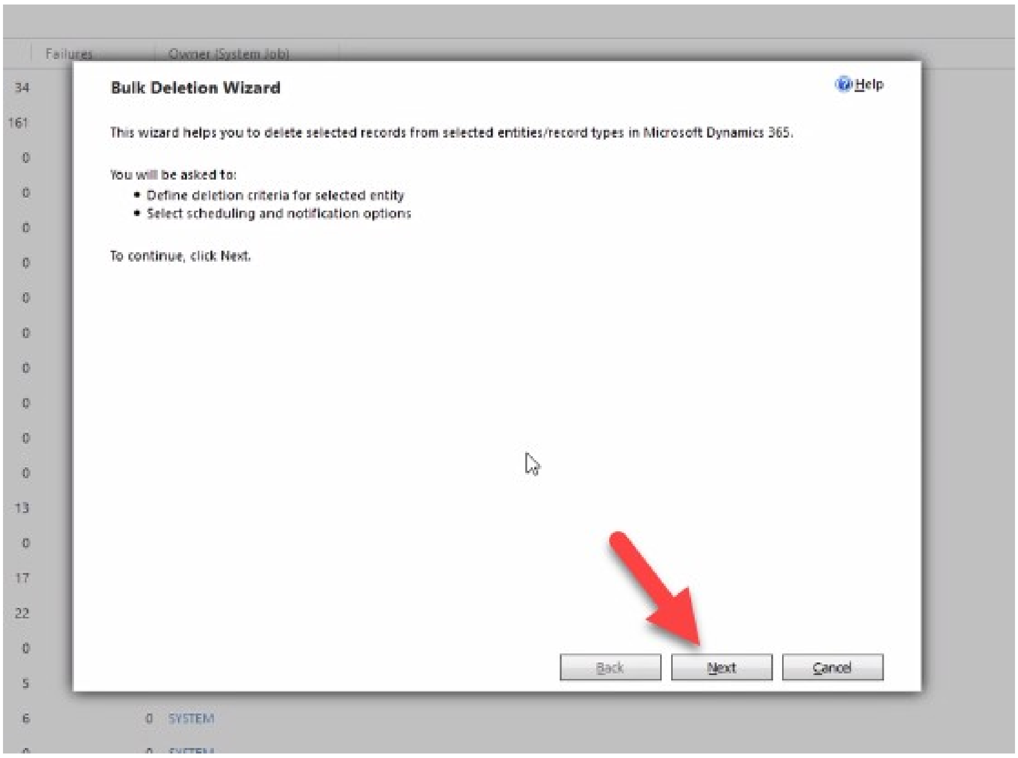
2. Select **Bulk Record Deletion**



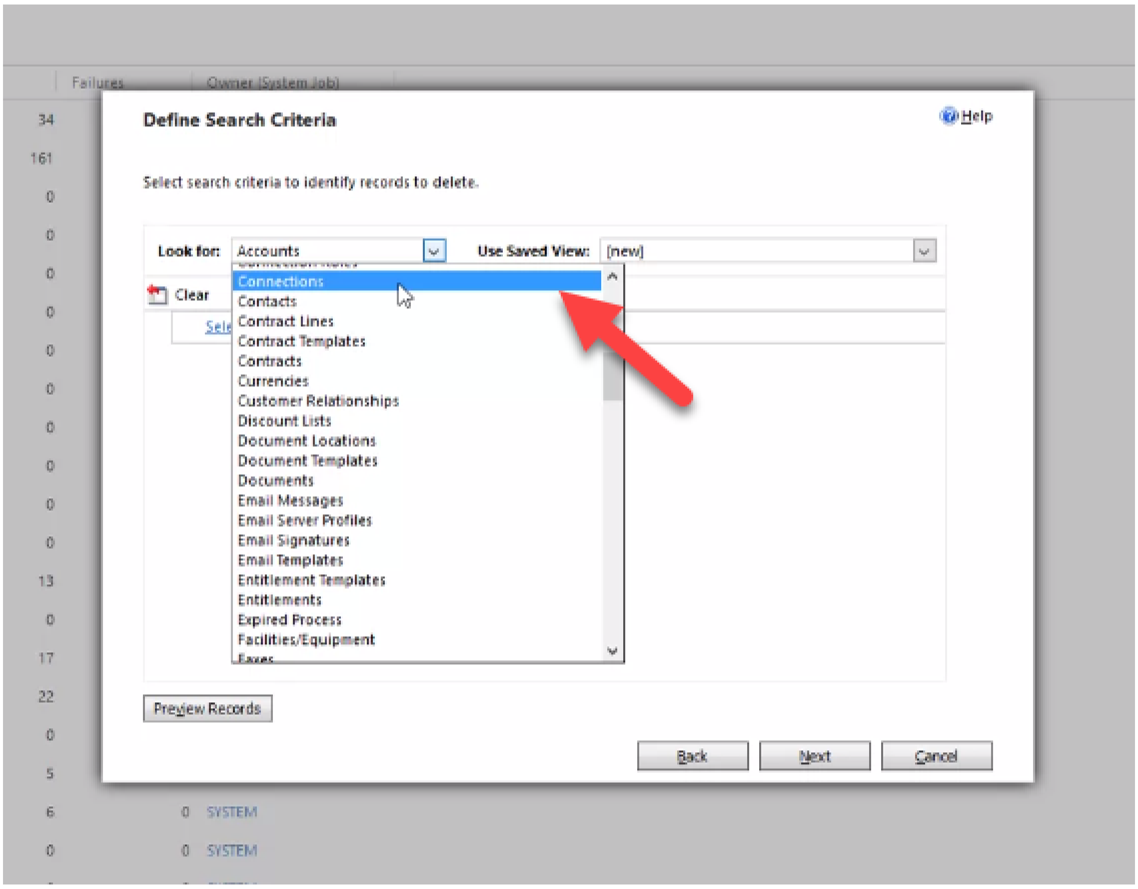
