



# TeamViewer User Guide for Microsoft Dynamics CRM D365

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## Introduction

The target of this the TeamViewer-Dynamics CRM integration is to enable Customer Service agents and Sales representatives use remote control and remote assistance to support their customers, troubleshoot any issues faster and more efficiently and remotely guide their customer through the use of a Product or Service.

## Audience

This document intends to address CRM support users.

## Prerequisites

It is assumed that the reader is familiar with using Microsoft Dynamics CRM. The support user needs to have a valid TeamViewer login/password and an associated valid license.

Email router/SMTP/Outlook configuration should be configured already in Microsoft Dynamics CRM.

Please note all the screenshots are used as per Microsoft Dynamics CRM2016 On-Premise.

## Software Requirements

TeamViewer Integration for Dynamics CRM is supported on the following versions of both Cloud and On-premise versions

- Dynamics CRM 2016-Online and On-premise
- Dynamics 365: Online

The TeamViewer integration for Dynamics CRM will be supported only on the Microsoft Dynamics CRM supported browsers. Microsoft recommends latest version of Internet Explorer browser.

## About TeamViewer for Microsoft Dynamics CRM

The TeamViewer integration for Dynamics CRM embeds TeamViewer remote control functionality into your CRM Service Cloud and On-premise environment. This allows you to

- Create and join a support session directly from a CRM service case
- Remotely control the customer's device
- View and Manage TeamViewer Sessions in the TeamViewer Management Console

With TeamViewer, you can easily create TeamViewer Service Cases and provide remote support right from your Dynamics CRM cases. The remote troubleshooting experience is improved by optimizing communication between users and Call Center staff. Remote control helps to increase efficiency of service desks and to improve customer satisfaction significantly.

## About this manual

This manual describes the installation and configuration of the TeamViewer App for Dynamics CRM Cloud and On-premise environments. It also provides a short overview of the various features provided by the application.

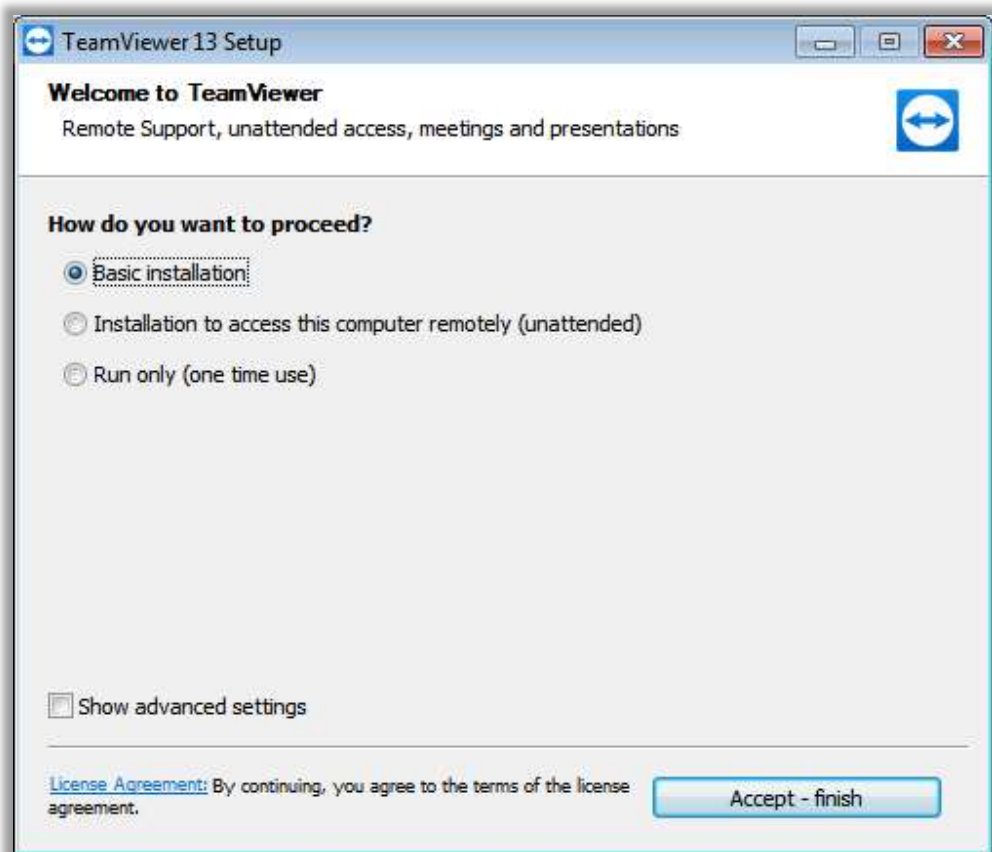


## Installation

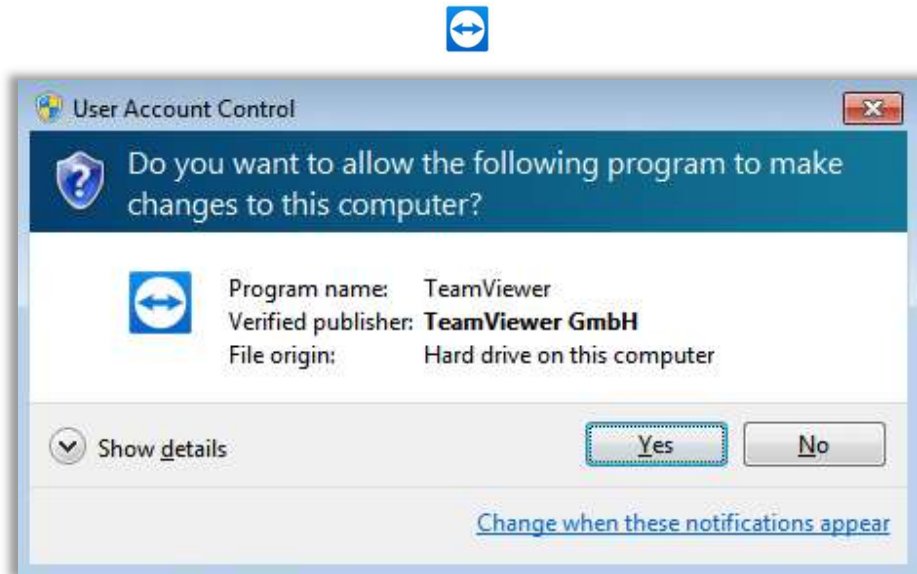
Installing the TeamViewer application is optional. In case you do not install TeamViewer, a run-once version of TeamViewer is downloaded when you try to join/initiate a TeamViewer session. Else, the TeamViewer window will be opened automatically. We recommend installing the TeamViewer application as this will reduce the time required to join a session. However, please note that you will need administrator access on your system in order to install TeamViewer.

To install the TeamViewer App, follow the below steps

- Download the TeamViewer installer by invoking the following URL:  
[https://download.teamviewer.com/download/TeamViewer\\_Setup.exe](https://download.teamviewer.com/download/TeamViewer_Setup.exe)
- Run the downloaded application. Choose the “Basic Installation” option as shown below and then click the “Accept – Finish” button



- In case the User Account Control dialog pops up, click the “Yes” button. TeamViewer installation will proceed and complete.

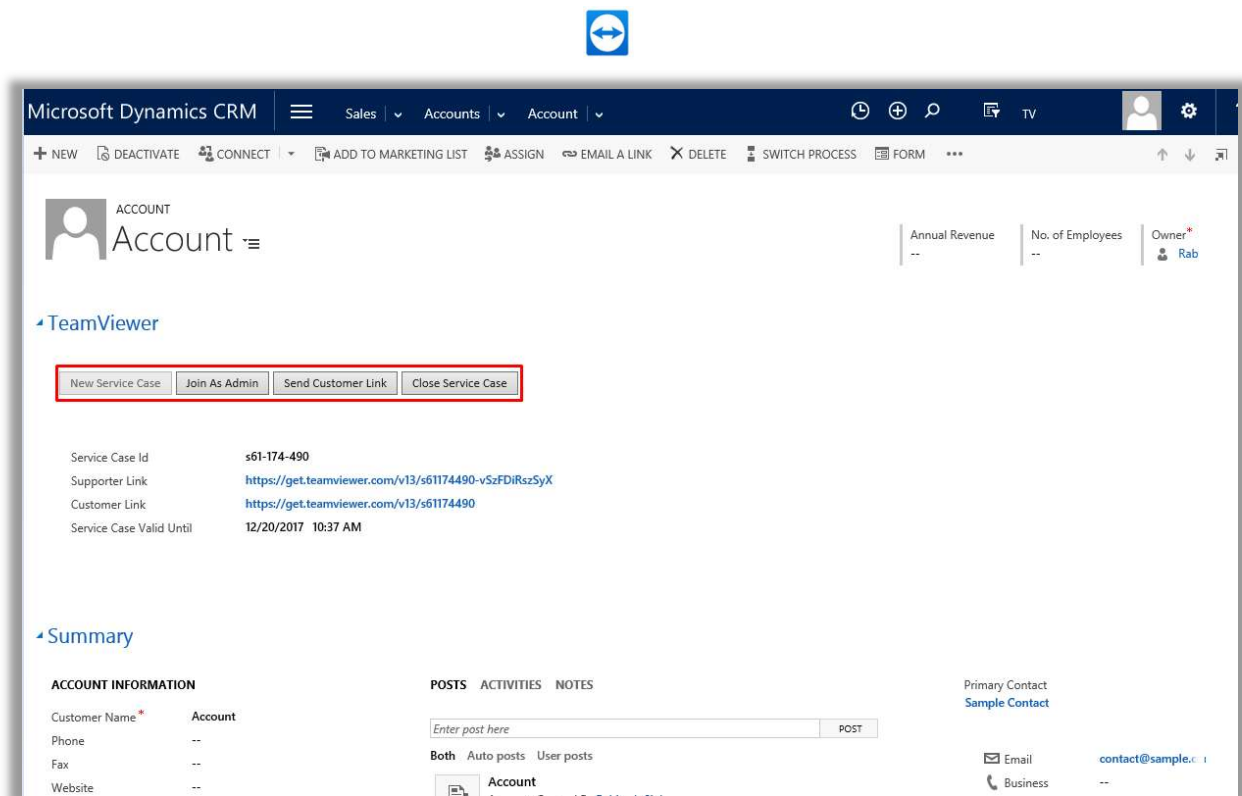


## Using TeamViewer for Microsoft Dynamics CRM

You may create a service case against any of the following entities

- Account
- Contact
- Opportunity
- Lead
- Case

You are allowed to create one service case per instance of the entity. Creating a service case initiates a new TeamViewer session. The below snapshot shows the various UI elements that will be available for the purpose of integrating with TeamViewer. While the snapshot shows an Account entity, the integration related UI elements will be common across all of the above entities.



The above image shows the state of a newly created account record. Since no service case has yet been created, the “**New Service Case**” button is in an enabled state. The remaining buttons are disabled. Here’s a quick note of the functions of the various buttons. These will be explained in more detail in the subsequent sections.

### New Service Case

As the name suggests, this button allows you to create a new service case i.e. to establish a TeamViewer session. This button remains enabled as long as no valid service case exists for this entity instance or if the service case has expired.

### Join As Admin

In case the TeamViewer app is not installed on the system, clicking on this button either downloads the use-once TeamViewer app and then opens the corresponding TeamViewer session; else, it directly opens the relevant TeamViewer session. This button remains enabled as long as a valid and unexpired service case exists for this entity instance.

### Send Customer Link

Clicking this link opens up the default email client with the addresses of all relevant contacts (i.e. all contacts associated to the entity instance) added to the “**To**” list and with the relevant email links (that enable the end users to join the TeamViewer session) in the body. This button remains enabled as long as a valid and unexpired service case exists for this entity instance.



## Close Service Case

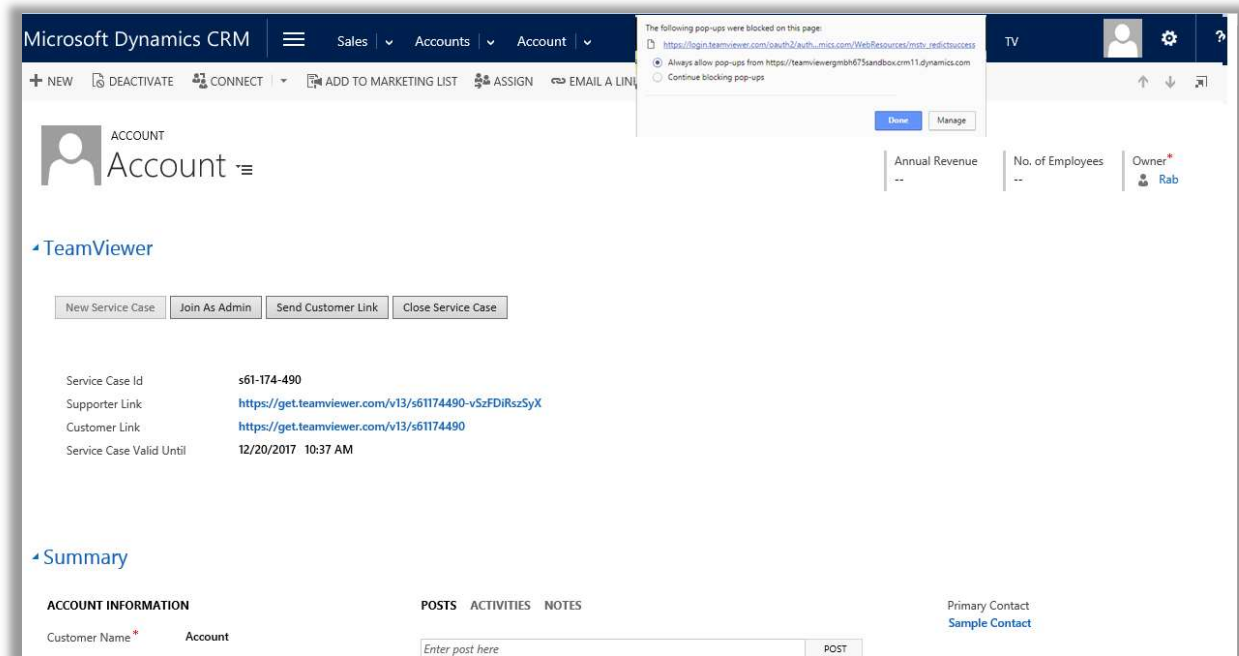
Clicking this button closes the service case associated with the current entity instance. This button remains enabled as long as a valid and unexpired service case exists for this entity instance.

