# Easy Associate - Up and running in 5 easy steps

This document describes the process of installing and successfully configuring the Easy Associate for Microsoft Dynamics CRM add-on. It is presumed that the reader of this manual is familiar with basic Dynamics CRM customizations such as importing solutions and adding components to Dynamics CRM forms. For more information on how to import solutions or customize in CRM please refer to the relevant MSDN pages

## 1. Import the Thrives Easy Associate Microsoft Dynamics CRM solution.

Download the Easy Associate solution through the download link provided in the email with your license keys. Once downloaded install the managed solution as you would normally install a solution.
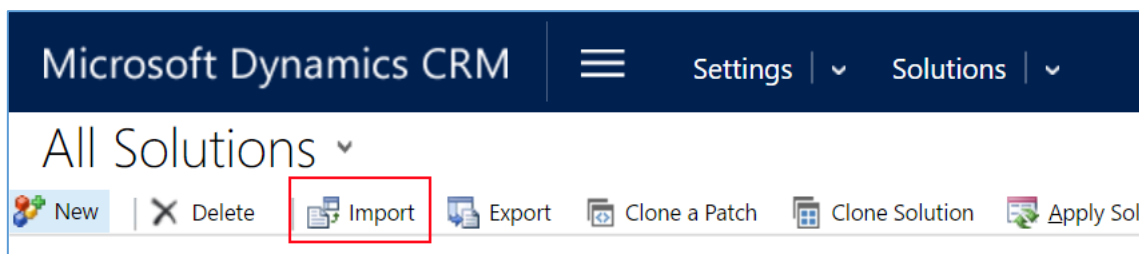
2. Activate your add-on on the Solution Configuration Page

When the solution is imported, open the solution by double clicking on the record in the solutions overview. You will automatically be redirected to the Solution Configuration Page. In the Solution Configuration Page, add the Redeem Token in the provided license key field and click on **Register**.

WARNING: clicking **Register** will activate your Redeem Token. This Redeem Token cannot be used on another environment afterwards. If for some reason the Redeem Token should be reactivated, please contact Thrives.
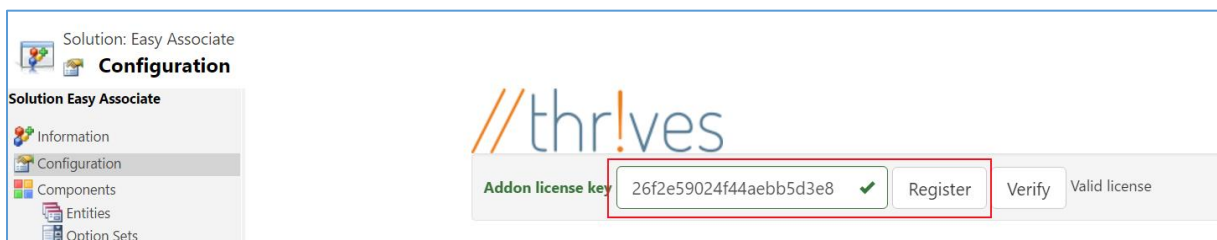
If you want to check the validity of your Redeem Token, enter the Redeem Token in the provided field and click **Verify**. If your Redeem Token is valid, a message **Valid license** will appear.

3. Configure your Easy Associate Form Component

After the add-on is activated, use the Solution Configuration Page to configure the desired Easy Associate Form components. The Configuration Page does not store any component information but is merely used as a generator.

In the following example we've created a custom relationship between the custom entity Language and Contact. Our goal is to show a list of Languages on the Contact form.

In order to set up the component, you will need the following information about your relationship:

1. **Relationship Name** (in this example: new_contact_new_language)
   Name of the relationship you wish to show on the form. This name can be found in your customizations.

2. **Display Field** (in this example: new_name)
   This is the schema name of the field of the **related entity** you wish to display.

3. **Number of Columns**

4. **Group By**
   This is the schema name of the field of the **related entity** you wish to display.

5. **Collapse other groups**
   Controls whether expanding a group will cause the other groups to collapse.

6. **Group Default Open**
   Specifies if all groups should be open or closed by default.

7. **Filter**
   Allows the user to Specify a custom fetchXml which should be applied to the relationship.

Fill out all fields as shown in the screenshot below and click Copy Configuration, to copy the configuration to your clipboard.

4. Add the Easy Associate Web resource to your form

In this example we use the contact form to register the web resource. Add a Web Resoruce to the form and specify **thr_/EasyAssociate/pages/main.html**.

Paste the information copied to the clipboard from the previous step into the **Custom Parameter** field.
Make sure to also check the **Pass record object-type code and unique identifier as parameters**.

5. See the result in action!