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	\checkmark	\checkmark	\checkmark
Dynamics 365 for Sales	\checkmark	\checkmark	\checkmark
Dynamics 365 for Customer Service	\checkmark	\checkmark	\checkmark
Dynamics 365 for Field Service	\checkmark	\checkmark	\checkmark
Dynamics for Project Service Automation	\checkmark	\checkmark	\checkmark
Microsoft Dynamics CRM Online Enterprise and Professional 2016	\checkmark	√	~
Microsoft Dynamics CRM On- premises 2016	\checkmark	×	\checkmark
Microsoft Dynamics CRM Online 2015 Update 1	\checkmark	\checkmark	\checkmark
Microsoft Dynamics CRM Online 2015 Update	\checkmark	\checkmark	\checkmark
Microsoft Dynamics CRM On- premises 2015	\checkmark	×	\checkmark
Microsoft Dynamics CRM Online 2013	×	\checkmark	\checkmark
Microsoft Dynamics CRM On- premises 2013	×	×	\checkmark
Microsoft Dynamics CRM Online 2011	×		✓
Microsoft Dynamics CRM On- premises 2011	×	×	\checkmark

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:

- 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:
 - <u>*.dynamics.com</u>
 - 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:

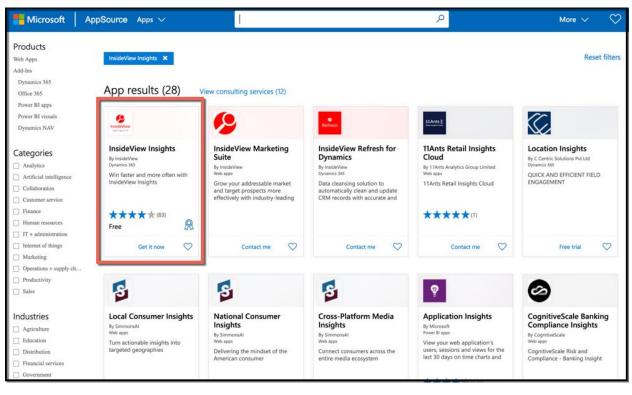
Installing InsideView Insights via AppSource Marketplace

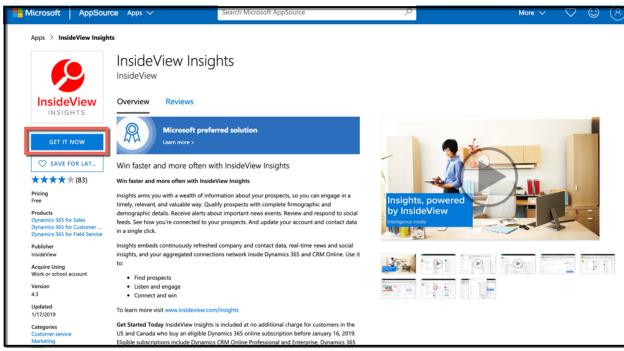
InsideView Insights is now available via Microsoft's AppSource Marketplace and can be installed directly from the marketplace.

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

Hicrosoft	AppSource Apps 🗸	InsideView		Q		More 🗸	\heartsuit
Products Web Apps Add-Ins	Web apps		services for InsideView	h suggestions	See all		
Dynamics 365 Office 365 Power BI apps		Apps Peptelo InsideView Insigh Pynamics 365		n suggestions			
Power BI visuals Dynamics NAV	Organization Chart By a By TeamImprover.Com Ltd Web	atwork atwork b apps b apps	-		ddon Marketing		
Categories	Create, Share, Search and Print righ Org Charts				on Marketing Cloud Jynamics 365		
Artificial intelligence Collaboration Customer service	****	*****(4)	*****	Free ***	(4)		
Finance Human resources T + administration	\heartsuit	Free trial	Free trial		Get it now		

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.

	Insights, po	owered by InsideView	
Insights	Insideview		
morgine	Overview Revie	WS	
	Sales intelligence i		×
GET IT NOW	CRM subscriptions	Sign in to Microsoft AppSource	4
Pricing	Win faster and more of	Enter the email address of the account you want to use when acquiring apps on	
Free	Insights arms you with a	AppSource.	
Products	engage in a timely, rele	The app you have selected (insights, powered by insideView) requires a work or school account to	
Dynamics 365 for Sales, Ente	firmographic and demo	Continue. Microsoft accounts are not supported for this app.	
Dynamics 365 for Customer Dynamics 365 for Field Servi	events. Review and resp prospects. And update 1	Work or school account	ed
Publisher		harry@insights.onmicrosoft.com	
InsideView	Insights embeds contin and social insights, and		
Acquire Using Work or school account	and CRM Online. Use it	Sign in	
Version	 Find prospects 	Don't have an account? Sign up for a free account	
42	 Listen and engage 		
Updated	 Connect and win 		
9/23/2017	Insights is included at no a	ditional charge in Dynamics 365 and CRM Online	
Categories		i to do is click the "Get" button to turn it on.	
Customer service	and the second second		
Marketing		eView is included at no additional charge in these	
Sales		d Canada::Dynamics CRM Online Professional and Ian 1 and Plan 2, Dynamics 365 for Sales, Dynamics 365	
Products supported CRM Online		mics 365 for Field Service, and Dynamics 365 for Project	

5. Enter the user details and click **Continue** to open the **Terms of Use** page.

			×
One more thin	g		
InsideView InsideView	nsights		
	rofile information. We have pulled e will save your information for ne		
Name *	Harry	Anhony	
Work email *	harry.anthony@insights.onmicr	osoft.com	
Job title			
Company	Insights		
Country / region	United States of America		
Phone number *	343-3434-133		
Microsoft can contact me terms of use and privacy p	on to use or share my account infor regarding this product and related p oblicy and understand that the right icrosoft is the provider. Use of App	products. I agree to the provider's s to use this product do not come	
You're signed in as	user@2.onmicrosof	ít.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	
InsideView	Add the application to Dynamics 365
	Select the Dynamics 365 organization you want to add this application to.
InsideView INSIGHTS	Connect to Dynamics 365 Organization to add the application to: abe (orgestbf7da5) \$
Inside View Insights	Apree to Microsoft's Legal Terms and Privacy Statement
Win faster and more often with Inside/Wise 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 you account and contect data in a single click.	Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365
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 neosnests	
Publisher: Inside View	

