

Property-xRM Sales

Basic Configurations



Property-xRM
The Complete Real Estate Suite

Metadata Confidential

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Property-xRM powered by Dynamics 365

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1. Introduction to Basic Configuration of Property-xRM

Once the solution has been imported successfully, there has to be some basic configurations that has to be performed before the system is fully ready to use.

The configurations helps the users to run a smooth and full cycle of the Property-xRM Sales process.

2. Offer/ Booking Approval Setup

For the offer to be send for approval, the approval hierarchy needs to be define. Below is the steps required to configure approval module for offer in your property xRM application.

Note: User who is performing this action should have system administrator role.

➤ Activate Offer Approval – Dialog

- From your Dynamics 365, navigate through Sales → Settings → Process
- Identify the workflow ‘Send Offer for Approval’. This workflow will be in ‘Draft’ status.

Dynamics 365					
Settings					
Processes					
All Processes					
<div> New Import Export Share Activate Deactivate More Actions </div>					
Process Name	Category	Primary Entity	Status	Created On	
Send Discount for Approval	Dialog	Offer	Draft	8/22/2017 7:34 ...	
Send Offer for Approval	Dialog	Offer	Draft	8/22/2017 7:34 ...	

- Open the workflow and click on stage ‘Xrm.Wf.ApprovalProcess’ as follows.

Process: Send Offer for Approval

Working on solution: Default Sol

Information

General Administration Notes

Add Step Insert Delete this step.

Input Arguments

Variables

Steps

Page: Type a description here.

Remarks

Prompt and Response: Set Properties

Prompt: Please Enter Your Remarks

Type a step description here.

If Remarks-Response Text contains data, then:

Type a step description here.

Xrm.Wf.ApprovalProcess (1.3.0.0)\Xrm.Wf.ApprovalProcess.ApprovalProcess Set Properties

Type a step description here.

Stop dialog

- Select Approval setup master from the list as follows.

Set Custom Step Input Properties - Microsoft Dynamics 365 - Google Chrome

galaxy40-vm1:5555/AppSource/SFA/Workflow/customactivityform.aspx?activityname=CustomActivityStep7&customstepcategory=...

Process: Send Offer for Approval

Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Approval Template	Lookup	Required	Approval setup for Offer
Requestor	Lookup	Optional	{Created By(Offer)}
Approval Topic	Single Line of Text	Optional	Offer Approval - {ID(Offer)}
Requestor Comments	Single Line of Text	Optional	{Response Text(Remarks)}
Associated Record URL	Single Line of Text	Optional	{Record URL(Dynamic)(Offer)}
Select Status of Entity Under Approval	Single Line of Text	Optional	100000008
Select State of Entity Under Approval	Single Line of Text	Optional	1
Select Status of Entity after Approval	Single Line of Text	Optional	100000010

Form Assistant

Dynamic Values

Operator: Set to

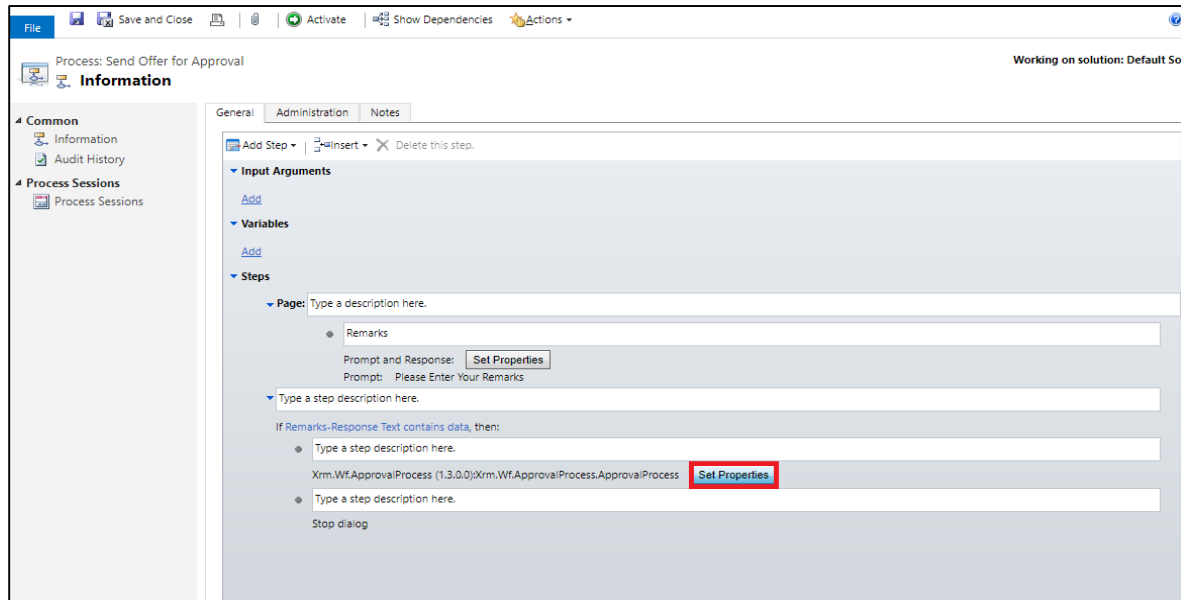
Look for: Offer

Add

- Save and Close, then activate the workflow.

