
INSIDEVIEW INSIGHTS

Installation Guide

Product Version 4.3

FEBRUARY, 2019

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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)		
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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**.

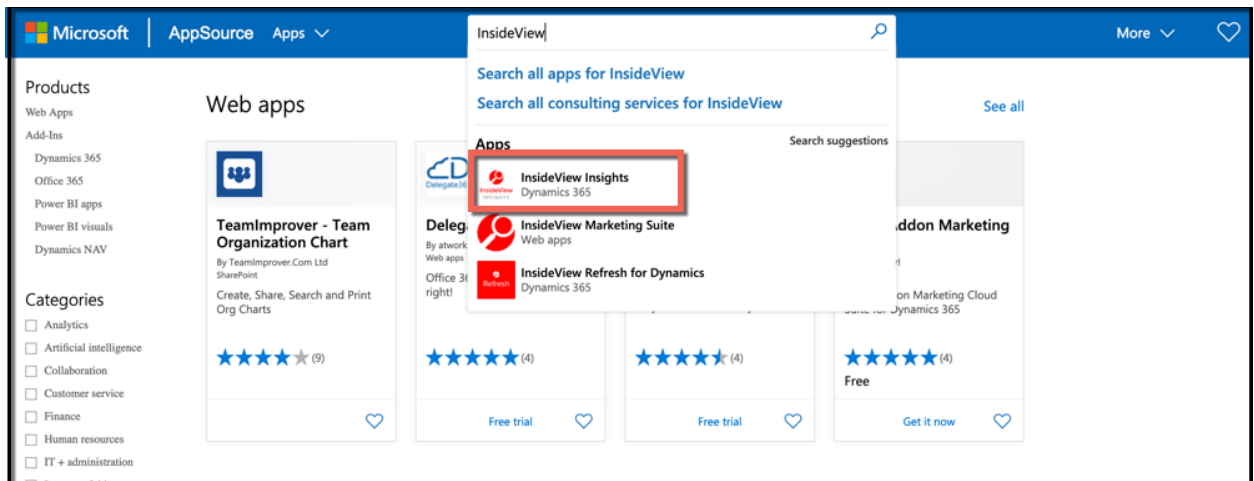
Chapter 3: Installing InsideView Insights

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

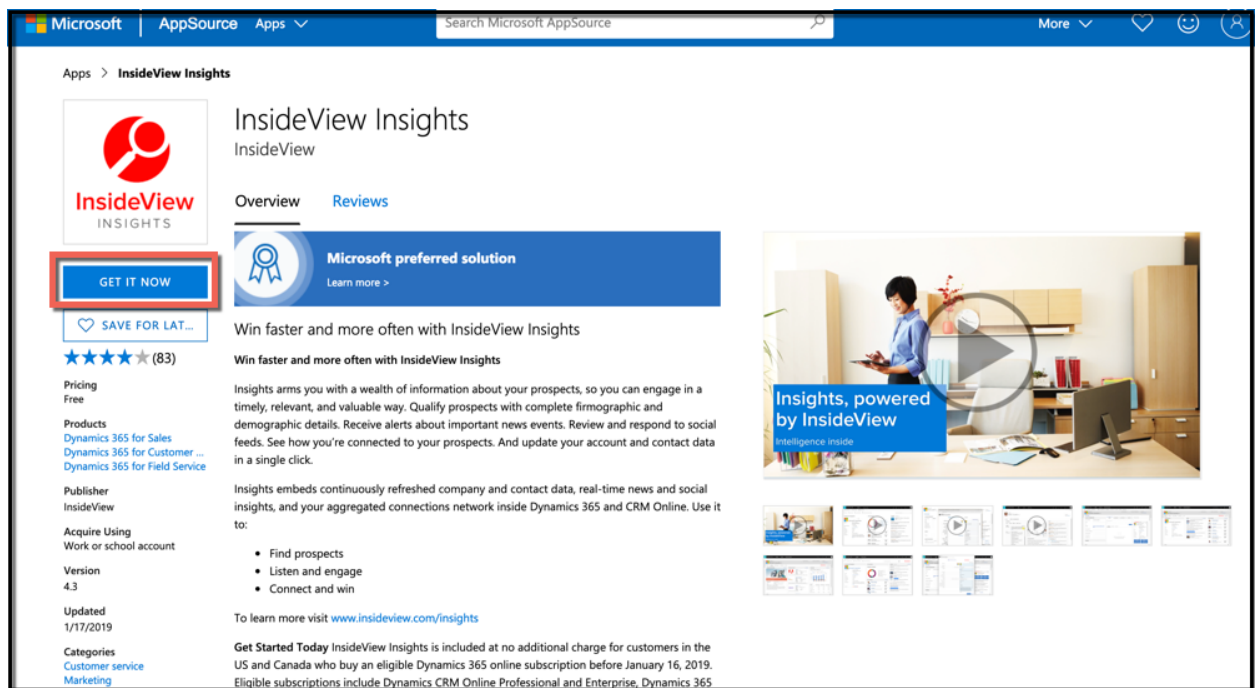
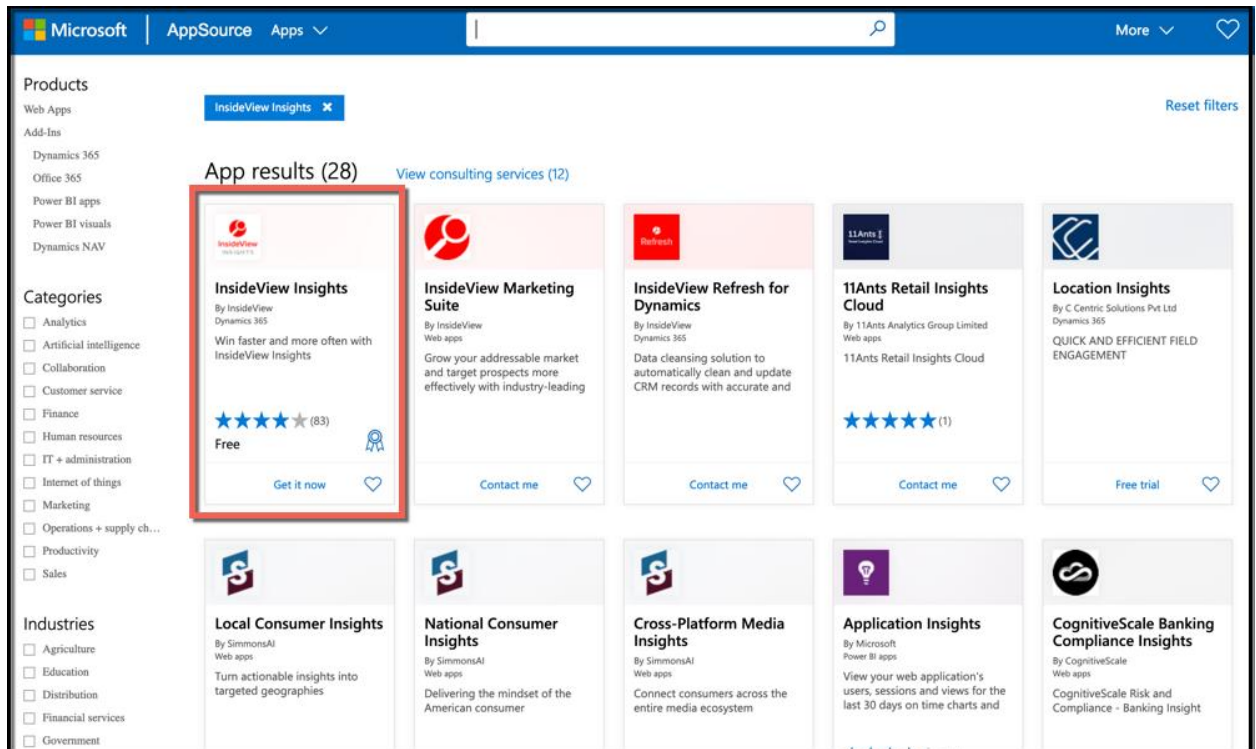
Installing InsideView Insights via AppSource Marketplace

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

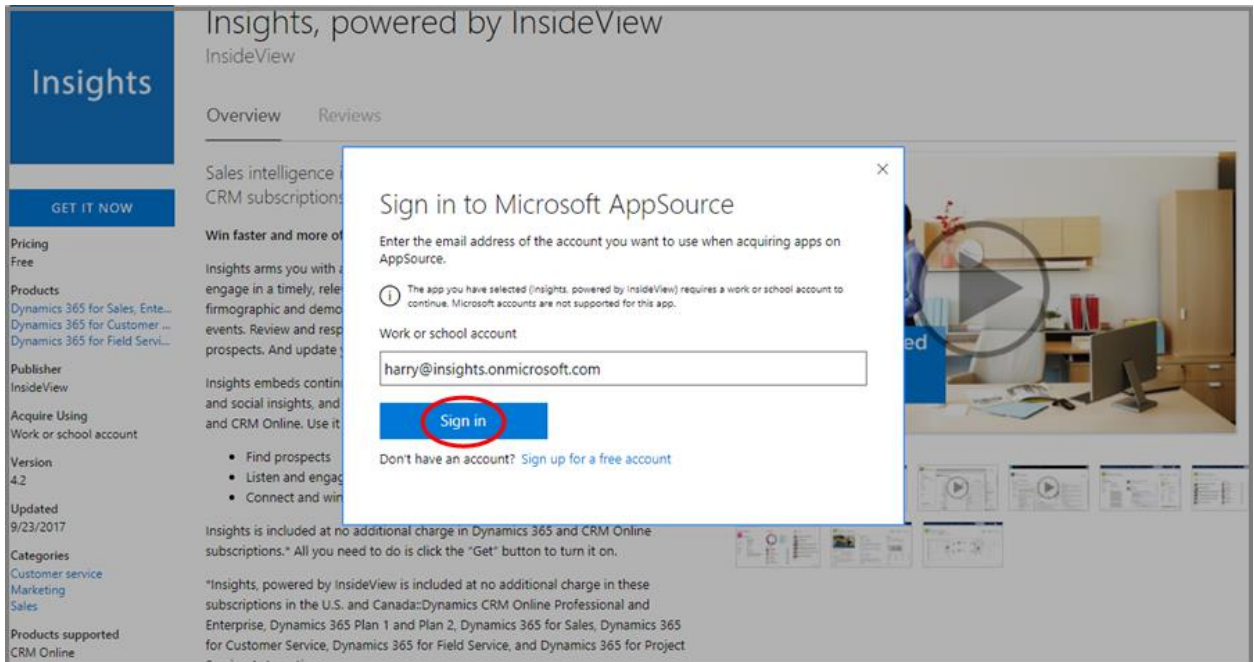
1. Go to the Microsoft's AppSource Market Place: <https://appsource.microsoft.com/en-us/marketplace>.
2. Enter the product name as **InsideView Insights** in the **Search** field and click the **Search** button.



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.

One more thing ...

 **InsideView Insights**
By InsideView

This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.

Name *	<input type="text" value="Harry"/>	<input type="text" value="Anthony"/>
Work email *	<input type="text" value="harry.anthony@insights.onmicrosoft.com"/>	
Job title	<input type="text"/>	
Company	<input type="text" value="Insights"/>	
Country / region	<input type="text" value="United States of America"/>	
Phone number *	<input type="text" value="343-3434-133"/>	

☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as user (user@...2.onmicrosoft.com).

Continue

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.

Microsoft Dynamics 365 Office 365

Microsoft

InsideView

InsideView INSIGHTS

InsideView Insights

Win faster and more often with InsideView Insights
Insights arms you with a wealth of information about your prospects, so you can engage in a timely, relevant, and valuable way. Qualify prospects with complete firmographic and demographic details. Receive alerts about important news events. Review and respond to social feeds. See how you're connected to your prospects. And update your account and contact data in a single click.

Insights embeds continuously refreshed company and contact data, real-time news and social insights, and your aggregated connections network inside Dynamics 365 and CRM Online. Use it to:

- Find prospects

Publisher: InsideView

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365
Organization to add the application to: abc (orgc8f7da5)

☒ Agree to Microsoft's Legal Terms and Privacy Statement

☒ Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365

Agree Cancel

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

Microsoft

Dynamics 365

Office 365

Dynamics 365 Administration Center

There's a better way to manage your instances. Try the new Admin center

INSTANCES
UPDATES
SERVICE HEALTH
BACKUP & RESTORE
APPLICATIONS

Manage your solutions

←

Manage your solutions

Select a preferred solution to manage on selected instance: abc

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
InsideView Insights	4.3	12/31/2021	Installation pending
LinkedIn Lead Gen forms	1.12.1006.0	1/1/2020	Not installed
Live Assist add-in powere...	1.0.0.0	1/1/2050	Not installed
Live Assist for Dynamics 3...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.3.1.8	1/1/2050	Not installed
Live Assist for Microsoft D...	3.3.1.8	1/1/2050	Not installed
OData v4 Data Provider	9.0.0.104	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics ...	1.11.1005.0	1/1/2020	Not installed
Project Service Automation	3.4.0.37	1/1/2050	Not installed
Relationship Insights	9.0.0.568	1/1/2050	Not installed
Sales Insights add-on	9.0.1.7043	1/1/2050	Not installed
Sample Data for Marketing	1.34.1032.0	1/1/2020	Not installed

InsideView Insights

Please wait while installation starts. This may take a few minutes.

InsideView Insights makes it easy to find and engage with buyers. Win deals using accurate prospect data, real-time insights, and social connections delivered directly inside Microsoft ... (more)

Created by: InsideView

Learn more

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

InsideView Insights

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Microsoft | Dynamics 365 Office 365

Dynamics 365 Administration Center

There's a better way to manage your instances. Try the new Admin center

INSTANCES | **UPDATES** | **SERVICE HEALTH** | **BACKUP & RESTORE** | **APPLICATIONS**

Manage your solutions

Manage your solutions


Select a preferred solution to manage on selected instance: **abc**

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
InsideView Insights	4.3	12/31/2021	Installed
LinkedIn Lead Gen forms	1.12.1006.0	1/1/2020	Not installed
Live Assist add-in powere...	1.0.0.0	1/1/2050	Not installed
Live Assist for Dynamics 3...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.3.1.8	1/1/2050	Not installed
Live Assist for Microsoft D...	3.3.1.8	1/1/2050	Not installed
OData v4 Data Provider	9.0.0.104	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics ...	1.11.1005.0	1/1/2020	Not installed
Project Service Automation	3.4.0.37	1/1/2050	Not installed
Relationship Insights	9.0.0.568	1/1/2050	Not installed
Sales Insights add-on	9.0.1.7043	1/1/2050	Not installed
Sample Data for Marketing	1.34.1032.0	1/1/2020	Not installed

InsideView Insights

InsideView Insights makes it easy to find and engage with buyers. Win deals using accurate prospect data, real-time insights, and social connections delivered directly inside Microsoft ... [\(more\)](#)

Created by: InsideView
[Learn more](#)



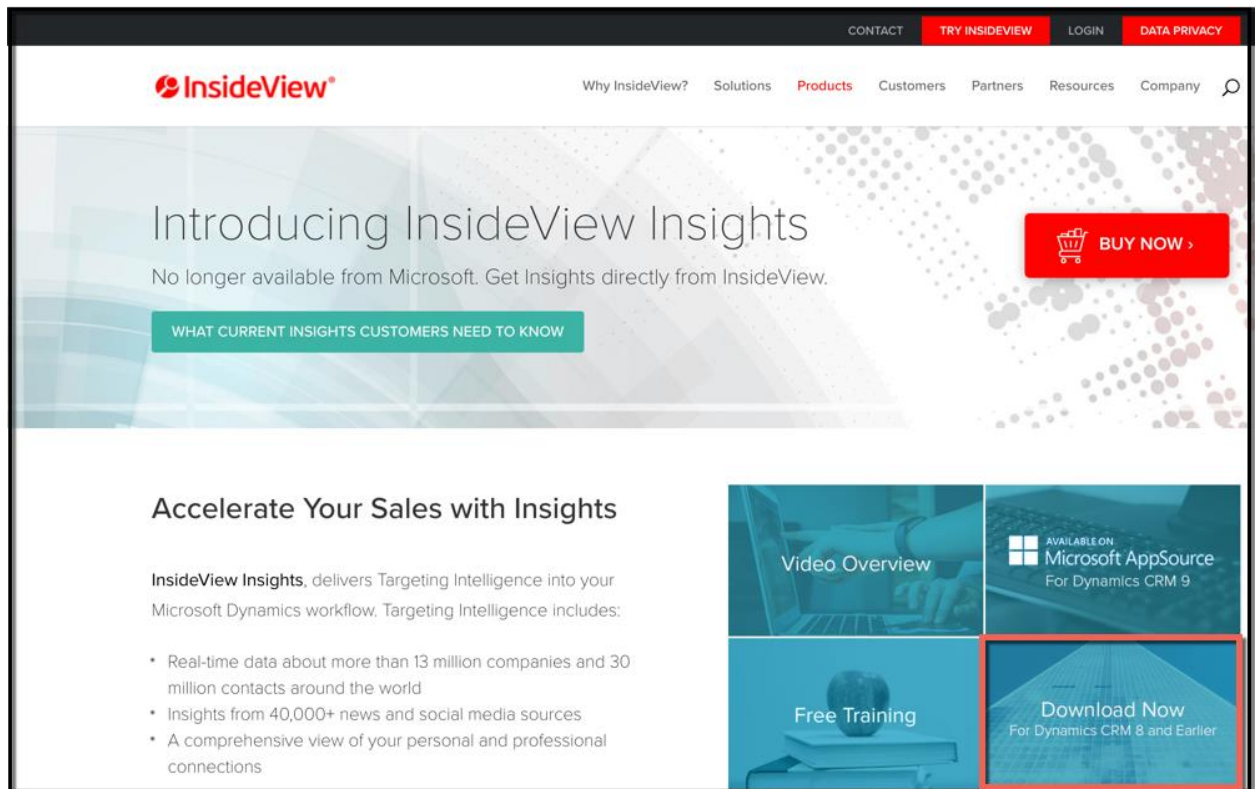
10. Make InsideView Insights available to everyone in your organization. For more information, refer to the next section, [Making InsideView Insights Available through the Dynamics CRM Online Web Client](#).

