power xrm

Microsoft Dynamics® CRM 2013/2015/2016

Microsoft Dynamics® 365 Customer Engagement

XRM.WebForm

Installation and Configuration Guide

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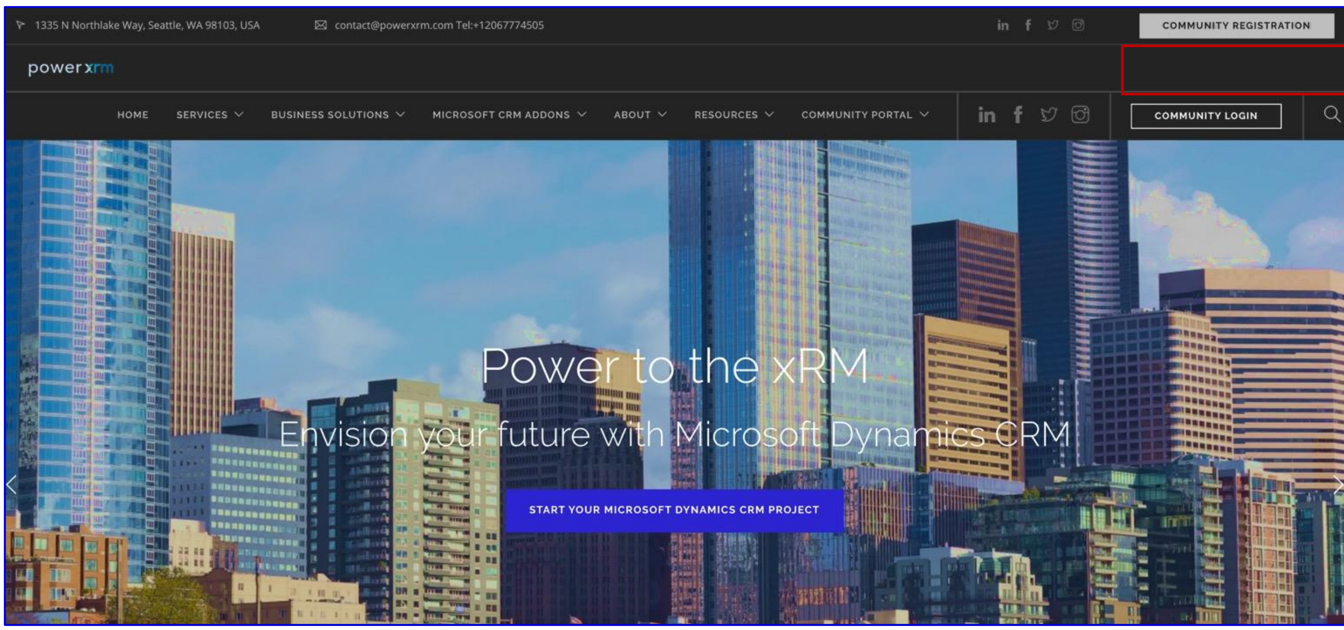
powerxrm

XRM Community Registration

XRM Community is a community of Dynamics CRM solutions and Dynamics CRM components to deliver a greater value to businesses around the world that enable Dynamics CRM customers to build their own CRM engagement solutions on Microsoft technologies.

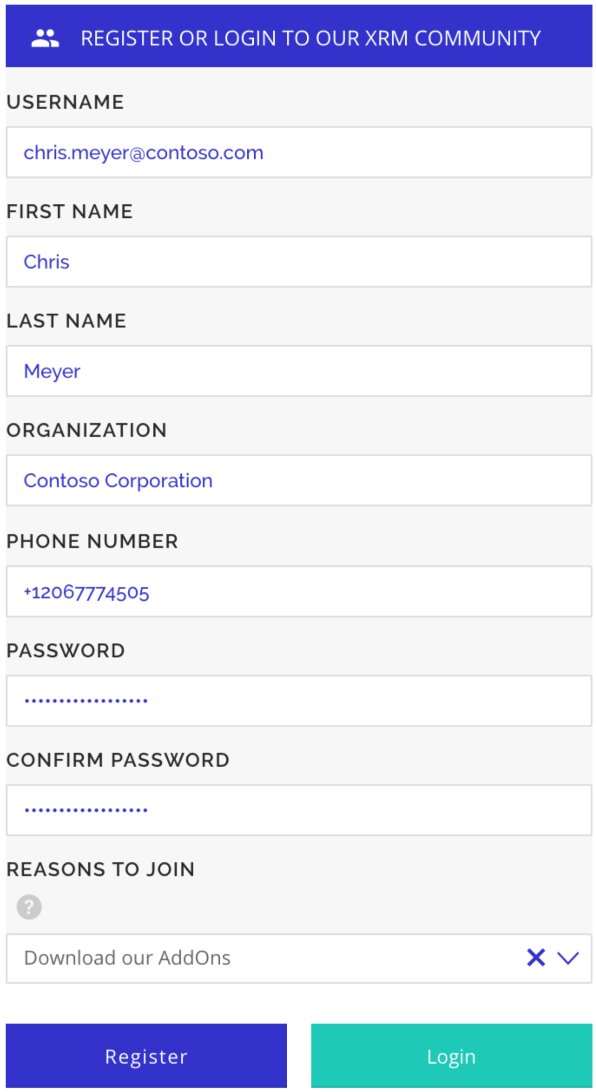
These AddOn capabilities enable any business processes to become Customer-facing. The first step in using an XRM.WebForm AddOn is to register on our Community Registration at: www.powerxrm.com



The AddOns download will empower your own customers as well as our partner ecosystem to accelerate our efforts to embrace Microsoft Dynamics CRM so they can deliver personalized and predictive customer experiences.

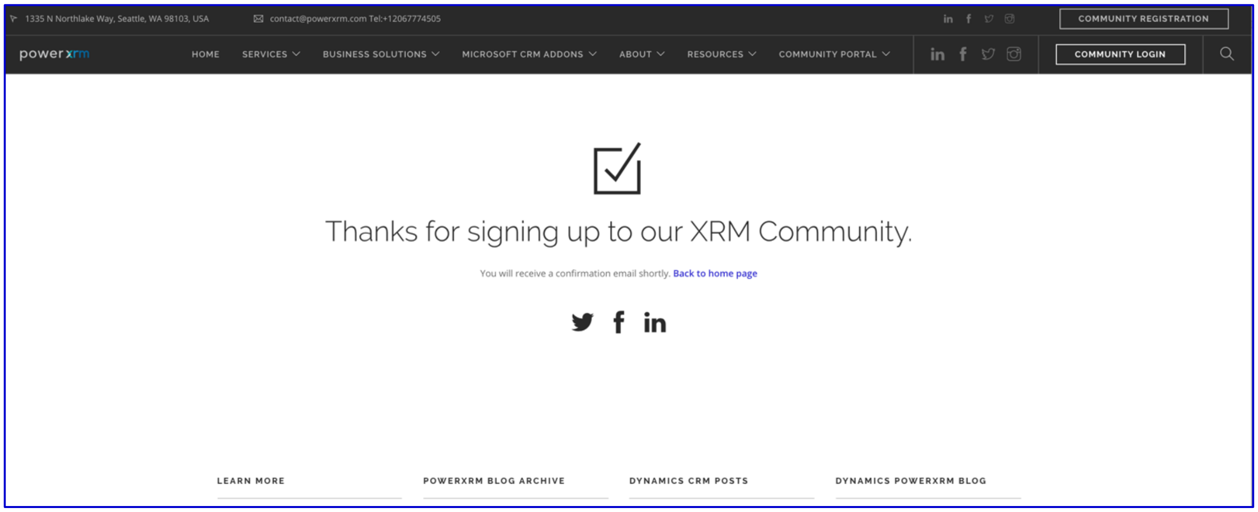
Registration and Solution Download

Download the AddOn from the PowerXRM Community. The Registration takes place at: http://www.powerxrm.com/register filling the registration form below:



To Register for our AddOns, you need to fill in your data, such as username (valid email address) that will be used as a License when using your AddOn, first name, last name, password, etc. And, at the bottom of the page, you need to select the reason of your registration. In this specific case select:

Download our AddOns. When you fill in the data and click Register, you will get an email with a Confirmation request. You need to confirm your email and registration:



Email Confirmation request:

Welcome to the Community, Chris!

Thanks for Signing Up! Just one more step.
Once you confirm, you can download our free AddOns and start receiving our Dynamics XRM offers.

Please confirm your Account here:

CONFIRM YOUR SUBSCRIPTION

Experience the XRM Community provided by PowerXRM.
Need Assistance? Visit our Community portal:
https://www.powerxrm.com/xrmcommunity