## Alerts

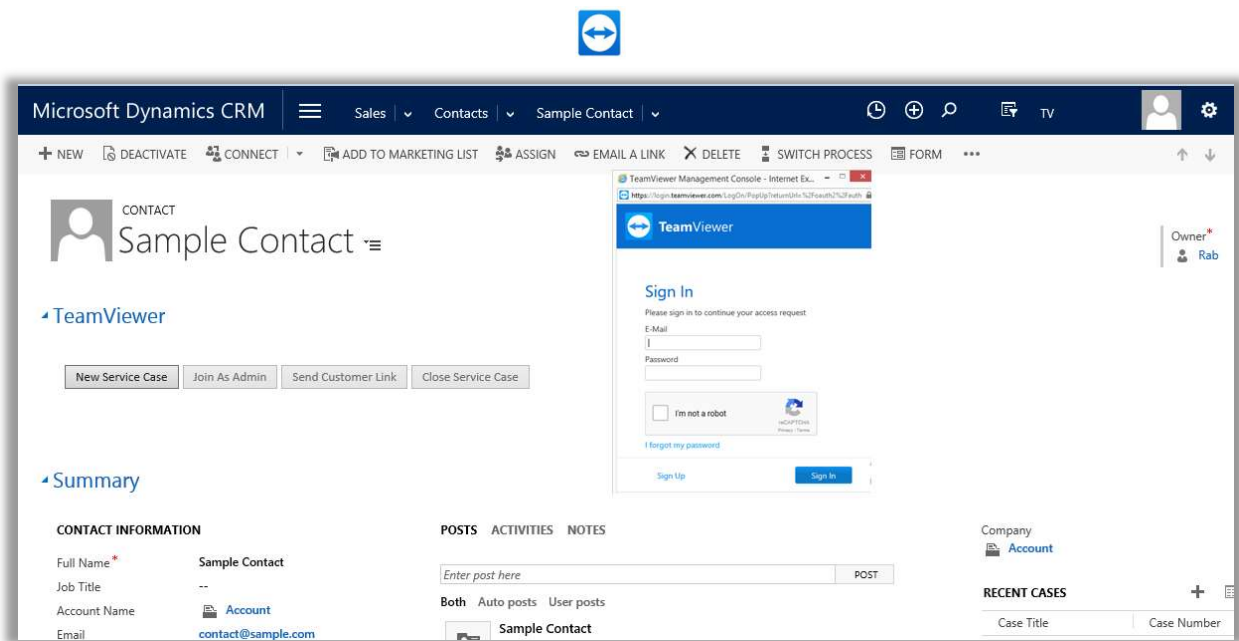
You will see an alert in case the customer has joined TeamViewer session corresponding to the current entity instance.

## Creating a TeamViewer Service Case

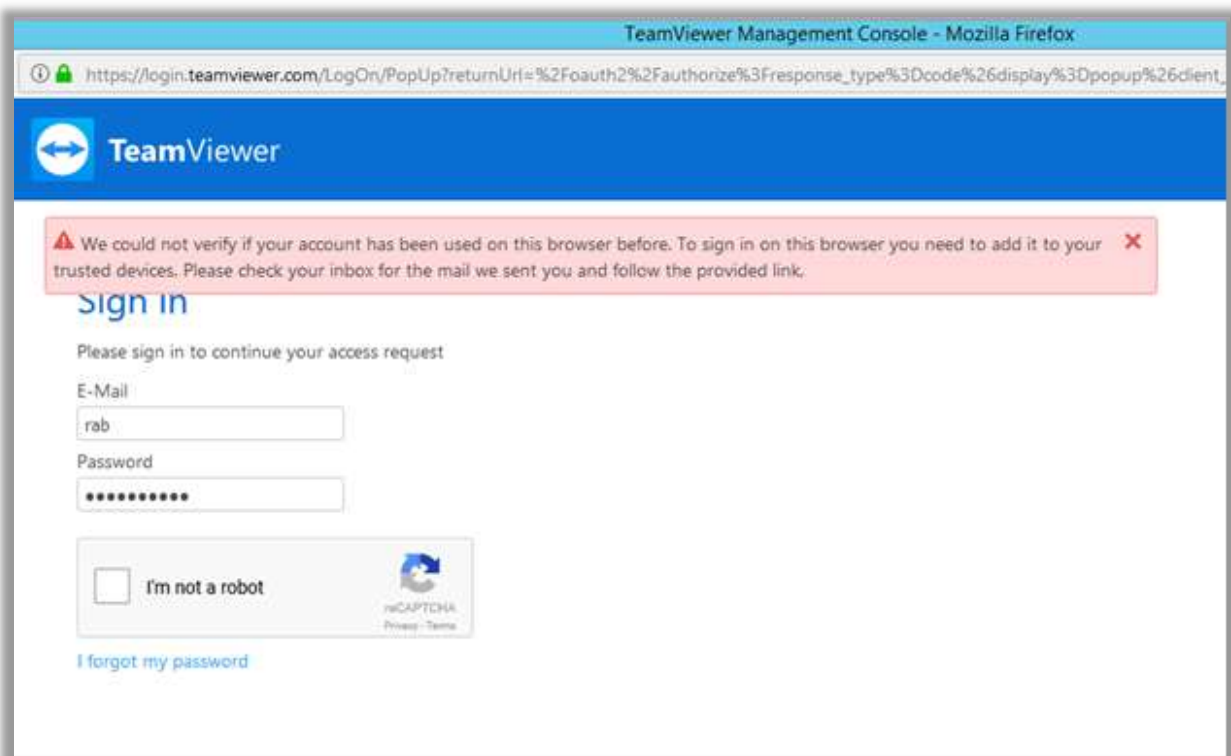
As mentioned earlier, In order to create a new service case, click on the **“New Service Case”** button. This will open up a new popup pointing to the TeamViewer site as shown below. Please note that the popup may get blocked by the browser’s popup blocker as shown below. In such cases, please instruct the browser to allow popups from the TeamViewer site.



Once the popup opens up, enter your TeamViewer credentials. In case the **“I’m not a robot”** checkbox does not show up, click on the **“Sign In”** button. Else, please check the checkbox, complete the reCAPTCHA challenge and then click on the **“Sign In”** button.



For the first time the supporter/customer need to verify and add devices in in the TeamViewer Management console.



Now you will notice that the “**New Service Case**” button now gets disabled and the “**Join as Admin**”, “**Send Customer Link**” and “**Close Service Case**” buttons now get enabled as shown in the snapshot below. In addition, the details of the service case are also shown.



The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Sales', 'Accounts', and 'Account'. Below this, a ribbon contains various actions: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, SWITCH PROCESS, FORM, and a menu icon. The main content area shows an 'ACCOUNT' record with a profile picture and the name 'Account'. To the right, there are fields for 'Annual Revenue', 'No. of Employees', and 'Owner' (Rab). Below the account name, a 'TeamViewer' section is visible, containing buttons for 'New Service Case', 'Join As Admin', 'Send Customer Link', and 'Close Service Case'. Underneath these buttons, a table lists service case details: Service Case Id (s61-174-490), Supporter Link (https://get.teamviewer.com/v13/s61174490-vSzFDiRszSyX), Customer Link (https://get.teamviewer.com/v13/s61174490), and Service Case Valid Until (12/20/2017 10:37 AM). At the bottom, a 'Summary' section is partially visible, showing 'ACCOUNT INFORMATION' and 'POSTS ACTIVITIES NOTES' tabs. The 'ACCOUNT INFORMATION' tab is active, displaying fields for 'Customer Name' and 'Account'.

This includes the following fields

### Service Case ID

As the name suggests, this is the ID of the TeamViewer session that was just created.

### Supporter Link

Clicking this link allows you to join the TeamViewer session as an admin. Please note that clicking on the “**Join as Admin**” achieves the same result.

### Customer Link

This is the link which will be sent to the customer when you send an email to the customer by clicking on the “**Send Customer Link**” button.

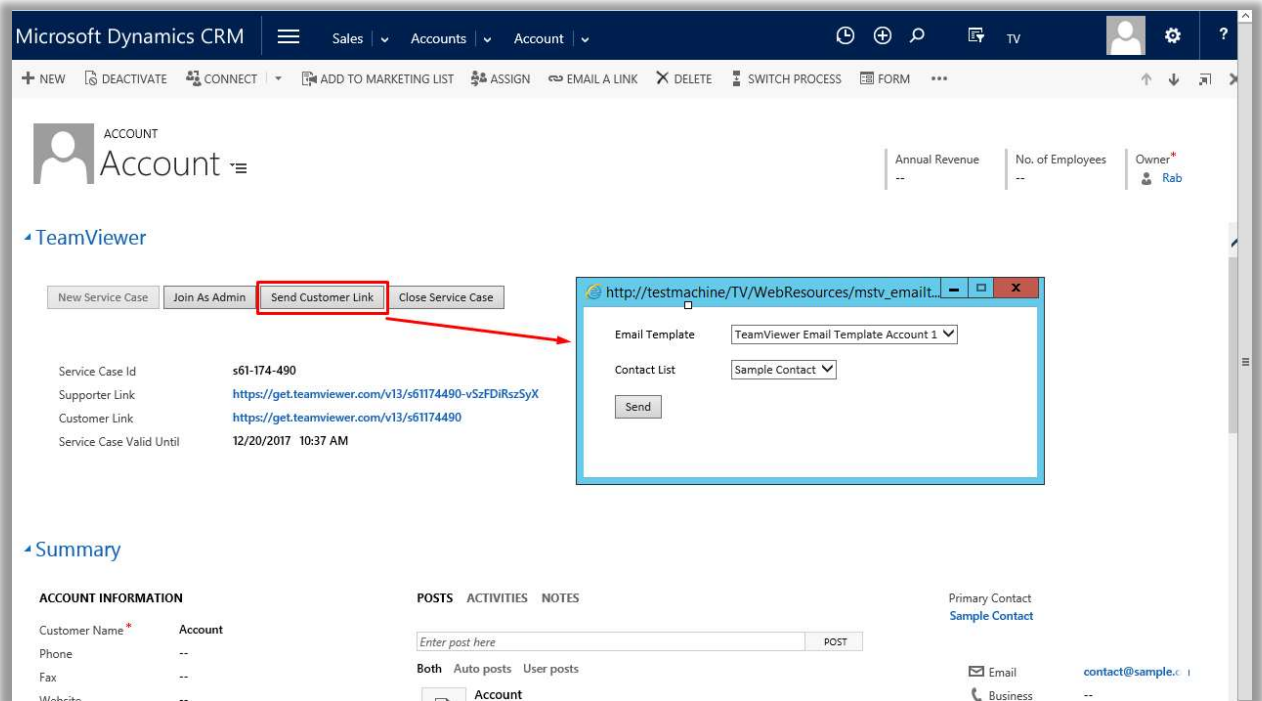
### Service Case Valid Until

This fields shows the date and time until when the service case is valid. This shows the UTC time. Once the “**Service Case Valid until**” date and time expires then the alert popup can’t be seen. To get the new alert of that customer joins the TeamViewer only if the Email is sent to customer through “**Send Customer Link**”.