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

Microsoft Dyr				cu Coutou	Office 3
ynamic	S 365	Admi	nistrati	on Center	
e's a better way to manage you	ir instances. Try the i	new Admin center			
ANCES UPDATES SER	VICE HEALTH B	ACKUP & RESTORE	APPLICATIONS		
nage your solu	itions				
Manage you	ir solution	c			
Manage you	ii solution	5			
Select a preferred	solution to m	anage on selecter	d instance: abc		
beider a preferree		anage on selecto			
SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS		
InsideView Insights	4.3	12/31/2021	Installation pending	InsideView Insights	
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	Please wait while installation starts. This may take a few minutes.	
Live Assist for Dynamics	3 1.0.0.0	1/1/2050	Not installed	InsideView Insights makes it easy to find and	
Live Assist for Microsoft I	0 3.3.1.8	1/1/2050	Not installed	Insurement Insigns Index IC asy to find and engage with buyers. Win deals using accurate prospect data, real-time insights, and social connections delivered directly inside Microsoft (more)	
Live Assist for Microsoft I	0 3.3.1.8	1/1/2050	Not installed		
	9.0.0.104	1/1/2050			
OData v4 Data Provider	9.0.0.104	1/1/2050	Installed		
OData v4 Data Provider Office 365 Groups	2.9.0.2	1/1/2050	Installed Not installed	Created by: InsideView	
	2.9.0.2				
Office 365 Groups	2.9.0.2 1.11.1005.0	1/1/2050	Not installed	Created by: InsideView	
Office 365 Groups Portal Data for Dynamics	2.9.0.2 1.11.1005.0	1/1/2050 1/1/2020	Not installed Not installed	Created by: InsideView	
Office 365 Groups Portal Data for Dynamics Project Service Automatic	2.9.0.2 1.11.1005.0 on 3.4.0.37	1/1/2050 1/1/2020 1/1/2050	Not installed Not installed Not installed	Created by: InsideView	

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

Hicrosoft [ynamics 365			om	ce 365				
Dynami	ynamics 365 Administration Center								
There's a better way to manage INSTANCES UPDATES Manage your so	SERVICE HEALTH B		APPLICATIONS						
	red solution to m		d instance: abc						
InsideView Insights	4.3	12/31/2021	Installed	InsideView Insights					
LinkedIn Lead Gen f	orms 1.12.1006.0	1/1/2020	Not installed	InsideView Insights makes it easy to find and					
Live Assist add-in po	were 1.0.0.0	1/1/2050	Not installed	engage with buyers. Win deals using accurate prospect data, real-time Insights, and social					
Live Assist for Dynam	nics 3 1.0.0.0	1/1/2050	Not installed	connections delivered directly inside Microsoft (more)					
Live Assist for Micros	oft D 3.3.1.8	1/1/2050	Not installed	Constant Inv. Taxida) Revu					
Live Assist for Micros	oft D 3.3.1.8	1/1/2050	Not installed	Created by: InsideView					
OData v4 Data Provi	der 9.0.0.104	1/1/2050	Installed						
Office 365 Groups	2.9.0.2	1/1/2050	Not installed						
Portal Data for Dyna	mics 1.11.1005.0	1/1/2020	Not installed						
Project Service Autor	mation 3.4.0.37	1/1/2050	Not installed						
Relationship Insights	9.0.0.568	1/1/2050	Not installed						
Sales insights add-or	9.0.1.7043	1/1/2050	Not installed						
Sample Data for Mar	keting 1.34.1032.0	1/1/2020	Not installed						

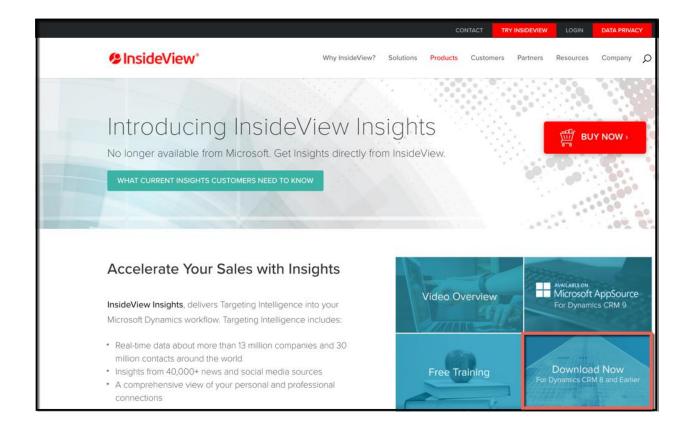
 Make InsideView Insights available to everyone in your organization. For more information, refer to the next section, <u>Making InsideView Insights Available through the Dynamics CRM</u> <u>Online Web Client</u>.

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.

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

Dynamics 365 🗸	Settings ~ Custor	lizations			+ ري م	y 🛛 🔋 🕘
Sales	Service Service	Marketing	InsideView Insights	Training	Settings	Internet of Things
Business	Customization	System		Process Center	InsideView Insights	Application
Business Management	Customizations	Sec. Administration	Email Configuration	Processes	User Settings	My Apps
Templates	+ Solutions	Security	Activity Feeds Confi	Microsoft Flows	Org Settings	
Product Catalog	Microsoft AppSource	🗟 Data Management	Activity Feeds Rules			
Service Management	← Plug-In Trace Log	System Jobs	Dynamics 365 App f			
	Solutions History	Document Manage	Sales AI			
		Auditing				

5. Click the **Import Solution** icon or link and select the downloaded zip file from your local computer.

Uynamics	365 ~	Settings	~	Solutions >
All Solutions		P P 🔖	0	Nore Actions 🗸
Name	Disp	lay Name	\	Version $ $ Installed On \downarrow Package T Publisher

6. Follow the instructions in the Installation prompts to complete your installation.

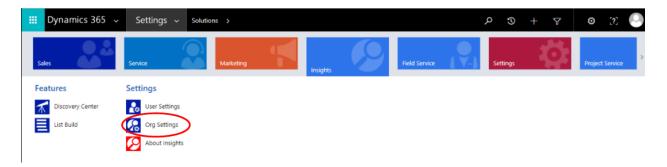
Making InsideView Insights Available through the Dynamics Web Client

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.

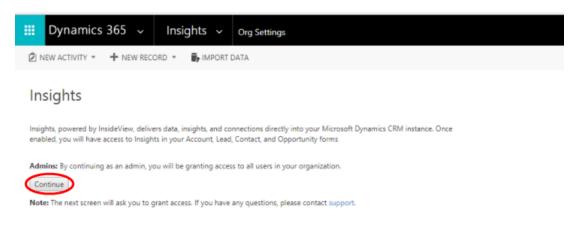
Instructions for CRM Administrators

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

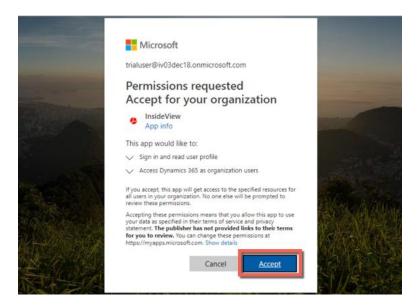
1. Go to Microsoft Dynamics 365> Insights > Settings > Org Settings.