Installing InsideView Insights in Microsoft Dynamics CRM On-Premises

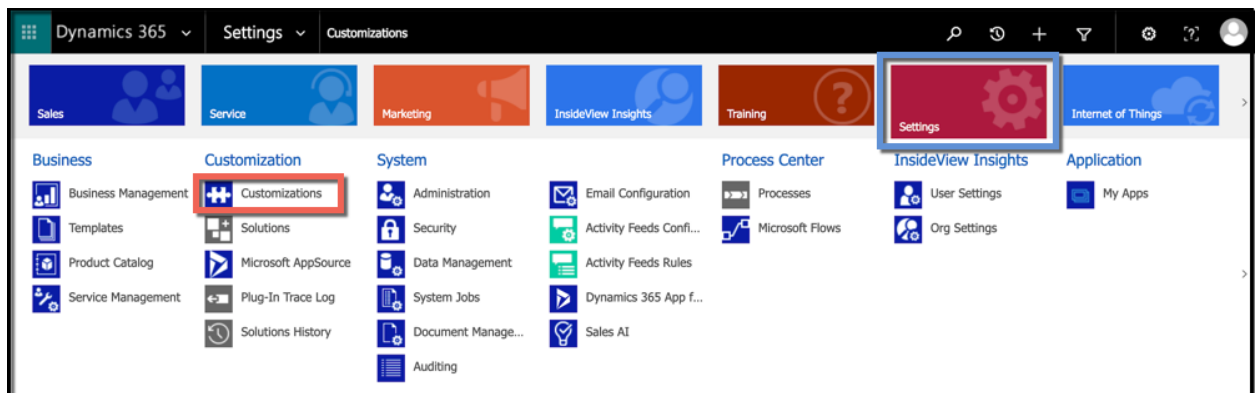
You can install Insights Enterprise 4.3 in Microsoft Dynamics CRM 2015 version and above. In order to install Insights Enterprise 4.3 in older versions of Microsoft Dynamics CRM, such as 2011 and 2013, it is recommended to upgrade your CRM to a newer version.

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

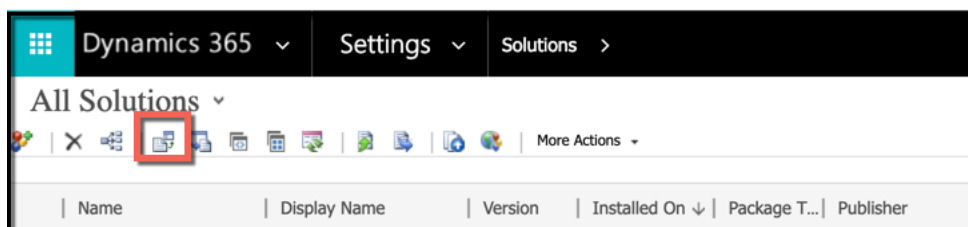
1. Download the Insights 4.3 package from the Insights Enterprise: <https://www.insideview.com/insights/> web page.



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.

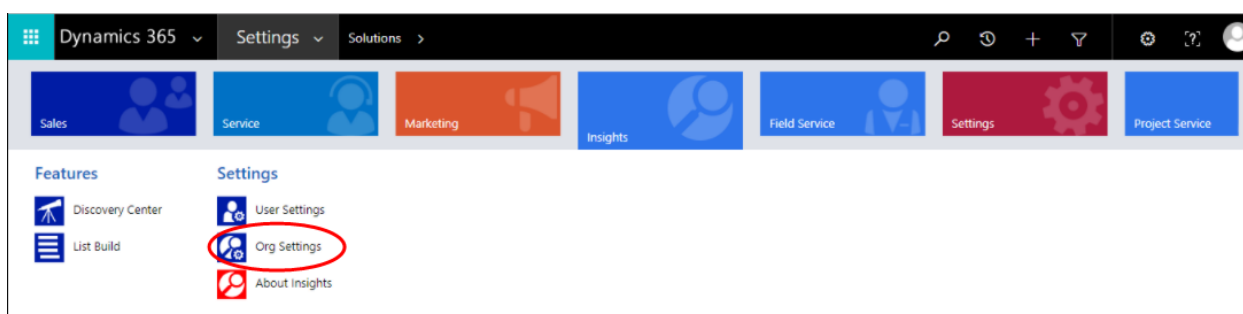
Making InsideView Insights Available through the Dynamics Web Client

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.

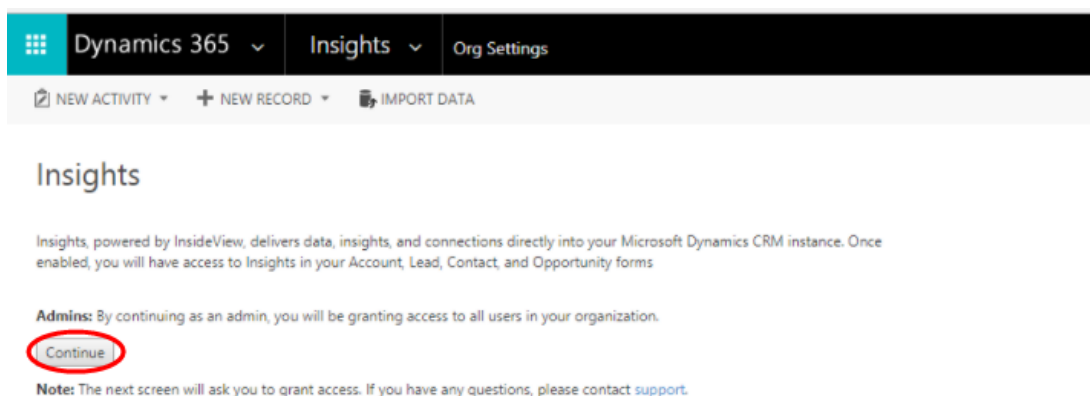
Instructions for CRM Administrators

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

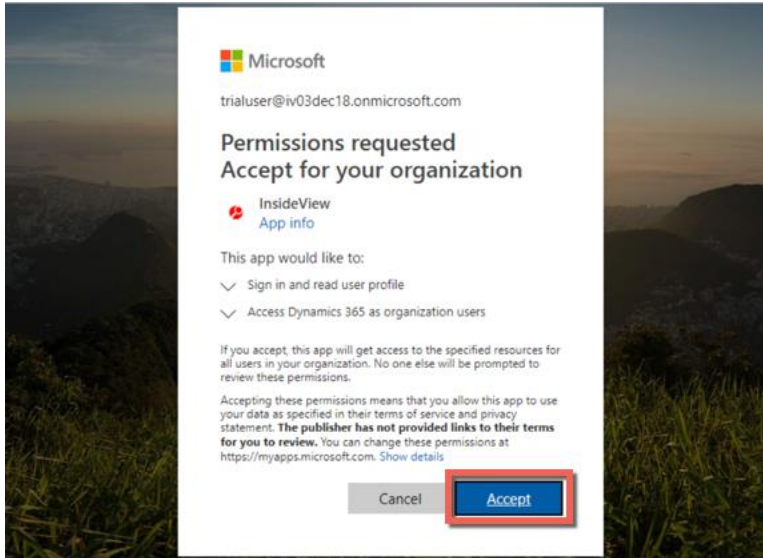
1. Go to **Microsoft Dynamics 365 > Insights > Settings > Org Settings**.



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



3. When prompted, sign in 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.

Insights Organizational Settings

Change the default settings for all users in your organization.

Field Mapping
Social
Application User

Accounts			Contacts			Leads		
Insights Fields	CRM Fields		Insights Fields	CRM Fields		Insights Fields	CRM Fields	
Company Logo	Default Image	▼	Contact Image	Entity Image	▼	First Name	First Name	▼
InsideView ID	---	▼	First Name	First Name	▼	Last Name	Last Name	▼
Company Name	Account Name	▼	Last Name	Last Name	▼	Company Name	Company Name	▼
Ownership	Ownership	▼	Title	Job Title	▼	Title	Job Title	▼
Fortune Ranking	---	▼	Email	Email	▼	Email	Email	▼
Ticker	Ticker Symbol	▼	Phone	Business Phone	▼	Industry	---	▼
Industry	---	▼	Fax	Fax	▼	Sub-Industry	---	▼
Sub-Industry	---	▼	URL	Website	▼	Revenue	Annual Revenue	▼
Primary SIC Code	SIC Code	▼	Street	Address 1: Street 1	▼	Employees	No. of Employees	▼
Primary SIC Description	---	▼	City	Address 1: City	▼	Phone	Business Phone	▼
Primary NAICS Code	---	▼	State	Address 1: State/Prov...	▼	Fax	Fax	▼
Primary NAICS Description	---	▼	Zip Code	Address 1: ZIP/Postal...	▼	URL	Website	▼
Revenue	Annual Revenue	▼	Country	Address 1: Country/R...	▼	Street	Street 1	▼
Employees	Number of Employees	▼	Lead Source	---	▼	City	City	▼
Phone	Main Phone	▼	Description	Description	▼	State	State/Province	▼
Fax	Fax	▼	Company Name	---	▼	Zip Code	ZIP/Postal Code	▼
URL	Website	▼	Contact Alias Name	---	▼	Country	Country/Region	▼
Street	Address 1: Street 1	▼	Contact Compensation	---	▼	Parent Company Country	---	▼
City	Address 1: City	▼	Contact Age	---	▼	Ultimate Parent Country	---	▼
State	Address 1: State/Prov...	▼	LinkedIn Profile	---	▼	Lead Source	---	▼
Zip Code	Address 1: ZIP/Postal...	▼	Facebook Profile	---	▼	Description	Description	▼
Country	Address 1: Country/R...	▼	Twitter Profile	---	▼	Contact Alias Name	---	▼
Description	Description	▼				Contact Compensation	---	▼
Account Source	---	▼				Contact Age	---	▼
Fiscal Year End	---	▼				LinkedIn Profile	---	▼
Most Recent Quarter	---	▼				Facebook Profile	---	▼
Parent Company	---	▼				Twitter Profile	---	▼
Ultimate Parent	---	▼				Ownership	---	▼
Equifax ID	---	▼				Ticker	---	▼
						Primary SIC Code	SIC Code	▼
						Primary SIC Description	---	▼
						Primary NAICS Code	---	▼
						Primary NAICS Description	---	▼
						Fiscal Year End	---	▼
						Most Recent Quarter	---	▼
						Parent Company	---	▼
						Ultimate Parent	---	▼
						Equifax ID	---	▼

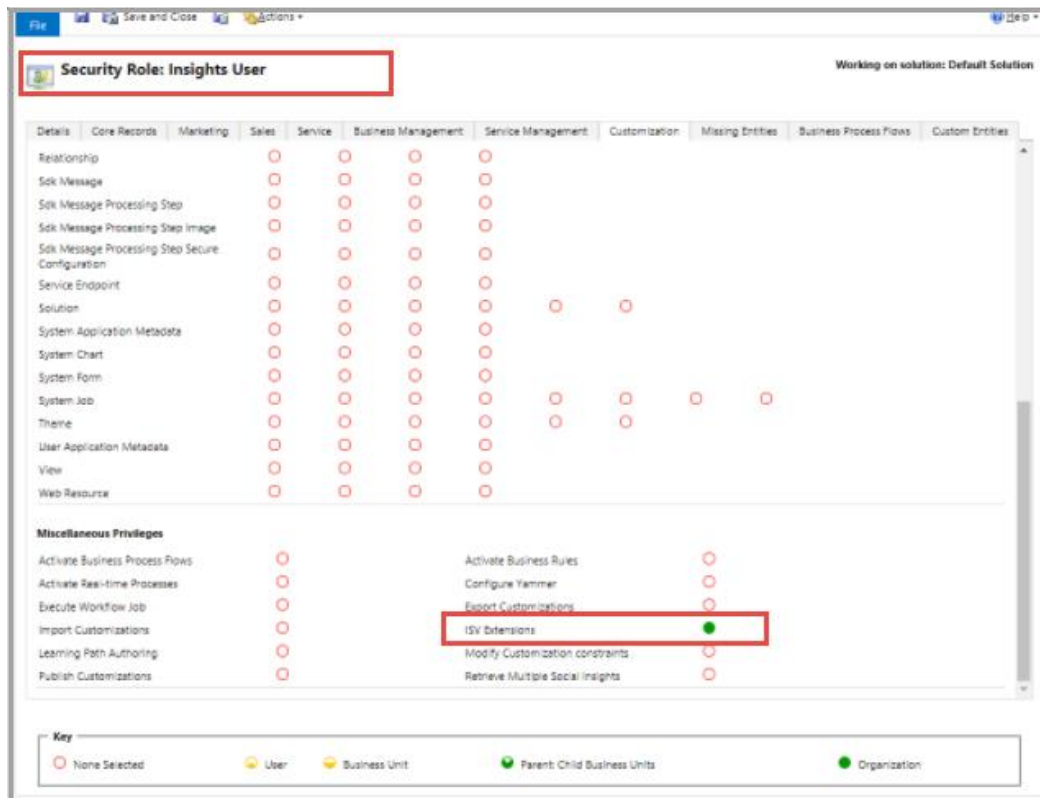
Save
Cancel

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.



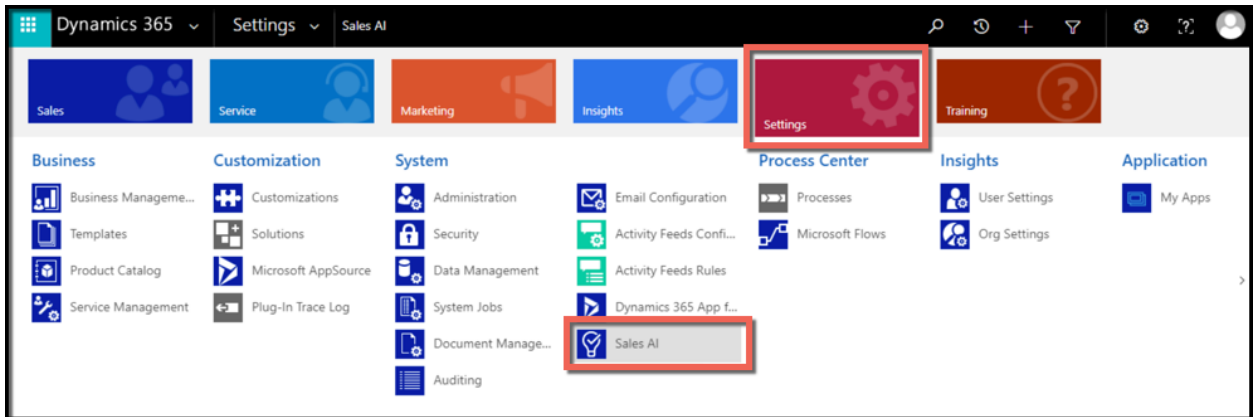
Verify the Insights Acquisition Alert Setting

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.

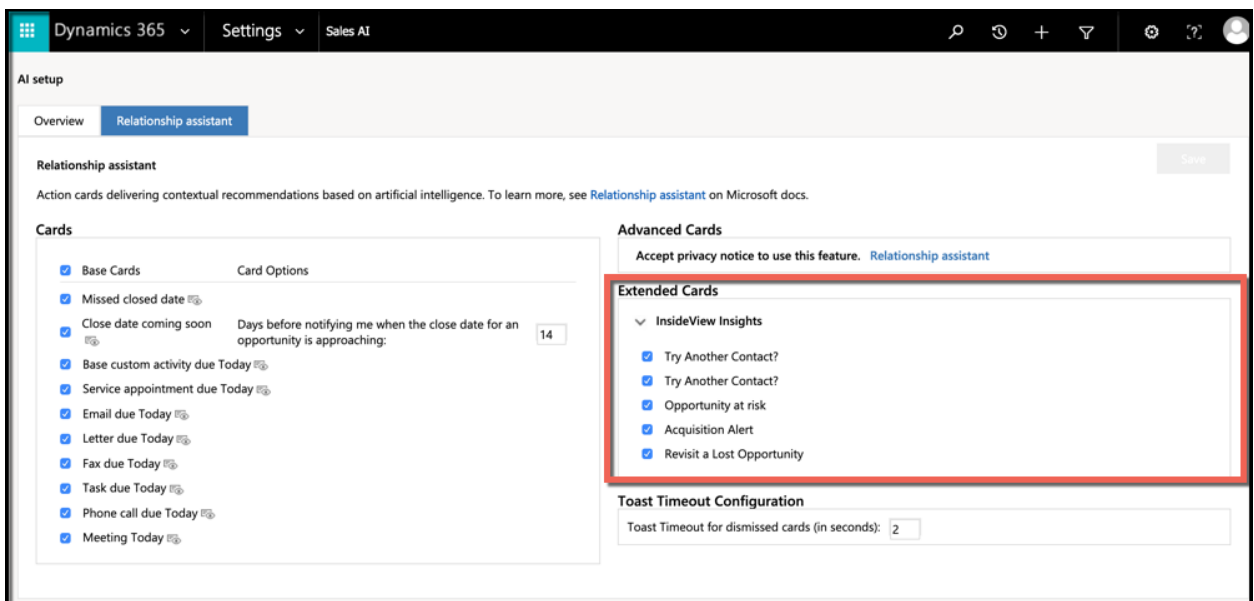
If this **Acquisition Alert** check box is not enabled, then users will not be able to view Relationship Agent cards. For more information, read the **Getting to the Insights Relationship Assistant Card** section in the *InsideView Insights User Guide*.