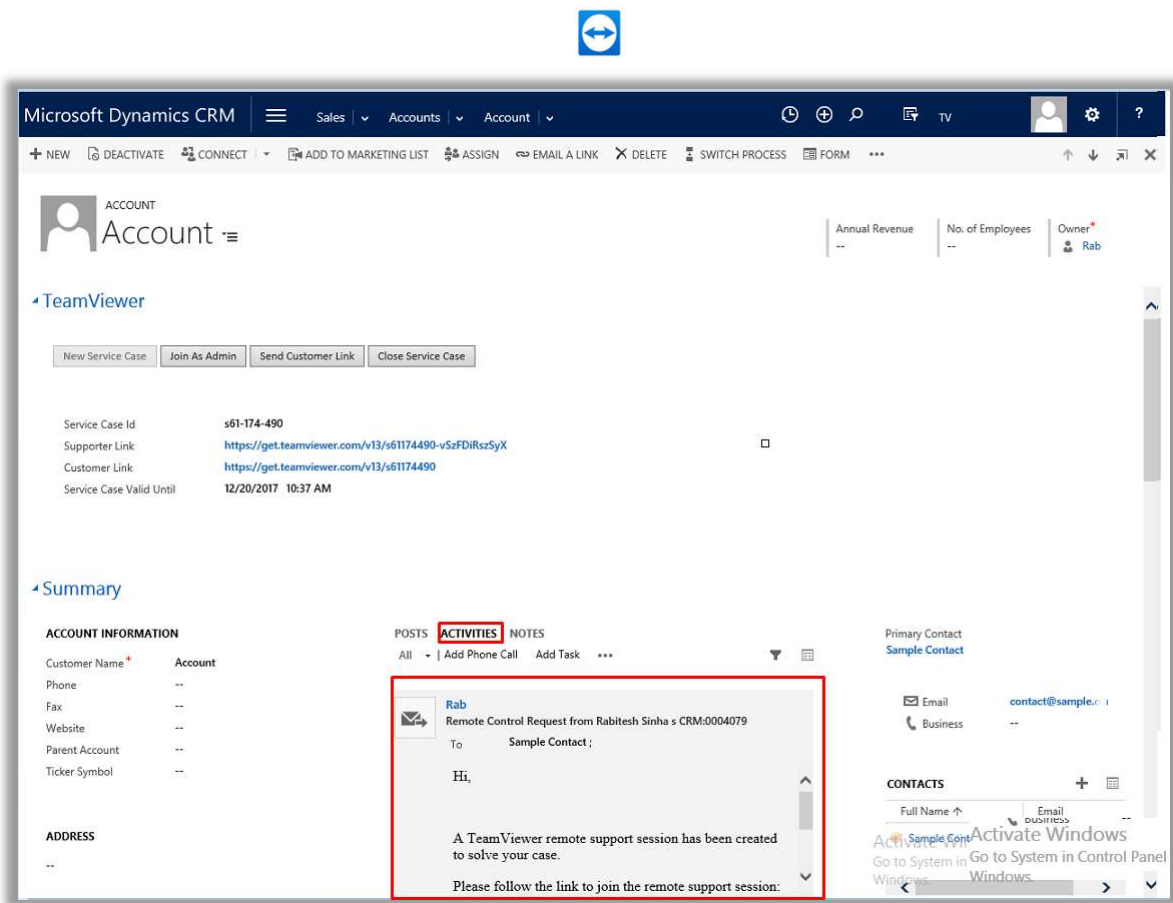


## Send Customer Link to Customer

Click on the “**Send Customer Link**” button in order to send the Customer Link to the customer. Once you click on the button, a new popup opens up. The popup displays a list of Email Templates applicable for the entity along with the list of contacts associated with the entity instance.



Choose the appropriate email template and contact and click on the “**Send**” button. Once the “**Send**” button is clicked, an email message is opened on your default email client. The email id of the selected contact will be available in the "To" list. The remaining fields like the subject and contents will be populated as per the selected email template.

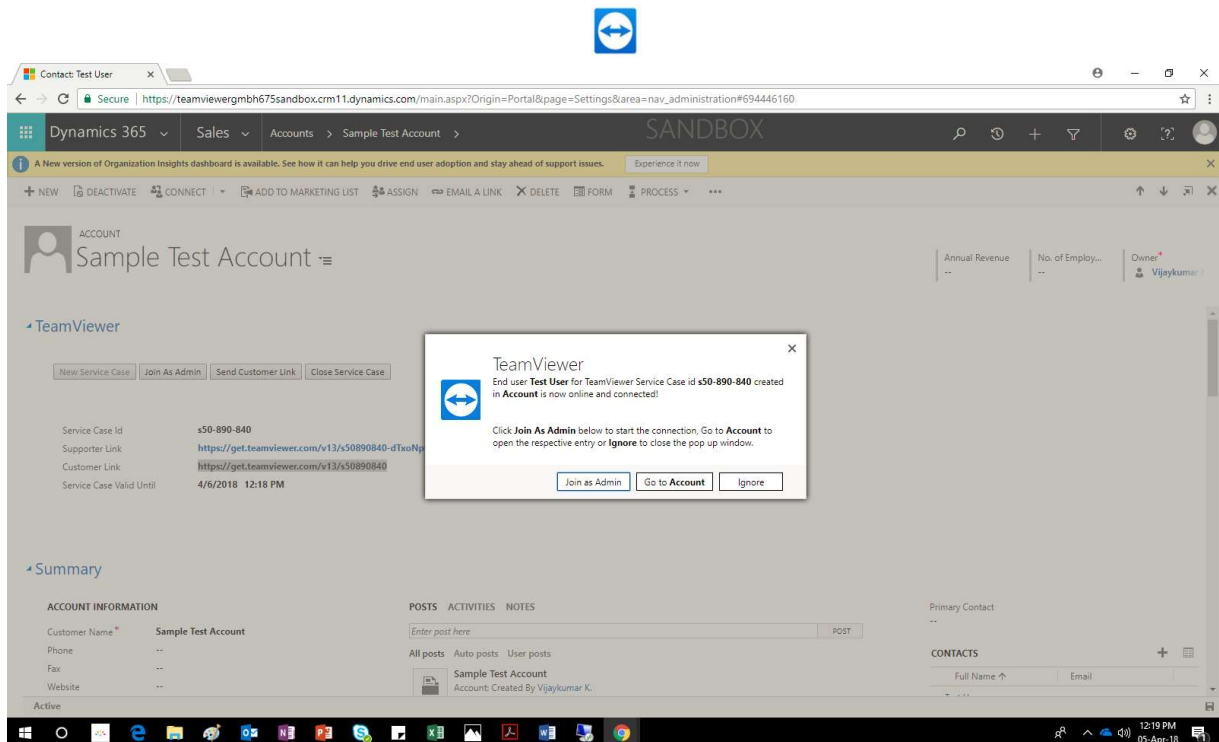


As an aside, please see the [appendix](#) to understand as to how you can add contacts to entities

## Connecting to a TeamViewer session

As mentioned earlier, once the customer receives the email and once he/she joins the TeamViewer session by clicking on the customer link, you will have notified via the alert message that appears on the Dynamics CRM page. Once notified, you can join the TeamViewer session by doing either of the following

- Clicking on the **“Join As Admin”** or on the Supporter link in case you are on the same entity instance that corresponds to the TeamViewer session
- Clicking on the Supporter link that is available in the alert.



Once you perform the above, in case you do not install TeamViewer, a run-once version of TeamViewer is downloaded when you try to join/initiate a TeamViewer session. Else, the TeamViewer window will be opened automatically. Once you join the TeamViewer session, the customer will be notified of the same and he/she will be asked to provide permission for you to be able to view/control his/her screen. Once the customer provides the permissions, the session will be established and you will be able to view and control the user's screen.

## Resolving the TeamViewer Service Case

Once you have been able to conclude the session and once you do not need the session any longer, please click on the "Close Service Case" button. This will close the Service case. Once this is done, the "New Service Case" button gets enabled and the "Send Customer Link", "Join as Admin" and "Close Service Case" buttons get disabled. In case you need to re-establish a session with the customer, please click on the "New Service Case" button.



Microsoft Dynamics CRM

Sales Accounts Account

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE SWITCH PROCESS FORM

ACCOUNT

Account

Annual Revenue -- No. of Employees -- Owner Rab

TeamViewer

New Service Case Join As Admin Send Customer Link **Close Service Case**

Service Case Id: s61-174-490  
Supporter Link: <https://get.teamviewer.com/v13/s61174490-vSzFDiRszSyX>  
Customer Link: <https://get.teamviewer.com/v13/s61174490>  
Service Case Valid Until: 12/20/2017 10:37 AM

Summary

ACCOUNT INFORMATION POSTS ACTIVITIES NOTES

Customer Name\* Account All Add Phone Call Add Task

Primary Contact Sample Contact

## Connection Report (TeamViewer Connection History)

You may view the closed sessions in the TeamViewer Connection History area. In order to view any recently closed sessions (that were closed after you opened the TeamViewer Connection History Page), click the refresh button.

Microsoft Dynamics CRM

Sales Accounts Account

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE SWITCH PROCESS FORM

ACCOUNT

Account

Annual Revenue -- No. of Employees -- Owner Rab

Contact Method Any  
Email Allow  
Bulk Email Allow  
Phone Allow  
Fax Allow  
Mail Allow

Shipping Method --  
Freight Terms --

CHILD ACCOUNTS

Account Name ↑ M  
No Account records found.

TeamViewer Connection History

**Refresh**

Session	Supporter Name ↑	Customer Name	Session Start	Session End	Duration
s61-174-490	Rab	Sample Contact	12/19/2017 11:17 AM	12/19/2017 11:17 AM	00:00:18

Activate Windows  
Go to System in Control Panel to activate Windows



## TeamViewer Security Role for Microsoft Dynamics CRM APP 2016 and D365

TeamViewer CRM App are enabled to use on Account, Contact, Case, Lead, and opportunity entities in Microsoft Dynamics CRM supported versions. Therefore the security role for TeamViewer CRM App users should have the minimum privileges for below entities.

1. Account
2. Contact
3. Lead
4. Opportunity
5. Case
6. TeamViewer Connection History
7. TeamViewer Current Session
8. TeamViewer User

Microsoft Dynamics CRM Administrator & Customizers will have the full access of TeamViewer custom entities created on the solution “**TeamViewer App**”. Microsoft Dynamics CRM Administrator has a security role of “**System Administrator**” which gives full privileges to access and customize anything in the Microsoft Dynamics CRM.

CRM Administrators & Customizers manages the operation of application, and they are the owners of the customizations as well. Any change to the customizations, users, workflows, plugins, actions, web resources can be done by them. They manages the visibility of certain entity records to different agent users or teams. They are also responsible for importing and exporting the solutions (customizations) in CRM Systems.

CRM Customizers manage the customization of the applications and other systems integrations. They are the owners for the customization deployed in CRM, such as workflows, plugins, actions, web resources.

Below are the custom entities (display name) in TeamViewer App Solution.

1. TeamViewer Company Report
2. TeamViewer Connection History
3. TeamViewer Current Session
4. TeamViewer User

Once TeamViewer App is installed from AppSource on the supported version of Microsoft Dynamics CRM then Microsoft Dynamics CRM system administrator should give proper security role to the user would be using TeamViewer CRM App.

Microsoft Dynamics CRM System Administrator has two choice to enable users to use TeamViewer CRM App and are listed below.



1. Adding the security role required to the existing security role enabled for CRM user. Please note that highest security role privilege will append/override the lowest security role privileges.

Role Name	Business Unit
<input type="checkbox"/> Schedule Manager	TV
<input checked="" type="checkbox"/> Scheduler	TV
<input type="checkbox"/> System Administrator	TV
<input type="checkbox"/> System Customizer	TV
<input checked="" type="checkbox"/> TeamViewer User	TV
<input type="checkbox"/> Vice President of Marketing	TV

2. Adding the security role “**TeamViewer User**” provided in the TeamViewer CRM App as standalone or can be added with existing user’s security role.

Role Name	Business Unit
<input type="checkbox"/> Scheduler	TV
<input type="checkbox"/> System Administrator	TV
<input type="checkbox"/> System Customizer	TV
<input checked="" type="checkbox"/> TeamViewer User	TV
<input type="checkbox"/> Vice President of Marketing	TV
<input type="checkbox"/> Vice President of Sales	TV



Minimum Security Role required for users to use TeamViewer CRM App are listed in below table. Apart from these security privileges users should have minimum privileges to login to Microsoft Dynamics CRM.

**Note:** The user with security role “**TeamViewer User**” will have user level access to TeamViewer Connection History, TeamViewer Current Session and TeamViewer User. Please refer below image.

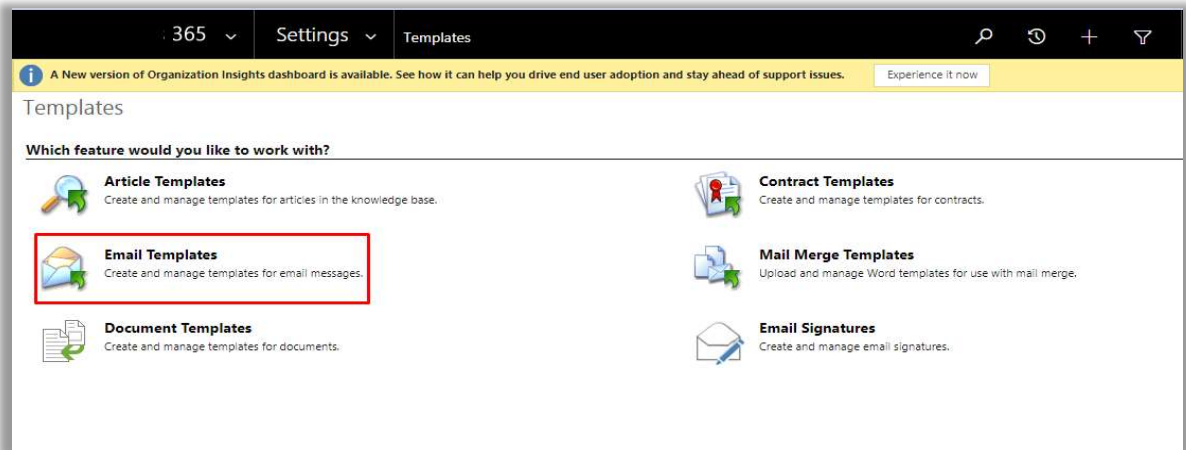
Entity	Create	Read	Write	Delete	Append	Appened To	Assign	Share
Account	👤	👤	👤	🚫	👤	👤	👤	👤
Contact	👤	👤	👤	🚫	👤	👤	👤	👤
Lead	👤	👤	👤	🚫	👤	👤	👤	👤
Opportunity	👤	👤	👤	🚫	👤	👤	👤	👤
Case	👤	👤	👤	🚫	👤	👤	👤	👤
TeamViewer Connection History	👤	👤	👤	🚫	👤	👤	👤	👤
TeamViewer Current Session	👤	👤	👤	👤	👤	👤	👤	👤
TeamViewer User	👤	👤	👤	🚫	🚫	🚫	🚫	🚫
User Settings	🚫	👤	🚫	🚫	🚫	🚫	🚫	🚫

**NOTE:** Additional security roles can be added by Microsoft Dynamics CRM administrator without affecting the existing functionality of the Microsoft Dynamics CRM, but needs to be careful while assigning the security roles to MS CRM users. Suggested method, is to test the affect in development or test environment and then deploy it in production.