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

Accounts			Contacts			G Leads		
sights Fields	CRM Fields		Insights Fields	CRM Fields		Insights Fields	CRM Fields	
ompany Logo	Default Image	*	Contact Image	Entity Image	*	First Name	First Name	Ŧ
sideView ID		*	First Name	First Name	*	Last Name	Last Name	*
ompany Name	Account Name	*	Last Name	Last Name	*	Company Name	Company Name	Ŧ
wnership	Ownership	*	Title	Job Title	*	Title	Job Title	Ŧ
ortune Ranking		*	Email	Email	*	Email	Email	Ŧ
cker	Ticker Symbol	*	Phone	Business Phone	*	Industry		Ŧ
dustry		Ŧ	Fax	Fax	*	Sub-Industry		Ŧ
ub-Industry		Ŧ	URL	Website	*	Revenue	Annual Revenue	Ŧ
imary SIC Code	SIC Code	*	Street	Address 1: Street 1	*	Employees	No. of Employees	Ŧ
imary SIC Description		*	City	Address 1: City	*	Phone	Business Phone	Ŧ
imary NAICS Code		*	State	Address 1: State/Prov	*	Fax	Fax	Ŧ
imary NAICS Description		*	Zip Code	Address 1: ZIP/Postal	*	URL	Website	*
evenue	Annual Revenue	*	Country	Address 1: Country/R	*	Street	Street 1	*
nployees	Number of Employees	*	Lead Source		*	City	City	*
ione	Main Phone	*	Description	Description	•	State	State/Province	*
x	Fax	*	Company Name		*	Zip Code	ZIP/Postal Code	*
RL	Website	*	Contact Alias Name		*	Country	Country/Region	Ŧ
reet	Address 1: Street 1	Ŧ	Contact Compensation		• []	Parent Company Country		Ŧ
ity	Address 1: City	*	Contact Age		*	Ultimate Parent Country		¥
ate	Address 1: State/Prov	v	LinkedIn Profile		•	Lead Source		*
p Code	Address 1: ZIP/Postal	*	Facebook Profile		•	Description	Description	*
ountry	Address 1: Country/R	Ŧ	Twitter Profile		•	Contact Alias Name		¥
escription	Description	*				Contact Compensation		*
ccount Source		*				Contact Age		*
scal Year End		*				LinkedIn Profile		*
lost Recent Quarter		*				Facebook Profile		*
arent Company		*				Twitter Profile		*
ltimate Parent		*				Ownership		*
quifax ID		Ŧ				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		*

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.

			-						Working on solu	tion: Default Solution
Security Role: Insights	Jser								Proteing of the	Inter Contract Science
Details Core Records Marketing	Sales	Service Bus	ness Managemen	t Servio	e Management	Customization	Missing	Intities	Business Process Flows	Custom Entities
Relationship	0	0	0	0						
Sdk Message	0	0	0	0						
Sok Message Processing Step	0	0	0	0						
idk Message Processing Step Image	0	0	0	0						
Sdk Message Processing Step Secure Configuration	0	0	0	0						
Service Endpoint	0	0	0	0						
Solution	0	0	0	0	0	0				
System Application Metadata	0	0	0	0						
System Chart	0	0	0	0						
System Farm	0	0	0	0						
System Job	0	0	0	0	0	0	0	0		
Inerre	0	0	0	0	0	0				
Jaar Application Metadata	0	0	0	0						
liter	0	0	0	0						
Neb Resource	0	0	0	0						
Miscellaneous Privileges										
Activate Business Process Flows	0			Activate B	usiness Rules		0			
Activate Resi-time Processes	0			Configure	Yammer		0			
Execute Workflow Job	0			Export Car	domizations.		0			
Import Customizations	0			ISV Extens	lans		•			
Learning Path Authoring	0			Modify Cu	stomization cons	traints	0			
Publish Customizations	C			Retrieve N	luitiple Social Ins	ights	0			
- Key										
O None Selected	G Uper	- Busine	ss Unit		Parent Child Bu	ciners Units			Organization	1

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.

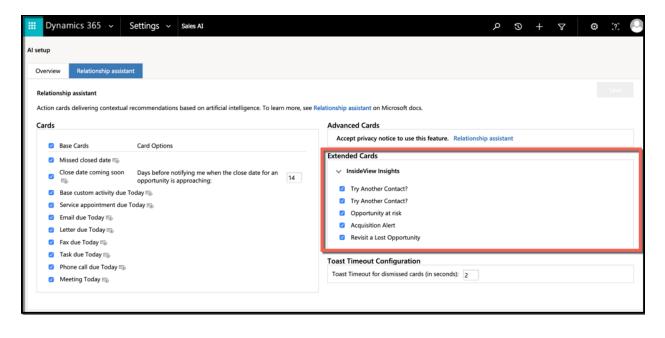
If this **Acquisition Alert** check box is not enabled, then users will not be able to view Relationship Agent cards. For more information, read the **Getting to the Insights Relationship Assistant Card** section in the *InsideView Insights User Guide*.

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

1. Go to Settings > Sales AI

🗰 Dynamics 365 🗸	Settings ~ Sales A	J			V + C V	o 🛛 🔍
Sales	Service	Marketing	Insights	Settings	Training	
Business	Customization	System		Process Center	Insights	Application
Business Manageme	Customizations	administration	Email Configuration	>>>> Processes	User Settings	My Apps
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows	Org Settings	
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules			>
🍾 Service Management	←■ Plug-In Trace Log	System Jobs	Dynamics 365 App f			
		Document Manage	Sales Al			
		Auditing		4		

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.

III Dynamics 365 ~ Settings ~ Sales AI	م	3 + 7 8	(?) 🕓
Al setup Overview Relationship assistant		Options Apps for Dynamics 365 See Welcome Screen	
Relationship assistant Action cards delivering contextual recommendations based on artificial intelligence. To learn more, see Re		About Opt Out of Learning Path	Save
Cards Base Cards Card Options	Advanced Cards Accept privacy notice to use this feature. Relationship assistant	Privacy & Cookies	ļ
Cards Image: Second s	Extended Cards InsideView Insights Try Another Contact? Try Another Contact? Opportunity at risk Acquisition Alert Revisit a Lost Opportunity Toast Timeout Configuration Toast Timeout for dismissed cards (in seconds): 2		

4. In the General tab, click the Manage personal relationship assistant settings link under the Configure Relationship assistant region.

Set Personal Options	2							
	7	×						
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.								
General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages								
Select the default mode in Advanced Find								
Advanced Find Mode OSimple Detailed								
Set the time zone you are in								
Time Zone (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi 💠								
Select a default currency								
Currency								
Support high contrast settings								
Select this option if you are using the High Contrast settings in your browser or operating system.								
Enable high contrast								
Set the default country/region code								
		_						
Enable country/region code prefixing Country/Region Code Prefix								
Configure Relationship assistant								
Manage personal relationship assistant settings								
View your user information.								
		_						
ок	Cancel							

5. In the Relationship Assistant tab, verify that the **Acquisition Alert** check box is enabled for **InsideView Insights** under the Extended Cards region.