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

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

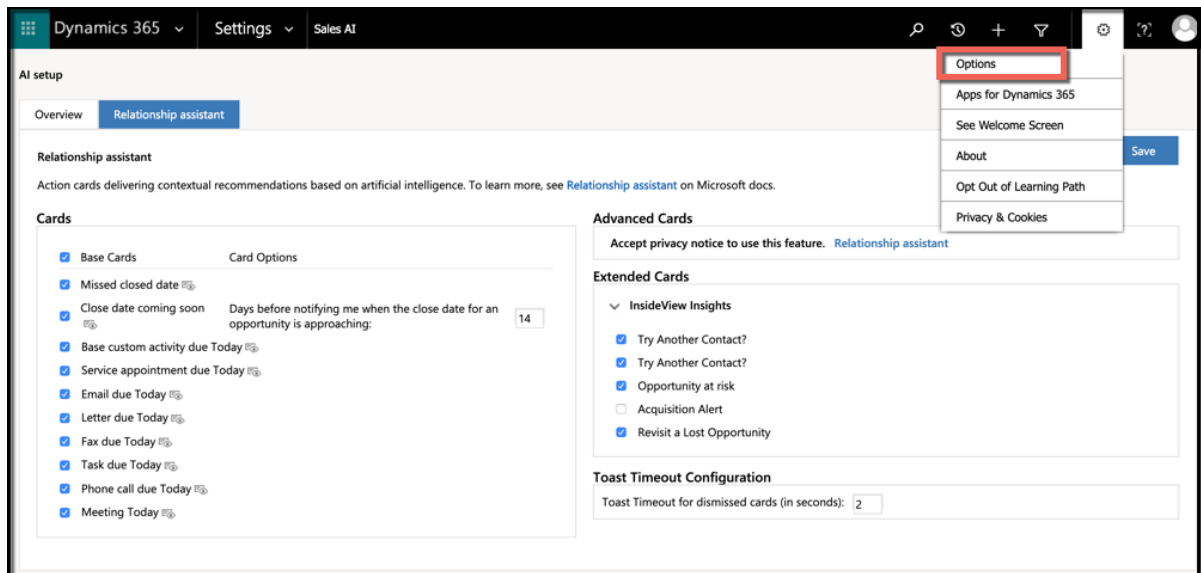


2. In the Sales AI page, click the **Relationship Assistant** tab and expand the Extended Card section and verify that the **Acquisition Alert** is enabled under the **InsideView Insights**.

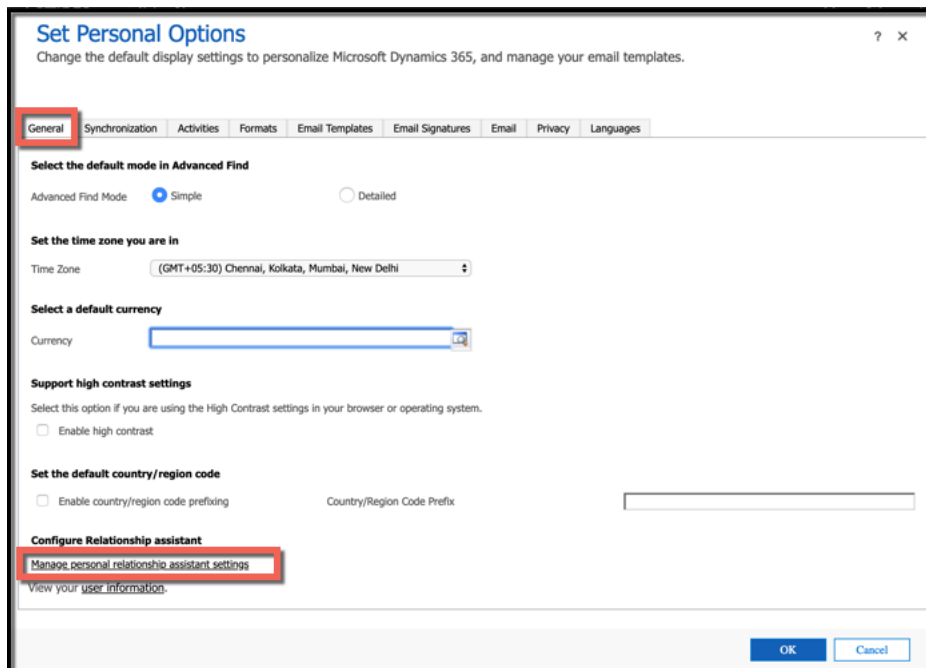


By default, All **InsideView Insights Alert** check boxes are enabled for Insights admin user when you install Insights solution in Dynamics 365. If it is disabled, you must enable it.

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.

AI setup

Relationship assistant

Relationship assistant

Action cards delivering contextual recommendations based on artificial intelligence. To learn more, see [Relationship assistant](#) on Microsoft docs.

Save

Cards

Base Cards Card Options

- ☒ Missed closed date ⓘ
- ☒ Close date coming soon ⓘ Days before notifying me when the close date for an opportunity is approaching:
- ☒ Base custom activity due Today ⓘ
- ☒ Service appointment due Today ⓘ
- ☒ Email due Today ⓘ
- ☒ Letter due Today ⓘ
- ☒ Fax due Today ⓘ
- ☒ Task due Today ⓘ
- ☒ Phone call due Today ⓘ
- ☒ Meeting Today ⓘ

Extended Cards

InsideView Insights

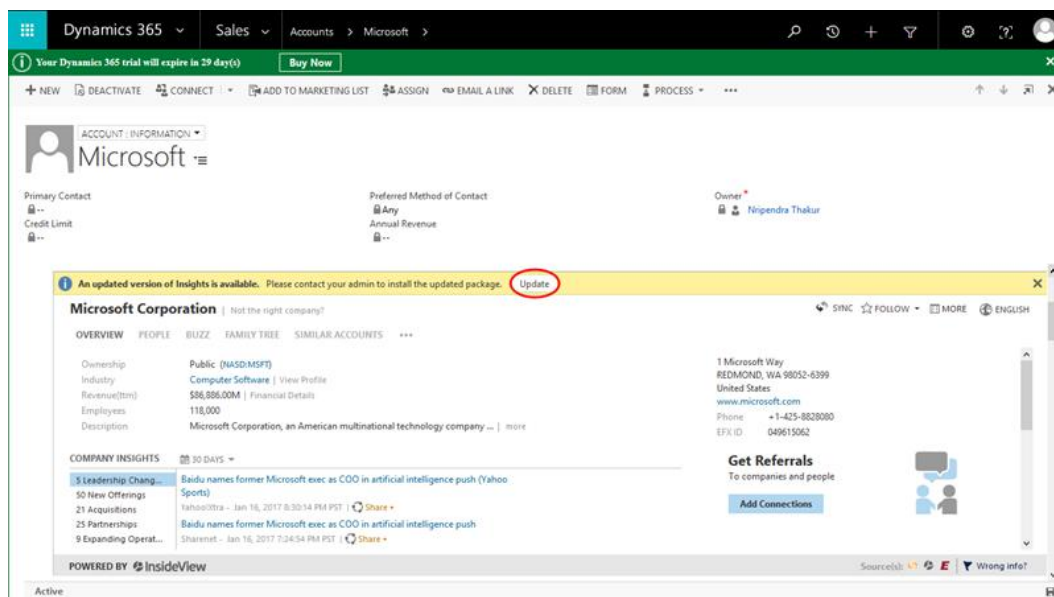
- ☒ Try Another Contact?
- ☒ Try Another Contact?
- ☒ Opportunity at risk
- ☒ Acquisition Alert
- ☒ Revisit a Lost Opportunity

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

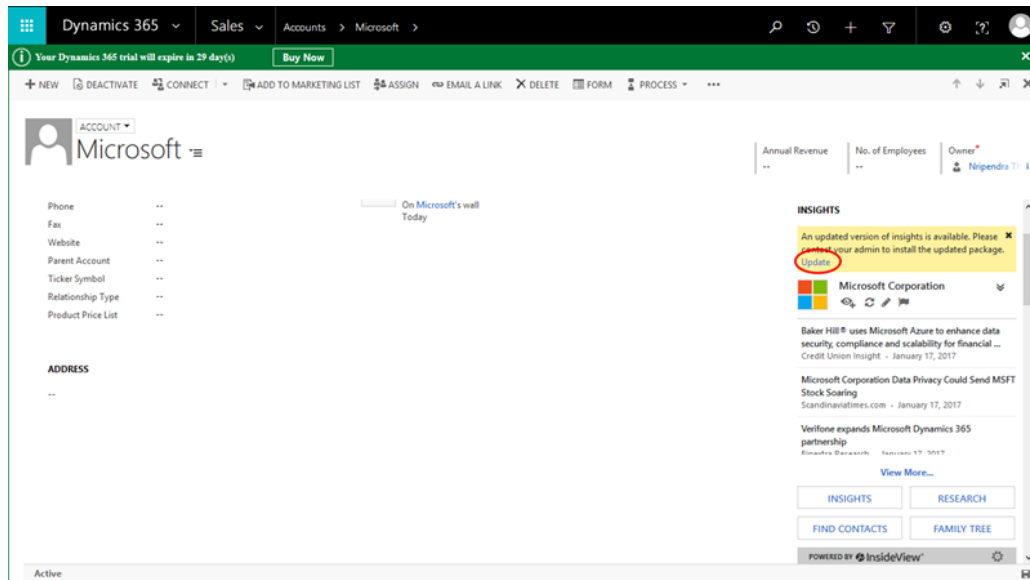
Chapter 4: Upgrading from an Older InsideView Insights Version to Insights 4.3

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:

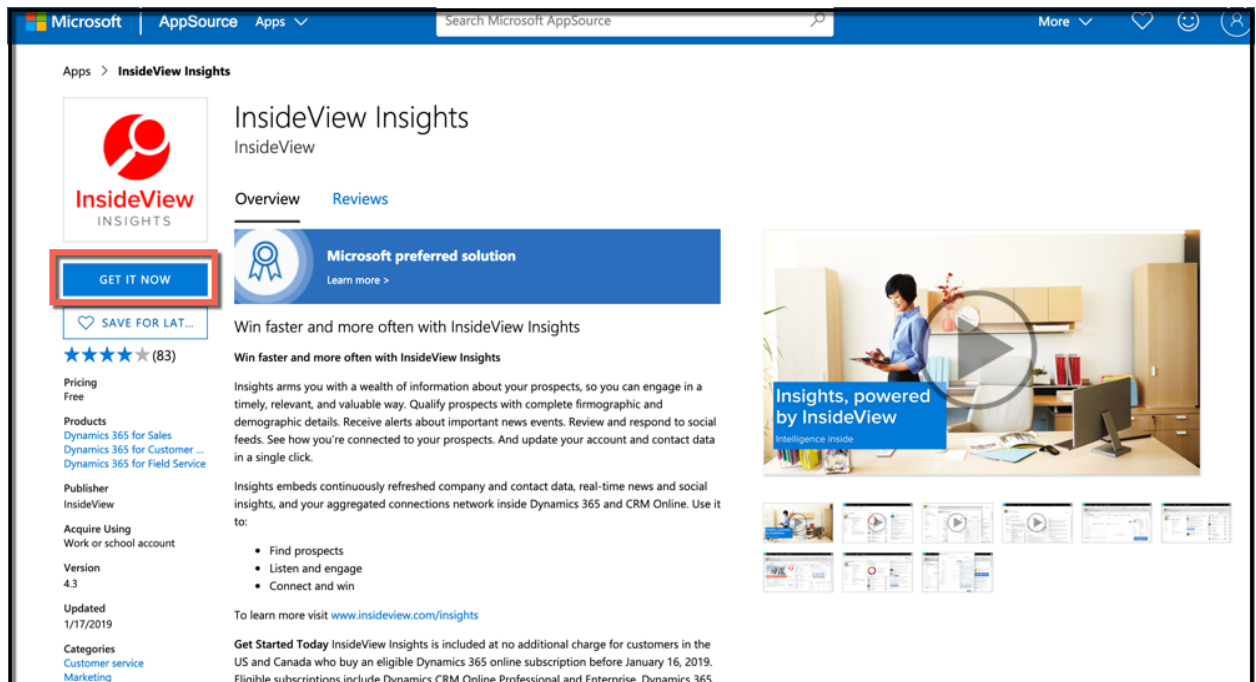
1. Sign in to <https://portal.office.com> with your Office 365 global administrator credentials.
2. Once the user logs in to the CRM, when you open an account, a contact, a lead an opportunity, or discovery center form the following alert with the **Update** link appears asking you to upgrade to latest 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**.

×

Sign into Microsoft AppSource

Use your work account

aakriti@iv16jan.onmicrosoft.com

×


Sign in

Don't have an account? [Sign up](#)

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

×

One more thing ...

 **InsideView Insights**
By InsideView

This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.

Name *

Harry

Anthony

Work email *

harry.anthony@insights.onmicrosoft.com

Job title

Company

Insights

Country / region

United States of America

Phone number *

343-3434-133

☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as user (user@iv16jan.onmicrosoft.com).

Continue

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**.

Microsoft Dynamics 365 Office 365

Microsoft

InsideView

InsideView INSIGHTS

InsideView Insights

Win faster and more often with InsideView Insights

Insights arms you with a wealth of information about your prospects, so you can engage in a timely, relevant, and valuable way. Qualify prospects with complete firmographic and demographic details. Receive alerts about important news events. Review and respond to social feeds. See how you're connected to your prospects. And update your account and contact data in a single click.

Insights embeds continuously refreshed company and contact data, real-time news and social insights, and your aggregated connections network inside Dynamics 365 and CRM Online. Use it to:

- Find prospects

Publisher: InsideView

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: abc (orgc8d7da5)

☒ Agree to Microsoft's Legal Terms and Privacy Statement

☒ Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365

Agree Cancel

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

Microsoft | Dynamics 365 Office 365

Dynamics 365 Administration Center

There's a better way to manage your instances. [Try the new Admin center](#)

INSTANCES UPDATES SERVICE HEALTH BACKUP & RESTORE APPLICATIONS

Manage your solutions

Manage your solutions

Select a preferred solution to manage on selected instance: abc

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
InsideView Insights	4.3	12/31/2021	Installed
LinkedIn Lead Gen forms	1.12.1006.0	1/1/2020	Not installed
Live Assist add-in power...	1.0.0.0	1/1/2050	Not installed
Live Assist for Dynamics 3...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.3.1.8	1/1/2050	Not installed
Live Assist for Microsoft D...	3.3.1.8	1/1/2050	Not installed
OData v4 Data Provider	9.0.0.104	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics ...	1.11.1005.0	1/1/2020	Not installed
Project Service Automation	3.4.0.37	1/1/2050	Not installed
Relationship Insights	9.0.0.568	1/1/2050	Not installed
Sales insights add-on	9.0.1.7043	1/1/2050	Not installed
Sample Data for Marketing	1.34.1032.0	1/1/2020	Not installed

InsideView Insights

InsideView Insights makes it easy to find and engage with buyers. Win deals using accurate prospect data, real-time insights, and social connections delivered directly inside Microsoft ... [\(more\)](#)

Created by: InsideView

[Learn more](#)

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

Chapter 5: Managing Organizational Settings

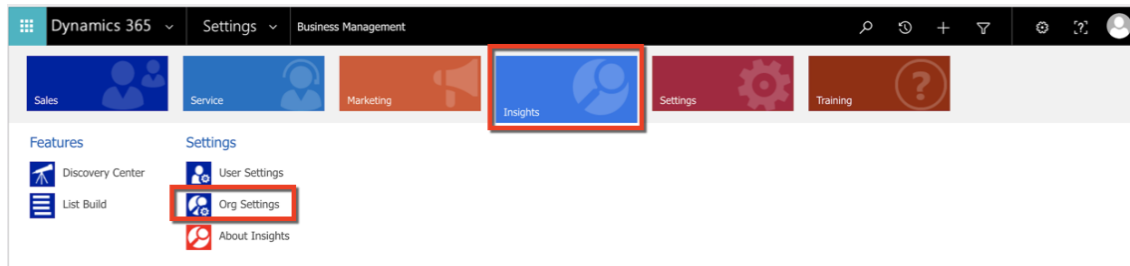
Insights allows administrators to manage organizational settings such as Insight-to-CRM field mappings and social media feeds. These settings affect all users in the organization.

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.

Insights Organizational Settings

Change the default settings for all users in your organization.

Field Mapping
Social
Application User

Accounts

Insights Fields	CRM Fields
Company Logo	Default Image
InsideView ID	---
Company Name	Account Name
Ownership	Ownership
Fortune Ranking	---
Ticker	Ticker Symbol
Industry	---
Sub-Industry	---
Primary SIC Code	SIC Code
Primary SIC Description	---
Primary NAICS Code	---
Primary NAICS Description	---
Revenue	Annual Revenue
Employees	Number of Employees
Phone	Main Phone
Fax	Fax
URL	Website
Street	Address 1: Street 1
City	Address 1: City
State	Address 1: State/Prov...
Zip Code	Address 1: ZIP/Postal...
Country	Address 1: Country/R...
Description	Description
Account Source	---
Fiscal Year End	---
Most Recent Quarter	---
Parent Company	---
Ultimate Parent	---
Equifax ID	---

Contacts

Insights Fields	CRM Fields
Contact Image	Entity Image
First Name	First Name
Last Name	Last Name
Title	Job Title
Email	Email
Phone	Business Phone
Fax	Fax
URL	Website
Street	Address 1: Street 1
City	Address 1: City
State	Address 1: State/Prov...
Zip Code	Address 1: ZIP/Postal...
Country	Address 1: Country/R...
Lead Source	---
Description	Description
Company Name	---
Contact Alias Name	---
Contact Compensation	---
Contact Age	---
LinkedIn Profile	---
Facebook Profile	---
Twitter Profile	---

Leads

Insights Fields	CRM Fields
First Name	First Name
Last Name	Last Name
Company Name	Company Name
Title	Job Title
Email	Email
Industry	---
Sub-Industry	---
Revenue	Annual Revenue
Employees	No. of Employees
Phone	Business Phone
Fax	Fax
URL	Website
Street	Street 1
City	City
State	State/Province
Zip Code	ZIP/Postal Code
Country	Country/Region
Parent Company Country	---
Ultimate Parent Country	---
Lead Source	---
Description	Description
Contact Alias Name	---
Contact Compensation	---
Contact Age	---
LinkedIn Profile	---
Facebook Profile	---
Twitter Profile	---
Ownership	---
Ticker	---
Primary SIC Code	SIC Code
Primary SIC Description	---
Primary NAICS Code	---
Primary NAICS Description	---
Fiscal Year End	---
Most Recent Quarter	---
Parent Company	---
Ultimate Parent	---
Equifax ID	---

Save
Cancel

- 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.

- Click **Save**.

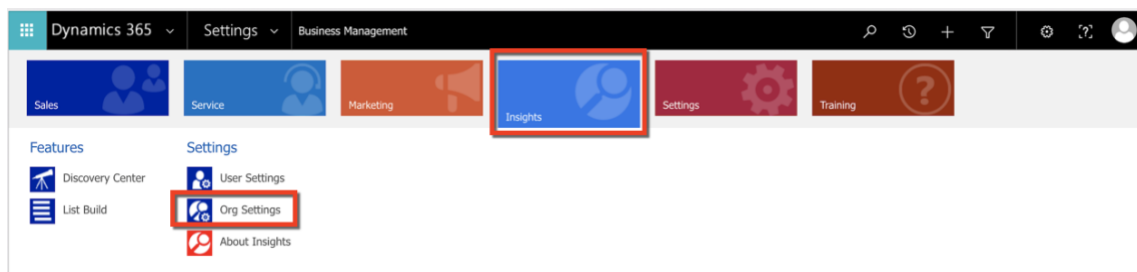
Create an Application User

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.