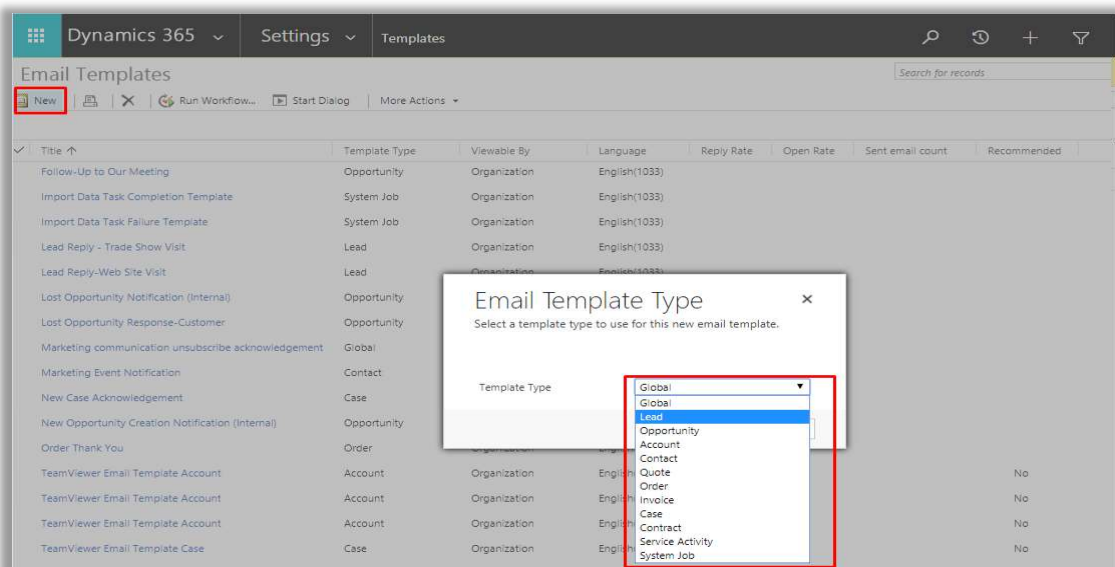
## Creating a TeamViewer Email Template

TeamViewer CRM App are enabled with TeamViewer email template to use on Account, Contact, Case, Lead, and opportunity entities to send the TeamViewer customer link to its customer through Microsoft Dynamics CRM. However the Microsoft Dynamics CRM Administrator or Customizers can create their own customized TeamViewer email template to send it to their customer.

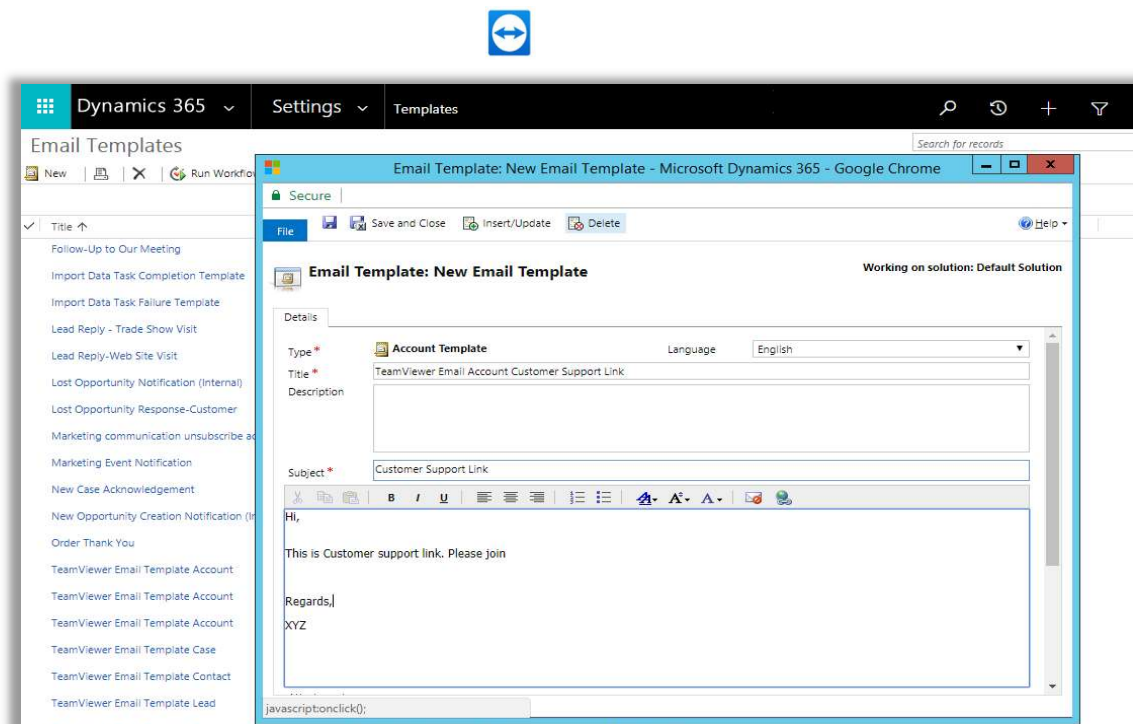
To create a TeamViewer email Template Microsoft Dynamics CRM Administrator or Customizers has to navigate to **Settings> Templates> Email Templates** do below customization.



1. The TeamViewer email template should be of Template Type of target entity wise. For instance if Microsoft Dynamics CRM Administrator or Customizers wants to create TeamViewer email template for Account entity then the Template Type should be **“Account”**.



2. The naming of TeamViewer email templates should begin with the keyword **“TeamViewer Email”**. For instance if TeamViewer email template is created for Account entity and the name is proposed as **“Account TeamViewer customer support Link”** then the correct naming of TeamViewer email template should be **“TeamViewer Email Customer Support Link Account”**. Here the key word **“TeamViewer Email”** is mandatory in the beginning of the TeamViewer email template naming. Please note that the key word **“TeamViewer Email”** is not case sensitive.



3. To write the body of the email template, it is advised to not to use the customer name HTML code (As shown in below image) as the TeamViewer email template won't pick the correct customer name from the contact given in the Lead, Opportunity and Case entity. However the Microsoft Dynamics CRM Administrator or Customizers can set the customer name HTML code to auto pick customer name and send to recipient.

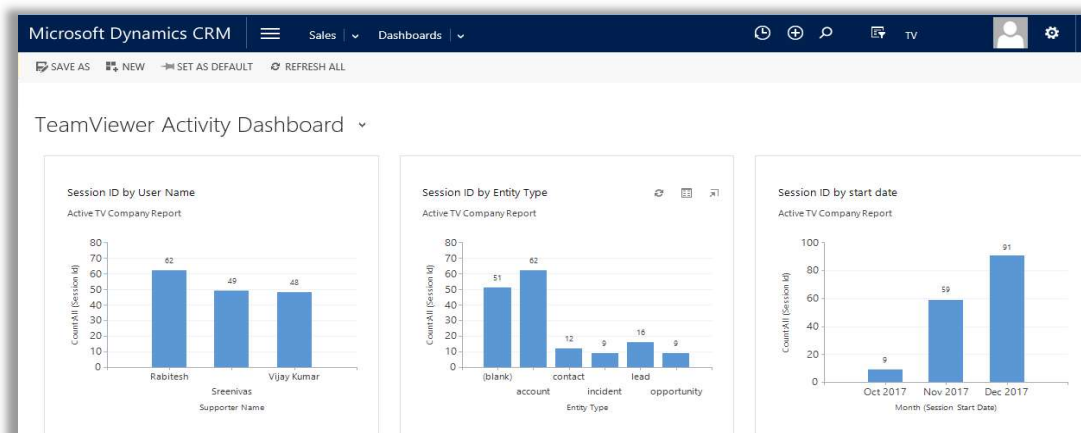
Please note the user name HTML code will set the correct user name as it is the Name of the CRM user which is not variable and sent correctly to recipient.  
Not used in default TeamViewer email template.



## Using TeamViewer Dashboard, Views and Chart

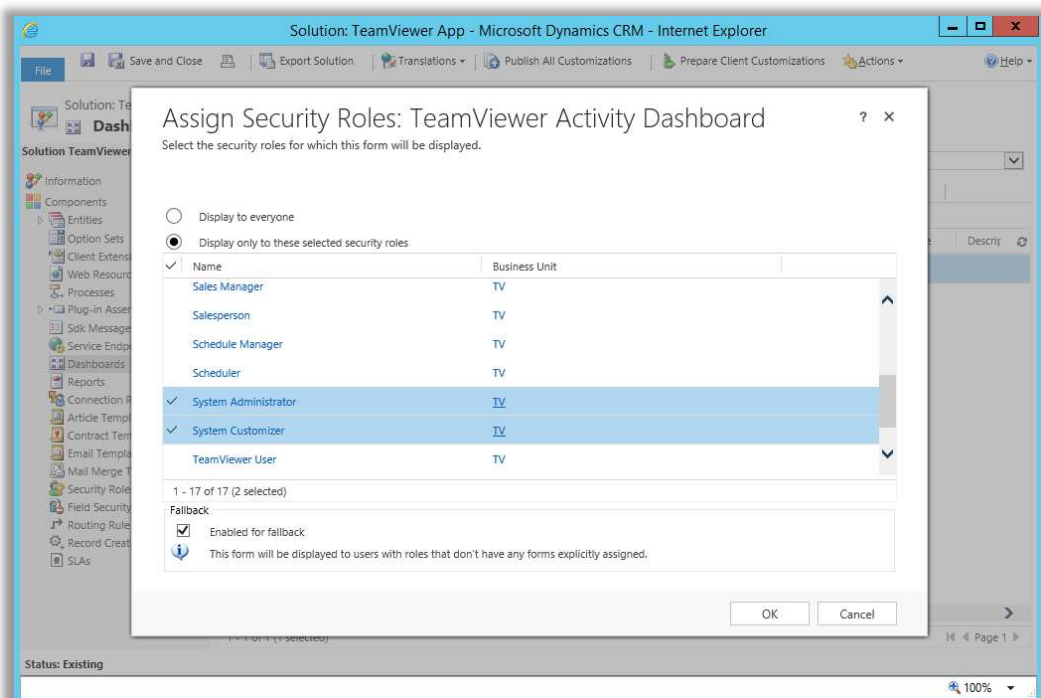
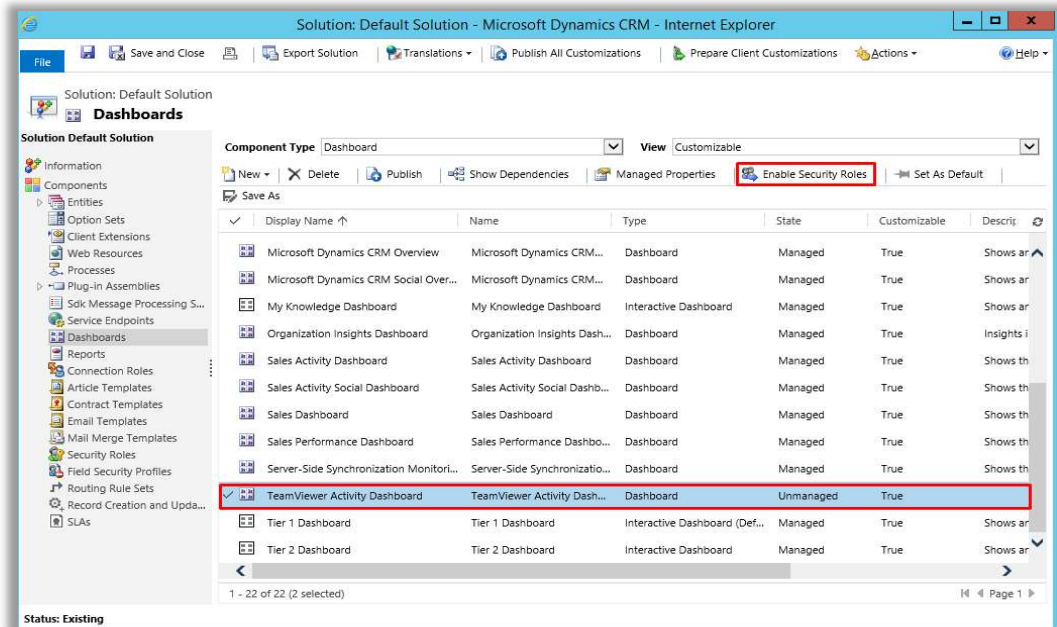
To view the dashboard only Microsoft Dynamics CRM Administrator or Customizers can navigate to **Sales/Service/Marketing > Dashboards > TeamViewer Activity Dashboard**

**Note:** Security roles other than System Administrator and System Customizer can't view "TeamViewer Activity Dashboard". However Microsoft Dynamics CRM Administrator or Customizers can give privileges to any security role to access "TeamViewer Activity Dashboard".