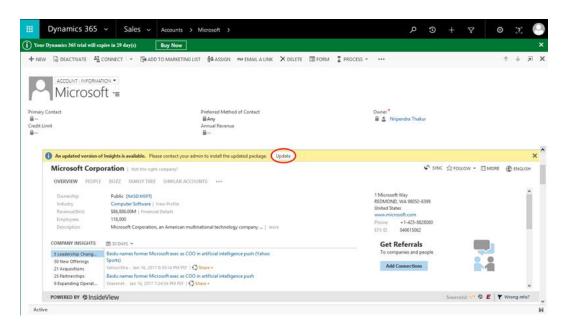
Service appointment due Today	Al setup Relatio	onship assistant		
 Fax due Today \$\overline{1}\$ Task due Today \$\overline{1}\$ Phone call due Today \$\overline{1}\$ Meeting Today \$\overline{1}\$\$ 	Relation	ionship assistant in cards delivering contextual r is Base Cards Missed closed date Close date coming soon Base custom activity due T Base custom activity due T Base custom activity due T Exervice appointment	Card Options Days before notifying me when the close date for an opportunity is approaching: oday 🖏	Extended Cards InsideView Insights InsideView Insights Try Another Contact? Try Another Contact? Opportunity at risk Acquisition Alert

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:

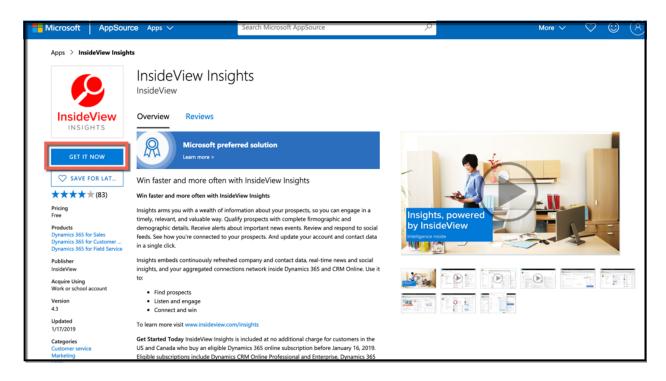
- 1. Sign in to <u>https://portal.office.com</u> with your Office 365 global administrator credentials.
- 2. Once the user logs in to the CRM, when you open an account, a contact, a lead an opportunity, or discovery center form the following alert with the **Update** link appears asking you to upgrade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

III Dynamic	s 365 v Sal	25 🗸 Accounts > Mi	crosoft >				Q	3	+ 7	۲	[?]	0
(i) Your Dynamics 365	trial will expire in 29 day(s	Buy Now										×
+ NEW 🔂 DEACTIV	ATE 🖧 CONNECT 🖓	ADD TO MARKETING LIST	និ្ននឹ ASSIGN 🐢 EMAIL រ	LINK X DELETE	E FORM	PROCESS -				ŕ	Ψ.	a x
	∙ rosoft =						Annual	Revenue	No. of Emplo		ner [*] Nripen	dra Th I
Phone			On Microsoft's wal					INSIGHTS				^
Fax			Today									
Website									ed version of insi- our admin to inst			
Parent Account								Update		in the upper	to peckey	p
Ticker Symbol								\sim	Microsoft Corr	oration		¥
Relationship Type									9.0/M			× .
Product Price List								security,	I® uses Microsoft compliance and s ion insight - Jani	alability for f		
								Stock So	t Corporation Dat aring viatimes.com - Jan			NSFT
								partnersh	expands Microsof		65	
									View I	fore		
								IN	SIGHTS	RESE	ARCH	
								FIND	CONTACTS	FAMIL	Y TREE	
								POWERE	o ar 🕸 InsideVie	w.	4	» v
Active												н

- 4. You can also go to the Microsoft's <u>AppSource Marketplace</u> 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.onmicrosof	t.com ×
Sign in	
Don't have an account? Sign	n up

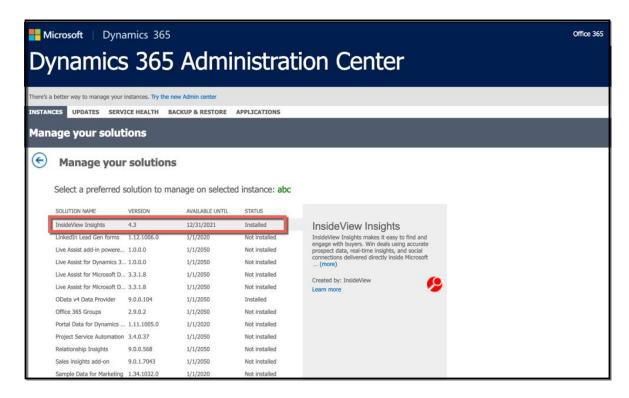
7. On the Insights page, enter the user details and click **Continue** to open the Terms of Use page.

			×
One more thing	g		
InsideView InsideView	nsights		
	rofile information. We have pulled e will save your information for ne		
Name *	Harry	Anhony	
Work email *	harry.anthony@insights.onmicr	osoft.com	
Job title			
Company	Insights		
Country / region	United States of America		
Phone number *	343-3434-133		
Microsoft can contact me terms of use and privacy p	on to use or share my account infor regarding this product and related p olicy and understand that the right crosoft is the provider. Use of App	products. I agree to the provider's s to use this product do not come	
You're signed in as `user	(user@2.onmicrosol	t.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**.

osoft Dynamics 365	Office
- Microsoft	
InsideView	Add the application to Dynamics 365 Scheet the Dynamics 366 organization you want to add this application to.
InsideView INSIGHTS InsideView Insights	Connect to Dynamics 365 Organization to add the application to: [abe (orgach@TdaS)]
Win faster and more often with Inside/View Insights Insights arms you with a wealth of information about your prospects, so you can engage in a timely, nelevant, and valuable way. Quality 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 prospect. And update your account and contact data in a single click. Insights embeds continuously referabed company and contact data, real-time news and social insights, and	Agree to Microsoft's Legal Terms and Privacy Statement Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365
insignis ennesis continuously retrestede company and contact data, tea-totte news and social insignis, and your aggregated connections network inside Dynamics 365 and CRM Online. Use it to: • Find networks Publisher: Inside/View	
	Agree Cancel
Publisher: InsideVicw	Agree Cancel

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



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.