➤ **Activate Offer Discount Approval - Dialog**

- From your Dynamics 365, navigate through Sales → Settings → Process
- Identify the workflow 'Send Discount for Approval'. This workflow will be in 'Draft' status.
- Open the workflow and click on stage 'Xrm.Wf.ApprovalProcess' as follows.



- Select Approval setup master from the list as follows.

Set Custom Step Input Properties - Microsoft Dynamics 365 - Google Chrome

galaxy40-vm1:5555/AppSource/SFA/Workflow/customactivityform.aspx?activityname=CustomActivityStep7&customstepcategory=...

File Save and Close Help

Process: Send Offer for Approval Working on solution: Default Solution

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Approval Template	Lookup	Required	Approval setup for Offer
Requestor	Lookup	Optional	{Created By(Offer)}
Approval Topic	Single Line of Text	Optional	Offer Approval - {ID(Offer)}
Requestor Comments	Single Line of Text	Optional	{Response Text(Remarks)}
Associated Record URL	Single Line of Text	Optional	{Record URL(Dynamic)(Offer)}
Select Status of Entity Under Approval	Single Line of Text	Optional	100000008
Select State of Entity Under Approval	Single Line of Text	Optional	1
Select Status of Entity after Approval	Single Line of Text	Optional	100000010

Form Assistant

Dynamic Values

Operator: Set to

Look for: Offer

Add

- Save and Close, then activate the workflow.

➤ **Set up the approver for each stage.**

User will be able select Offer Approval users by following the below steps.

- Open Advance Find from your Dynamics 365 as follows.

Dynamics 365 Sales Dashboards

SAVE AS NEW SET AS DEFAULT REFRESH ALL

Sales Activity Social Dashboard

Sales Pipeline

My Open Opportunities

what's new

Advanced Find
Create advanced search queries.

POST

All records | All posts Auto posts User posts

Abhiram Thulasi
Lead: Qualified by Abhiram Thulasi and converted to Contact Abhiram Thulasi, Opportunity Abhiram Thulasi.
On Abhiram Thulasi's wall
4/9/2018 12:25 PM

Abhiram Thulasi
Lead: Qualified by Abhiram Thulasi and converted to Contact Abhiram Thulasi, Opportunity Abhiram Thulasi.
On Abhiram Thulasi's wall
4/9/2018 12:25 PM

Abhiram Thulasi
Opportunity: Created by Abhiram Thulasi for Contact Abhiram Thulasi.
On Abhiram Thulasi's wall
4/9/2018 12:25 PM

Abhiram Thulasi
Opportunity: Created by Abhiram Thulasi for Contact Abhiram Thulasi.
On Abhiram Thulasi's wall
4/9/2018 12:25 PM

Abhiram Thulasi
Contact: Created By Abhiram Thulasi.

- Search for record 'Approval Setup' and find the result. System will show approval setup records as your search result.

FILE ADVANCED FIND

Query Saved Views Results New Save Edit Columns Edit Properties Clear Group AND Group OR Download Fetch XML Details

Look for: Approval Setup Use Saved View: (new)

Select

- Select and open first record form the result as follows.