Microsoft Dynamics CRM Administrator or Customizers can give privileges to any security role to access **“TeamViewer Activity Dashboard”** by navigating to **Settings > Customizations > Customize the System > Dashboards** > Then select the **“TeamViewer Activity Dashboard”** and then **“Enable Security Roles”**





## Creating/edit TeamViewer Dashboard

Microsoft Dynamics CRM Administrator or Customizers can create a new TeamViewer related dashboard or they can edit the existing “**TeamViewer Activity Dashboard**”.

### Creation of new TeamViewer Dashboard:

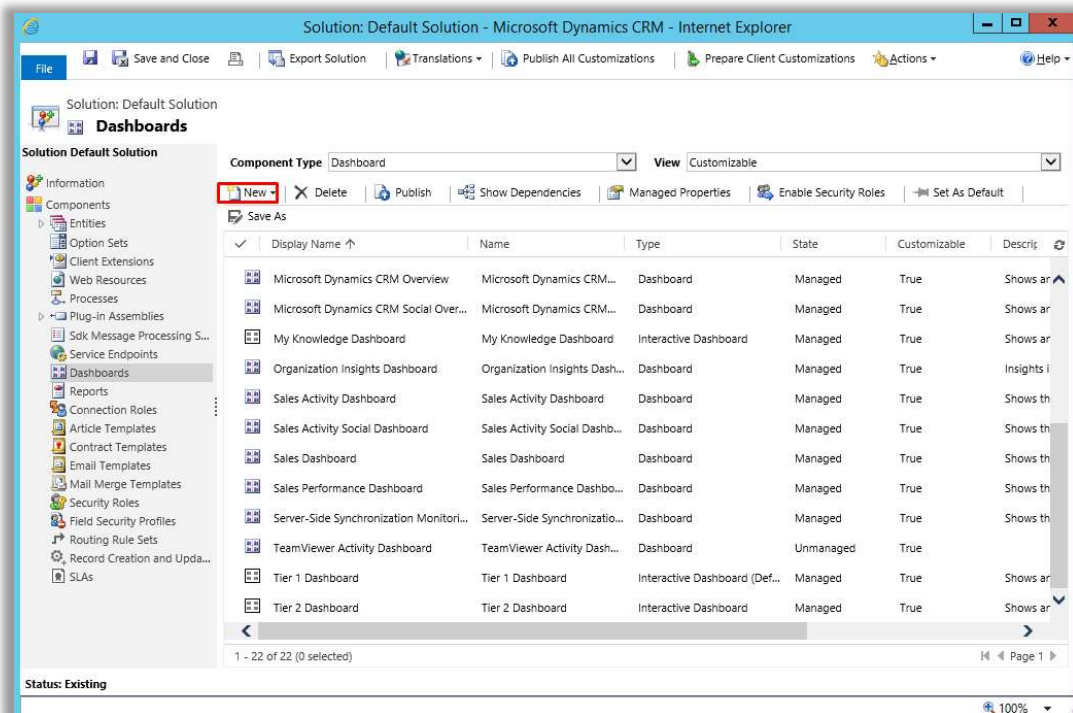
Microsoft Dynamics CRM system administrator can insert Charts, List (Views), Iframes, Web resources.

Microsoft Dynamics CRM Administrator or Customizers should navigate to **Settings > Customizations > Customize the System**.

They should open TeamViewer related entities and then they can proceed to create Views and Charts as per the requirement to add into the dashboard.

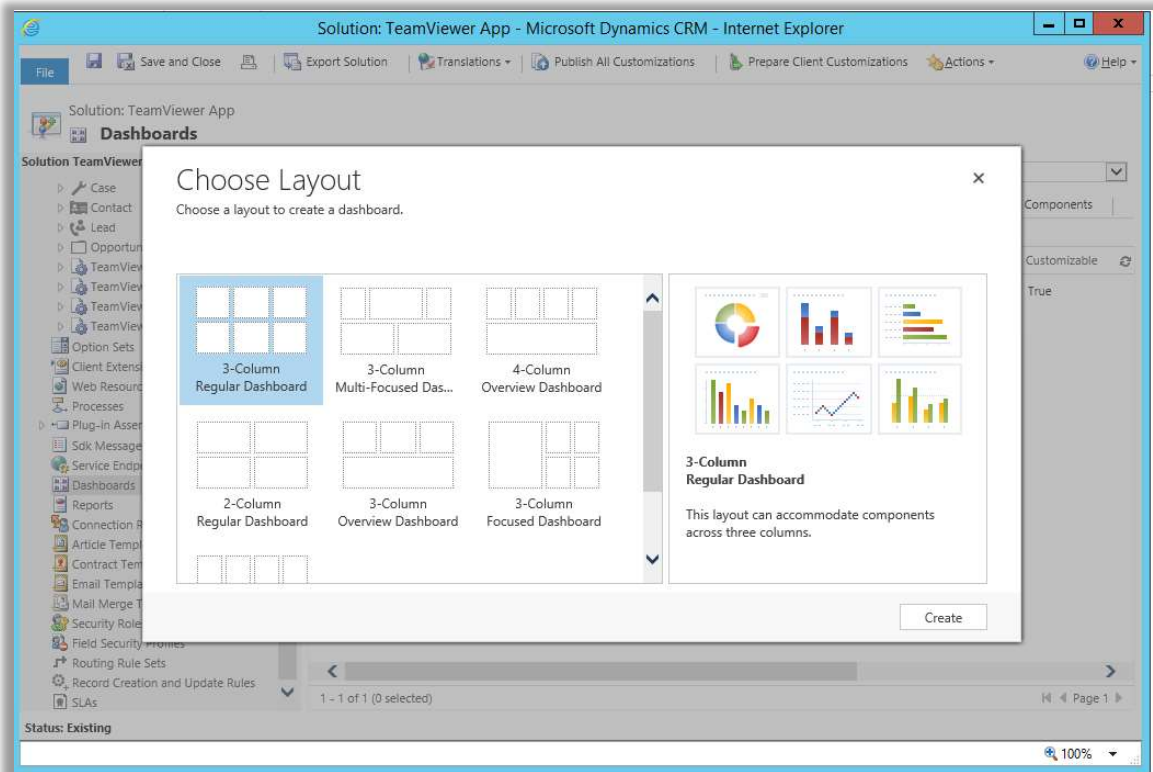
To know more about how to create Views and Charts kindly Google the procedure to create Microsoft Dynamics CRM Views and charts and also can refer different blogs on Views and Chart creation for Microsoft Dynamics CRM.

After the Views and Charts are created, go the Dashboard and then click new to create new dashboard.





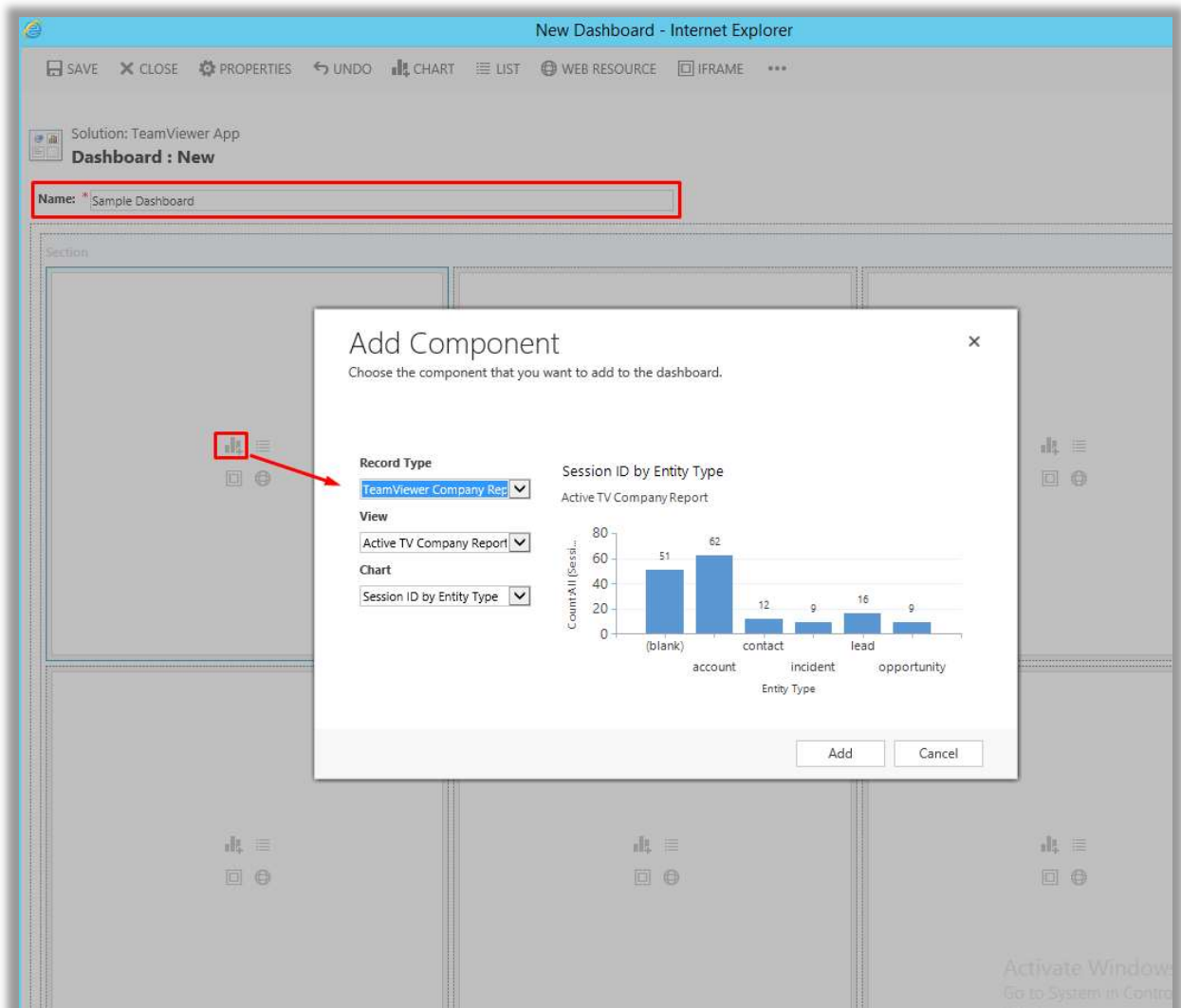
Select the Dashboard layout as required, refer the image below. And then click Create button.



Give a meaningful name of the Dashboard. Example “**Sample Dashboard**” and then click the Chart icon inside the layout. Then select the Record Type, Views and Charts created earlier. Then click Add button and the Charts will be created for the dashboard. Now select the dashboard and “**Publish**” it.

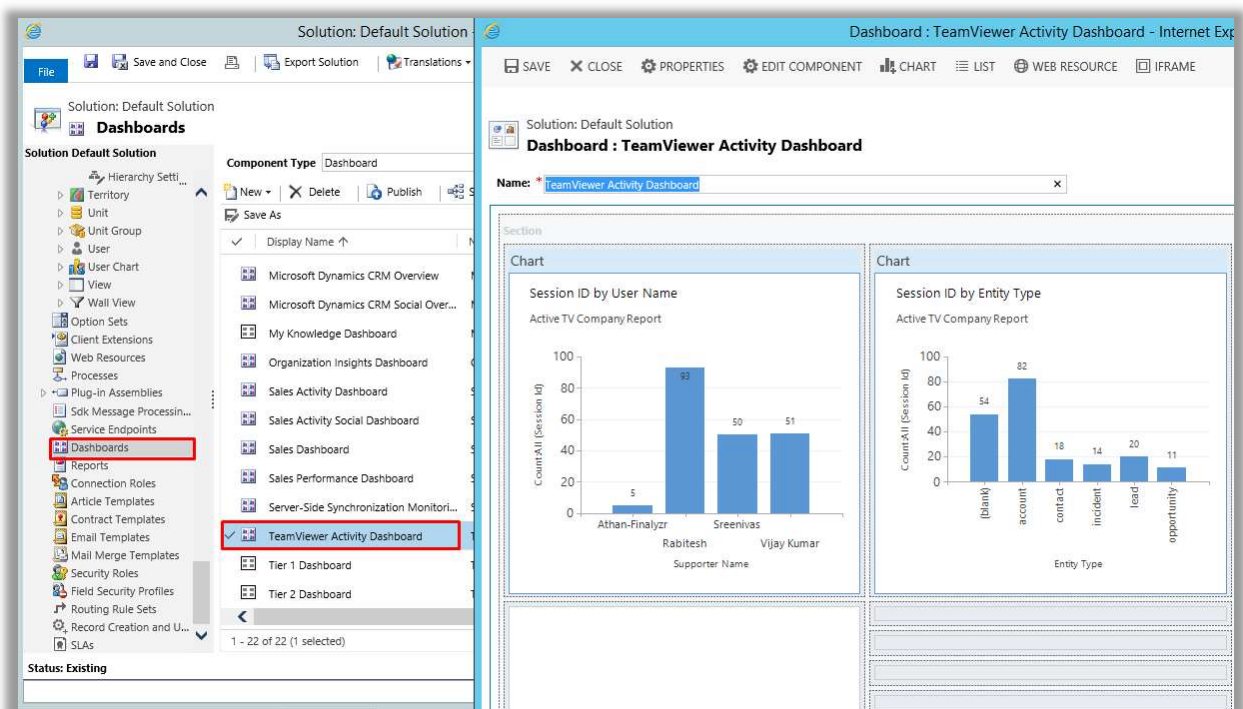
**Note:** This newly created dashboard will be enabled for all the security role by default. To restrict this dashboard for other security roles the Microsoft Dynamics CRM Administrator or Customizers can give privileges to any required/selected security role to access the TeamViewer Dashboard.