	Dynamics 365 🗸	Settings ~	Busines	Management						Q	3	+	Y	۲	[?]	0
Sa	les	Service		Marketing	Ĩ	Insights	9	Settings	O	Training						
Fe	atures	Settings														
7	Discovery Center	Luser Settings	_													
E	List Build	Org Settings														
	-	About Insights	5													

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			Contacts			G Leads		
nsights Fields	CRM Fields		Insights Fields	CRM Fields		Insights Fields	CRM Fields	
ompany Logo	Default Image	*	Contact Image	Entity Image	*	First Name	First Name	Ŧ
nsideView ID		*	First Name	First Name	Ŧ	Last Name	Last Name	*
ompany Name	Account Name	¥	Last Name	Last Name	v	Company Name	Company Name	¥
wnership	Ownership	*	Title	Job Title	*	Title	Job Title	Ŧ
ortune Ranking		*	Email	Email	*	Email	Email	÷
icker	Ticker Symbol	*	Phone	Business Phone	*	Industry		*
idustry		*	Fax	Fax	*	Sub-Industry		*
ub-Industry		¥	URL	Website	v	Revenue	Annual Revenue	¥
rimary SIC Code	SIC Code	*	Street	Address 1: Street 1	*	Employees	No. of Employees	Ŧ
rimary SIC Description		*	City	Address 1: City	*	Phone	Business Phone	*
rimary NAICS Code		*	State	Address 1: State/Prov		Fax	Fax	¥
rimary NAICS Description		*	Zip Code	Address 1: ZIP/Postal	Ŧ	URL	Website	*
evenue	Annual Revenue	Ŧ	Country	Address 1: Country/R		Street	Street 1	Ŧ
mployees	Number of Employees	*	Lead Source		*	City	City	Ŧ
hone	Main Phone	*	Description	Description	*	State	State/Province	*
эх	Fax	*	Company Name		Ŧ	Zip Code	ZIP/Postal Code	¥
RL.	Website	*	Contact Alias Name		v	Country	Country/Region	*
treet	Address 1: Street 1	Ŧ	Contact Compensation		*	Parent Company Country		Ŧ
ity	Address 1: City	*	Contact Age		¥	Ultimate Parent Country		Ŧ
tate	Address 1: State/Prov	*	LinkedIn Profile		Ŧ	Lead Source		Ŧ
ip Code	Address 1: ZIP/Postal	*	Facebook Profile		Ŧ	Description	Description	Ŧ
ountry	Address 1: Country/R	*	Twitter Profile		Ŧ	Contact Alias Name		Ŧ
lescription	Description	*				Contact Compensation		Ŧ
ccount Source		*				Contact Age		Ŧ
iscal Year End		*				LinkedIn Profile		*
fost Recent Quarter		*				Facebook Profile		Ŧ
arent Company		*				Twitter Profile		*
Itimate Parent		*				Ownership		Ŧ
quifax ID		*				Ticker		Ŧ
						Primary SIC Code	SIC Code	Ŧ
						Primary SIC Description		*
						Primary NAICS Code		*
						Primary NAICS Description		Ŧ
						Fiscal Year End		Ŧ
						Most Recent Quarter		*
						Parent Company		*
						Ultimate Parent		*
						Equifax ID		*

4. 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.

5. 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.

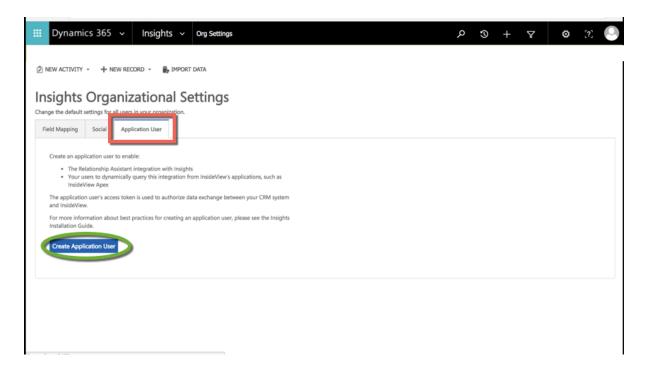
Note: Insights allows only Microsoft Dynamics System Administrator to create an application user and configured it.

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.

🗰 Dynamics 365 🗸	Settings v Business Management	P I T I I I I I I I I I I I I I I I I I
Sales	Service Arketing	Settings Training
Features Discovery Center Elist Build	Settings User Settings Org Settings Org About Insights	

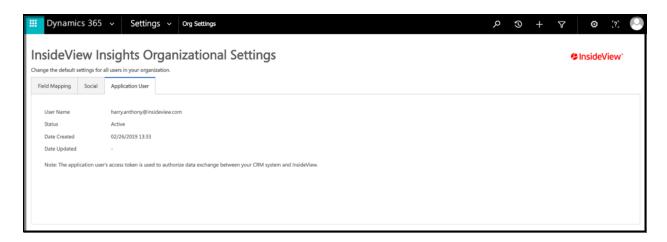
3. On the Insights Organizational Settings page, select the **Application User** tab and then click the **Create Application User** button.



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

First Name * Last Name *	ication User Enter application first Name Enter application last Name Enter email address	Save Cancel			

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



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

III Dynamics 365 v	Sales v Dashboard	s >			+ © ۹	V 0 (?)
Sales	Service	Harketing	Insights	Settings	Training	
Business	Customization	System		Process Center	Insights	Application
Business Management	+++ Customizations	So Administration	Email Configuration	Processes	User Settings	My Apps
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows	Org Settings	
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules			
Service Management	Plug-In Trace Log	System Jobs	Dynamics 365 App f			
		Document Manage	Sales AI			
		Auditing				

8. Click the **Users** link.

# U	ynamics 365 v Settings v Security		S 🛛 Y + 🕫 X
Securit	у		
Which 6	ature would any like to work with?		
8	Users Add new users. I Information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.	<u>.</u>	Teams Add new learns and new members to existing beams. Hodify the learn description and delete members from teams.
2	Security Roles Create new security roles. Manage and delete existing security roles for your organization.		Business Units Add new business units. Edit and deactivate existing business units. Change the parent business unit.
2	Field Security Profiles Manage user and team permissions to read, create, or write information in secured fields.	•	Hierarchy Security Configure hierarchy securits, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.
4	Positions Add new Position. Modify the Position description.	<u>.</u>	Access Team Templates Add new team templates. Modify the team template description.

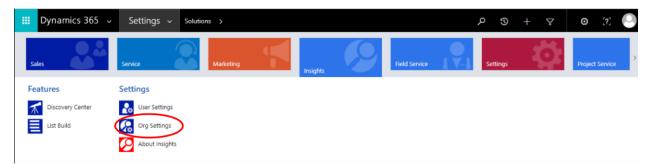
9. Check for the application username that you have saved earlier.

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.

Dynamics 365 Insights Org Setting	gs			Q	3	+	\mathbb{Y}	٢	[?]
Insights Organizational Settings Change the default settings for all users in your organization.	5								
We will never post anything on your behalf or store your data. Facebook									
Ø Twitter ⊗ Blog									
								Save	Cancel

- 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:

- 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.