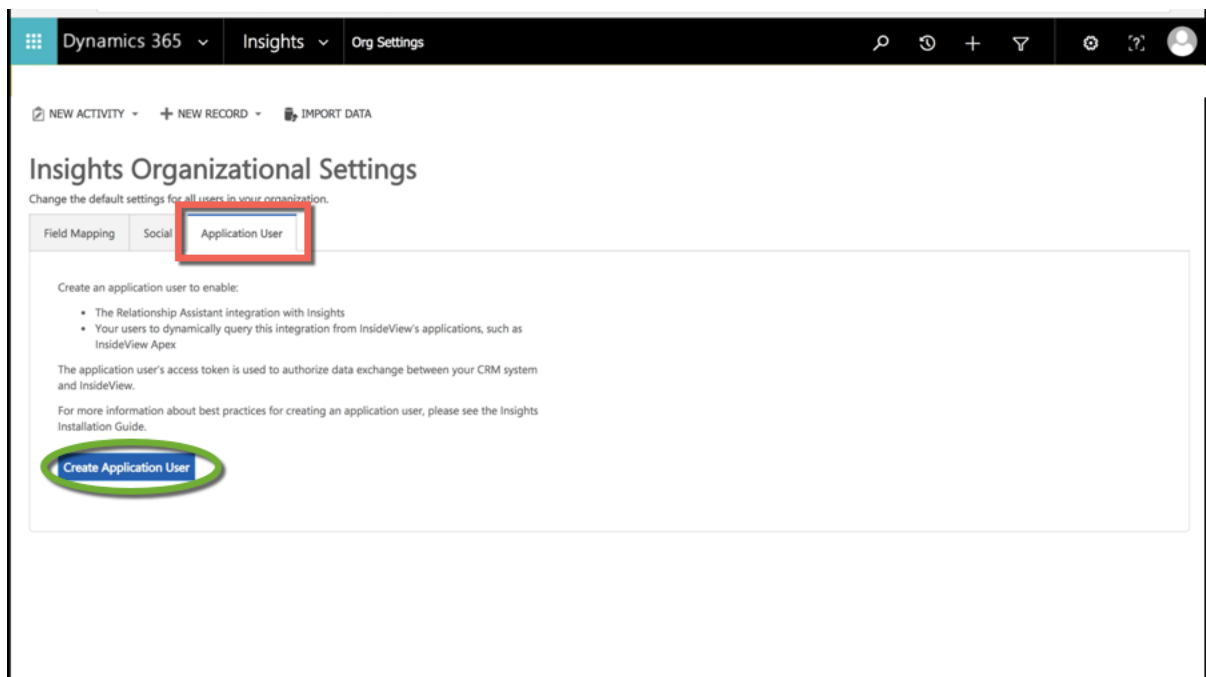
Note: Insights allows only Microsoft Dynamics System Administrator to create an application user and configured it.

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

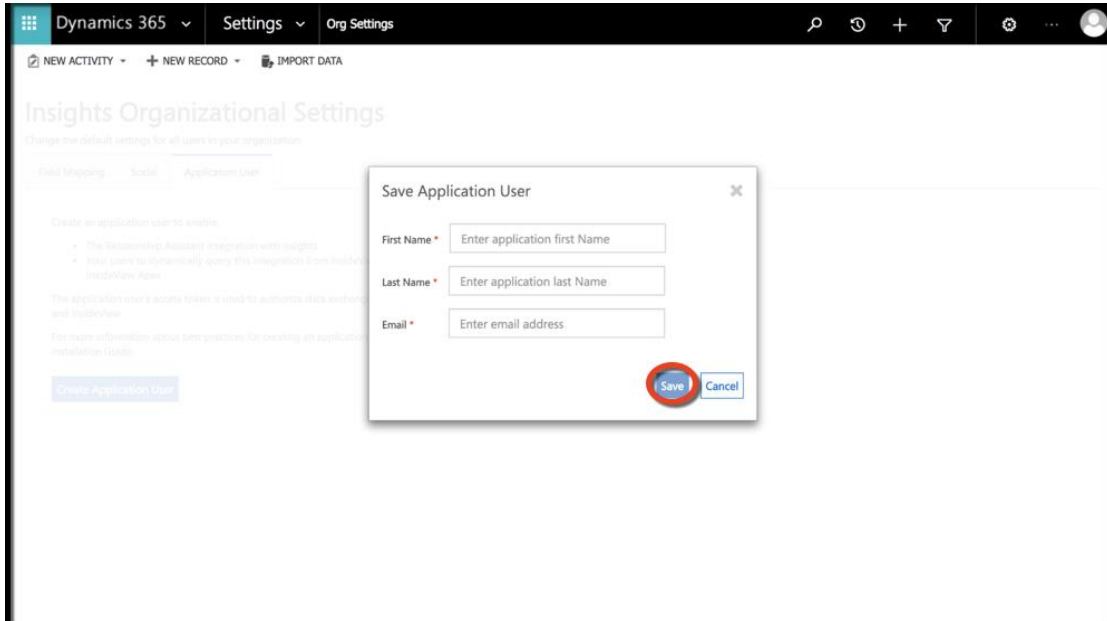
1. Sign in to Microsoft Dynamics 365.
2. Go to **CRM > Settings > Insights > Org Settings**.



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

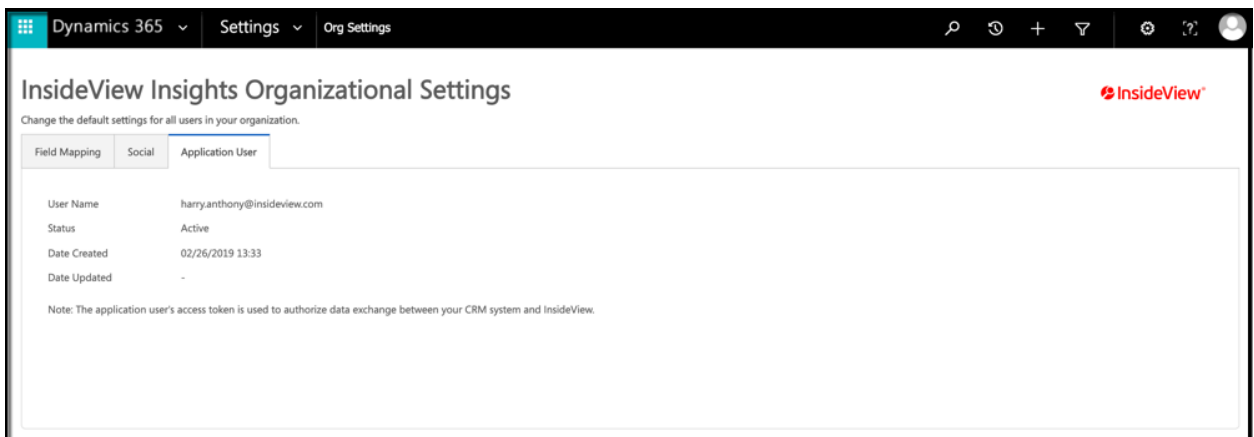


4. In the Save Application User window, enter the following details:
 - First Name
 - Last Name
 - Email Address



The screenshot shows the Dynamics 365 interface with the 'Settings' menu open to 'Org Settings'. A modal dialog titled 'Save Application User' is displayed in the center. The dialog has three input fields: 'First Name' with the placeholder 'Enter application first Name', 'Last Name' with the placeholder 'Enter application last Name', and 'Email' with the placeholder 'Enter email address'. At the bottom right of the dialog are two buttons: 'Save' (highlighted with a red circle) and 'Cancel'. The background shows the 'Insights Organizational Settings' page with tabs for 'Field Mapping', 'Social', and 'Application User'.

5. Click the **Save** button.
6. Once the application user is created, the following confirmation screen appears.

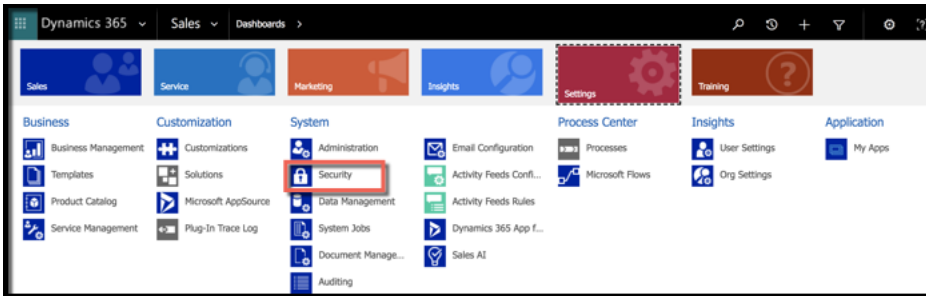


The screenshot shows the Dynamics 365 interface with the 'Settings' menu open to 'Org Settings'. The 'Application User' tab is selected under 'InsideView Insights Organizational Settings'. The screen displays the following information:

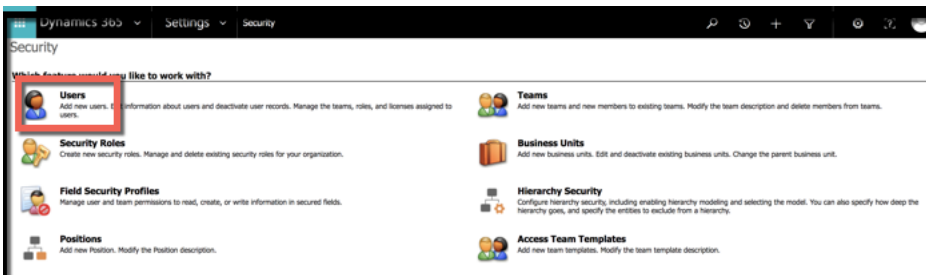
User Name	harry.anthony@insideview.com
Status	Active
Date Created	02/26/2019 13:33
Date Updated	-

Note: The application user's access token is used to authorize data exchange between your CRM system and InsideView.

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



8. Click the **Users** link.



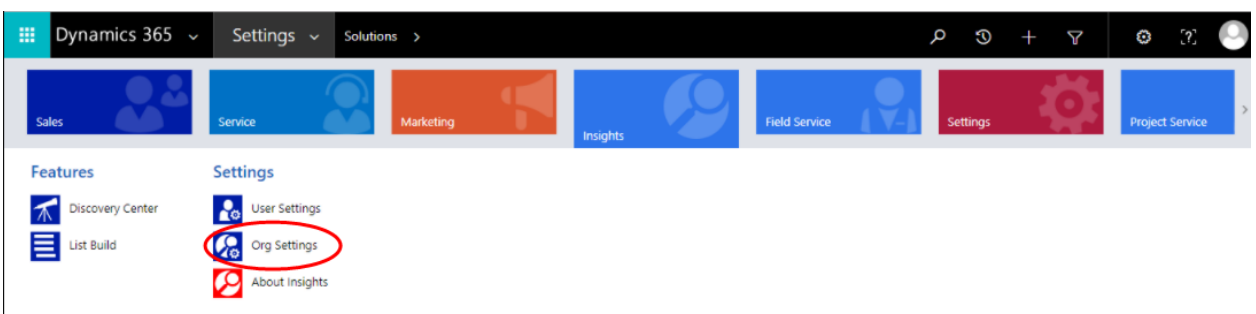
9. Check for the application username that you have saved earlier.

Review and Update Social Media Feeds Settings

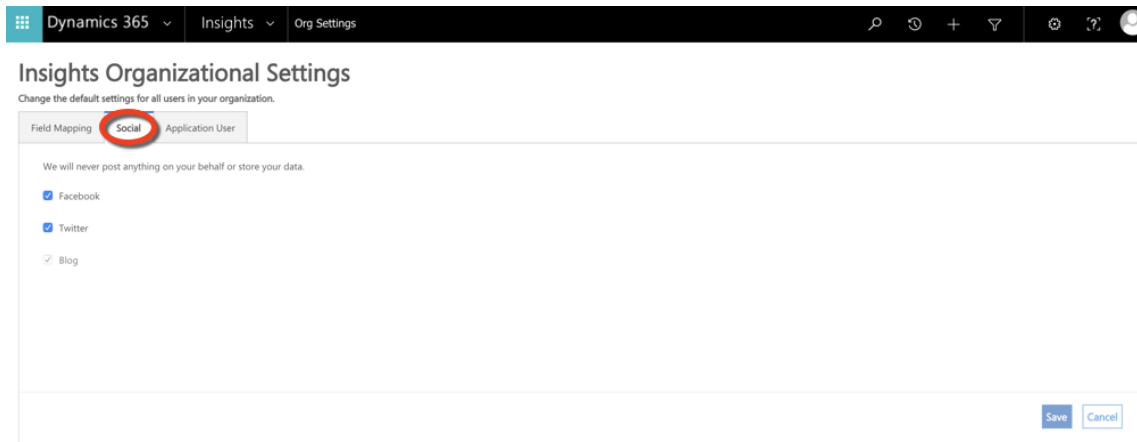
With Insights you can enable or disable social media feeds for your entire organization to track the latest news and events on sites such as Twitter, Facebook and company blogs.

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.

The screenshot displays the InsideView Insights user interface. At the top, a ribbon contains various tool icons. The 'Web Resource' icon is highlighted with a red box. Below the ribbon, the 'Account' form is shown. The form has a left sidebar with a tree view containing categories like 'Account', 'Common', and 'Project Service'. The main area of the form is titled 'Solution: Default Solution' and 'Form: Account'. It features a 'Header' section with fields for 'Annual Revenue', 'Number of Employees', and 'Owner'. Below this is a 'Summary' section with a table of 'ACCOUNT INFORMATION' containing fields like 'Account Name', 'Phone', 'Fax', 'Website', 'Parent Account', 'Ticker Symbol', 'Relationship Type', and 'Product Price List'. To the right of the table is a 'SOCIAL PANE' and a 'Relationship Assistant' section. At the bottom, there is an 'ADDRESS' section with a field for 'Address 1'.



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:

Add Web Resource

Add an existing web resource to the Form.

General Formatting Dependencies

Web resource

Web resource *  iv_/webpages/summary_mashup.htm 

Field Name and Properties

Name * WebResource_ Insights

Label * Insights

☐ Display label on the Form

Visibility

☒ Visible by default

☐ Enable for mobile

Web Resource Properties

Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.

☒ Pass record object-type code and unique identifier as parameters.

OK Cancel

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:

Web Resource Properties ?

Modify this Web resource's properties.

General

Formatting

Dependencies

Layout


Select the number of columns the control occupies:


☒ One column


☐ Two columns


☐ Three columns

☐ Four columns









Row Layout

Select the number of rows the control occupies.

Number of Rows

☒ Automatically expand to use available space

Scrolling

Select the scrolling type for the IFRAME.

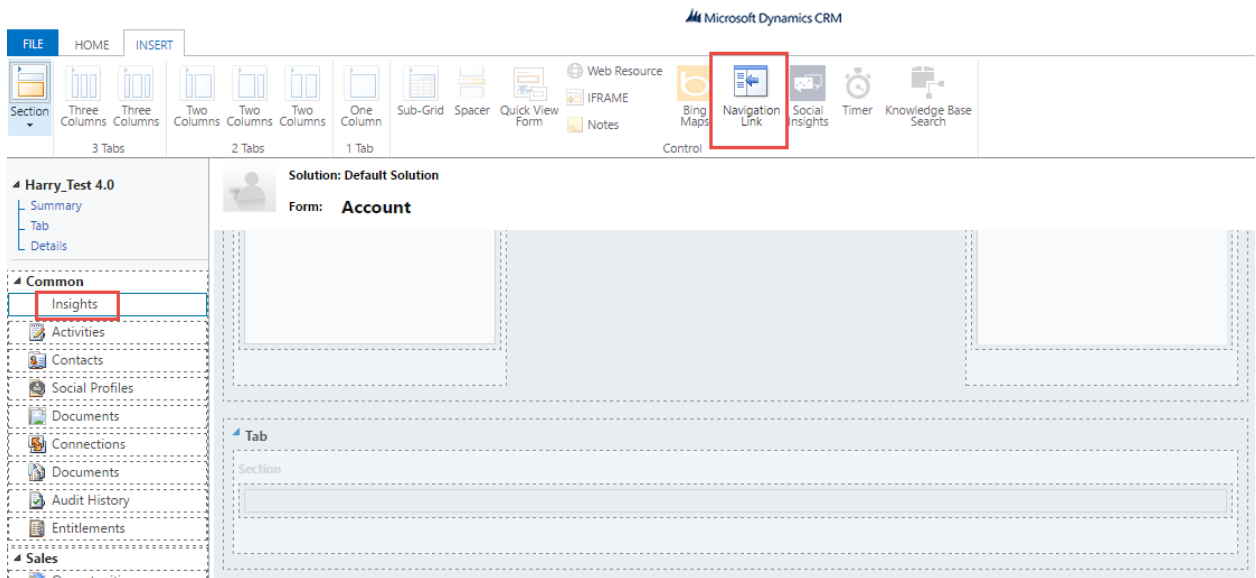
Scrolling

Border

Specify whether a border is displayed.

☐ Display border

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.