By following above described process the Microsoft Dynamics CRM Administrator or Customizers can insert Charts, List (Views), Iframes, Web resources on the Dashboard.



### Editing existing TeamViewer Activity Dashboard:

Microsoft Dynamics CRM Administrator or Customizers can edit the existing dashboard provided through TeamViewer Application (TeamViewer Activity Dashboard). System Administrator or System Customizer should navigate to **Settings > Customizations > Customize the System > Dashboard**. Double Click the **"TeamViewer Activity Dashboard"**.



Microsoft Dynamics CRM Administrator or Customizers can change existing Charts by Clicking the old chart layout and then Click **“EDIT COMPONENT”** button. Then system Administrator or Customizers select another chart. And then click button set, SAVE and Publish the dashboard.

Microsoft Dynamics CRM Administrator or Customizers can also delete the Chart by clicking the **“REMOVE”** button. And then click button set, SAVE and Publish the dashboard.

In the same manner Microsoft Dynamics CRM Administrator or Customizers can increase/decrease the Width or increase/decrease height of the layout. Also they can do the operations on Charts, List (Views), Iframes, Web resources.



SAVE

CLOSE

PROPERTIES

EDIT COMPONENT

REMOVE

CHART

LIST

WEB RESOURCE

Solution: Default Solution

Dashboard : TeamViewer Activity Dashboard

Name: \* TeamViewer Activity Dashboard

Section

Chart

Session ID by User Name

Active TV Company Report

Count All (Session Id)

Athan-Finalyze

Rabitesh

Sreenivas

Vijay Kumar

5

93

50

51

Supporter Name

Set Properties

Set the List or Chart properties.

Specify a unique name.

Name \* Componenta88e8b8

Name

Label \* TeamViewer Company Reports

☐ Display label on the Dashboard

Data Source

Specify the primary data source for this list or chart.

Records All Record Types

Entity TeamViewer Company Reports

Default View Active TV Company Report

Additional Options

☐ Display Search Box

☐ Display Index

View Selector Off

System Views

Active TV Company Report

Inactive TV Company Report

Chart Options

Default Chart Session ID by User Name

☒ Show Chart Only

Set

Cancel

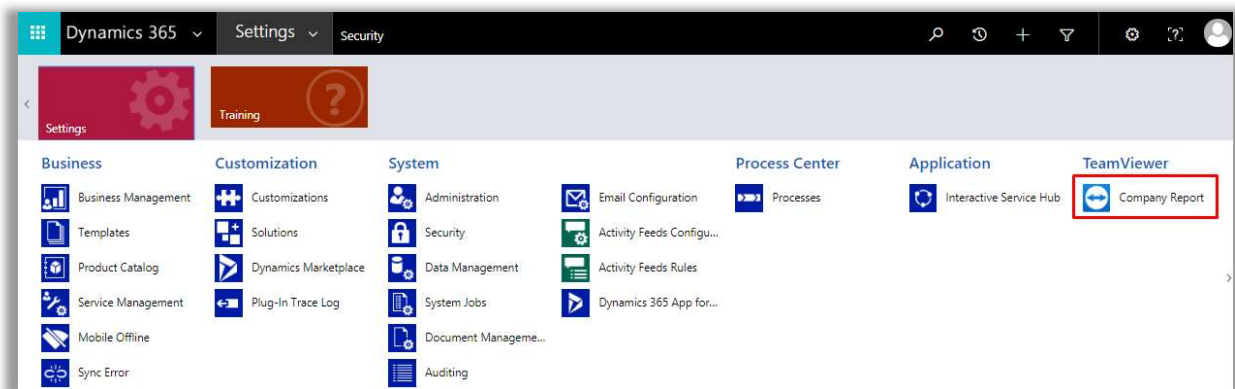


## TeamViewer Company Report(Admin)

Microsoft Dynamics CRM Administrator or Customizers can only see the TeamViewer Company report at organization level.

There are two ways to view the TeamViewer Company report. Navigation through settings and Advanced Find.

1. Navigation: **Settings> TeamViewer Area > Company Report** (Click to open the entity form)



Active TeamViewer Company Report will show all the established successful TeamViewer session between the Microsoft Dynamics CRM supporter and Customer. TeamViewer company report will show all the successful TeamViewer session created by the members of Company Group in TeamViewer Management Console. TeamViewer Company Report shows all the completed session within Group Id.

Entity Type	Session Id	User-id	Supporter Name	Customer Name	Device Id	Session Start Date	Session End Date	Description	Notes
contact	s64-635-491	u104643744	Atha	Test B	456275161	12/15/2017 5:25 PM	12/15/2017 5:26 PM	{ "fullName": "Atha...	
incident	s71-987-315	u104643744	Atha	Test B	262423732	12/15/2017 3:50 PM	12/15/2017 4:01 PM	{ "fullName": "Atha...	
contact	s73-588-490	u104643744	Atha	Test B	456275161	12/15/2017 3:06 PM	12/15/2017 4:02 PM	{ "fullName": "Atha...	
contact	s85-164-003	u104643744	Atha	Test B	456275161	12/15/2017 2:56 PM	12/15/2017 3:01 PM	{ "fullName": "Atha...	

This Active TeamViewer Company Report are refreshes every 24hrs through Workflow scheduler but Microsoft Dynamics CRM Administrator or Customizers Can click on the button **“REFRESH REPORT”** to refresh the report manually.



Microsoft Dynamics CRM

Settings Company Report

NEW REFRESH REPORT DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

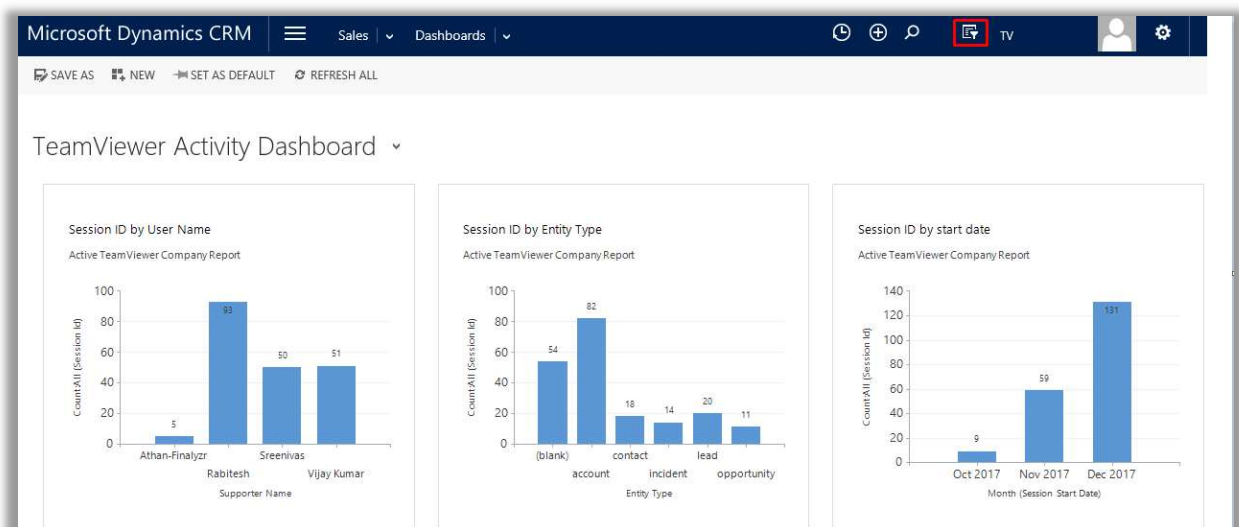
Active TeamViewer Company Report

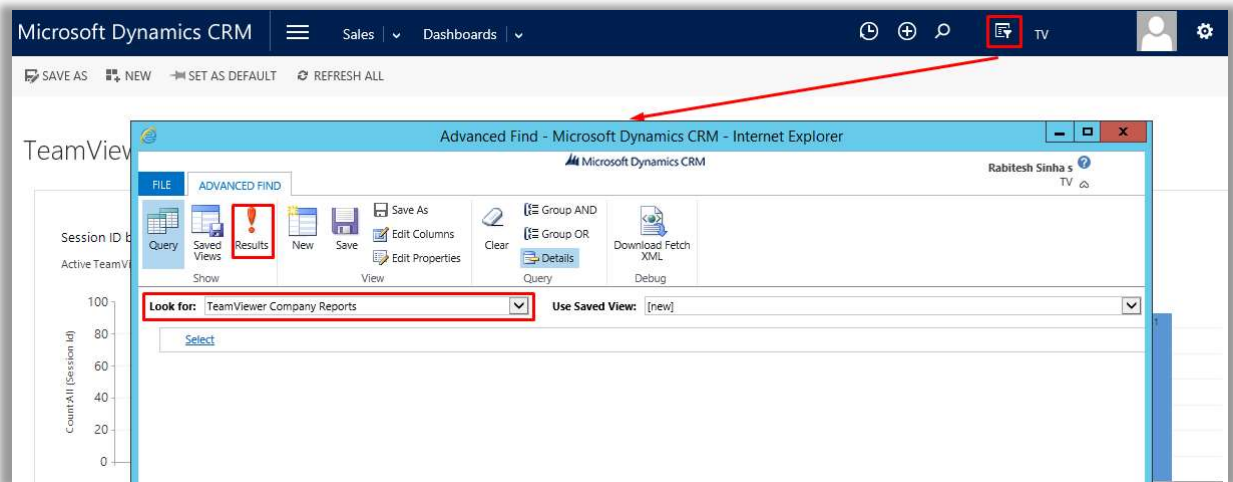
Entity Type	Session Id	User-id	Supporter Name	Customer Name	Device Id	Session Start Date	Session End Date	Description	Notes
contact	s64-635-491	u104643744	Atha	Test B	456275161	12/15/2017 5:25 PM	12/15/2017 5:26 PM	{"fullname":"Ath...	
incident	s71-987-315	u104643744	Atha	Test B	262423732	12/15/2017 3:50 PM	12/15/2017 4:01 PM	{"fullname":"Ath...	
contact	s73-588-490	u104643744	Atha	Test B	456275161	12/15/2017 3:06 PM	12/15/2017 4:02 PM	{"fullname":"Ath...	
contact	s85-164-003	u104643744	Atha	Test B	456275161	12/15/2017 2:56 PM	12/15/2017 3:01 PM	{"fullname":"Ath...	