Tobject Price Lists Insights Insights Insights Insights Common Insights Insights Insights Insights Insights Activities Insights Insights Insights Insights Insights Common Insights Insights Insights Insights Insights Controcts Insights Insights Insights Insights Insights Insights Controcts Insights Insi	3 Tabs Account - Summary	2 Tabs 1 Tab Solution: De		Web Resource FFANE Timeline Bing Navigation Social Transport Control	er Knowledge Base ACI Relationship Predictive Lead Predictive Opportunity Search Control Assistant Scoring Scoring
Project Service Annual Revenue Number of Employees Owner* Contact Insights Insights Insights Insights Activities * Summary Account Name* Account Name Insights Contacts # Account Name* Account Name Project Service Point Documents Point Paint Phone Point Point Project Service Point Point Point Point Project Service Point Point Point Point					
Common Insights Insights - Activities - Social Profiles - Connections - Connections - Connections - Phone - Parent Account - Actuals Website Website Website Opportunity Lines - Outre Lines - Information - Information - Project Service -	- Details	Annual Revenue			
Social Profiles ACCOUNT INFORMATION Social Profiles Contacts Account Name* Account Name Account Name Account Name* Account Name* Account Name Proce Documents Proce Proce Proce Actuals Proce Proce Proce Opportunity Unics Prent Account Prent Account Prent Account Contacts Unics Prent Account Prent Account Prent Account Contact Unics Prent Account Prent Account <th></th> <th></th> <th></th> <th></th> <th></th>					
Account Name* Account Name Recount Name Recount Name Account Name* Account Name Recount Name Recount Name Documents Proce Real Recount Name Recount Name Account Name Recount Name Recount Name Recount Name Recount Name Account Name Recount Profee Recount Profee Recount Profee Recount Profee Opportunity Lines Prent Account Parent Account Recount Profee Optotes Ticker Symbol Ticker Symbol Ticker Symbol Drofers Relationship Type Relationship Type Relationship Type Project Service Product Price List Product Nice List Product Nice List	Activities	⁴ Summary			
Quarters # Account Name* Account Name B Connections Phone Main Proce Phone Main Proce A Audit History Fex Fex A Audit History Fex Fex Opportunity Wobsite Wobsite Opportunity Preet Account Preet Account Quarters Taker Symbol Taker Symbol Taker Symbol Taker Symbol	Social Profiles	ACCOUNT INFORMATIO	DN	SOCIAL PANE	
Connections Phone Main Phone Documents Phone Main Phone Audit History Fax Res Audit History Fax Res Audit History Prent Account Website Vebsite Website Website Opportunity Lines Parent Account Parent Account Opportunity Lines Restoration Type Restoration Type Outes Toker Symbol Toker Symbol Orders Restoration Type Restoration Type Product Price List Product Price List Product Price List	🔝 Contacts	Account Name*	Account Name		
In Unclinents Proce A dudit History Fax A dudit History Fax A chalas Webaite Webaite Webaite Parent Account Parent Account Orders Toker Symbol Orders Relationship Type Poduct Lines Poduct Price List Product Price Poduct Price List Product Price Poduct Price List	Connections				
Audit History Pex Fax Actuals Vebalte Website Couctes Perent Account Parent Account Opportunity Lines Toker Symbol Toker Symbol Outes Toker Symbol Toker Symbol Otofers Relationship Type Relationship Type Project Service Podert Pice List Prodert Pice List	Documents				
Resource Preferences Website Vectorial Opportunity Lines Parent Account Parent Account Outoris Parent Account Totler Sumbol Outoris Relationship Type Relationship Type I of Devices Podext Price List Podext Price List Project Service Podext Price List Podext Price List	Audit History				
Rescure Preferences Parent Account Opportunity Lines Parent Account Optob Ticker Symbol Octors Relationship Type Int Devices Podect Price List Project Service Prodect Price List	\lambda Actuals				
Opportunity Unes Parent Account Outres Toker Symbol Outres Toker Symbol Orders Relationship Type Polot Devices Product Price List Project Service Product Price List	Resource Preferences				
Outle Lines Ticker Symbol Orders Relationship Type Relationship Type Relationship Type Entitlements Product Price List Project Service Product Price List	Deportunity Lines	1 1 1 F			
Options Relationship Type Relationship Type D Orders Relationship Type Relationship Type D Or Devices Product Price List Project Service Product Price List	Quotes	* Ferrar Contractor Contractor			
Orders Relationship Type Relationship Type D 10 Devices Product Price List Product Price List Project Service Product Price List Primary Contact	Quote Lines				
Project Service Product Price List Primary Contact	🚺 Orders	Relationship Type			l [
Project Service Primary Contact	😡 IoT Devices				
Project Service					
Leads Primary Contact					Primary Contact
ADDRESS	🚳 Leads				Primary Contact
	A Opportunities	Address 1			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:

ppages/summary_r	nashup.htm	Q
ppages/summary_r	nashup.htm	
ere supported.		

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	1
Modify this Web resource's properties.	
General Formatting Dependencies	
Layout	
Select the number of columns the control occupies:	
One column	
OTwo columns	
OThree columns	
Four columns	
Row Layout	
Select the number of rows the control occupies.	
Number of Rows 20	
Scrolling	
Select the scrolling type for the IFRAME.	
Scrolling As Necessary	×
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.

										ALL N	/licrosoft Dyn	amics CRM	N			
FILE	HOME INSER	π										_				
Section	Three Three Columns Columns	Two	Two s Columns	Two Columns	One Column	Sub-Grid	Spacer	Quick View Form	 Web Resource IFRAME Notes 	Bing Maps	Navigation Link	Social Insights	Ö Timer	Knowledge Ba Search	e	
	3 Tabs		2 Tabs		1 Tab					Control		1				
	ry_Test 4.0 nmary				n: Default Accou											
L Det																
4 Cor	nmon Insights															
£	Activities															
<u>s</u>	Contacts															
	Social Profiles															
	Documents															
[]	Connections	1	Tab													
N	Documents		Section	1												
	Audit History															
	Entitlements															
⊿ Sale																

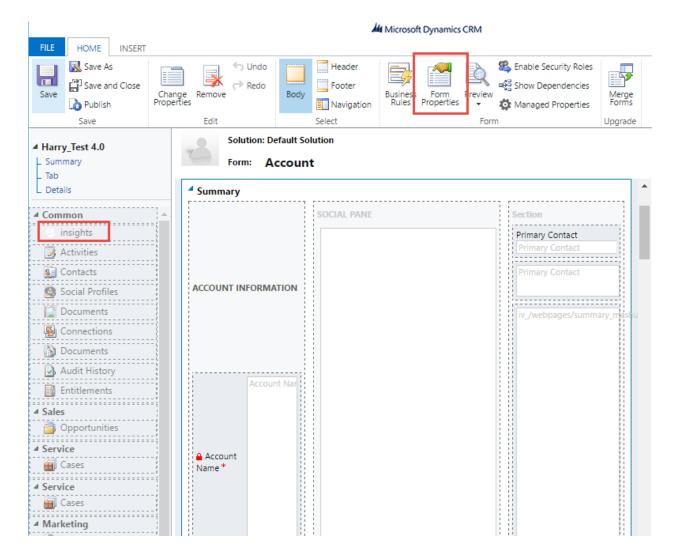
Note: If the Insights link does not exist under the Common tile, create a new **Navigation Link**.

- 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.

Navigo Modify this li		ink Properties	?	×
Label — Name * Icon	Insights	ages/insights_32px.png		
	esource	Resource or external URL	Q	
		ОК	Cancel	

- p

- 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.