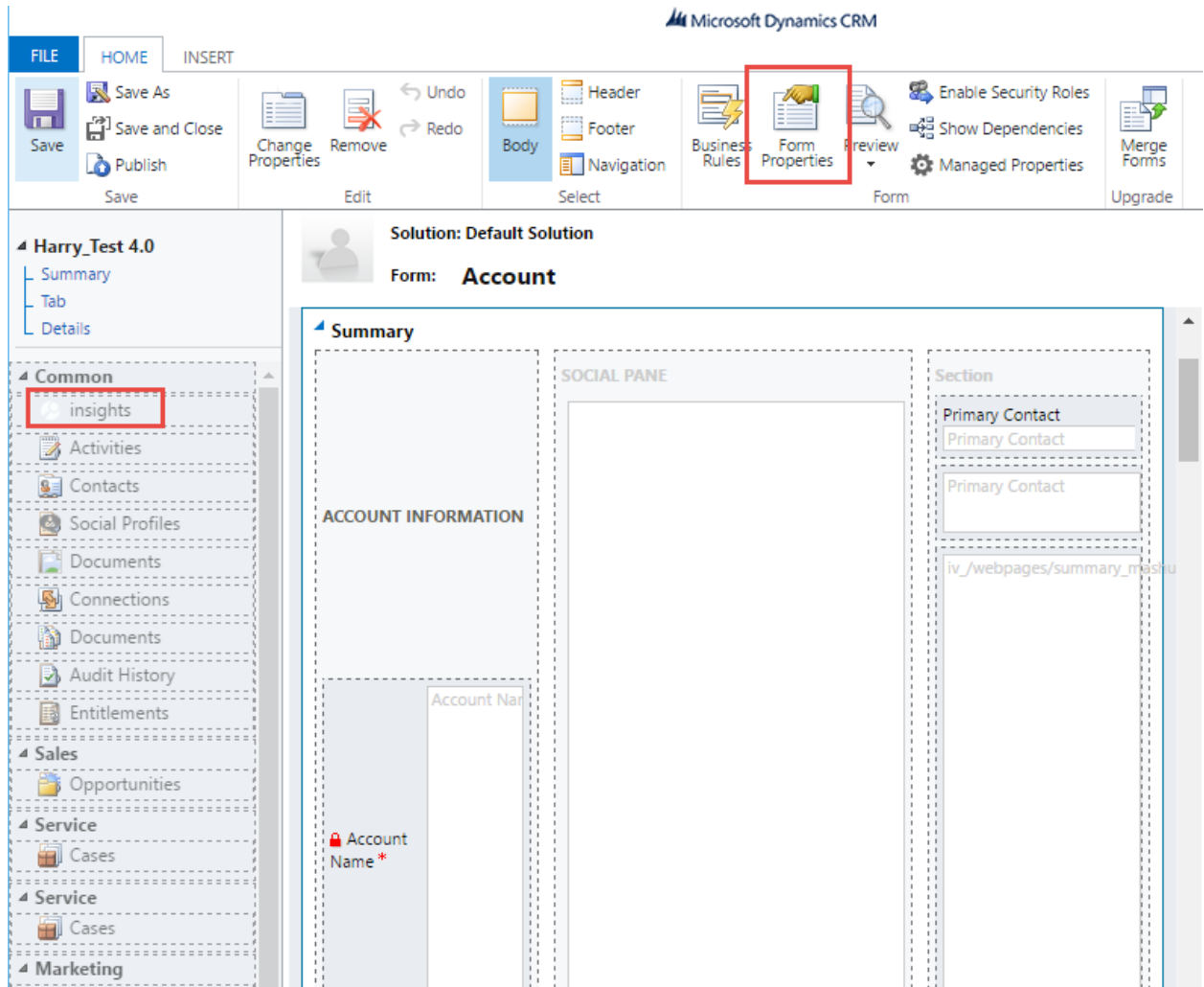
Note: If the Insights link does not exist under the Common tile, create a new **Navigation Link**.

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*.

Form Properties

×

Modify this form's properties.

EventsDisplayParametersNon-Event Dependencies

Add query string parameters to allow for data to be passed to the form. These parameters can be accessed using scripts in form or field event handlers

+

×

iv_onLoadAction

Name *

iv_onLoadAction

Type *

SafeString

OK

Cancel

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.

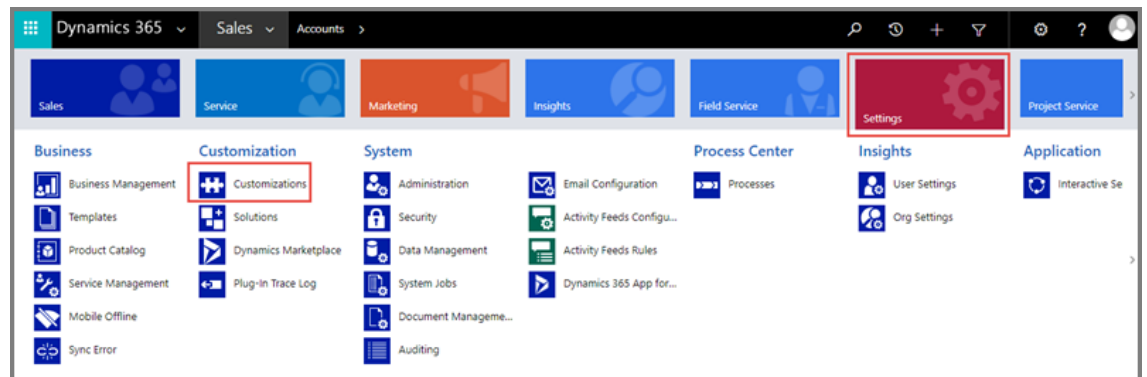
Add Insights Dashboard Widget in the Microsoft Dynamics CRM Dashboard

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.

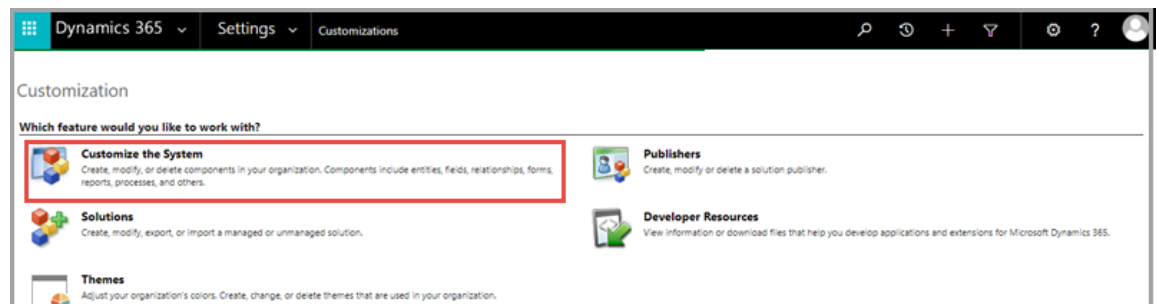
Note: The Insights Dashboard widget can be configured and accessed only your Microsoft Dynamics CRM administrator.

Here's how:

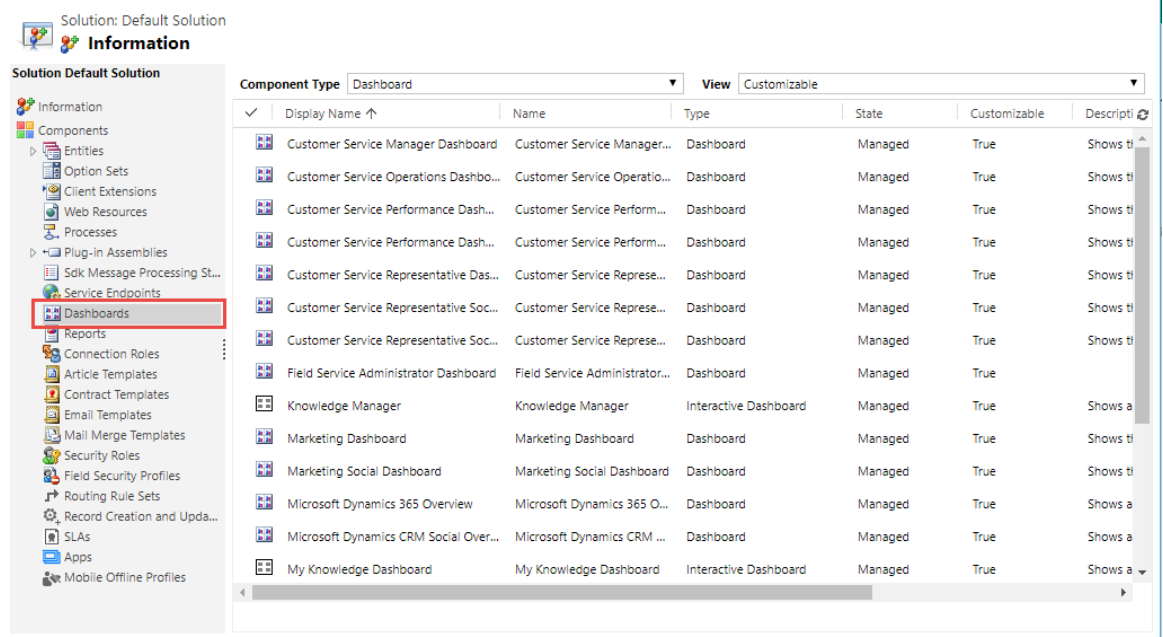
1. Go to the **Settings > Customizations**.



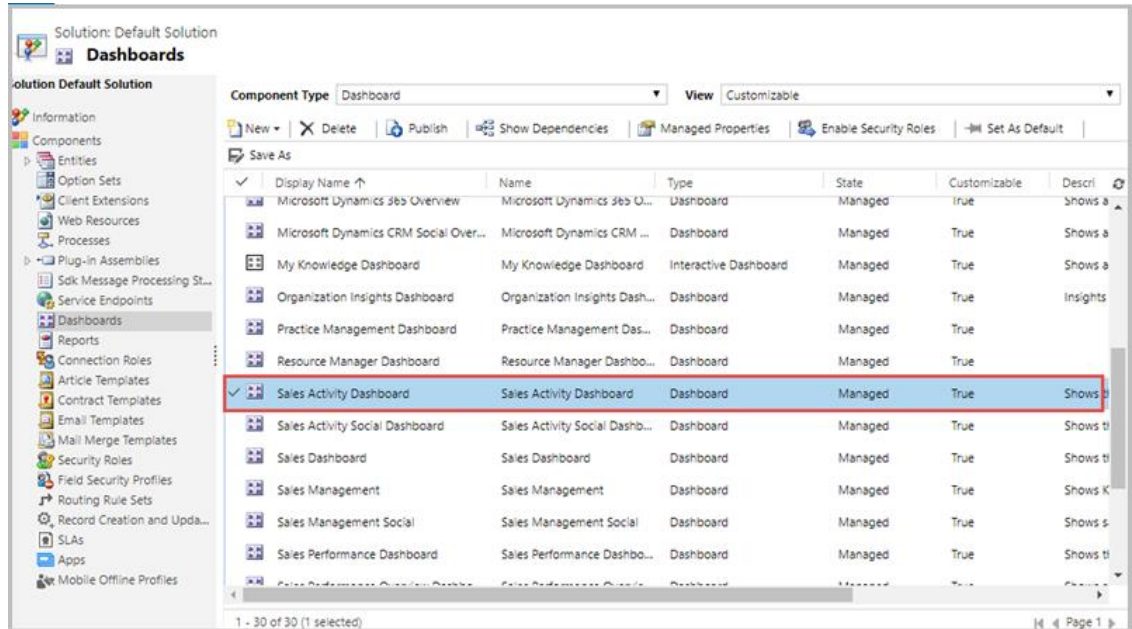
2. In the Customization page, click the **Customize the System** link.



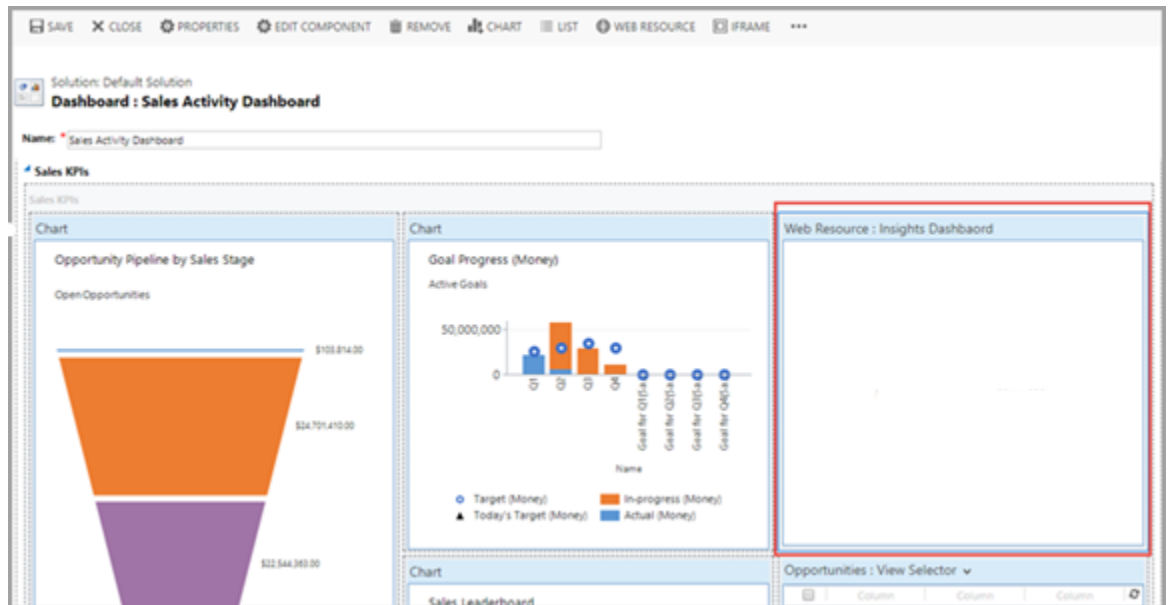
3. In the **Solution Editor** dialog, double-click the **Dashboard** link.



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**.

Web Resource Properties

Modify this Web resource's properties.

Web resource

Web resource *

Field Name and Properties

Name *

Label *

☐ Display label on the Dashboard

Visibility

☒ Visible by default

Web Resource Properties

Custom Parameter(data)

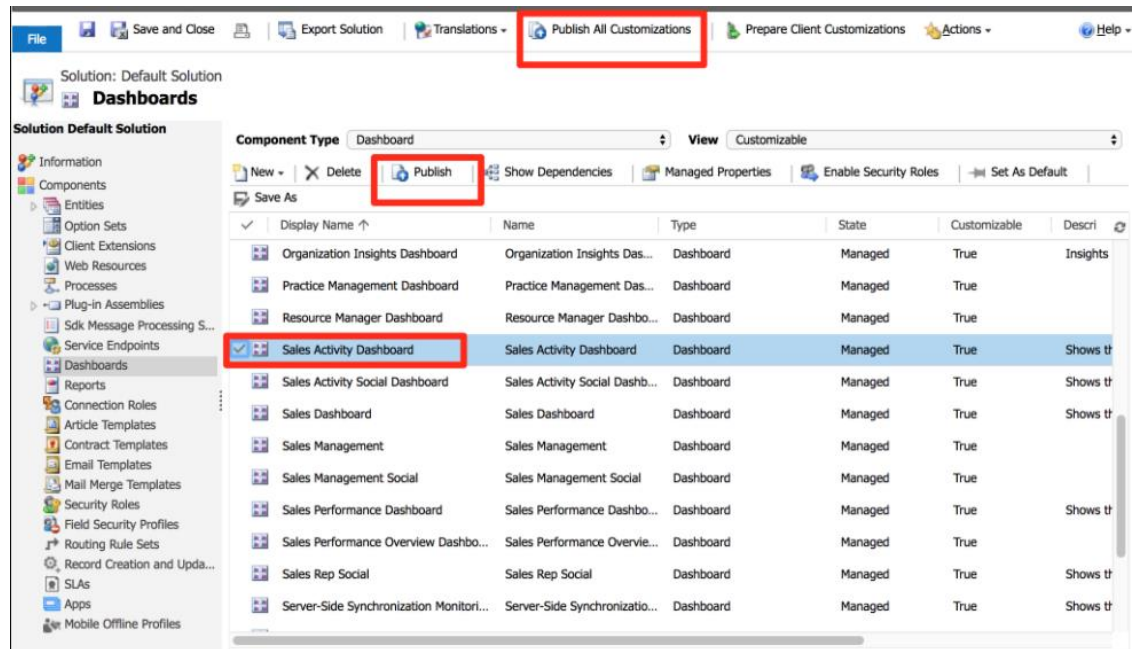
☐ Restrict cross-frame scripting, where supported.

☐ Pass record object-type code and unique identifier as parameters.

☐ Enable for tablet

OK Cancel

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**.



- 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

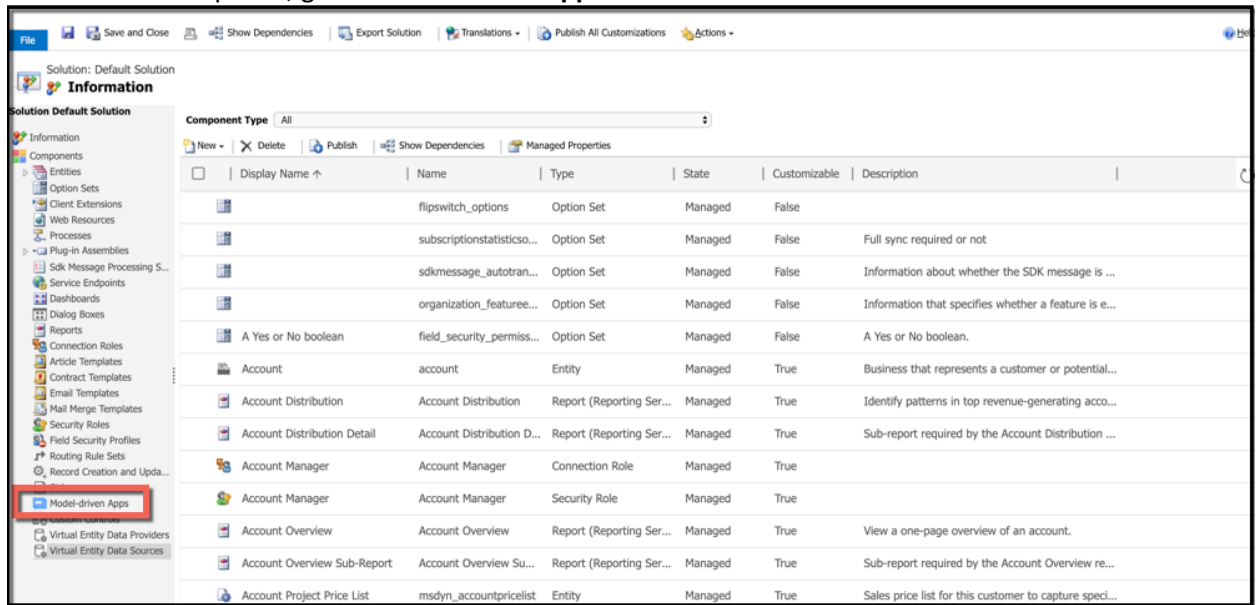
These steps are required if the user wants to configure any **UCI** sitemap (default Sales Hub App or any other custom UCI sitemap) to use InsideView Insights features navigation tiles.