3. Click **New**



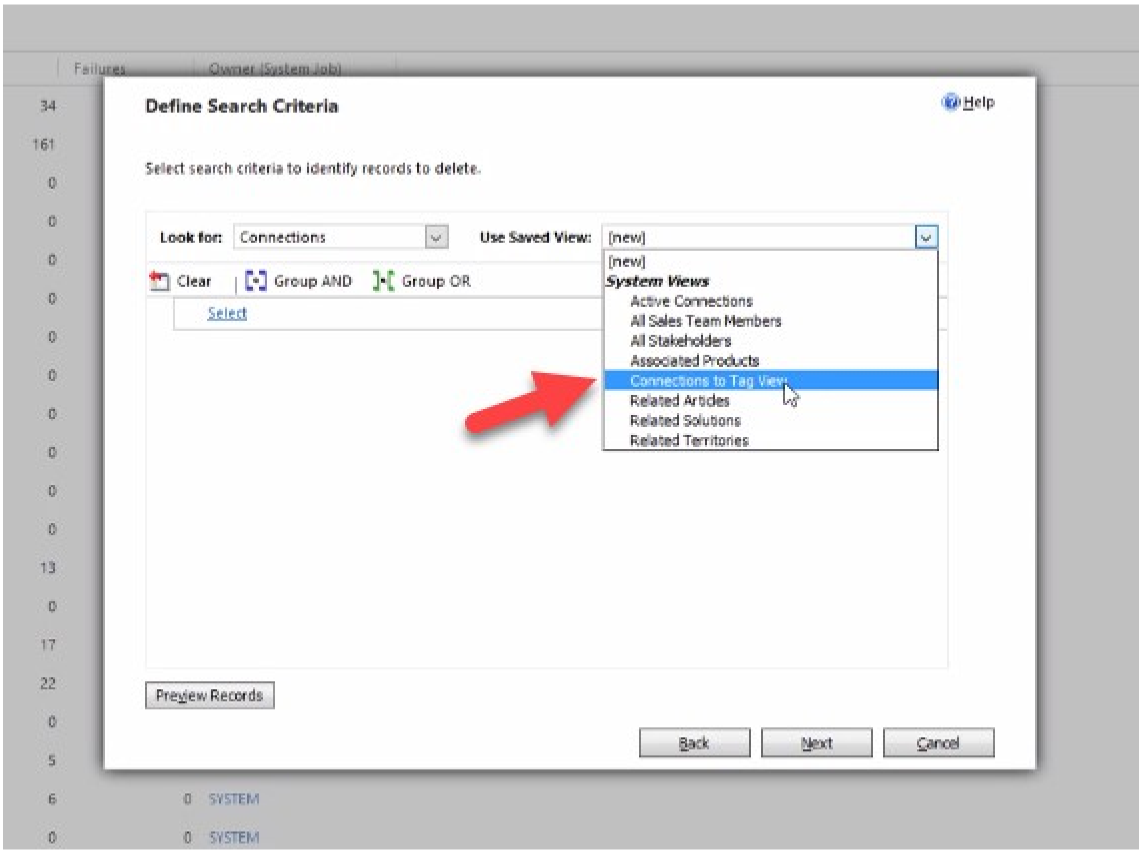
4. Click **Next**