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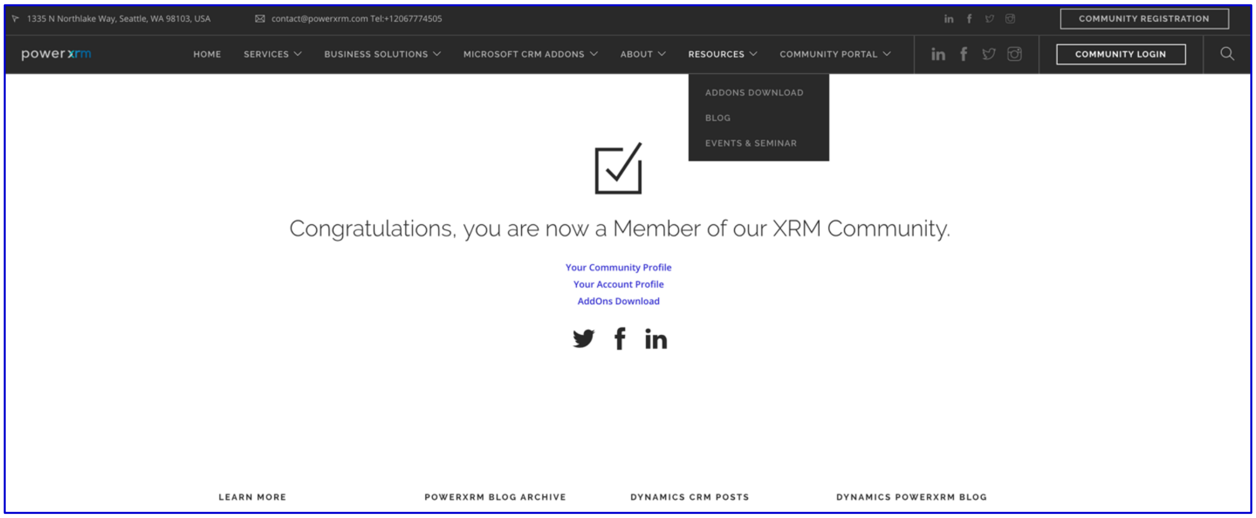
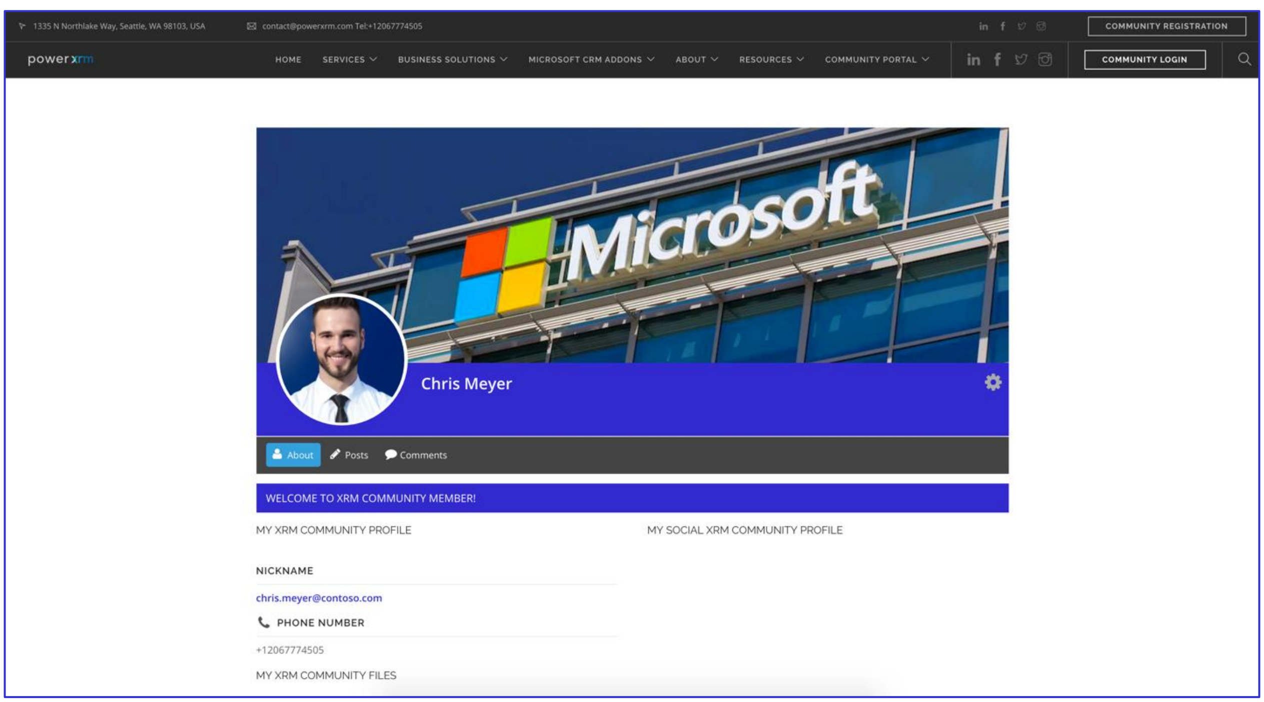
Once Confirmed, you will be redirected to the Community Confirmation page:

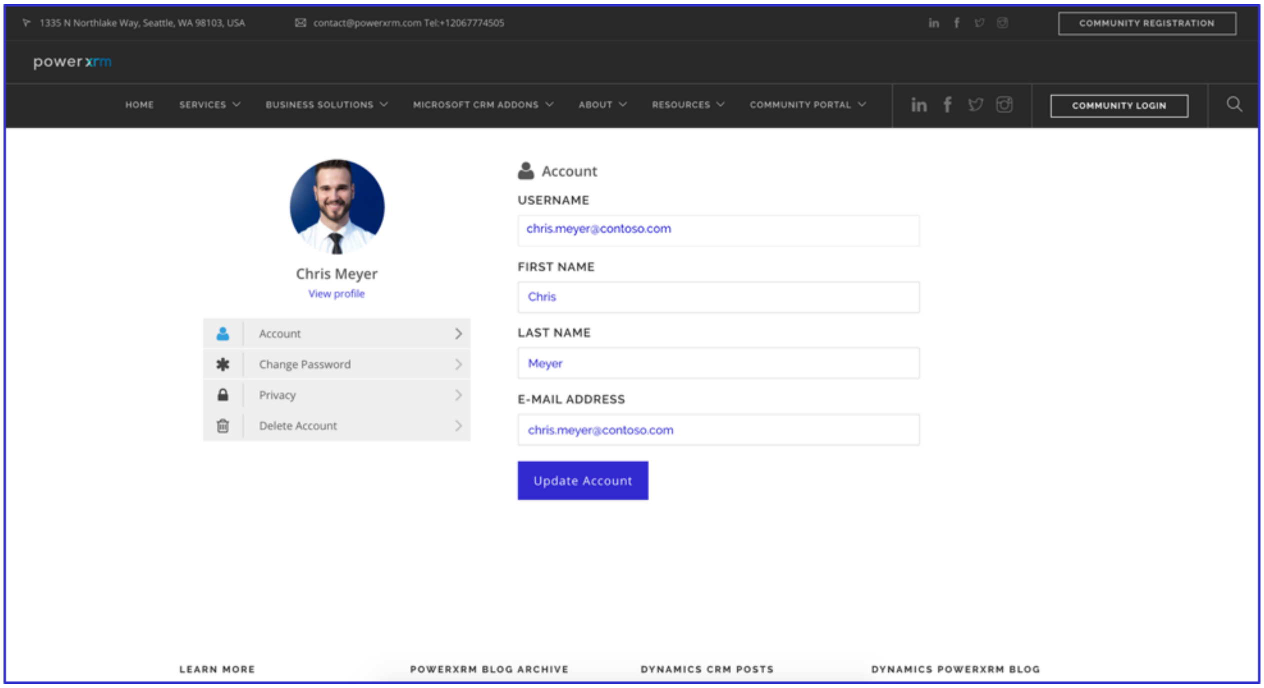


Once you have registered, you will be able to download your Solution. On http://www.powerxrm.com/, select the appropriate Microsoft CRM AddOns, and choose the AddOn you want to download.

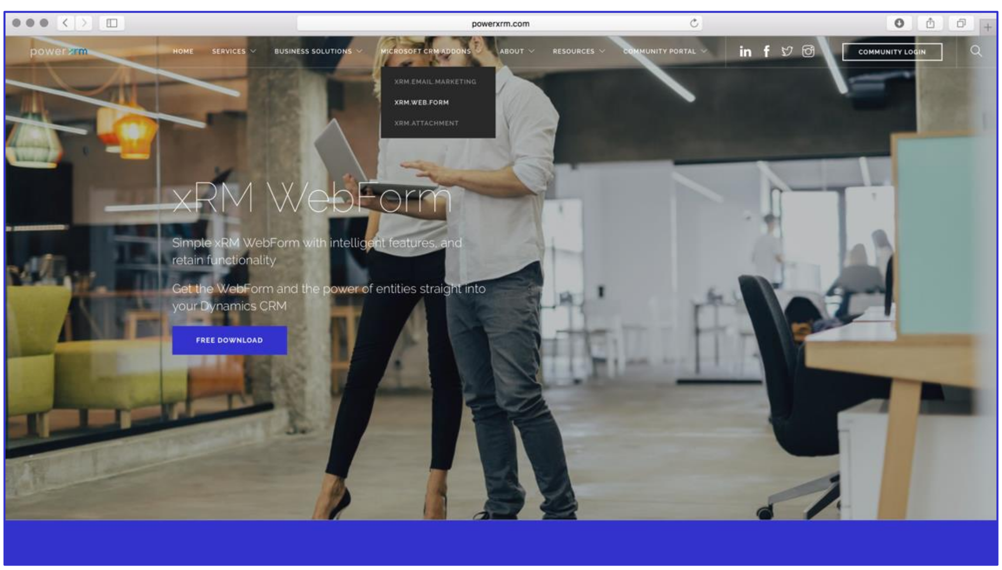
You can check your Community profile and add your details, by selecting Community Portal: Community profile

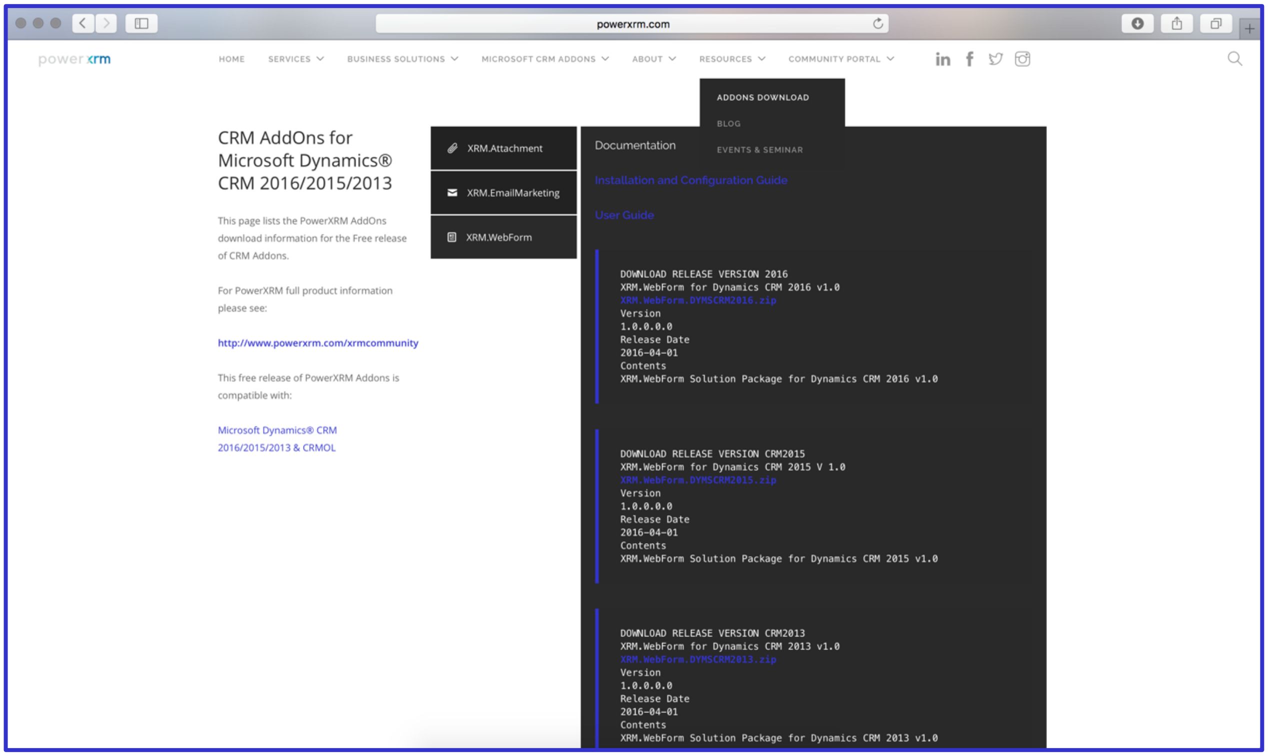


Your can access your Account Profile and change your Account details except your username (your email address used to register for AddOns). Account profile is under the Community Profile, My Account:



The Registration will allow you to download the AddOns where you can read more about its features and download the Solution by clicking Free Download and save it on your local machine.




powerxrm.com
power xrm
HOME
SERVICES
BUSINESS SOLUTIONS
MICROSOFT CRM ADDONS
ABOUT
RESOURCES
COMMUNITY PORTAL
ADDONS DOWNLOAD
BLOG
EVENTS & SEMINAR
CRM AddOns for Microsoft Dynamics® CRM 2016/2015/2013
This page lists the PowerXRM AddOns download information for the Free release of CRM Addons.
For PowerXRM full product information please see:
http://www.powerxrm.com/xrmcommunity
This free release of PowerXRM Addons is compatible with:
Microsoft Dynamics® CRM 2016/2015/2013 & CRMOL
XRM.Attachment
XRM.EmailMarketing
XRM.WebForm
Documentation
Installation and Configuration Guide
User Guide
DOWNLOAD RELEASE VERSION 2016
XRM.WebForm for Dynamics CRM 2016 v1.0
XRM.WebForm.DYMSCRM2016.zip
Version
1.0.0.0.0
Release Date
2016-04-01
Contents
XRM.WebForm Solution Package for Dynamics CRM 2016 v1.0
DOWNLOAD RELEASE VERSION CRM2015
XRM.WebForm for Dynamics CRM 2015 V 1.0
XRM.WebForm.DYMSCRM2015.zip
Version
1.0.0.0.0
Release Date
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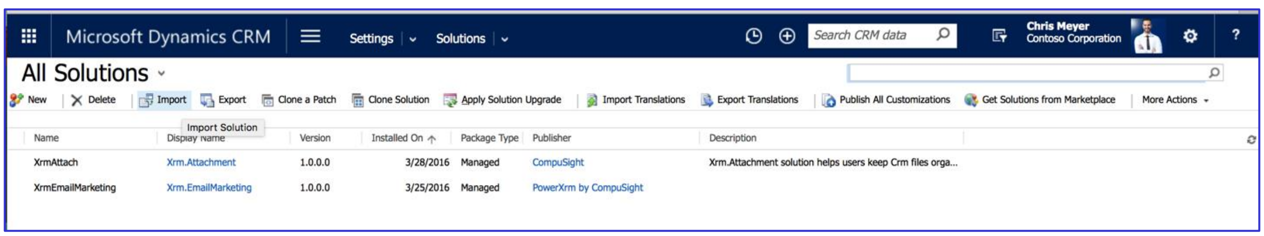
XRM.WebForm Solution Package for Dynamics CRM 2015 v1.0
DOWNLOAD RELEASE VERSION CRM2013
XRM.WebForm for Dynamics CRM 2013 v1.0
XRM.WebForm.DYMSCRM2013.zip
Version
1.0.0.0
Release Date
2016-04-01
Contents
XRM.WebForm Solution Package for Dynamics CRM 2013 v1.0

Import and Solution Installation

The following instruction will guide you through the import and installation process of your AddOn.

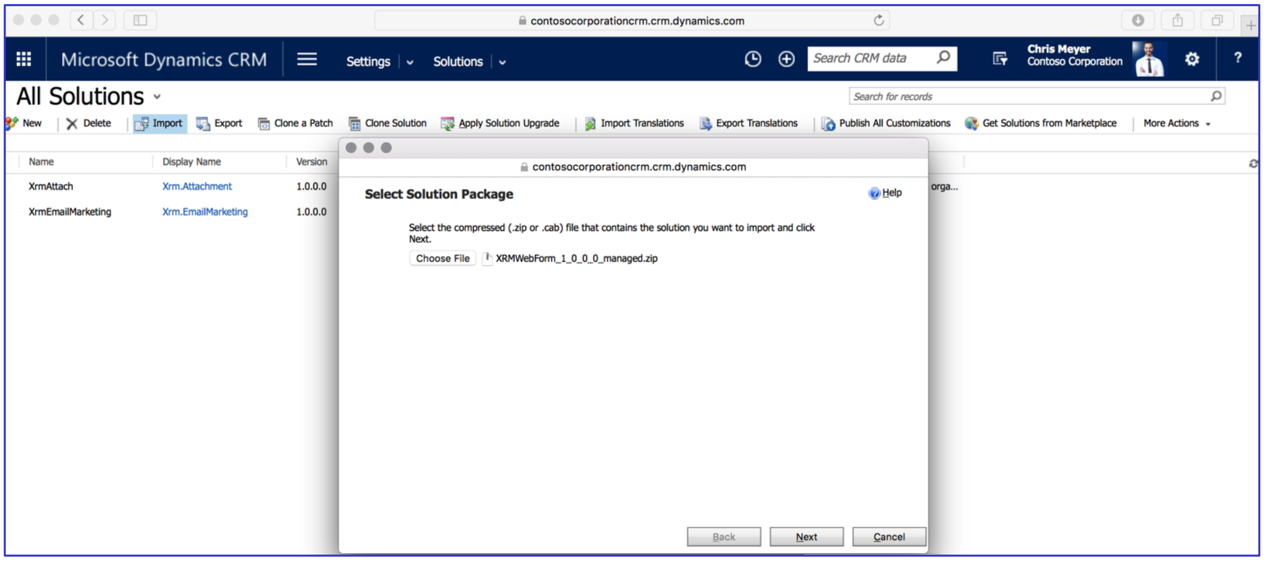
- Login to CRM using a System Administrator account
- Navigate to Settings
- Click Solutions
- Click Import
- Publish All Customizations

The downloaded Solution is imported in Microsoft Dynamics CRM, simply by navigation to the Solutions page in Dynamics CRM. On the Solution page, click Import.

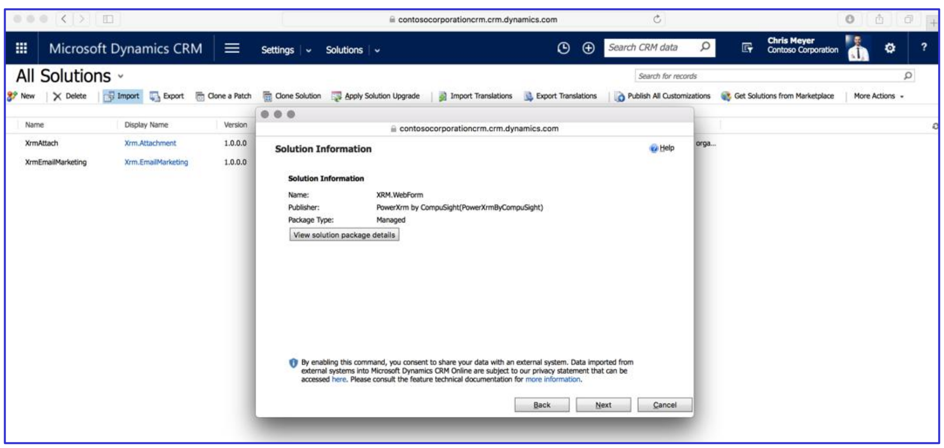


The Import opens a new setup wizard where the CRM user locates and selects the downloaded zip executable file for import. The following solution package: XrmWebForm_1_0_0_0 must be installed in the Dynamics CRM, prior to running the XRM.WebForm Solution:

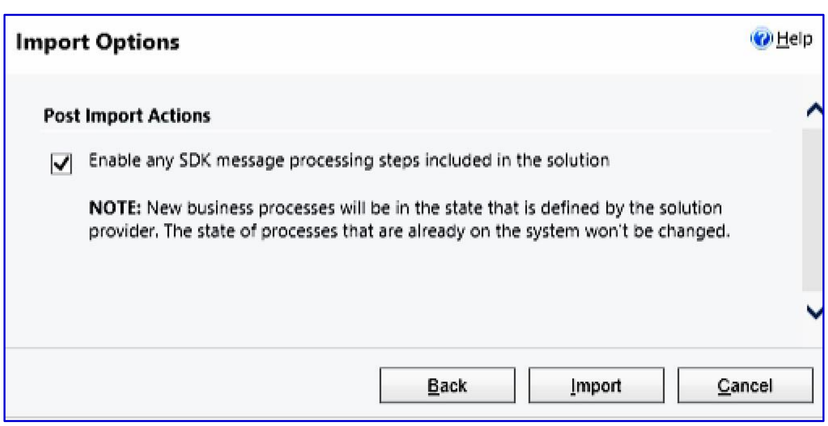
The Import opens a new form where the CRM user locates and selects the downloaded zip file for import. The following solution package: XrmWebForm_1_0_0_0 must be installed on the CRM Organization prior to running the XRM.WebForm AddOn:



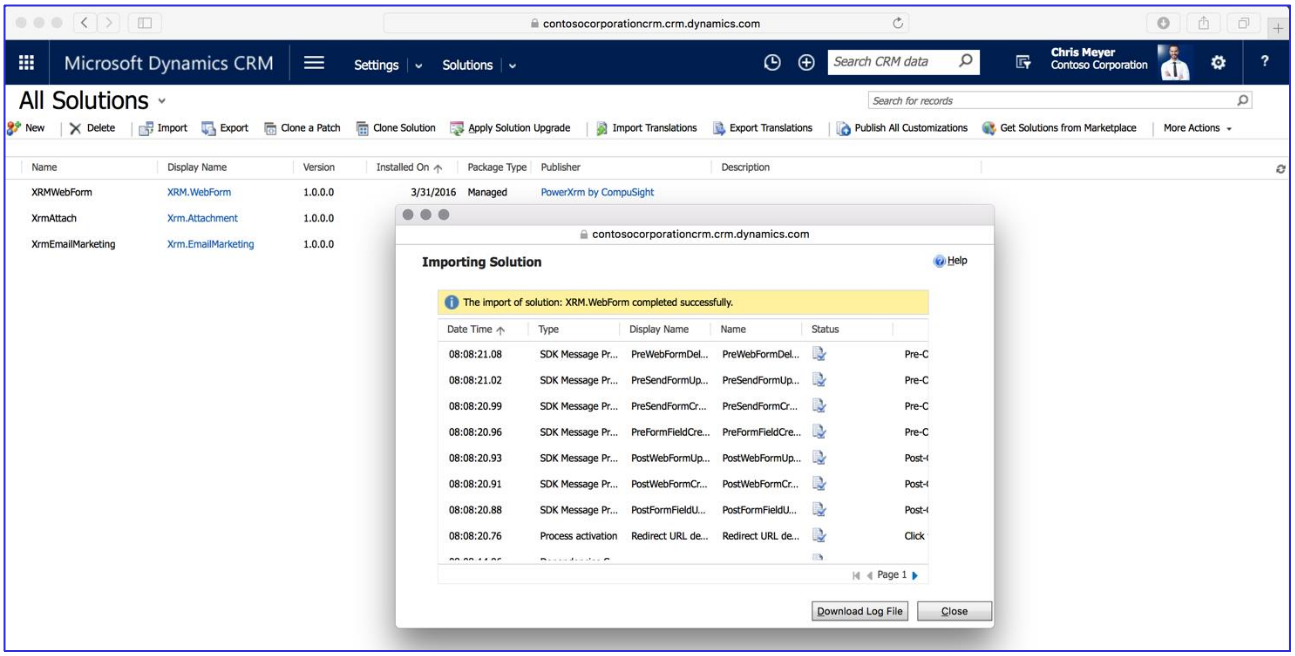
Click next, and on the next step, the form displays the Solution Information.