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

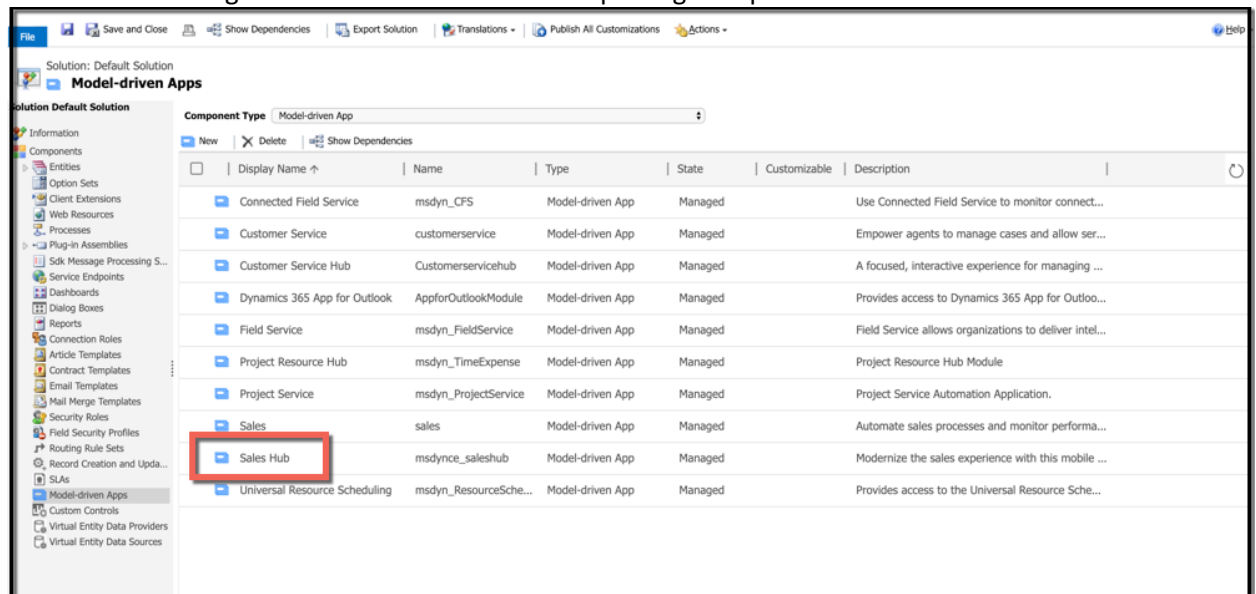
Log in to Dynamics CRM with System Administrator or System Customizer credentials.

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

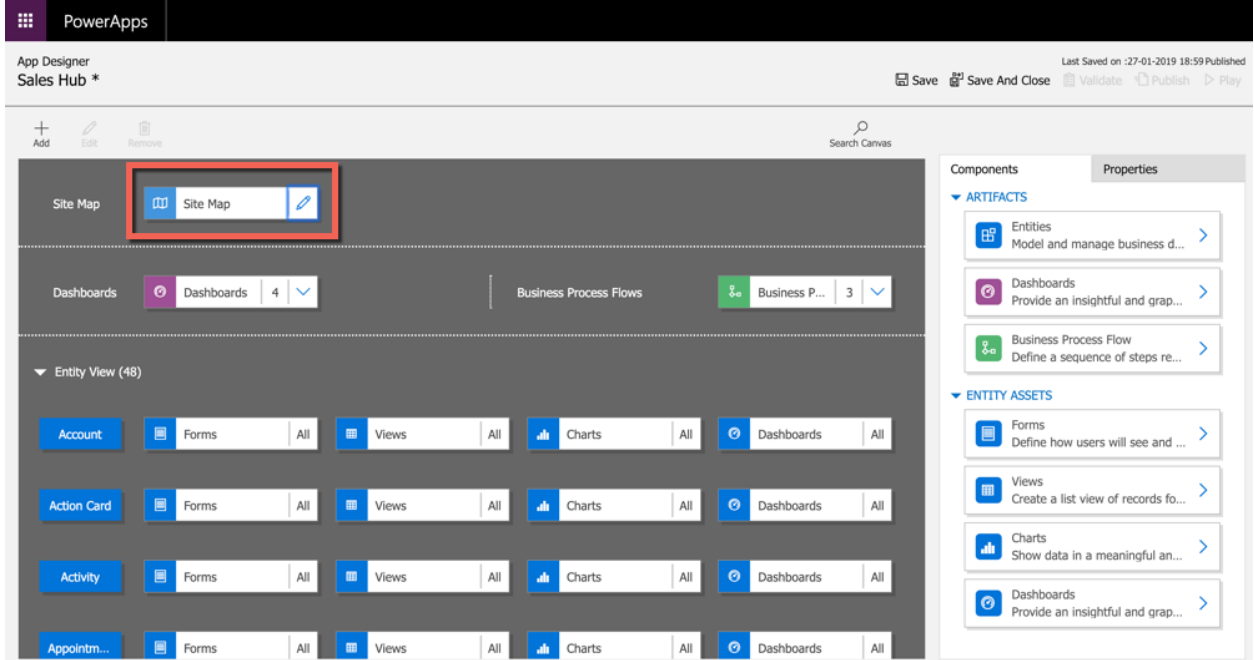
2. In the Solution Explorer, go to **Model-driven Apps**.



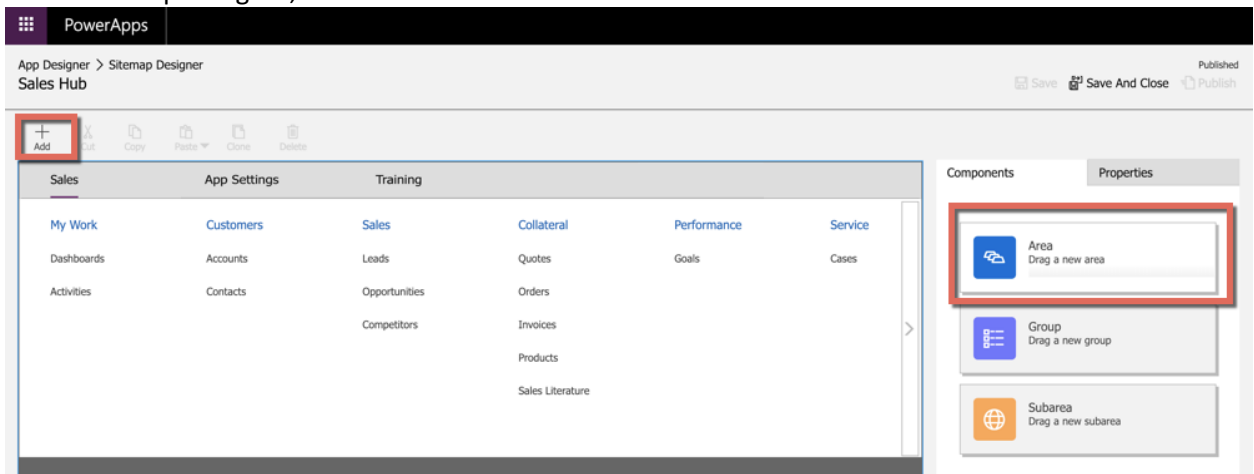
3. In the Model-driven Apps page, double-click on any custom **UCI** app that you wish to configure for InsideView Insights feature access. The Sitemap Designer opens in a new window.



- 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.



- 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 *InsightsMain*.
- Select the **Show Groups** check box.

Components

Properties

AREA

▼

General

Title (1033)

InsideView Insights

Icon

Icon for InsideView Insights navigation link

▼

ID *

InsightsMain

☒

Show Groups

>

Advanced

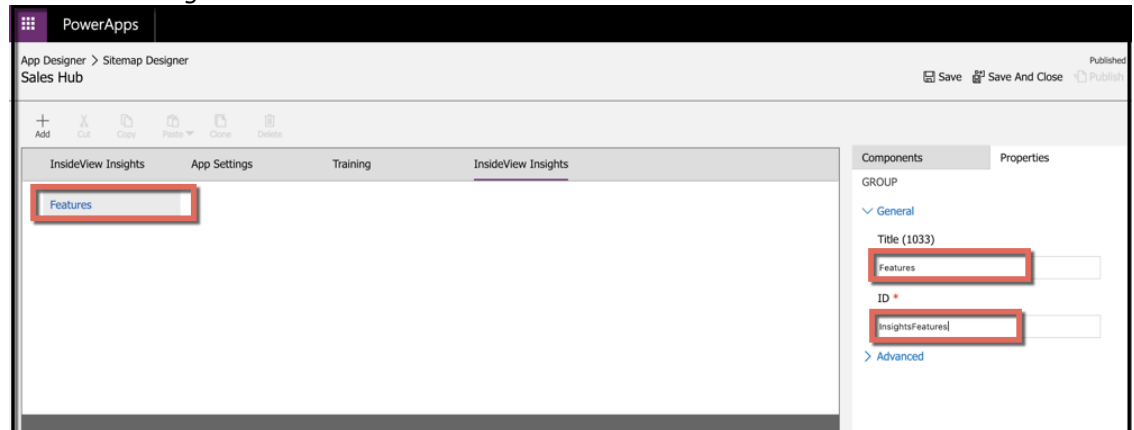
6. Select the **InsideView Insights** area and drag and drop two **groups** from the **Components** panel, into the area.



Enter the property values for each group:

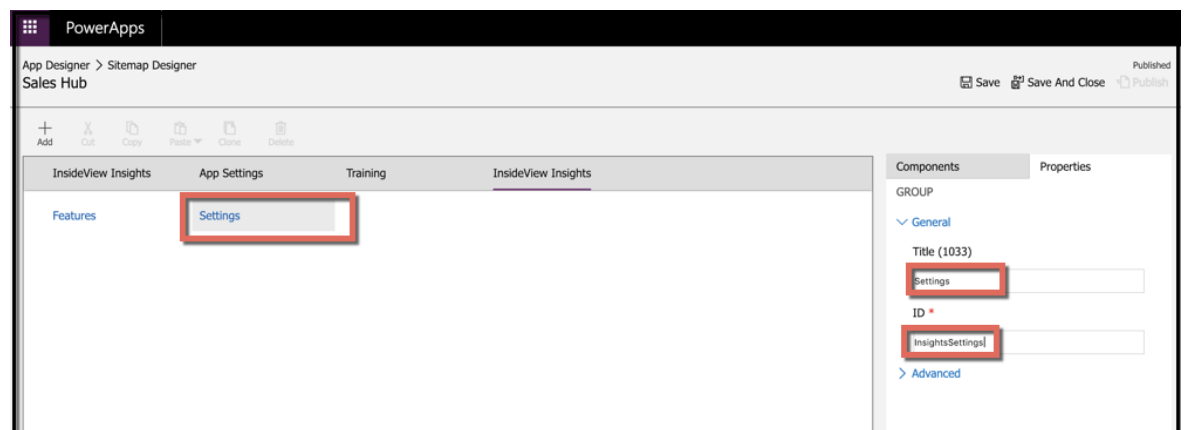
Group 1 – Features

- 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.*



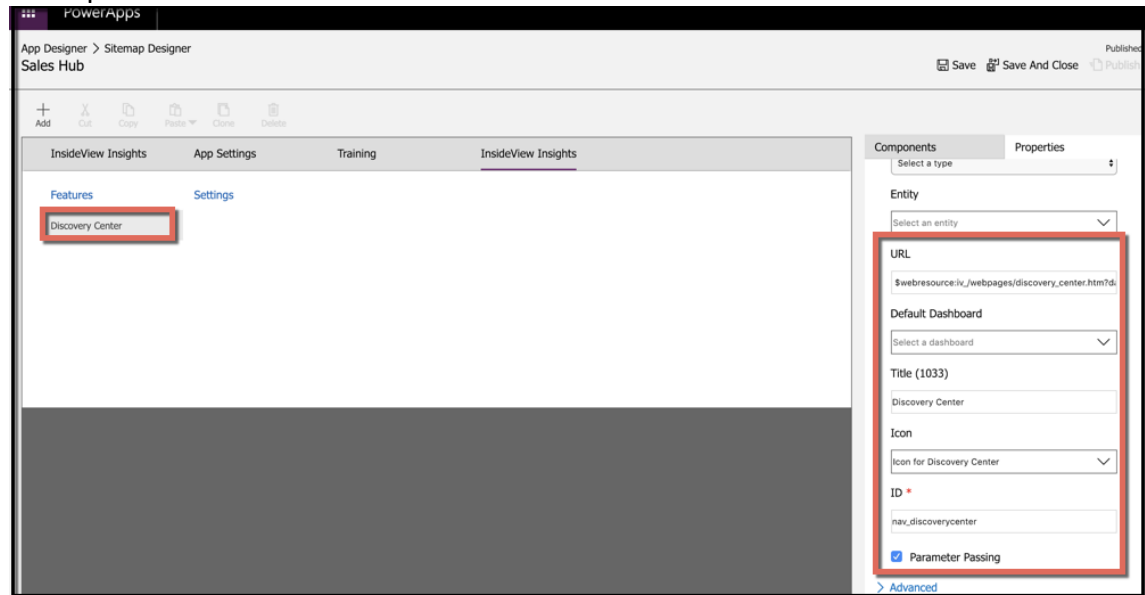
7. Select the group to which you want to add a subarea and click **Add > Subarea**. Add **two** subareas to the **Features** group and **three** subareas to the **Settings** group.

Enter the following property values for each subarea:

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

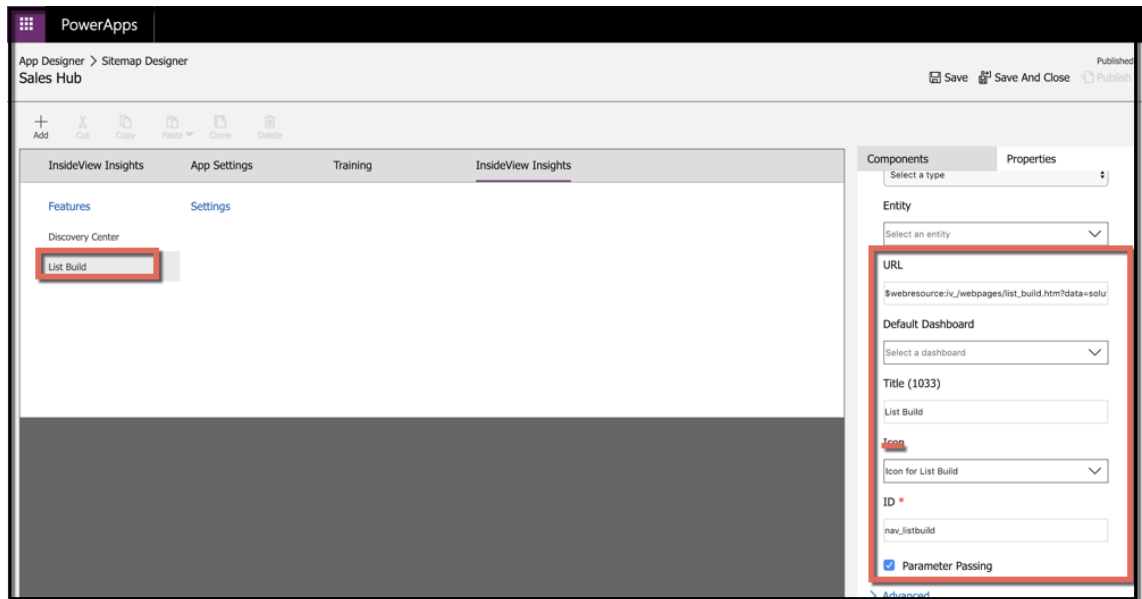
- **Type**: Select the **Web Resource** option.

- **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.



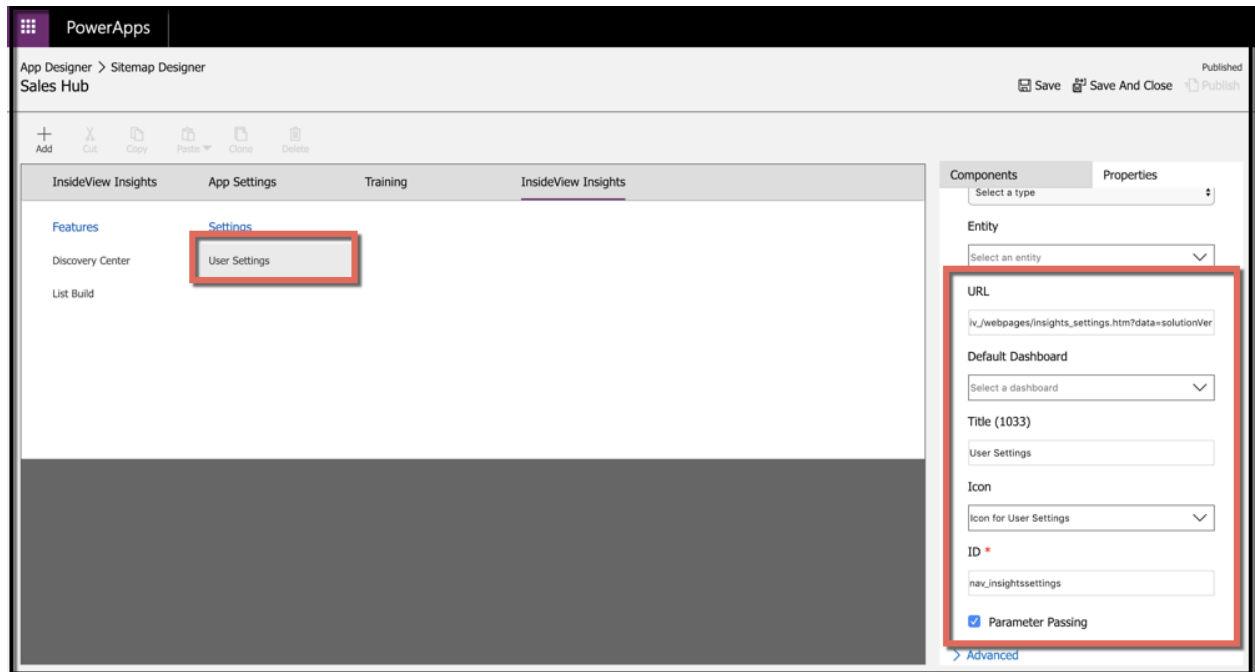
Sub Area 2 under **Features** group: property values for subarea **List Build**:

- **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.