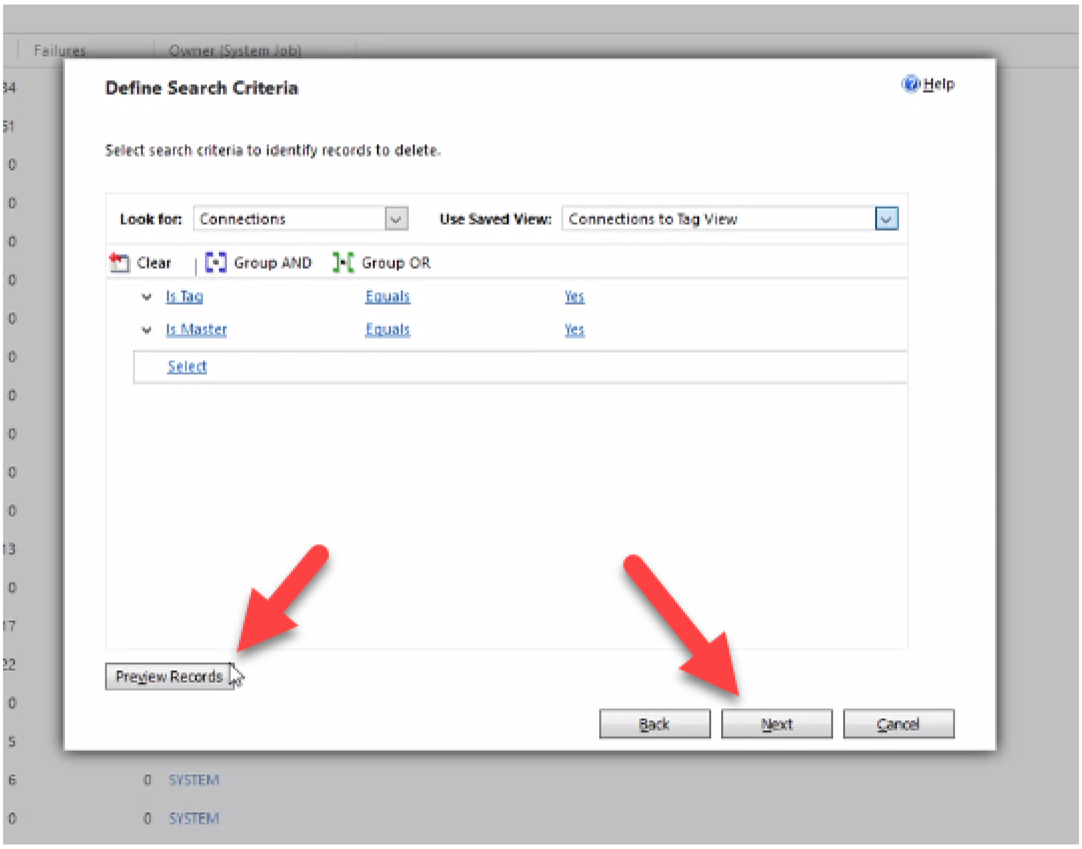
5. Find **Connections** in **Look for** drop-down list