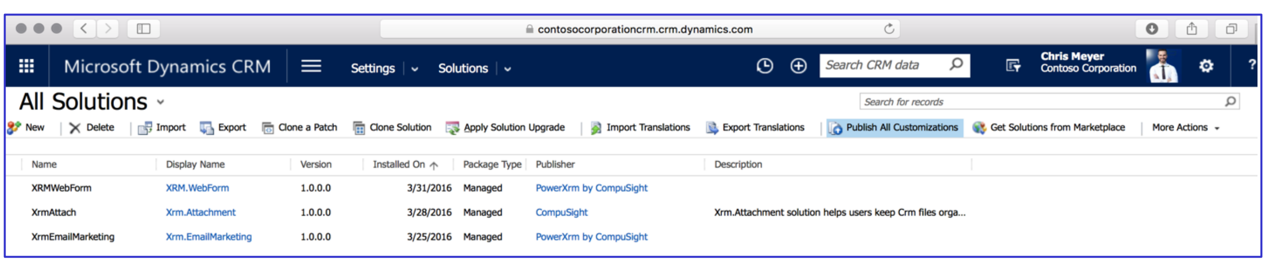
Click next, there is a check-box message: Enable any SDK message processing steps included in the solution. This message is checked by default, and you should leave it checked.



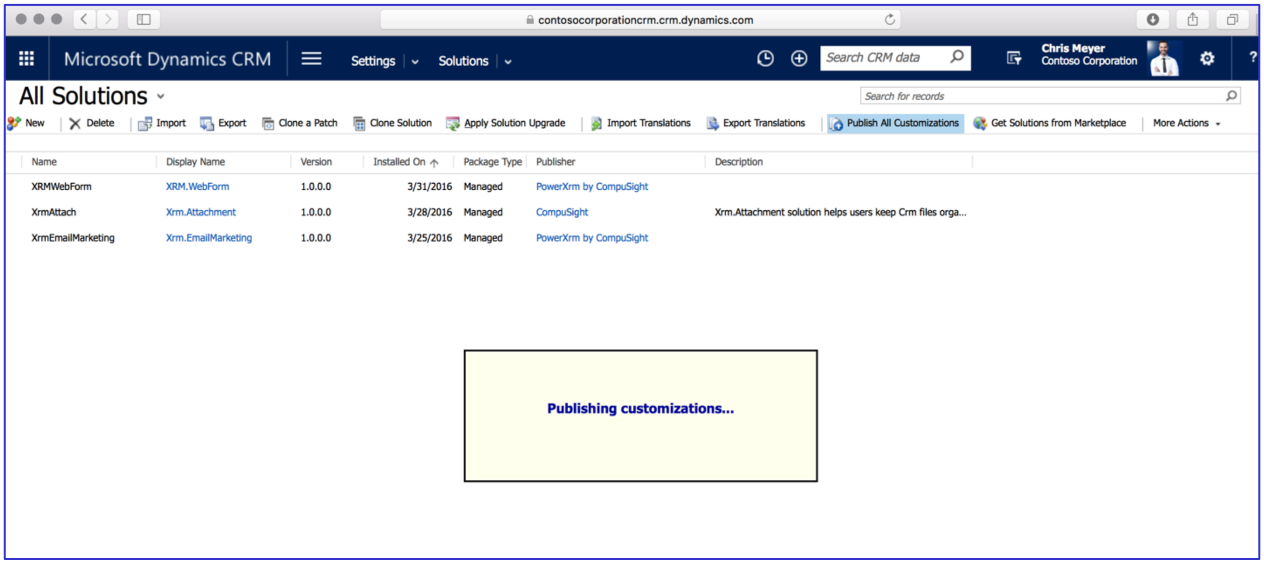
Click Import. This starts the importing process, and when the process is done, a window of confirmation is displayed. Besides the message about successful import, there is a list of installed components and status of their import. There is an option to Download Log File at the bottom of the page. Click close, when the import is finalized and the solution is ready to be used.



The XRM.WebForm solution import is complete. At the Solution page, there is the solution that was just imported.



In order for all components to be published and ready to be used, you can select the newly imported solution and click Publish All Customizations.



Next step in using XRM.WebForm solution is to set configuration in Configuration page.

XRM.WebForm Configuration

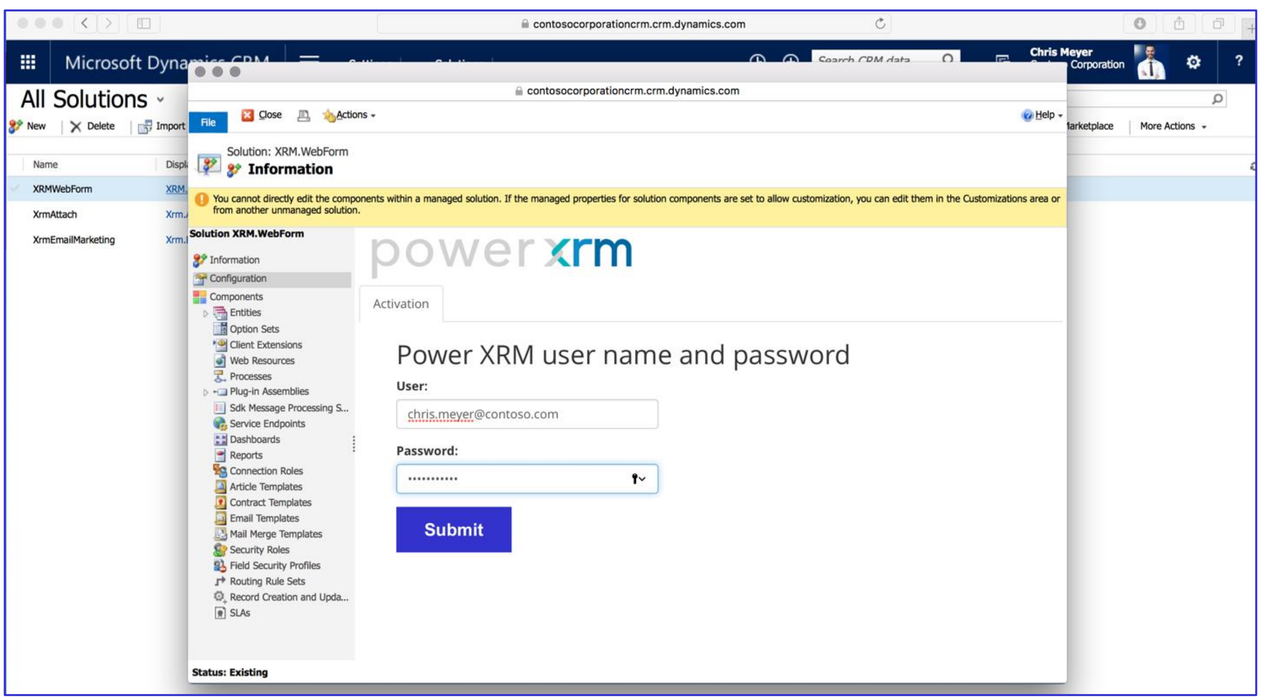
Open your solution, and navigate to the PowerXRM Configuration page.

Configuring the Solution:

1. Navigate to Configuration Page
2. Activate the License key by entering the PowerXRM Credentials
3. Setup by entering the CRM Credentials
4. Configure payment before trial period expires

Activation

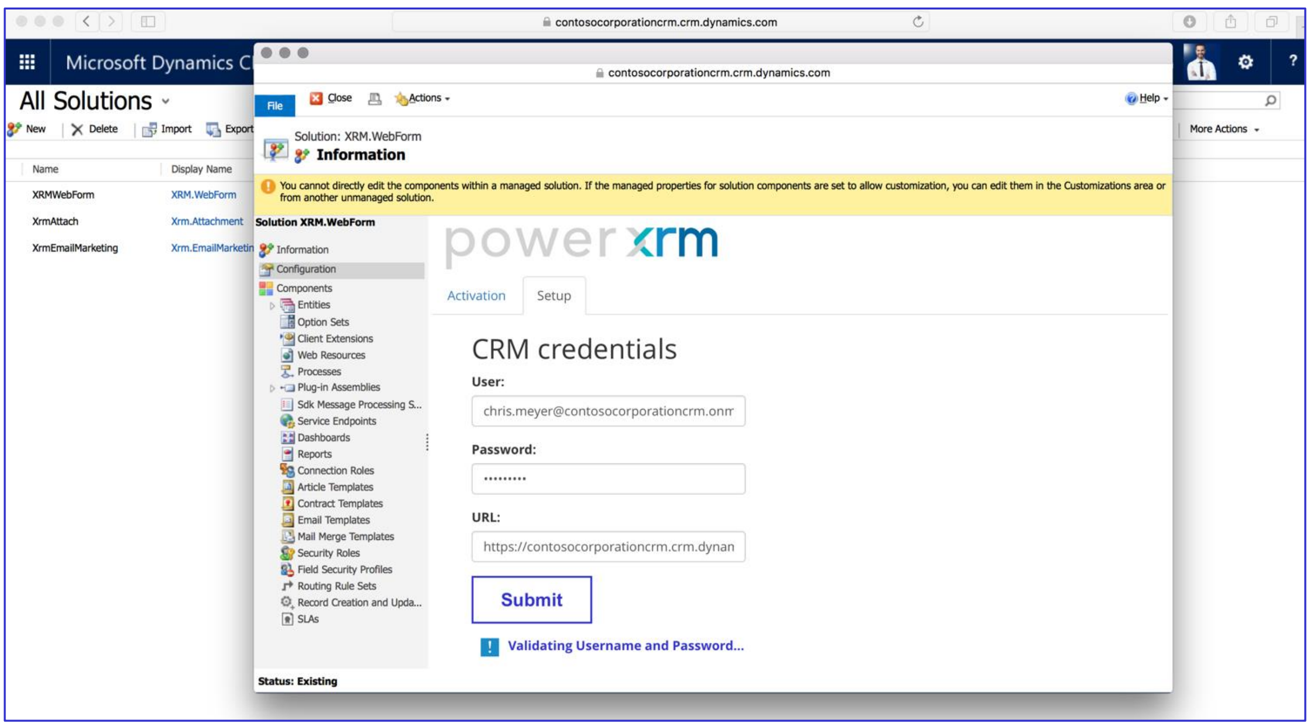
If you are starting XRM.WebForm solution for the first time (no added configuration), you will get a pop-up message about non-existing configuration. On the displayed tab, there are two fields that need to be filled: username and password. Enter username and password you used to register to PowerXRM page before downloading solution. Insert your credentials data and click submit.