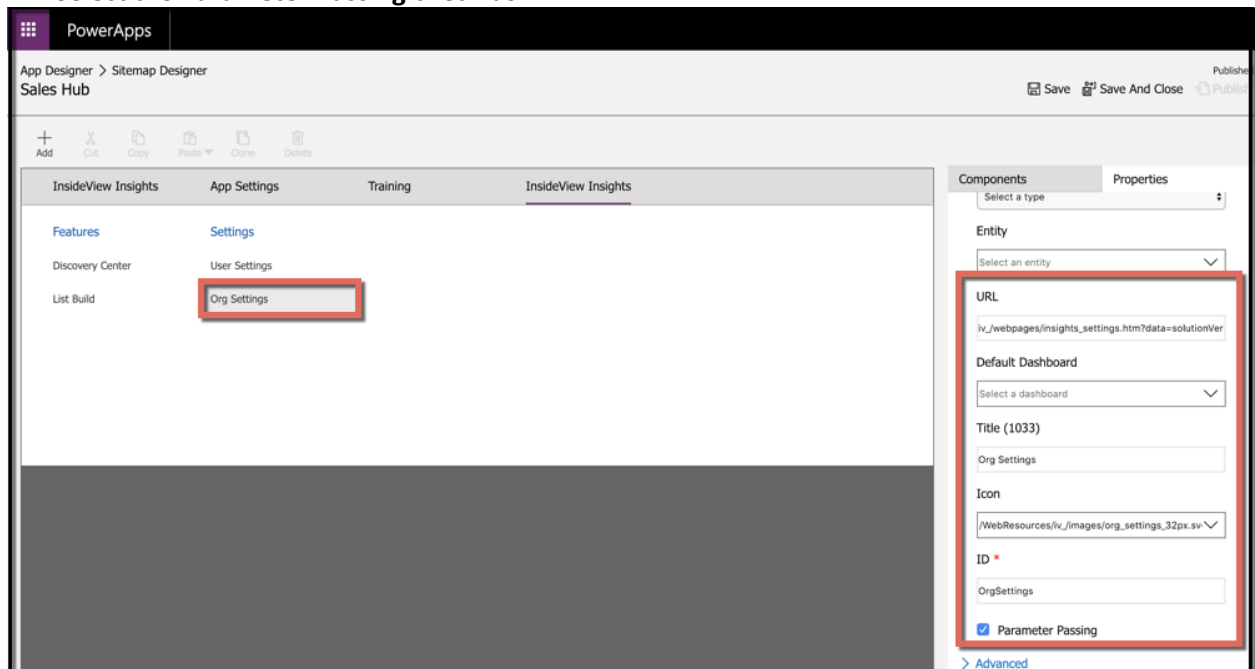
Sub Area 3 under **Settings** group: Property values for subarea **User Settings**:

- **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.

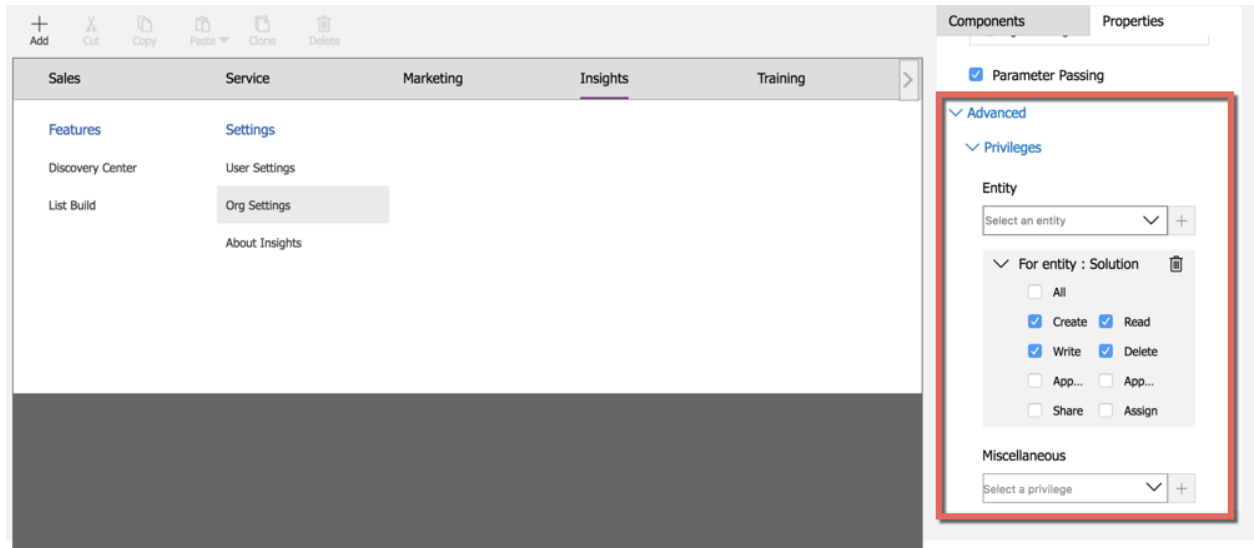


Sub Area 4 under **Settings** group: property values for subarea **Org Settings**:

- **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.

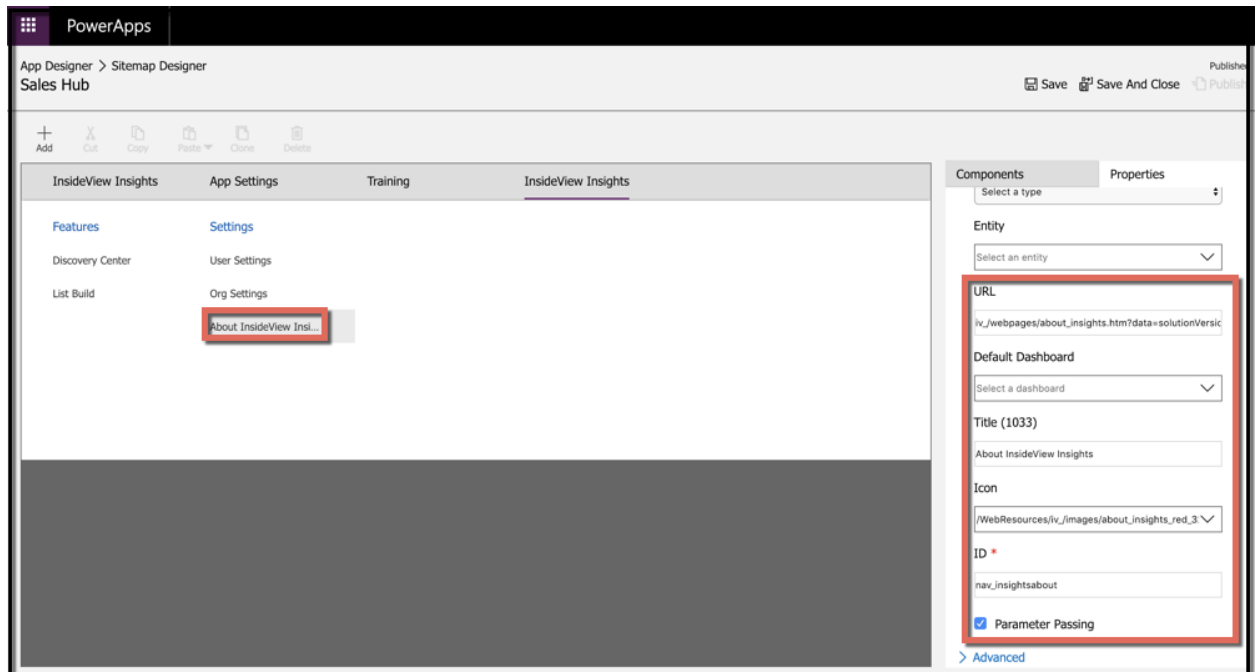


- Expand the **Advanced** link and select **Privileges**.
- In the **Entity** drop-down, select the **Solution** item and click **Add +**.
- Click > to **Expand** the Privileges for Solution entity and select the *create, read, write* and *delete* check boxes.
- Deselect remaining check boxes.
- Expand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

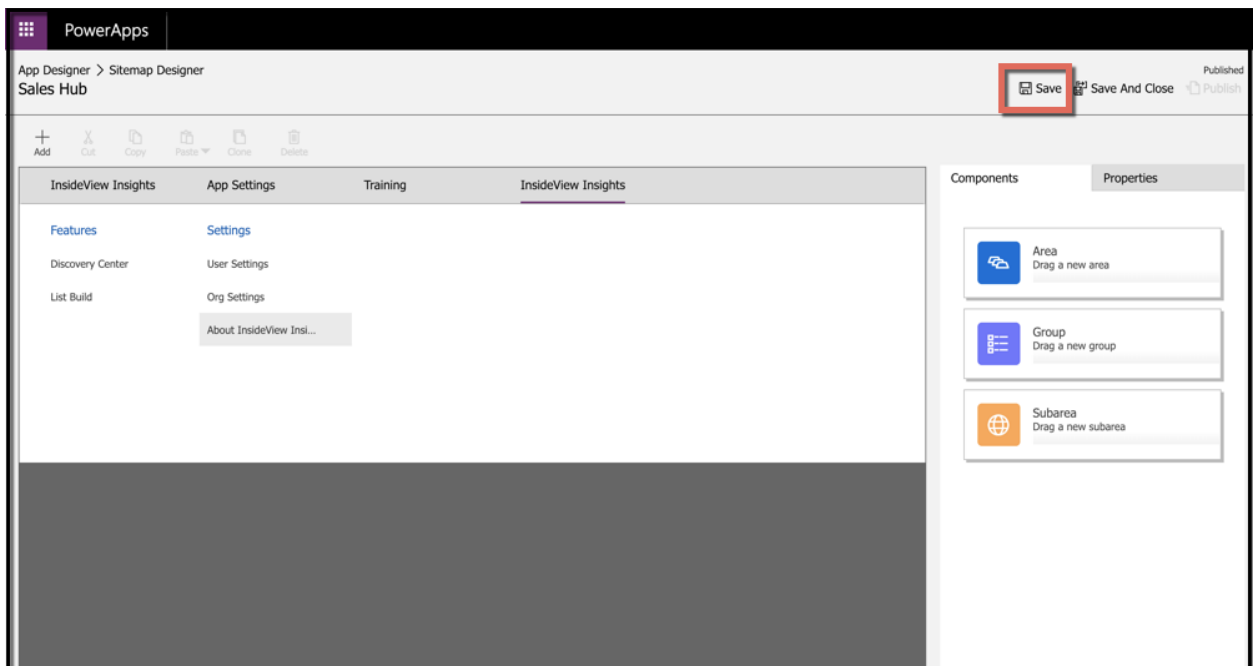


Sub Area 5 under the **Settings Group**: property values for subarea **About InsideView Insights**:

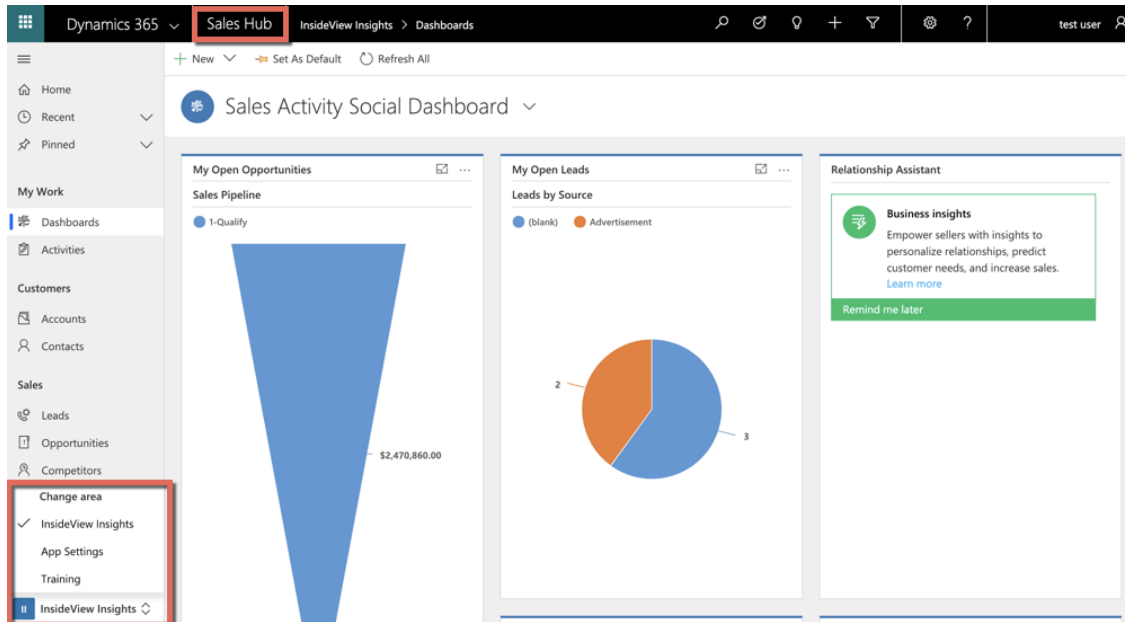
- **URL**: *\$webresource:iv_/webpages/about_insights.htm*.
- **Title**: *About Insights*.
- **Icon**: *Icon for About InsideView Insights*.
- **ID**: *nav_insightsabout*.
- Select the **Parameter Passing** check box.
- Expand **Advanced** > **SKUs** and select all check boxes.
- Expand **Advanced**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



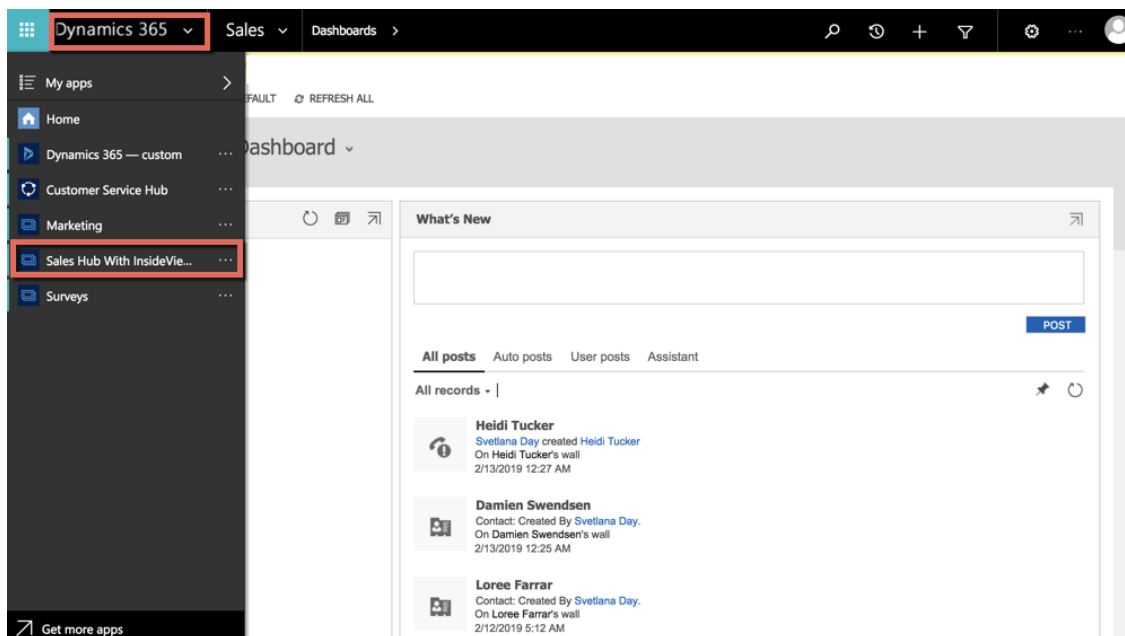
If you face any issues, submit a request for [technical support](#). InsideView's support team will contact you to address your problem.

Navigating to InsideView Insights Features Using the UCI App Sitemap

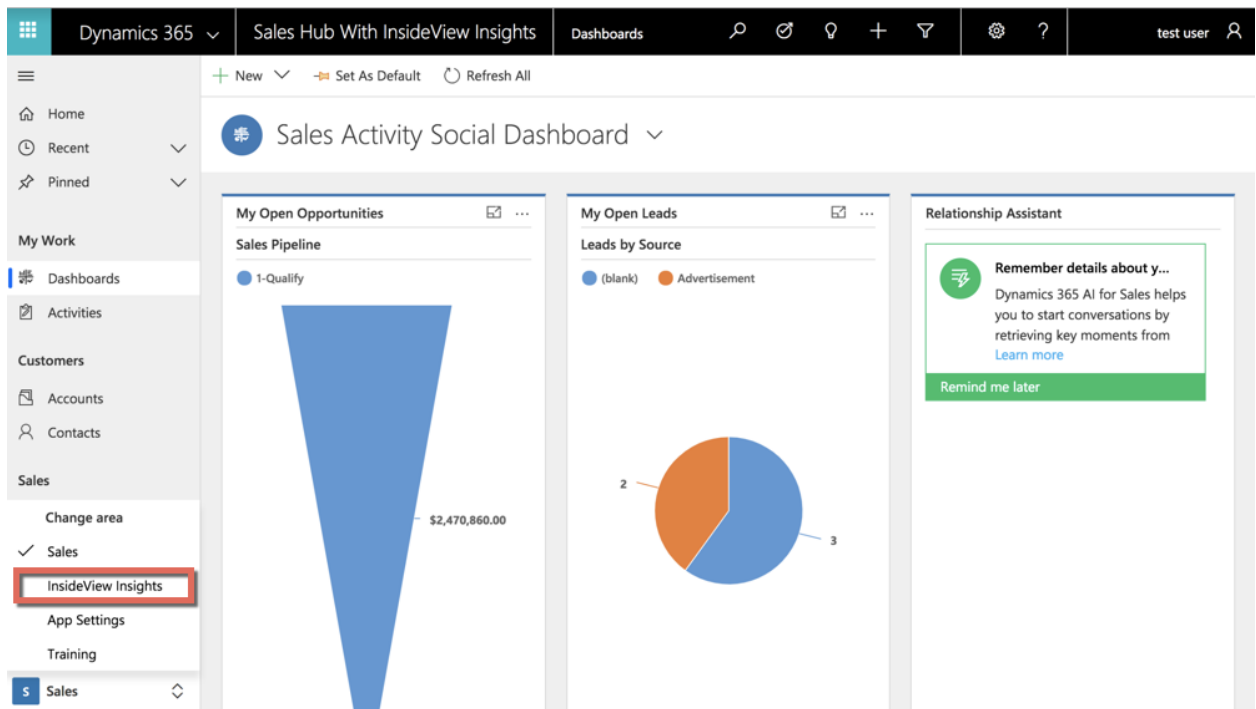
You can navigate to InsideView Insights features in any UCI app using the sitemap that is configured with all InsideView Insights features.