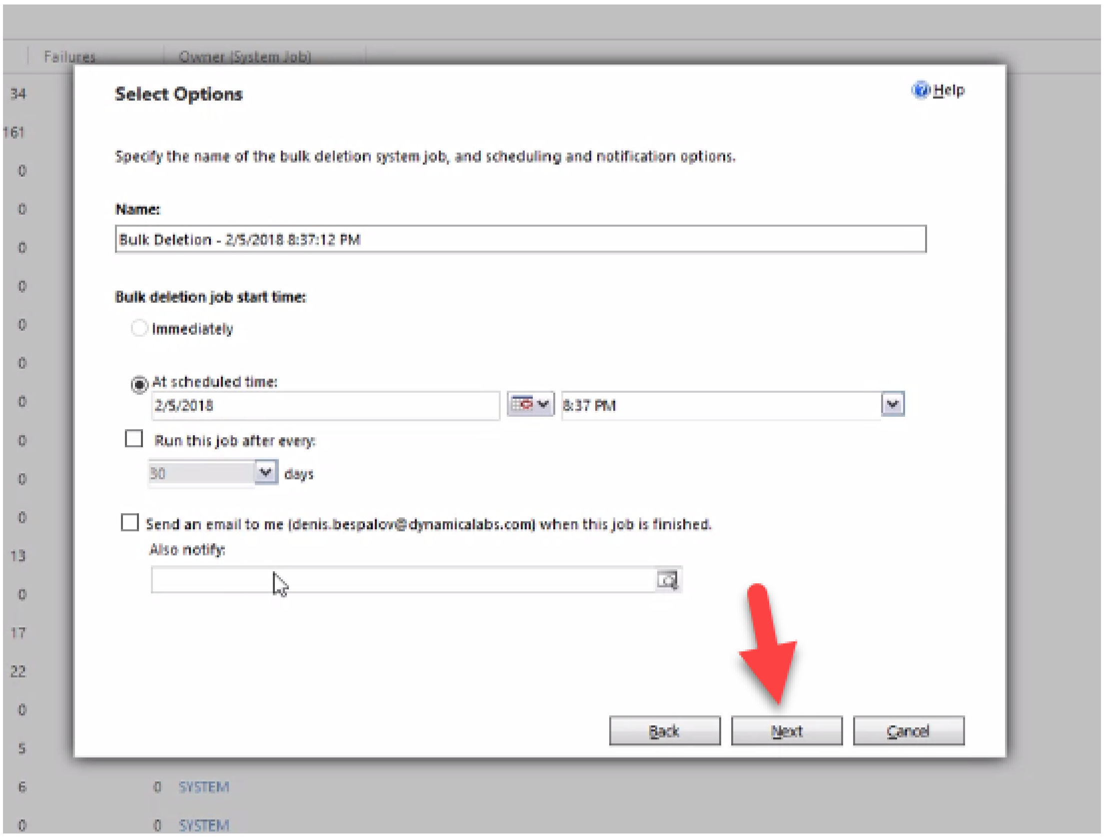
6. Select **Connections to Tag View** from Use Saved View drop-down list