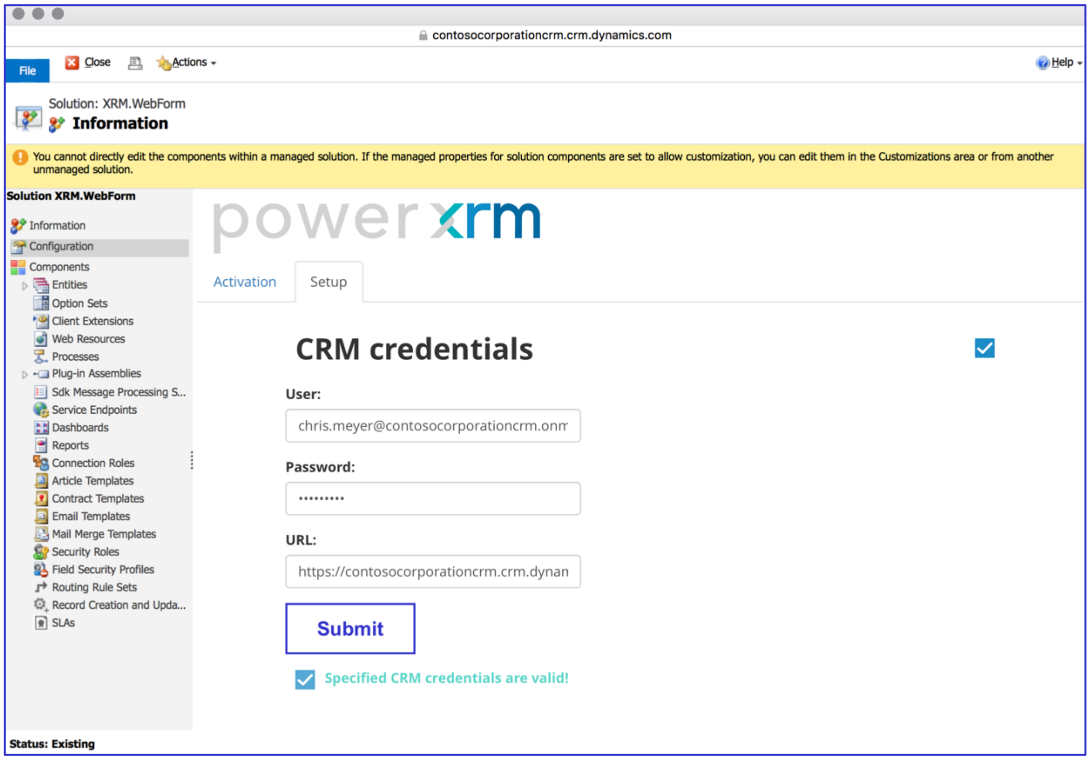


Setup

If the login is successful, a pop-up message will appear. Next step is to enter the CRM user credentials Setup tab. Those user credentials (username and password) can be credentials of any Administrator user or a user who has security role of "WebForm Service User". Therefore, it does not need be necessarily credentials of currently logged in user. In addition, URL of the organization needs to be entered. By default, XRM.WebForm offers origin of the website as the URL. However, if that is not the URL of the organization that can be used for accessing its end-point, then correct URL needs to be entered. That would be a case if the CRM is on premise or in case that it is online and the domain is masked.

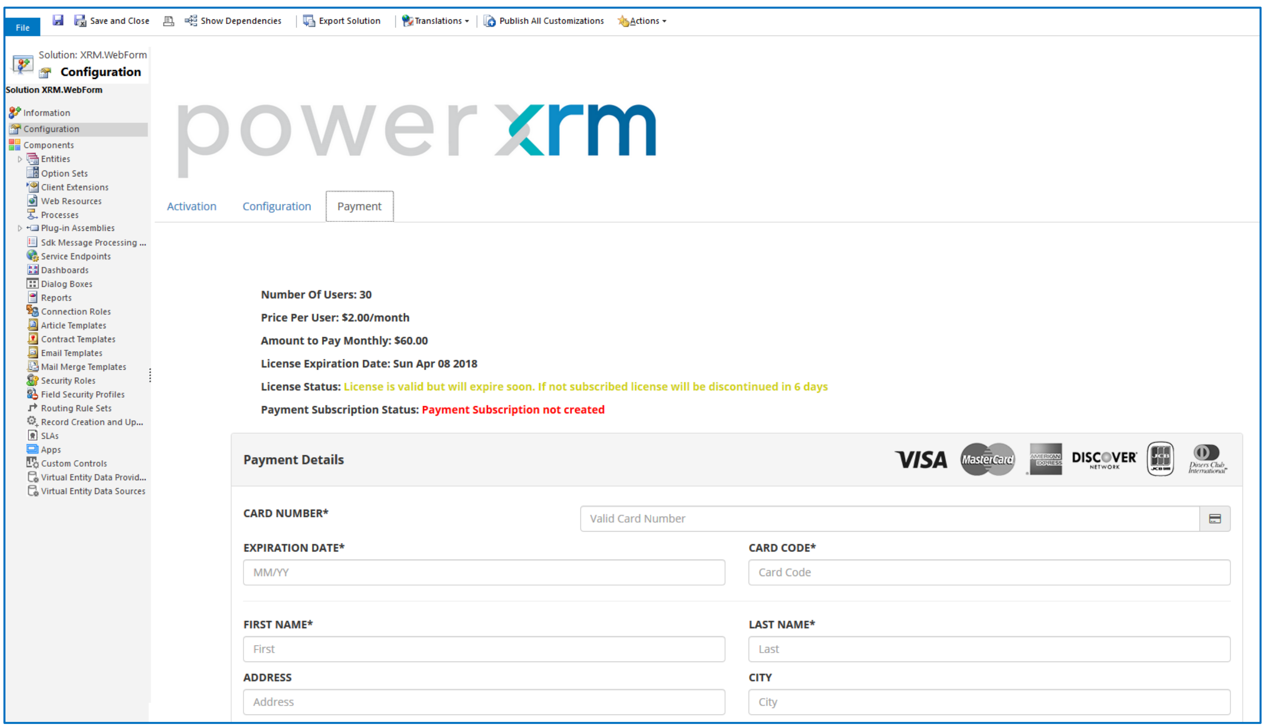
Important thing to notice here is the case with CRM on premise. XRM.WebForm in current version can be used in CRM on premise only if it has internet-facing deployment, meaning that it can be accessed over the Internet. That is required so that new entity records can be created from third-party locations. In the following versions of XRM.WebForm, it will be extended with ability to be used from CRM on premise which are installed locally and which are not accessible via Internet.




contosocorporationcrm.crm.dynamics.com
File
Close
Actions
Help
Solution: XRM.WebForm
Information
You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.
Solution XRM.WebForm
Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing S...
Service Endpoints
Dashboards
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles
Routing Rule Sets
Record Creation and Upda...
SLAs
power xrm
Activation
Setup
CRM credentials
User:
chris.meyer@contosocorporationcrm.onm
Password:
URL:
https://contosocorporationcrm.crm.dynan
Submit
Specified CRM credentials are valid!
Status: Existing

Payment

The final tab to which you will be transferred is a Payment tab. In this tab you will be able to check expiration dates of your license and create monthly subscription for XRM.WebForm. Every add-on is charged on the monthly basis with the price calculated based on the number of users in CRM organization. As the payment happens monthly, it is necessary to create subscription and the calculated amount will be deduced from your bank account automatically every month. As we implement highest standards of security, PowerXRM uses Authorize.Net for processing payments and managing subscriptions. You can in any moment cancel subscription and prevent any further money deduction. Furthermore, in order to make payment process as transparent as possible, you will be e-mailed from Authorize.net after each payment happens, so you can promptly react if you wish to cancel subscription.



All payment management is done on this tab of Configuration page. The tab consists of two parts: first one is the list of data relevant to payment and second is form used for subscribing and unsubscribing for payment.

Informational part includes following data about the payment:

- Number Of Users – this information is automatically pulled from CRM organization. This number includes only active users. It is daily updated.

- Price Per User – this price is determined for each add-on differently. For XRM.WebForm, it is 1$ per user monthly and for XRM.WebForm is 2$ per user monthly.
- Amount to Pay Monthly – product of number of users and price per user. This is the amount of money that will be changed every month automatically.
- License Expiration Date/Payment date – if the subscription is not created (add-on is in trial period), this is the date when the add-on will stop working. Otherwise, if the subscription is created, this is the date when the next payment will occur. This date changes with
- License Status – information if the license is valid, invalid or in trial period.
- Payment Subscription Status – information if the subscription is created, uncreated or canceled.