Below are the description of the columns used in the Active TeamViewer Company Report

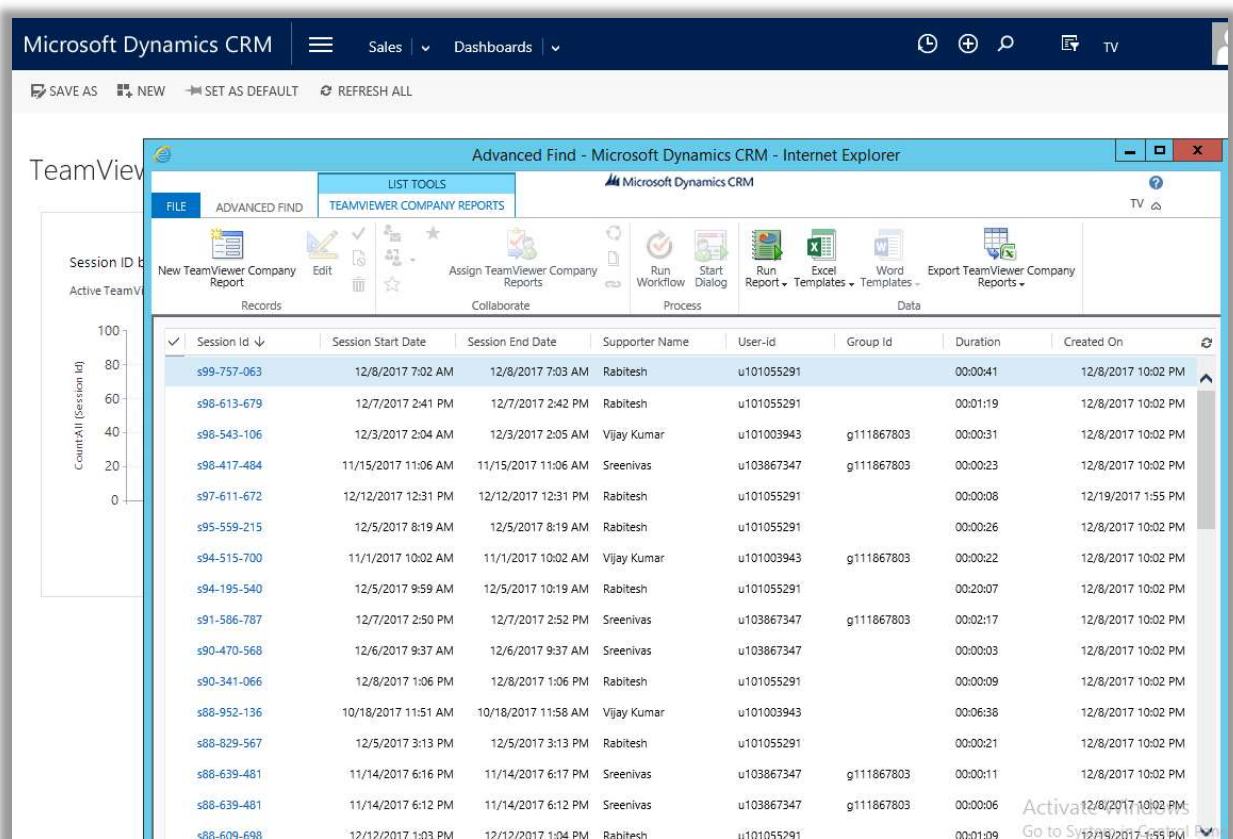
- Entity Type:** Name of the entity where the TeamViewer session is created.
- Session Id:** Unique TeamViewer session id created from the TeamViewer.
- User Id:** User ID of the user the TeamViewer group is shared with.
- Supporter Name:** Name of the user the TeamViewer group is shared with.
- Customer Name:** Full name of the customer to whom 'Send Customer Link' emails are sent.
- Device Id:** The TeamViewer Id that is unique for this entry of the computers & contacts list.
- Session Start Date:** Start date and time of the TeamViewer connection.
- Session End Date:** End date and time of the TeamViewer connection.
- Description:** This is used to store an arbitrary string but is only available to API functions.
- Notes:** Notes for the TeamViewer connection.

- Advanced Find > Select Look For > TeamViewer Company Report** and then click “Results” button.





On Click of the “Results” button the window will display all the Active TeamViewer Company Report.



In the same manner Microsoft Dynamics CRM Administrator or Customizers can used Advanced Find button to get the details of TeamViewer Connection History, TeamViewer Current Session and TeamViewer User.

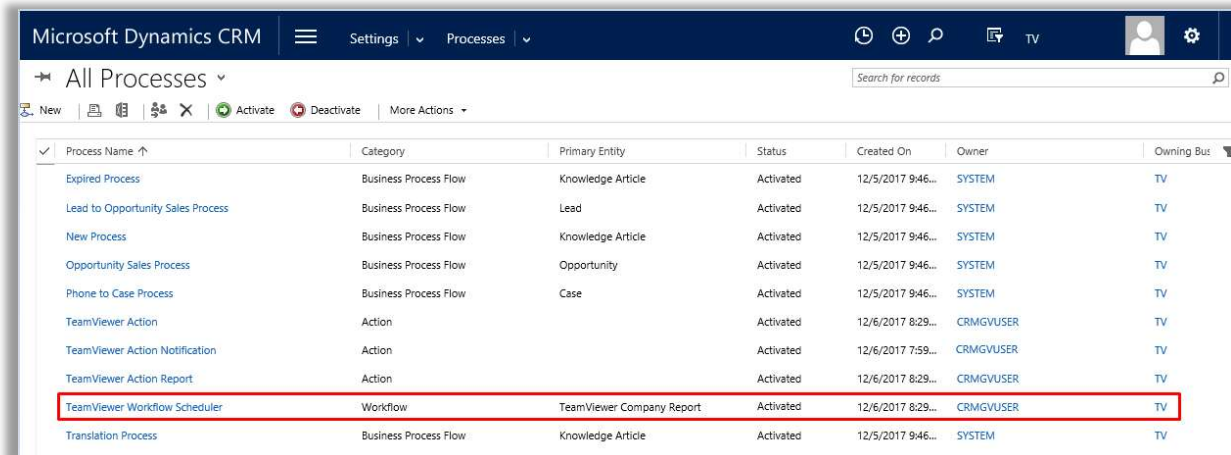
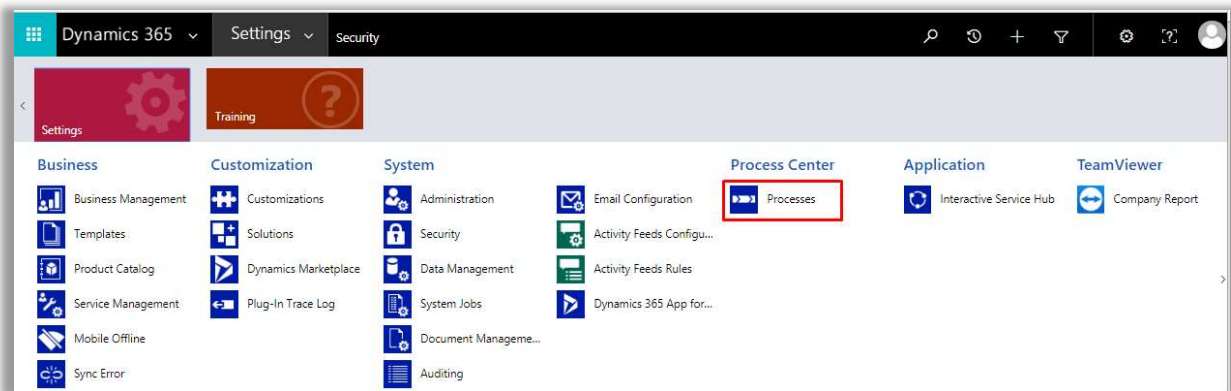


## TeamViewer Company Report Scheduling

For the first time when the TeamViewer App solution is installed in the Microsoft Dynamics CRM then Microsoft Dynamics CRM Administrator or Customizers should run **TeamViewer Workflow Scheduler**, manually for the first time. The steps are given below.

TeamViewer App solution has the ability to run the TeamViewer Company Report automatically through Workflow scheduler. This Workflow scheduler runs every 10 hours and it fetch the details of company report from TeamViewer API.

Microsoft Dynamics CRM Administrator or Customizers can modify the scheduler timings by Navigating to the **Settings> Processes**, then Click on the “**TeamViewer Workflow Scheduler**”.



TeamViewer Workflow Scheduler can be configured by Clicking the blue marked time interval key word “Timeout until **23 Hours , 59 Minutes** then”.



Process: TeamViewer Workflow Scheduler - Microsoft Dynamics CRM - Internet Explorer

Working on solution: Default Solution

Information

General Administration Notes

Hide Process Properties

Process Name \* TeamViewer Workflow Scheduler

Activate As Process

Available to Run

☒ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

Workflow Job Retention

☐ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope User

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

Add Step Insert Delete this step

Scheduling Company Report Every 24 hrs

Timeout until 23 Hours, 59 Minutes then

Calling Company Report Custom workflow

TVWorkflowScheduler (1.0.0.0):TVWorkflowScheduler:TVWorkflowScheduler Set Properties

On Click of “**Timeout until 23 Hours, 59 Minutes then**”, a new window will open where the Microsoft Dynamics CRM System Administrator or System Customizer can select the “Dynamic Values” and “After” timing Hour and Minute to set the new timeframe to run the “**TeamViewer Workflow Scheduler**”.

Process: TeamViewer Workflow Scheduler - Microsoft Dynamics CRM - Internet Explorer

Working on solution: Default Solution

Information

General Administration Notes

Hide Process Properties

Process Name \* TeamViewer Workflow Scheduler

Activate As Process

Available to Run

☒ Run this workflow in the background (recommended)

☒ As an on-demand process

☐ As a child process

Workflow Job Retention

☐ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope User

Start when:

☐ Record is created

☐ Record status changes

☐ Record is assigned

☐ Record fields change

☐ Record is deleted

Add Step Insert Delete this step

Scheduling Company Report Every 24 hrs

Timeout until 23 Hours, 59 Minutes then

Calling Company Report Custom workflow

TVWorkflowScheduler (1.0.0.0):TVWorkflowScheduler:TVWorkflowScheduler Set Properties

Specify Condition - Microsoft Dynamics CRM -- Webpage Dialog

File Save and Close

Group AND Group OR

Timeout Equals 23 Hours, 59 Minutes Duration

Form Assistant

Dynamic Values

Month Day Hour Minute

0 0 23 59

Duration

http://testmachine/TV/Condition/Condition.aspx?EntityId=2e385eaf-1ee9-4158-94 Local intranet | Protected Mode: Off



**Note:** The TeamViewer Workflow scheduler will run automatically from the installation of TeamViewer App solution in Microsoft Dynamics CRM supported versions. The Microsoft Dynamics CRM Administrator or Customizers can view the status of the TeamViewer workflow scheduler by navigating to “**Process Session**” and get the details of status reason.

Process Name	Regarding	Status Reason	Owner	Created On	Completed On
TeamViewerWorkflowScheduler	s14-176-965	Canceled	Rab	1/4/2018 10:42 AM	1/4/2018 1:00 PM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/4/2018 12:41 AM	1/4/2018 10:42 AM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/3/2018 2:41 PM	1/4/2018 12:41 AM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/3/2018 4:40 AM	1/3/2018 2:41 PM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/2/2018 6:40 PM	1/3/2018 4:40 AM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/2/2018 8:40 AM	1/2/2018 6:40 PM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/1/2018 10:39 PM	1/2/2018 8:40 AM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/1/2018 12:39 PM	1/1/2018 10:39 PM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	1/1/2018 2:38 AM	1/1/2018 12:39 PM
TeamViewerWorkflowScheduler	s14-176-965	Succeeded	Rab	12/31/2017 4:36 PM	1/1/2018 2:38 AM

If **Status Reason** is **Succeeded** then the workflow will fetch records of all the TeamViewer successfully completed session id reports from **TeamViewer API** and will show on the CRM TeamViewer Report entity.

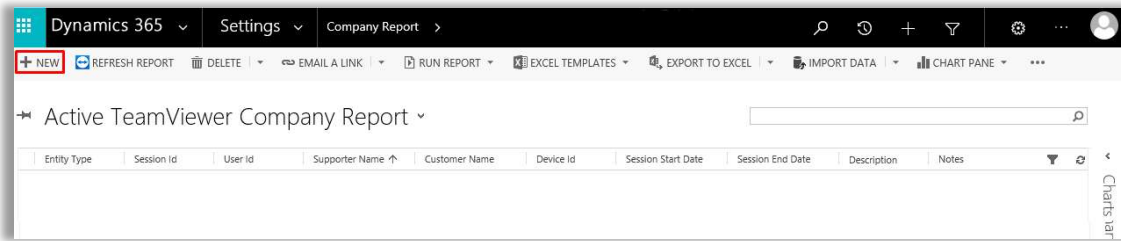
If **Status Reason** is **Canceled/Failed** then the workflow need to start manually.

**Note:** Microsoft Dynamics CRM Administrator or Customizers can create and configure an email notification on the TeamViewer Workflow scheduler for status reason Canceled or Failed to get notified on the stopped of TeamViewer Workflow scheduler. Thereafter they can run the TeamViewer Workflow scheduler manually through on-demand process.