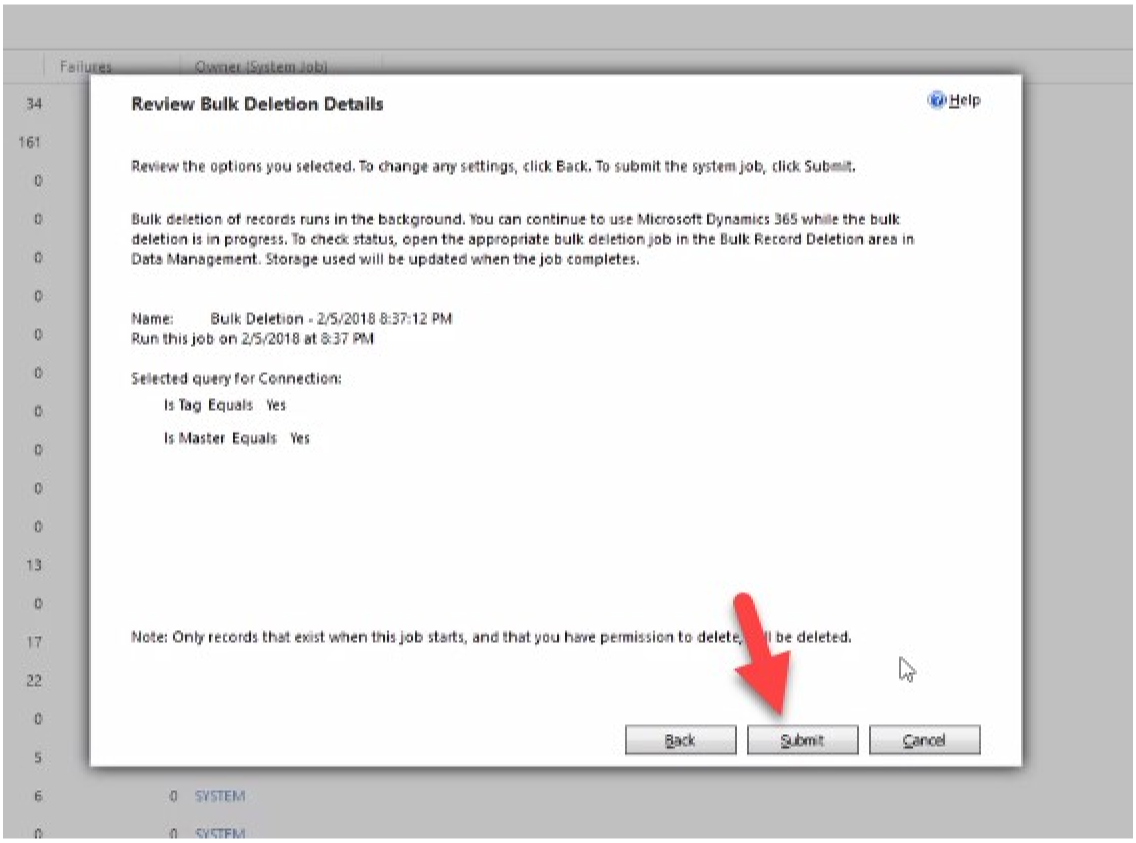
7. You can view found connections with **Preview Records** button or click **Next** to proceed to the next step