Below this informational part is a form for creating and updating subscription. It consists of the following fields:

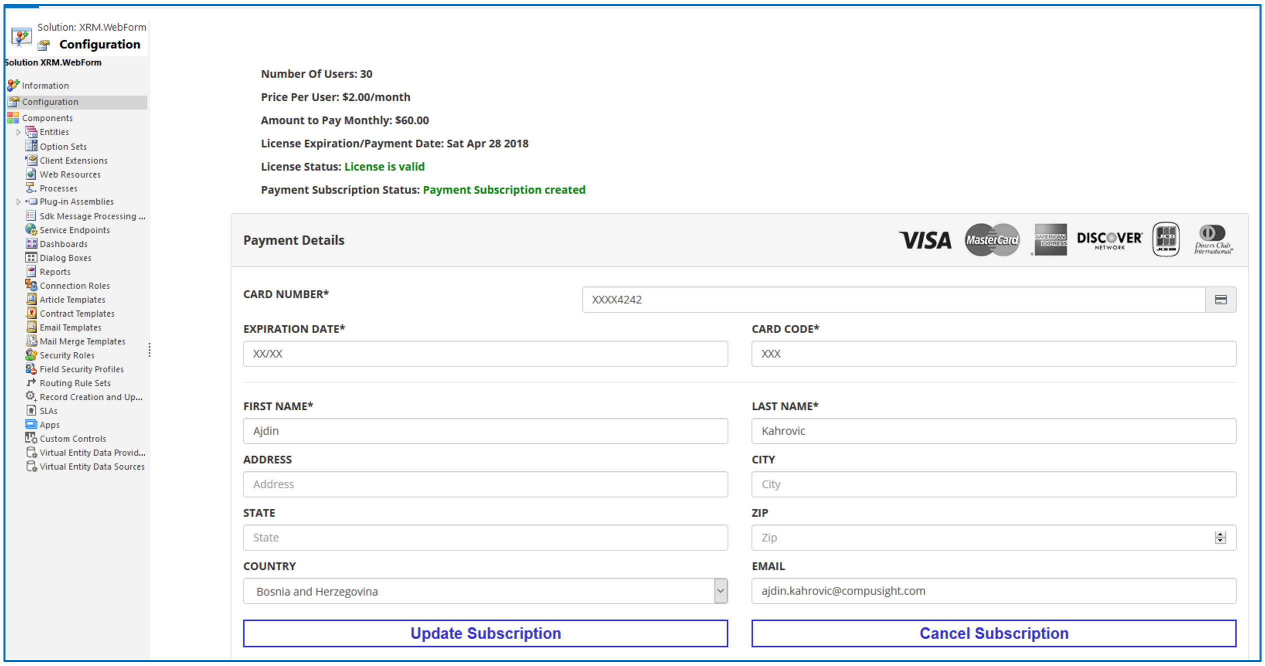
- Card Number
- Expiration Date
- Card (CVV) Code

Besides these, there is also a set of data about card holder. These include first name, last name, address, city, state, zip code, country and e-mail. Out of these, only first and last name of the card holder are required fields. If the e-mail address is specified, it will be used to notify card holder on every payment transaction that occurs. If it is not specified, e-mail address used for creating powerxrm.com account will be notified by Authorize.net about transactions that occur.

When the form is filled with the data about card and card holder, “Start Subscription” button should be clicked. If the data is correct and the card is valid, subscription will be created. Payment Subscription Status will change and possibly License Status and License Expiration Date. If the trial period is over, money will be deduced the same day and License Expiration Date/Payment Date will be set for the same date next month. Otherwise, if the trial period is still active, License Expiration Date/Payment Date is the date when the payment will occur.

If the subscription is created, next to “Start Subscription” button will appear “Cancel Subscription” button as well. Click on that button will cancel subscription and money will not be deduced any more. However, add-on will not stop working immediately. It will stop working when the license expires which is the date specified in the informational part of the tab. Also, “Start Subscription” button will be renamed to “Update

Subscription". If you change any of the data on this form, you should click on this button in order to make update to happen.

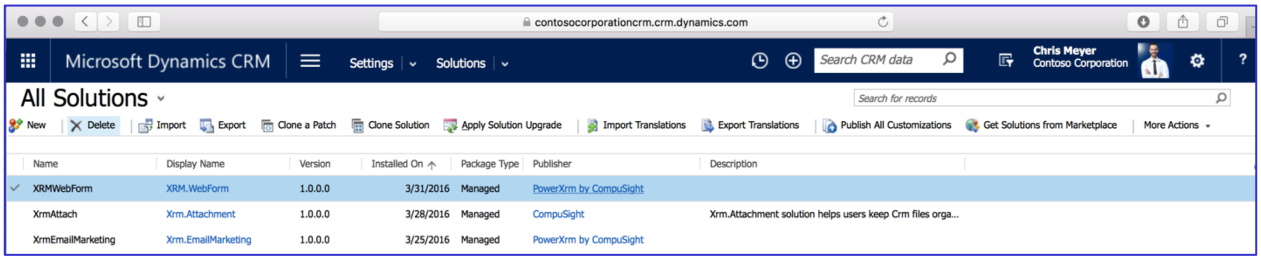


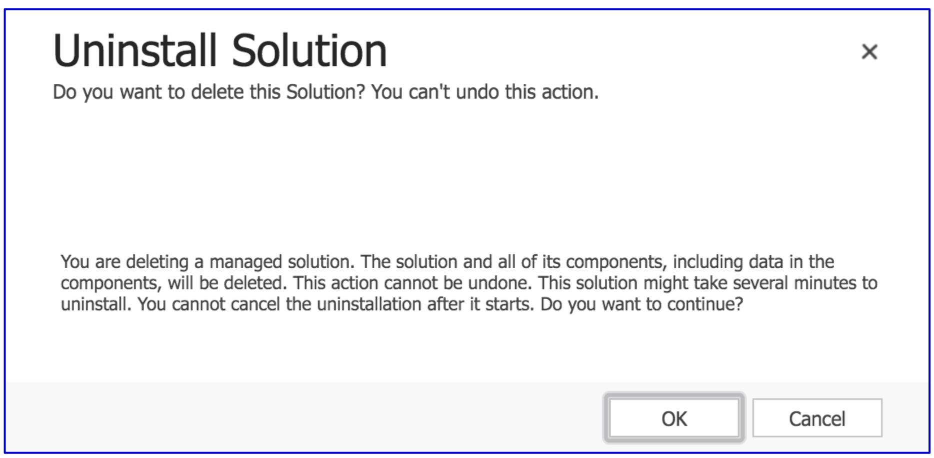
XRM.WebForm with invalid license will stop working. It will happen if trial period is over and a subscription is not created. Also, it will happen if next payment date comes and transaction cannot occur because card expired is blocked etc. It will also happen if the subscription is canceled and license expiration date comes. In any of these cases, XRM.WebForm will stop working. It means that WebForms created in CRM will not be available for previewing and deploying. When "Preview & Deploy" button is clicked, error message will appear instead of preview version of the WebForm. WebForms deployed on the websites will still appear as same as the license is valid. When they are submitted, WebForm visitor will be redirected to destination specified by WebForm editor, just as the license is valid. However, WebForm submission will not create record in CRM, nor it will create WebForm Activity. Furthermore, e-mail notification will be sent to WebForm editor that submission occurred, but it will not contain any of submitted data. Instead, it will contain the message that the data is not available due to invalid license. As soon as license becomes valid again, WebForm submission will automatically start creating CRM records and WebForm Activities.

Finally, there are two important things that need to be mentioned here. First is that PowerXRM and XRM.WebForm do not store any of information about card or card holder. These data are only passed to Authorize.Net with purpose of creating subscription. PowerXRM is completely unaware of any of these data. Another important thing to notice is that there is a workflow running in your CRM organization, which is a part of XRM.WebForm solution. This workflow is activated when the solution is activated. This workflow runs in the background and updates XRM.WebForm on the number of users in CRM organization. As it runs in the context of WebForm Service User, it is essential that he/she (a person who activates XRM.WebForm solution), has privileges to read User entity in CRM. Also, as this is crucial information for the payment process, if this workflow is deactivated manually or WebForm Service User stops having this privilege, XRM.WebForm solution will stop working.

Uninstall the Solution

The process of uninstalling the solutions is to delete the AddOn solutions in the reverse order that they were installed.





Security Roles

There are three security roles included in imported solution:

- WebForm Editor
- WebForm User
- WebForm Service User

Each of these security roles has default set of privileges, however, they are, unlike other components of this solution, left customizable so that they can be adjusted to requirements of each organization. However, it is highly recommended not to edit these security roles since it might cause malfunctioning of the complete solution. If some user needs wider set of privileges than those included into these security roles, better practice would be to add those privileges into custom security role and to add that security role to the user.

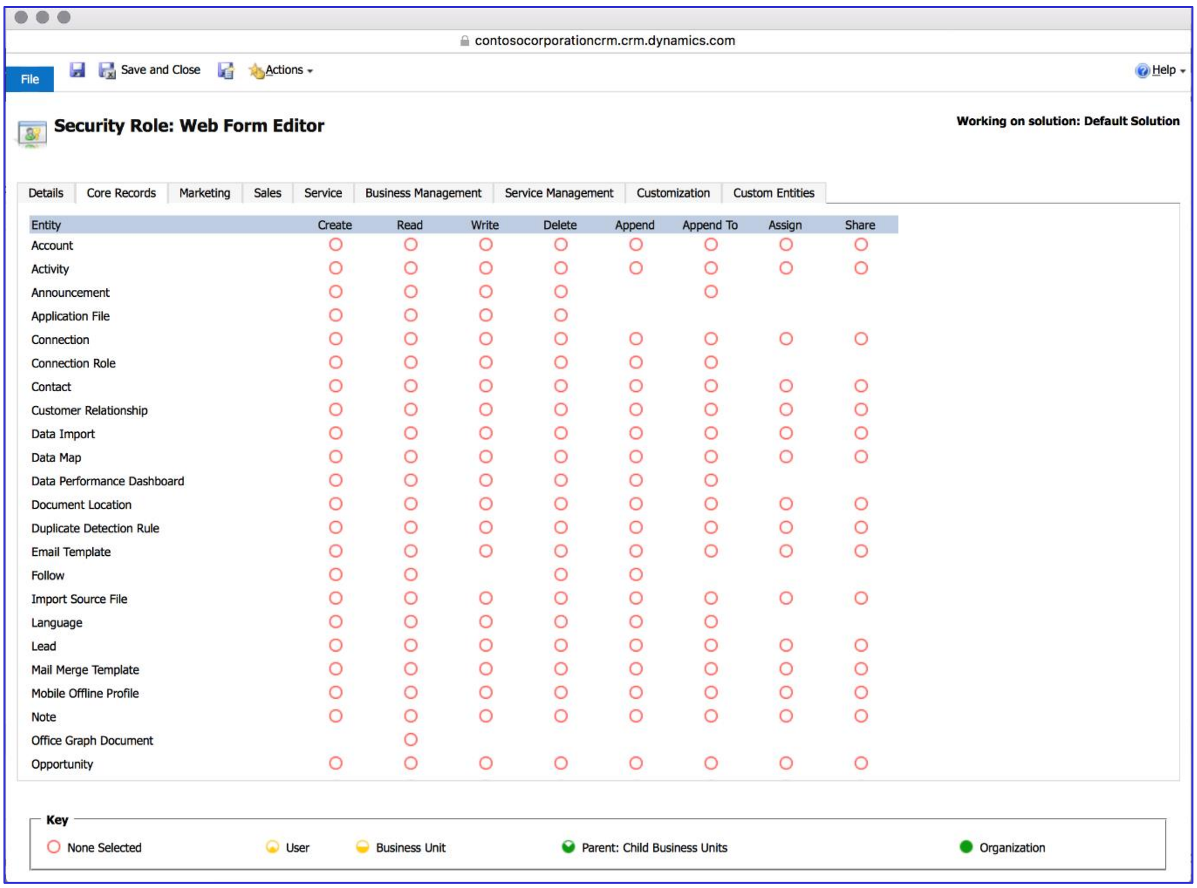
Let’s see which privileges are included by default to each security role and to what kind of user is each security role intended.