Microsoft Dynamics 365

Amjad Jaleel
Property xRM App Source Version

FILE ADVANCED FIND APPROVAL SETUP

LIST TOOLS

Activate Deactivate Book Records

Delete Approval Setup

Follow Unfollow

Assign Approval Setup

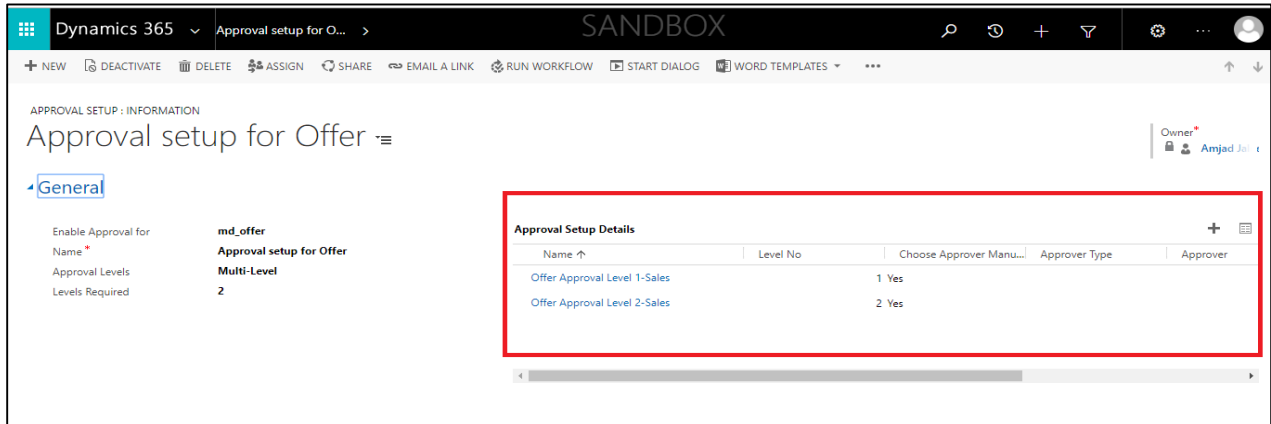
Share Copy a Link Email a Link

Run Workflow Start Dialog Run Report Excel Templates Word Templates Export Approval Setup

Approval Setup

✓	Name ↑	Created On	Approval Chosen...	Approver	Created By	Status Reason
✓	Approval setup for Offer	4/12/2018 4:33 PM	No	Amjad Jaleel	Amjad Jaleel	Active

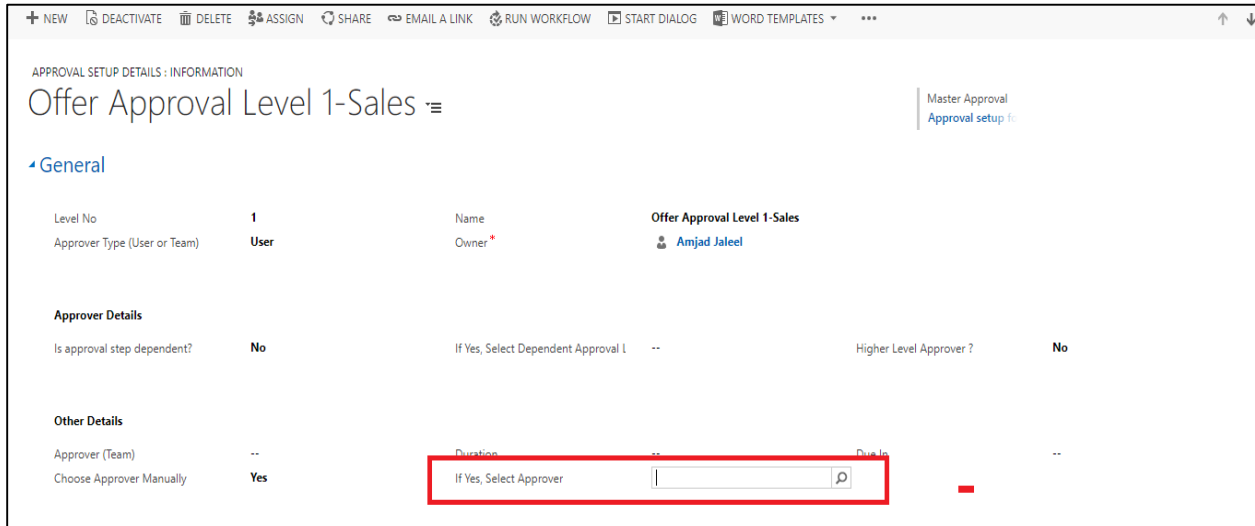
- Once the record is opened, user will be able to see the below details and user has to open 'Approval Setup Details' for level 1.



Approval Setup Details

Name	Level No	Choose Approver Manually	Approver Type	Approver
Offer Approval Level 1-Sales	1	Yes		
Offer Approval Level 2-Sales	2	Yes		

- Choose Approver Name and save the changes. Same process needs to apply for 'Approval Setup Details' for level 2.



Offer Approval Level 1-Sales

Level No: 1
Approver Type (User or Team): User
Name: Offer Approval Level 1-Sales
Owner: Amjad Jaleel

Approver Details

Is approval step dependent?: No
If Yes, Select Dependent Approval Level: --
Higher Level Approver?: No

Other Details

Approver (Team): --
Duration: --
Due Date: --
Choose Approver Manually: Yes
If Yes, Select Approver: [Empty Field]