	*		
iv_onl	.oadAction		
ame'	iv_or	LoadAction	
/pe *	Safe	String	•

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.

OK

Cancel

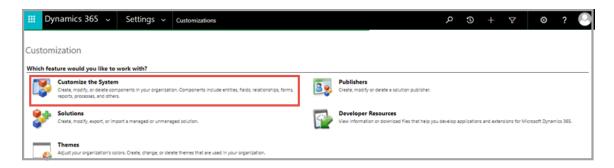
×

Here's how:

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

III Dynamics 365 🗸	Sales ~ Accounts	>				© ? 🍳
Sales	Service	Marketing	Insights	Field Service	Settings	> Project Service
Business	Customization	System		Process Center	Insights	Application
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% Service Management	Plug-In Trace Log	System Jobs	Dynamics 365 App for			
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2. In the Customization page, click the **Customize the System** link.



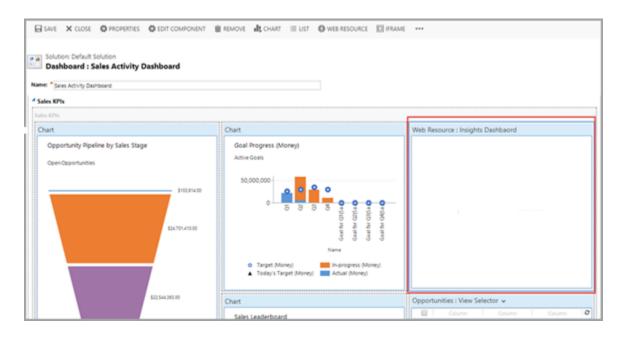
3. In the Solution Editor dialog, double-click the Dashboard link.

Solution: Default Solution 2 Information									
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Contract Templates Email Templates	80 80 80 80	Knowledge Manager	Knowler	dge Manager	Interactive	e Dashboard	Managed	True	Shows a
Mail Merge Templates		Marketing Dashboard	Marketi	ng Dashboard	Dashboar	d	Managed	True	Shows ti
Security Roles Field Security Profiles	88	Marketing Social Dashboard	Marketi	ng Social Dashboard	Dashboan	d	Managed	True	Shows th
. IP Routing Rule Sets ◎ Record Creation and Upda		Microsoft Dynamics 365 Ove	rview Microso	ft Dynamics 365 O	Dashboan	d	Managed	True	Shows a
SLAs		Microsoft Dynamics CRM So	tial Over Microso	ft Dynamics CRM	Dashboar	d	Managed	True	Shows a
🚍 Apps 🚵 Mobile Offline Profiles	0 0 0 0	My Knowledge Dashboard	My Kno	wledge Dashboard	Interactive	e Dashboard	Managed	True	Shows a 👻
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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.

Information		onent Type Dashboard	•	Then Contoint too		1.0000000000000000000000000000000000000	
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Mobile Offline Profiles	-	Para Andress A	P=1== P=d===== P=== /=	A		*	

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.

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- 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**.

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Web Resources	RF.	Practice Management Dashboard	Practice Management Das	Dashboard	Managed	True	
 Plug-in Assemblies 							
Sdk Message Processing S		Resource Manager Dashboard	Resource Manager Dashbo	Dashboard	Managed	True	
Service Endpoints	< 11	Sales Activity Dashboard	Sales Activity Dashboard	Dashboard	Managed	True	Shows
Dashboards Reports	25	Sales Activity Social Dashboard	Sales Activity Social Dashb	Dashboard	Managed	True	Shows
Connection Roles	1	Sales Dashboard	Sales Dashboard	Dashboard		T	Change
Article Templates	-	Sales Dashboard	Sales Dashboard	Dashboard	Managed	True	Shows
Contract Templates	25	Sales Management	Sales Management	Dashboard	Managed	True	
Email Templates	37	Sales Management Social	Sales Management Social	Dashboard	Managed	True	
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Apps	35	Server-Side Synchronization Monitori	Server-Side Synchronizatio	Dashboard	Managed	True	Shows

9. 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 <u>Online Help</u> 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**.

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Sdk Message Processing S		sdkmessage_autotran	Option Set	Managed	False	Information about whether the SDK message is	
Dashboards		organization_featuree	Option Set	Managed	False	Information that specifies whether a feature is e	
Reports	A Yes or No boolean	field_security_permiss	Option Set	Managed	False	A Yes or No boolean.	
Article Templates Contract Templates	Account	account	Entity	Managed	True	Business that represents a customer or potential	
Email Templates Mail Merge Templates	Account Distribution	Account Distribution	Report (Reporting Ser	Managed	True	Identify patterns in top revenue-generating acco	
Security Roles Field Security Profiles	Account Distribution Detail	Account Distribution D	Report (Reporting Ser	Managed	True	Sub-report required by the Account Distribution	
P Routing Rule Sets ↓ Record Creation and Upda	S Account Manager	Account Manager	Connection Role	Managed	True		
Model-driven Apps	Account Manager	Account Manager	Security Role	Managed	True		
Virtual Entity Data Providers	Account Overview	Account Overview	Report (Reporting Ser	Managed	True	View a one-page overview of an account.	
C Virtual Entity Data Sources	Account Overview Sub-Report	Account Overview Su	Report (Reporting Ser	Managed	True	Sub-report required by the Account Overview re	
	Account Project Price List	msdyn_accountpricelist	Entity	Managed	True	Sales price list for this customer to capture speci	

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.

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mation		Model-driven App			•		
ponents Entities Option Sets	New	X Delete add Show Dependence Display Name ↑	Name	Туре	State	Customizable Description	
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Processes Plug-in Assemblies		Customer Service	customerservice	Model-driven App	Managed	Empower agents to manage cases and allow ser	
Sdk Message Processing S Service Endpoints		Customer Service Hub	Customerservicehub	Model-driven App	Managed	A focused, interactive experience for managing	
Dashboards Dialog Boxes		Dynamics 365 App for Outlook	AppforOutlookModule	Model-driven App	Managed	Provides access to Dynamics 365 App for Outloo	
Reports Connection Roles		Field Service	msdyn_FieldService	Model-driven App	Managed	Field Service allows organizations to deliver intel	
Article Templates Contract Templates		Project Resource Hub	msdyn_TimeExpense	Model-driven App	Managed	Project Resource Hub Module	
Email Templates Mail Merge Templates		Project Service	msdyn_ProjectService	Model-driven App	Managed	Project Service Automation Application.	
Security Roles Field Security Profiles		Sales	sales	Model-driven App	Managed	Automate sales processes and monitor performa	
Routing Rule Sets Record Creation and Upda		Sales Hub	msdynce_saleshub	Model-driven App	Managed	Modernize the sales experience with this mobile	
SLAs Model-driven Apps		Universal Resource Scheduling	msdyn_ResourceSche	Model-driven App	Managed	Provides access to the Universal Resource Sche	

4. 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.