WebForm Editor

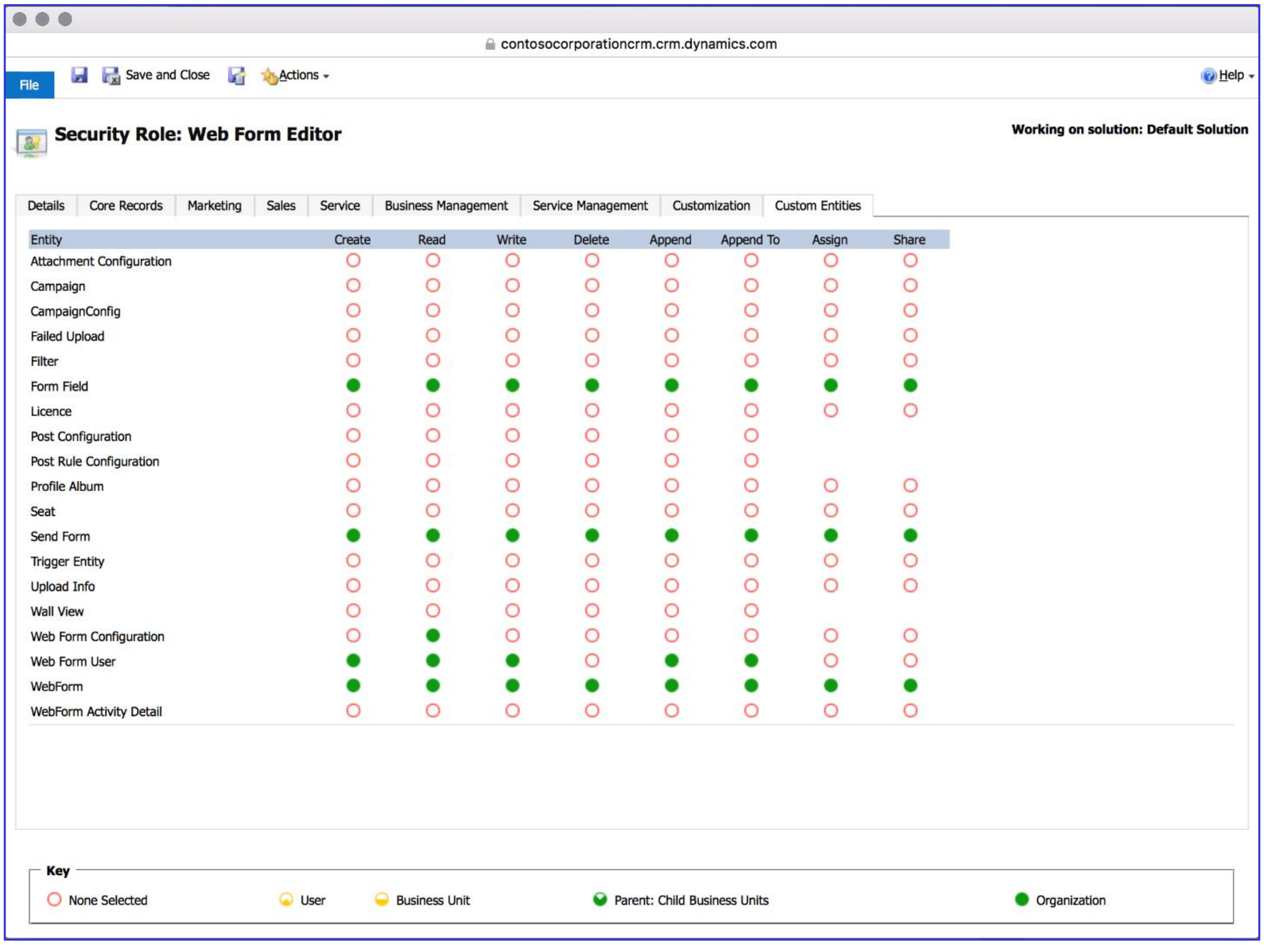
Users with this security role will be able to read, create, update/write, delete and deploy all WebForms. User will have permission to modify not only WebForms created by herself, but also WebForms created by other users. Therefore, seats attached to license key are reserved for users with this security role. Seat reservation happens when the user creates and deploys WebForm for the first time.

This user does not have any permission over WebForm submission – he/she cannot read WebForm Activities nor created entity records. Also, this user does not have any permission over selecting user account which will create entity records with each submission.

These privileges are reserved for WebForm Editor:



Privileges over Core records

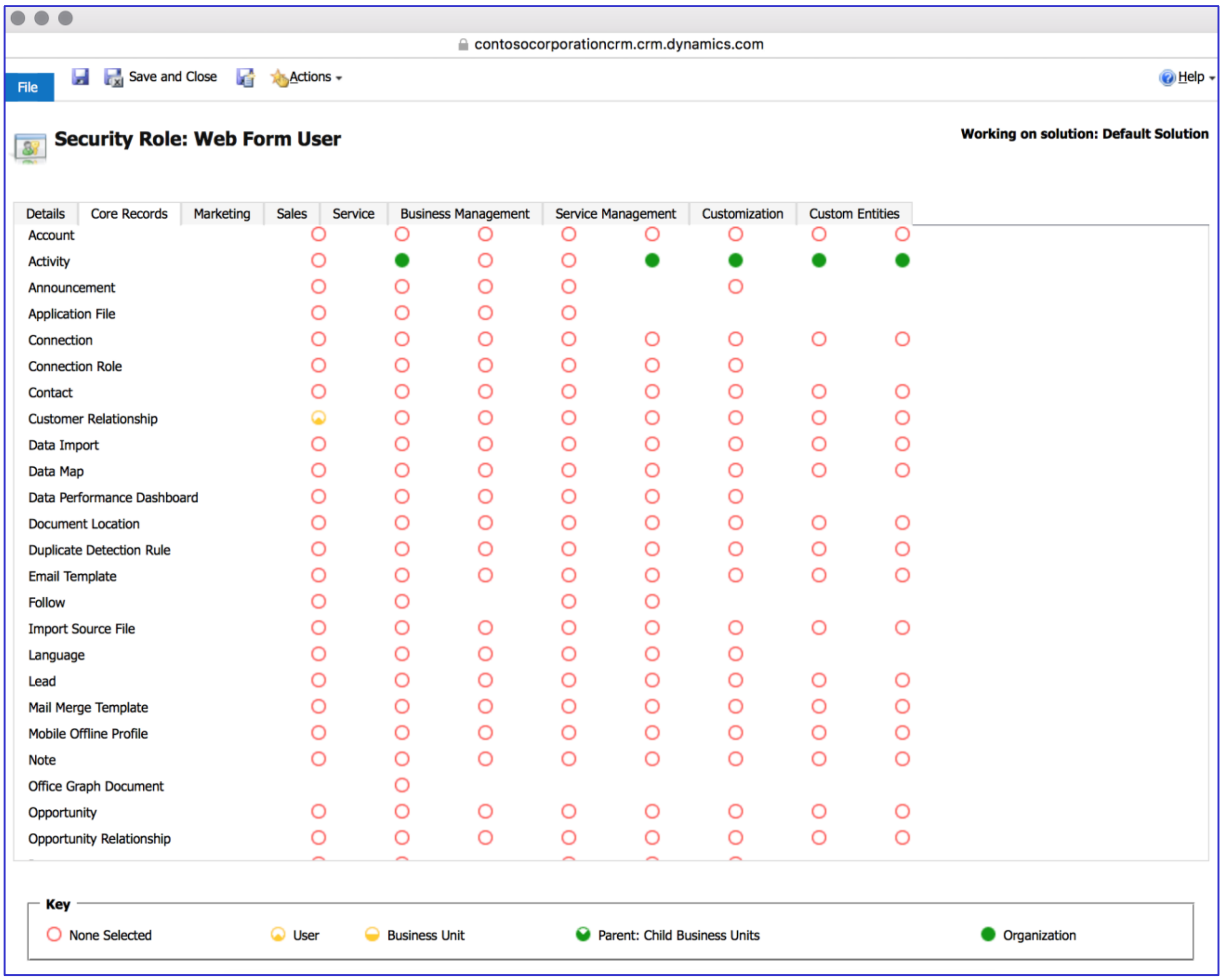


Privileges over Custom Entities

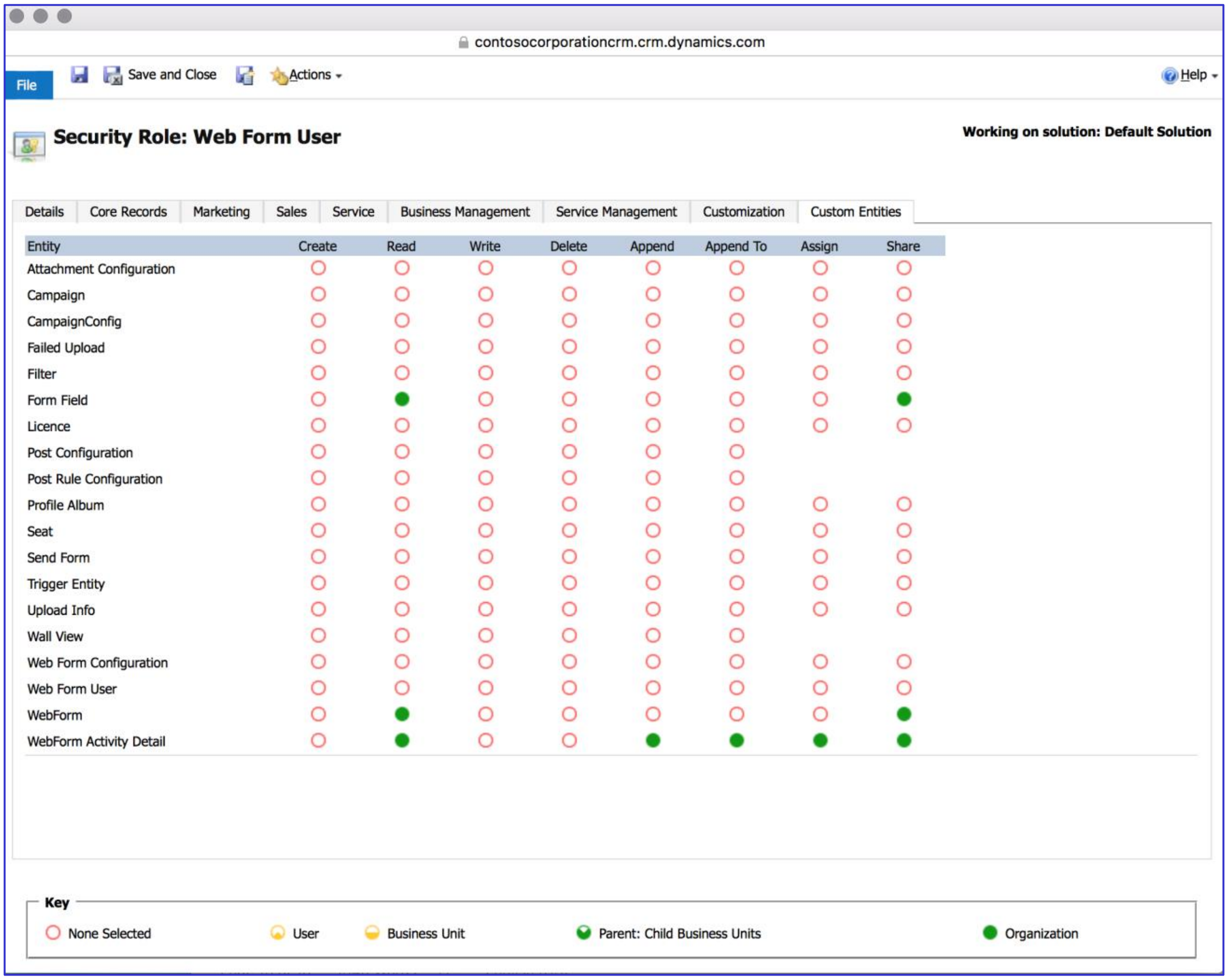
WebForm User

Users with this security role can preview Web Form Activities and their details. So, their elementary role is to oversee WebForm submissions. They can read all details of WebForm submission through WebForm activities, but they cannot read entity record created by that WebForm submission. On the other side, they have privilege to read all WebForms so that they can see the definition of submitted WebForm, but they do not have permissions to modify them, create new Web Forms or to deploy them. Seats are not reserved for users with this security role.

These privileges are reserved for WebForm User:



Privileges over Core records



Privileges over Custom Entities

WebForm Service User

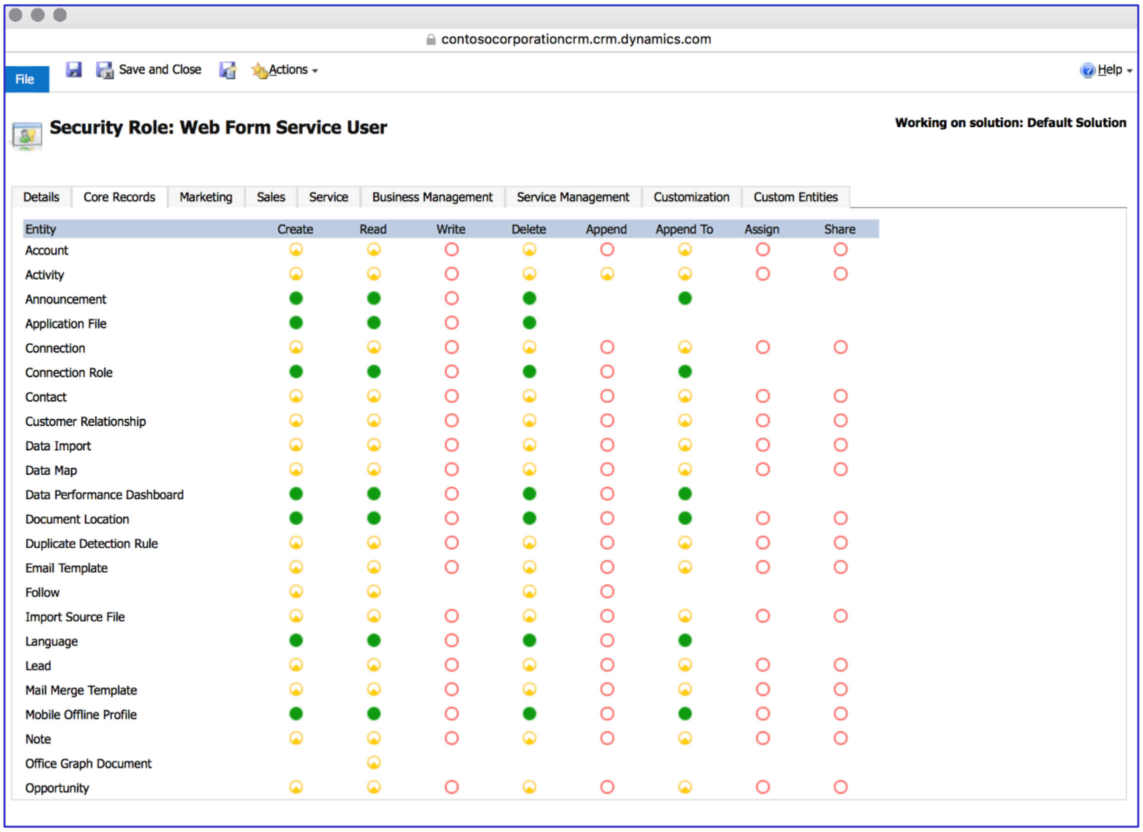
As it could be seen under Configuration chapter, CRM credentials should be entered into the form on Configuration page. Those CRM credentials will be used for creating entity records and WebForm Activities after each WebForm submission. Every activity will be assigned to the user whose credentials are used and every entity record will be created by this user.

Most probably, Dynamics CRM Administrator who imports the solution will use his/her credentials for solution configuration and that will work fine because Administrator has all privileges needed by default. However, it is also possible to enter CRM credentials of a user who is not Dynamics CRM Administrator. In that case, that user needs to have privileges for creating, reading, deleting and appending to the entity that is used as a target entity of a WebForm. That user needs to have privileges of creating, reading, deleting, appending and appending to activities and WebForm Activity Details and appending and appending to WebForms. All these privileges are part of WebForm Service User security role.

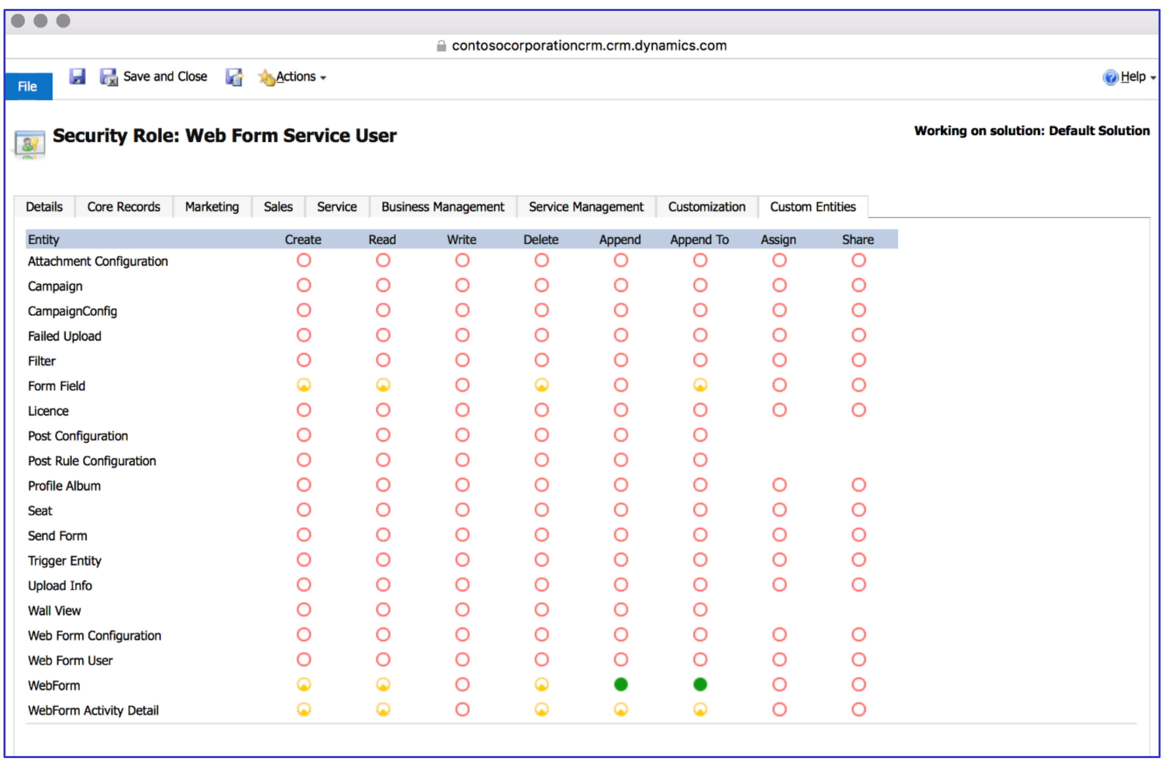
When the CRM credentials of a user who is not Dynamics CRM Administrator are used for configuring solution, then it is necessary to assign security role of WebForm Service User to that user. That security role will enable WebForm editors to choose any system entity as target entity for WebForms. However, if target entity of some WebForm is a custom entity, then privileges of creating, reading, deleting and appending to that custom entity need to be given to the user whose CRM credentials are used. It can be done by giving those privileges to WebForm Service User security role or to any other security role assigned to that user.

Additionally, WebForm Service User has a privilege to read user and user settings. This is necessary as payment workflow runs in context of WebForm Service User and it continuously updates information on current number of users.

These privileges are reserved for WebForm Service User by default:



Privileges over Core records



Privileges over Custom Entities

Solution Package Information

For more details regarding the XRM.WebForm solution, please visit:

http://www.powerxrm.com/xrmwebform

For more information regarding User Guide, see: User Guide

For more details regarding CRM Solution Packages please visit the following documentation on MSDN http://msdn.microsoft.com/en-us/library/gg334530

or contact PowerXRM at:

http://www.powerxrm.com/contact

contact@powerxrm.com