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

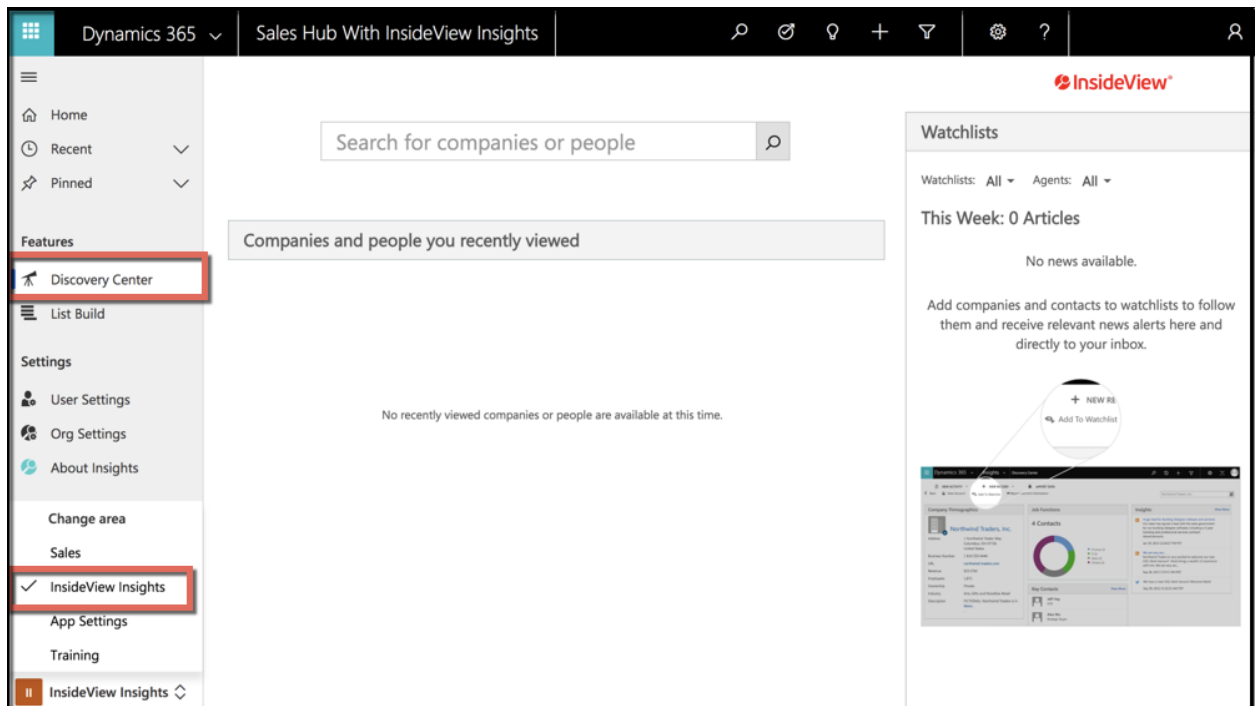
1. Navigate to the **Dynamics 365 > Sales Hub with InsideView Insights**.



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

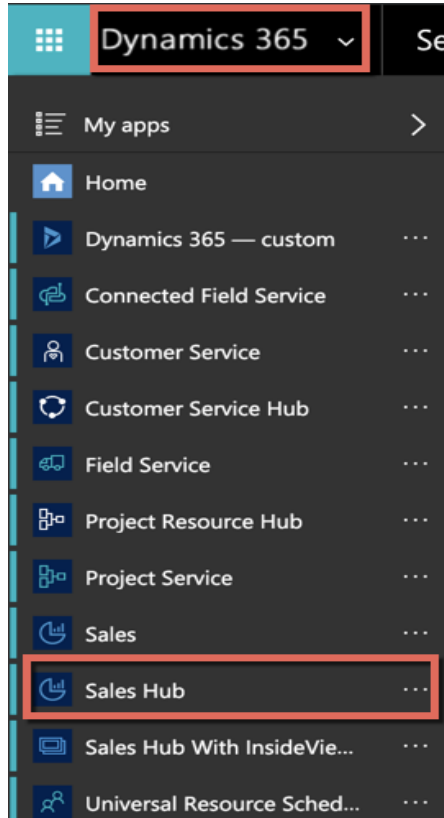


- Once you select the **InsideView Insights** sitemap, all the **Features** and **Settings** that are configured earlier will be visible in the Navigation pane.
- Click on any option under the **Features** or **Settings** menu to open the respective InsideView Insights page.

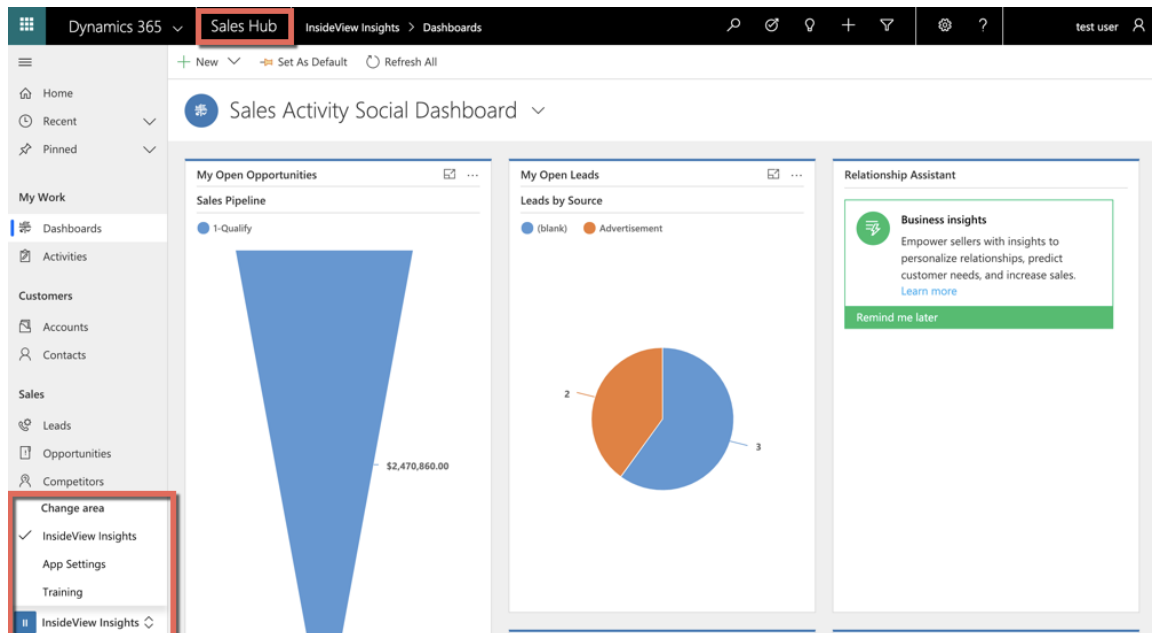


Note: Once you have configured custom Sales Hub or any UCI, you can navigate to InsideView Insights features by selecting the site map. To do so, follow these steps:

- 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

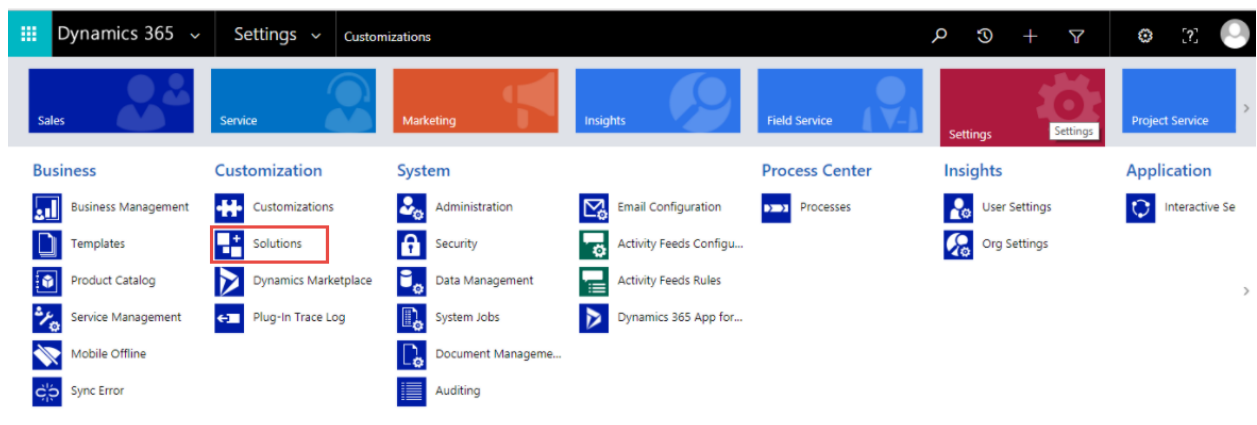
The User Guide will answer many of your questions. If you need more help with InsideView Insights for Dynamics 365, you or your CRM Administrator can contact the Microsoft CRM Support Team:

<http://go.microsoft.com/fwlink/p/?LinkId=620732>.

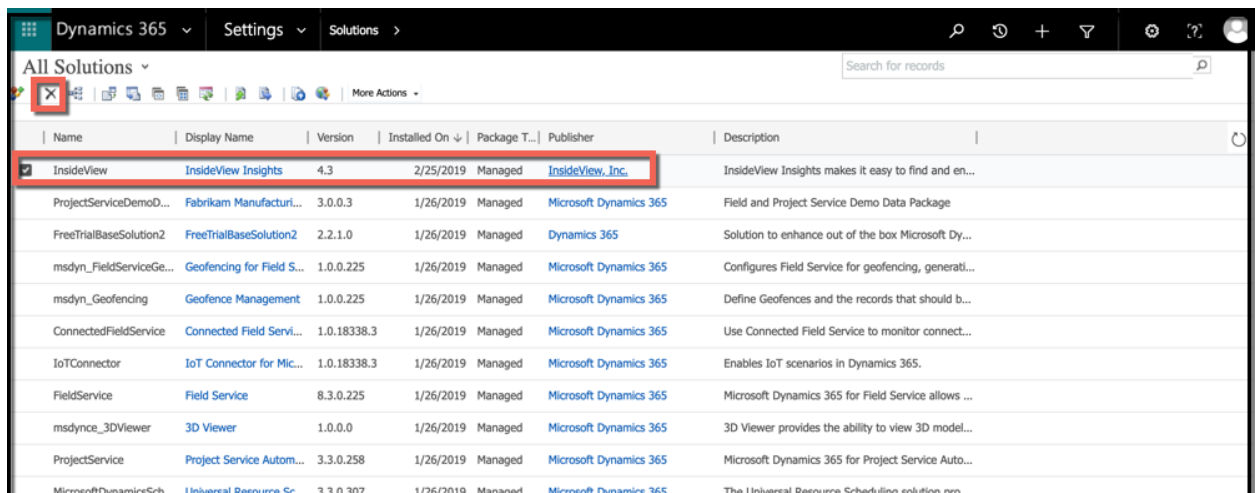
Chapter 9: Uninstalling InsideView Insights

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**.

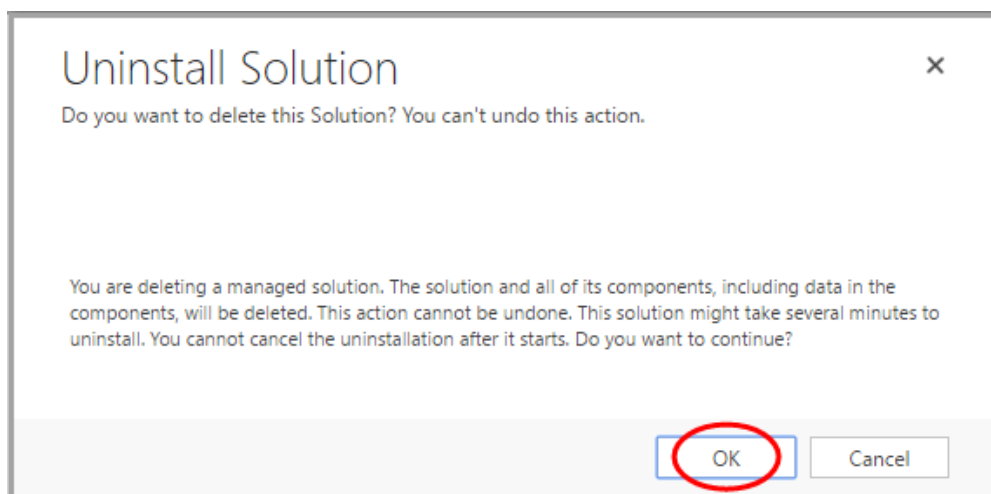


3. On the Solutions page, select the *InsideView Insights* version that you have installed and click the **Delete** button.

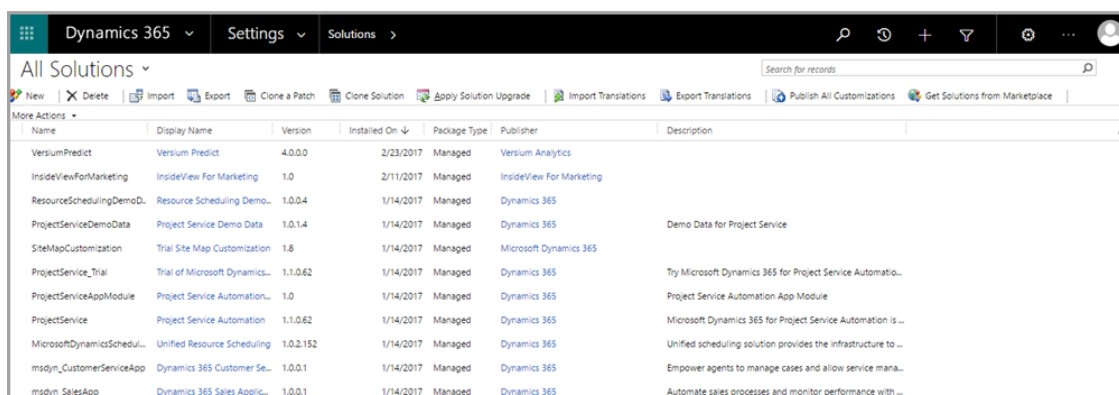


Name	Display Name	Version	Installed On	Package T...	Publisher	Description
<input checked="" type="checkbox"/> InsideView	InsideView Insights	4.3	2/25/2019	Managed	InsideView, Inc.	InsideView Insights makes it easy to find and en...
ProjectServiceDemoD...	Fabrikam Manufactur...	3.0.0.3	1/26/2019	Managed	Microsoft Dynamics 365	Field and Project Service Demo Data Package
FreeTrialBaseSolution2	FreeTrialBaseSolution2	2.2.1.0	1/26/2019	Managed	Dynamics 365	Solution to enhance out of the box Microsoft Dy...
msdyn_FieldServiceGe...	Geofencing for Field S...	1.0.0.225	1/26/2019	Managed	Microsoft Dynamics 365	Configures Field Service for geofencing, generati...
msdyn_Geofencing	Geofence Management	1.0.0.225	1/26/2019	Managed	Microsoft Dynamics 365	Define Geofences and the records that should b...
ConnectedFieldService	Connected Field Servi...	1.0.18338.3	1/26/2019	Managed	Microsoft Dynamics 365	Use Connected Field Service to monitor connect...
IoTConnector	IoT Connector for Mic...	1.0.18338.3	1/26/2019	Managed	Microsoft Dynamics 365	Enables IoT scenarios in Dynamics 365.
FieldService	Field Service	8.3.0.225	1/26/2019	Managed	Microsoft Dynamics 365	Microsoft Dynamics 365 for Field Service allows ...
msdynce_3DViewer	3D Viewer	1.0.0.0	1/26/2019	Managed	Microsoft Dynamics 365	3D Viewer provides the ability to view 3D model...
ProjectService	Project Service Autom...	3.3.0.258	1/26/2019	Managed	Microsoft Dynamics 365	Microsoft Dynamics 365 for Project Service Auto...
MicrosoftDynamicsSch...	Universal Resource Sc...	3.3.0.307	1/26/2019	Managed	Microsoft Dynamics 365	The Universal Resource Scheduling solution pro...

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



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



Name	Display Name	Version	Installed On	Package Type	Publisher	Description
VersumPredict	Versum Predict	4.0.0.0	2/23/2017	Managed	Versum Analytics	
InsideViewForMarketing	InsideView For Marketing	1.0	2/11/2017	Managed	InsideView For Marketing	
ResourceSchedulingDemoD...	Resource Scheduling Demo...	1.0.0.4	1/14/2017	Managed	Dynamics 365	
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	1/14/2017	Managed	Dynamics 365	Demo Data for Project Service
SiteMapCustomization	Trial Site Map Customization	1.8	1/14/2017	Managed	Microsoft Dynamics 365	
ProjectService_Trial	Trial of Microsoft Dynamics...	1.1.0.62	1/14/2017	Managed	Dynamics 365	Try Microsoft Dynamics 365 for Project Service Automation...
ProjectServiceAppModule	Project Service Automation...	1.0	1/14/2017	Managed	Dynamics 365	Project Service Automation App Module
ProjectService	Project Service Automation	1.1.0.62	1/14/2017	Managed	Dynamics 365	Microsoft Dynamics 365 for Project Service Automation is ...
MicrosoftDynamicsSchedu...	Unified Resource Scheduling	1.0.2.152	1/14/2017	Managed	Dynamics 365	Unified scheduling solution provides the infrastructure to ...
msdyn_CustomerServiceApp	Dynamics 365 Customer Se...	1.0.0.1	1/14/2017	Managed	Dynamics 365	Empower agents to manage cases and allow service mana...
msdyn_SalesApp	Dynamics 365 Sales Applic...	1.0.0.1	1/14/2017	Managed	Dynamics 365	Automate sales processes and monitor performance with ...

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