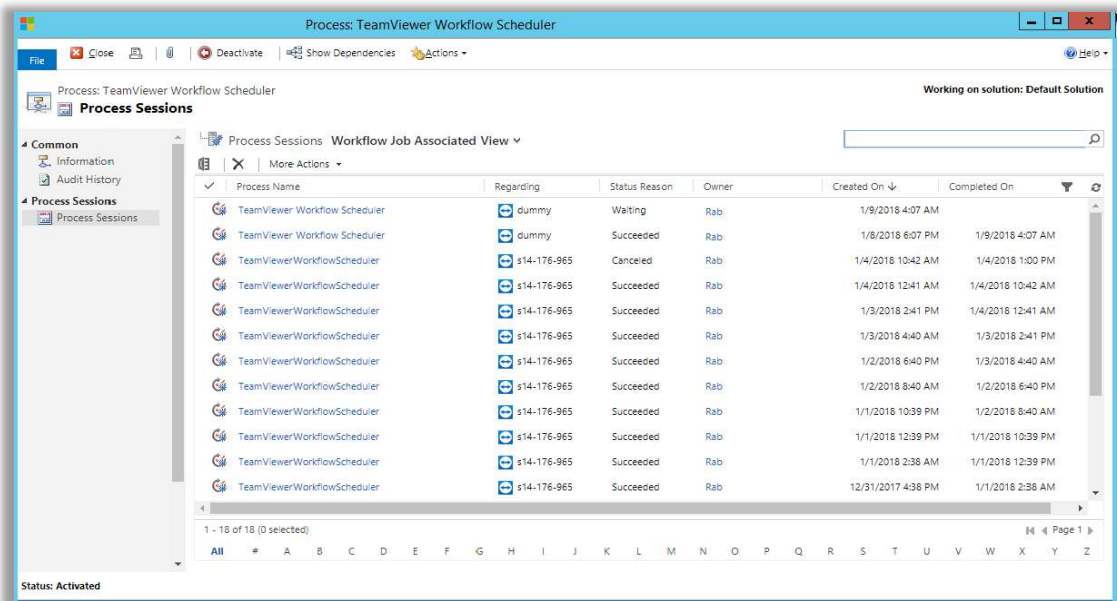
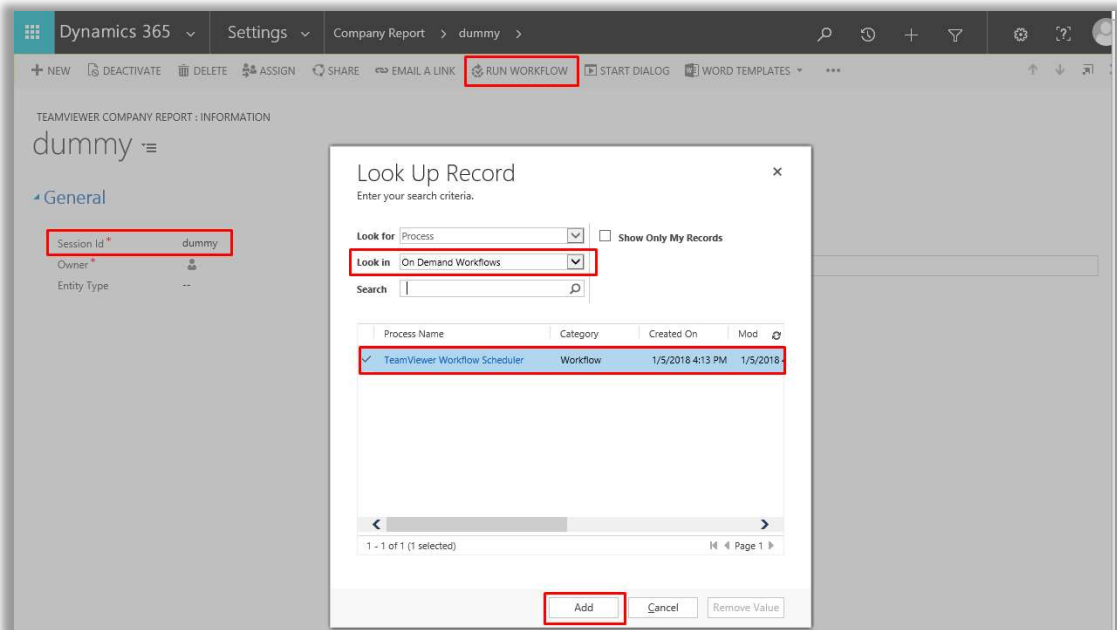
#### Manually starting the TeamViewer Workflow scheduler through on-demand process.

Microsoft Dynamics CRM Administrator or Customizers should navigate to **Settings> TeamViewer Area > Company Report** (Click to open the entity form).

If no record is available then create a new dummy record by clicking the “New” button to run on demand TeamViewer Workflow Scheduler. Initially the TeamViewer Workflow scheduler will show status reason as Waiting and will succeeded after 10 hours (Currently, TeamViewer Workflow Scheduler is configured for 10 hours).



Then create a TeamViewer Company dummy record and run the on demand TeamViewer Workflow scheduler. And with this the TeamViewer Workflow scheduler will start running.

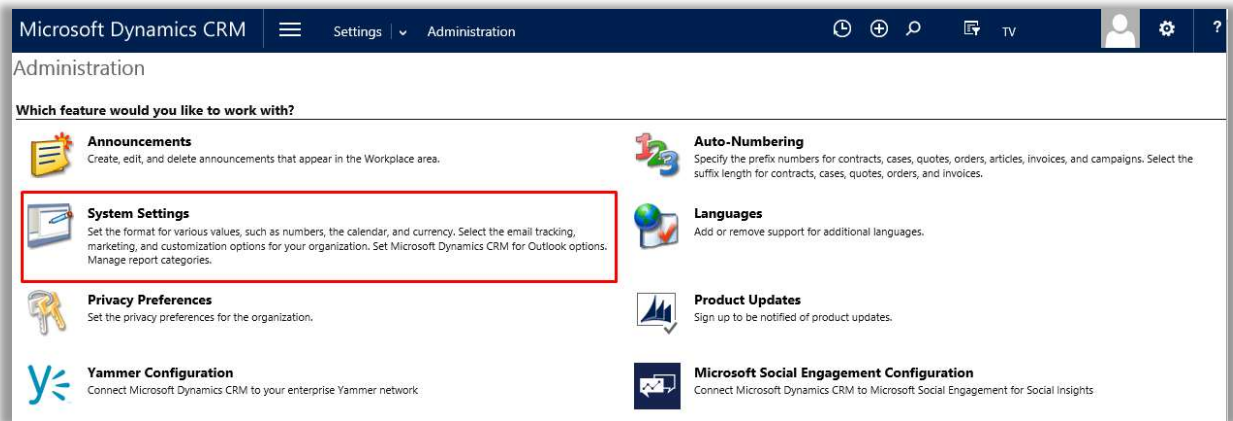




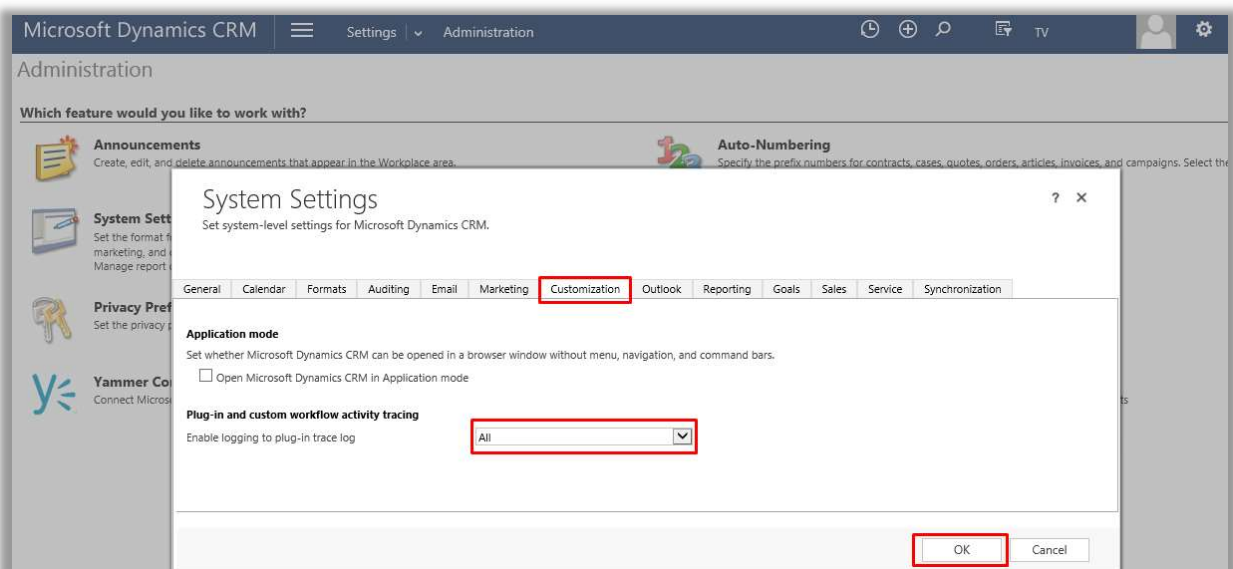
## Enabling Plug-In Trace Log to report TeamViewer Plugin issues

Microsoft Dynamics CRM System Administrator or System Customizer can enable Plug-in Trace Log to get the error from any of the TeamViewer plugins. Which then can be reported to TeamViewer GmbH support team to get the fixes.

Navigation to enable Plug-in Trace Log: **Settings > Administration > System Settings > Customization > Plug-in and custom workflow activity tracing**



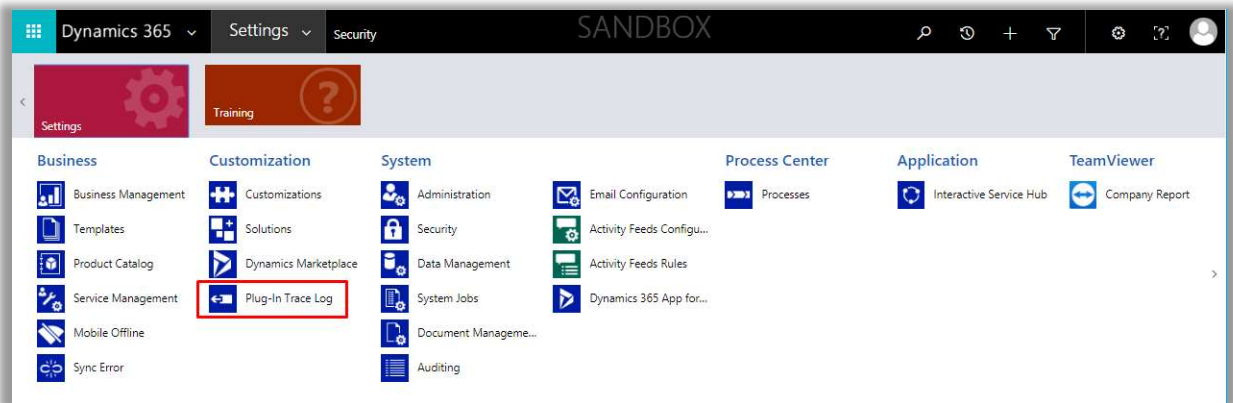
To get the plug-In Tracing Log the Microsoft Dynamics CRM System Administrator or System Customizer should set Plug-in and custom workflow activity tracing to **“All”**. And then Click **“OK”**.





Once the Plug-in and custom workflow activity tracing to “**All**” then the Microsoft Dynamics CRM System Administrator or System Customizer should be able to see all the error report inside the “**Plug-In Trace Log**”.

Navigation to Plug-In Trace Log: **Settings > Plug-In Trace Log**, and then Click it to Open the form and view the issue log.





## Appendix

### Adding contacts to entities

You may add contacts to entities by clicking on the '+' button in the Contacts section. Please see the snapshot below for reference.

The screenshot shows the Dynamics 365 interface for the 'TV Reports1' account. The top navigation bar includes 'Dynamics 365', 'Sales', 'Accounts', and 'TV Reports1'. The main content area is divided into several sections: 'Summary', 'ACCOUNT INFORMATION', 'ADDRESS', 'POSTS', 'ACTIVITIES', 'NOTES', 'CONTACTS', and 'RECENT OPPORTUNITIES'. The 'CONTACTS' section on the right has a red box around the '+' button, indicating where to click to add a new contact.

On click of the '+' button, a quick create form opens up where you can add the Name and email address of the contact. Click the Save button to link the contact to the account.

The screenshot shows the 'Contact' quick create form in Dynamics 365. The form is divided into three main sections: 'Details', 'Contact Information', and 'Address'. The 'Details' section includes fields for 'First Name', 'Last Name', 'Job Title', and 'Account Name'. The 'Contact Information' section includes fields for 'Email', 'Mobile Phone', 'Business Phone', and 'Description'. The 'Address' section includes fields for 'Street 1', 'Street 2', 'City', and 'ZIP/Postal Code'. The 'Last Name' field is highlighted with a red box, and the 'Email' field is also highlighted with a red box.



Once the contact is created and added, it appears in the grid as shown below. Please note that emails are sent to Account's contact. For lead, Opportunity and Case if Account is selected then the email will be sent to the Account's Primary contact.

Microsoft Dynamics CRM

See how the interactive service hub can make you more productive. Experience it now

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE SWITCH PROCESS FORM

ACCOUNT FDD

Annual Revenue No. of Employees Owner Rabitesh Sinha s

Summary

ACCOUNT INFORMATION

Customer Name\* FDD

Phone --

Fax --

Website --

Parent Account --

Ticker Symbol --

ADDRESS

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Dump Account

Account: Created By Rabitesh Sinha s.

On Dump Account's wall Yesterday

Primary Contact

Dump Contact1

Email contact1@dump.com

Business --

CONTACTS

Full Name Email

Dump Contact1 contact1@dump.com

Dump Contact2 contact2@dump.com

Dump Contact3 contact3@dump.com

RECENT OPPORTUNITIES

Topic Status

No Opportunity records found.

To create Account's Primary contact, Click the lookup of the Primary customer and then Magnifying search button and then click on "+ New" and create the Contact and that will be added to Account as Primary contact.

Microsoft Dynamics CRM

See how the interactive service hub can make you more productive. Experience it now

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE SWITCH PROCESS FORM

ACCOUNT FDD

Annual Revenue No. of Employees Owner Rabitesh Sinha s

Summary

ACCOUNT INFORMATION

Customer Name\* FDD

Phone --

Fax --

Website --

Parent Account --

Ticker Symbol --

ADDRESS

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Dump Account

Account: Created By Rabitesh Sinha s.

On Dump Account's wall Yesterday

Primary Contact

Dump Contact1

Email contact1@dump.com

Business --

CONTACTS

Full Name Email

Dump Contact1 contact1@dump.com

Dump Contact2 contact2@dump.com

Dump Contact3 contact3@dump.com

Look Up More Records

3 results

New

RECENT OPPORTUNITIES

Topic Status

No Opportunity records found.



Create the contact from Quick create form and ensure that the Account name is same as the Account created.

Once the Primary contact is created it will show up in the account form as shown in the below image with email id.