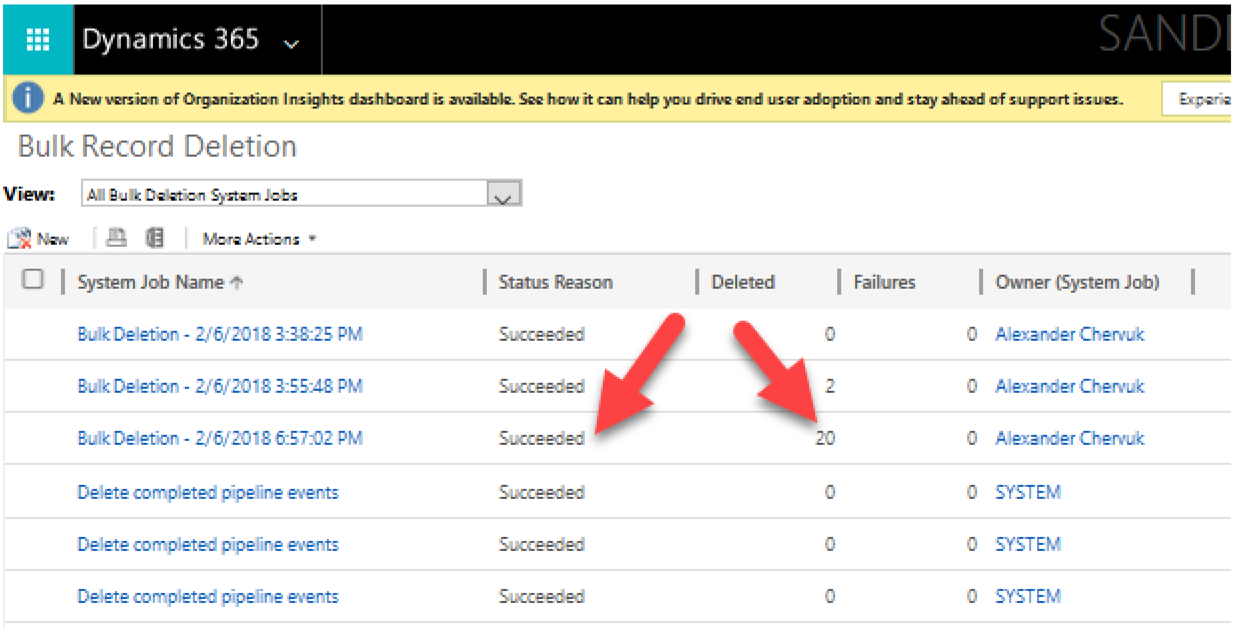
8. Specify the name and scheduling of the **Bulk Deletion** system job, then click Next



9. Review the system job information. If everything is ok – click **Submit**

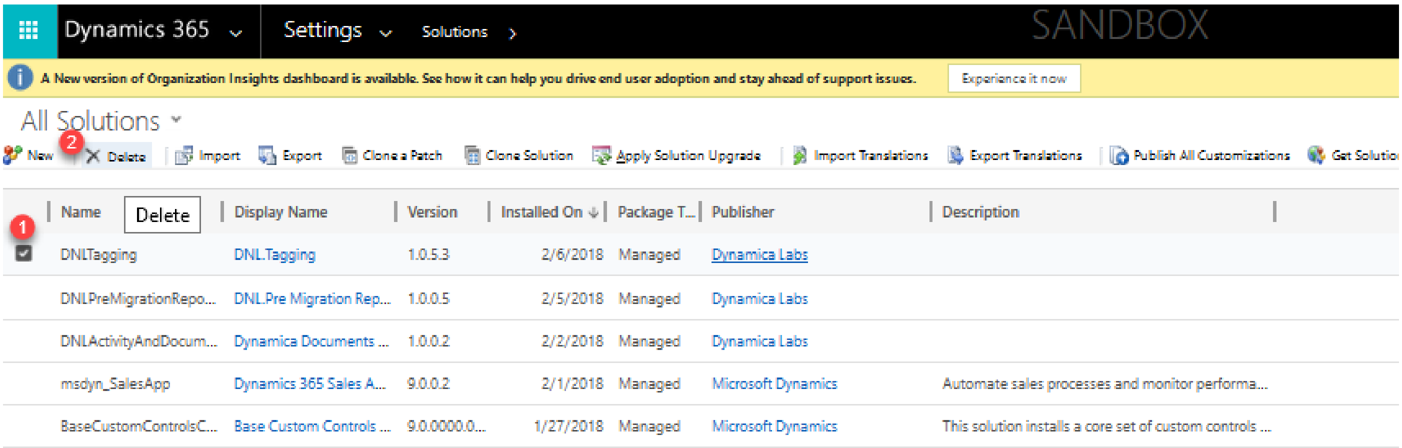


10. Wait until **Bulk Record Deletion** system job finish deletion (you may need to **refresh page F5**)



11. Go to **Settings -> Solutions**

12. Select the **Dynamica Tagging** solution and click **Delete**



13. Wait for the solution to be uninstalled.