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	Designer Is Hub *								🗟 Sa		ast Saved on :27-01-2019 18:59 Published
+ Ade								s	O jearch Canvas		
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										Dashboard Provide an	insightful and grap >
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5. In the Sitemap Designer, click Add and select Area.

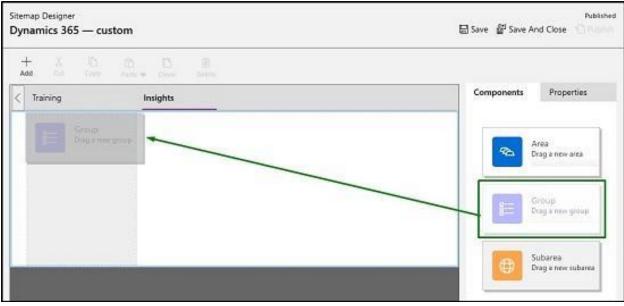
	PowerApps								
	Designer > Sitemap Desig S Hub	ner							Published Save 👹 Save And Close 🕤 Publish
H Ad	- X D D Cut Copy Par	te 🕶 Clone Delete							
	Sales	App Settings	Training				Con	nponents	Properties
	My Work	Customers	Sales	Collateral	Performance	Service			Area
	Dashboards	Accounts	Leads	Quotes	Goals	Cases		6	Drag a new area
	Activities	Contacts	Opportunities	Orders			14		
			Competitors	Invoices			>	8==	Group Drag a new group
				Products					
				Sales Literature					Subarea Drag a new subarea

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 Insight	s navigation link 🛛 🗸
ID *	
InsightsMain	
Show Groups	
> Advanced	

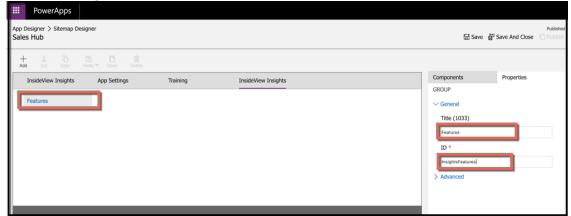
6. Select the **InsideView Insights** area and drag and drop two **groups** from the **Components** panel, into the area.



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*.

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App Designer > Sitemap Designer Sales Hub			🗟 Save	ave And Close	Published
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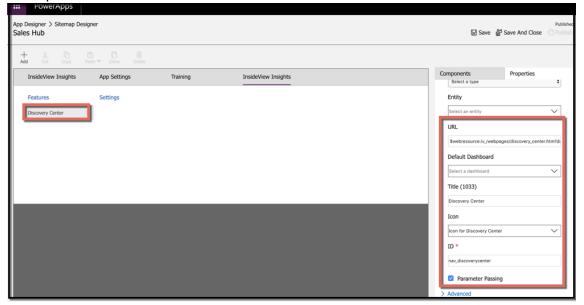
 Select the group to which you want to add a subarea and click Add > Subarea. Add two subareas to the Features group and three subareas to the Settings group.

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.

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List Build				URL Swebresource:iv./web Default Dashboard Select a dashboard Title (1033) List Build Los Los for List Build Io * nev_listbuild Parameter Pass Atheneol		sta=solu

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.

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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.

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Discovery	y Center	User Settings			Select an entity	\sim
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					Title (1033)	
	_				Org Settings	
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					ID *	
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					Parameter Passing	9
					> Advanced	

- 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.

+ X D DA	Cone Delete				Components Properties
Sales	Service	Marketing	Insights	Training >	Parameter Passing
Features Discovery Center List Build	Settings User Settings Org Settings About Insights				 ✓ Advanced ✓ Privileges Entity Select an entity ✓ For entity : Solution All ✓ Create Ø Read Ø Write Ø Delete App App Share Assign Miscellaneous Select a privilege ✓ +

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

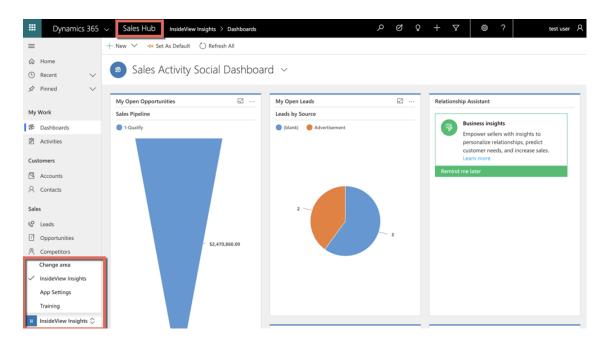
- **URL**: *\$webresource:iv_/webpages/about_insights.htm.*
- Title: About Insights.
- **Icon**: Icon for About InsideView Insights.
- **ID**: *nav_insightsabout*.
- Select the **Parameter Passing** check box.
- Expand Advanced > SKUs and select all check boxes.
- Expand Advanced > Client and select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

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InsideView Insights	App Settings	Training	InsideView Insights	Components Properties
Features Discovery Center List Build	Settings User Settings Org Settings About Inside View Insl			Entity Select an entity URL iv_/webpages/about_insights.htm?data=solutionVersic Default Dashboard Select a dashboard Title (1033) About insideView insights
				Icon WebResources,ñv_/images/about_insights_red_3 V ID * nav_insightsabout Parameter Passing Advanced

8. Click Save.

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InsideView Insights	App Settings	Training	InsideView Insights	Components	Properties
Features	Settings				
Discovery Center	User Settings			Area Drag a	new area
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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 <u>technical support</u>. InsideView's support team will contact you to address your problem.

Navigating to InsideView Insights Features Using the UCI App Sitemap

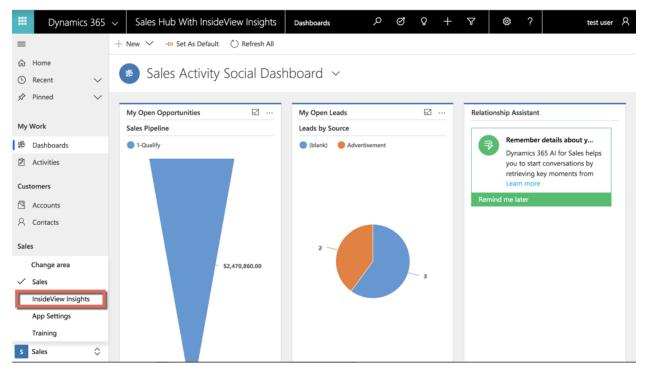
You can navigate to InsideView Insights features in any UCI app using the sitemap that is configured with all InsideView Insights features.

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**.

III Dynamics 365 🗸	Sales v Dashboards >	Q	9	+	\mathbb{Y}	۵	🖸
🗐 My apps	FAULT Ø REFRESH ALL						
🚹 Home							
Dynamics 365 — custom	Pashboard ~						
Customer Service Hub							
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Sales Hub With InsideVie							
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	Heidi Tucker Svetlana Day created Heidi Tucker On Heidi Tucker wall 2/13/2019 12:27 AM						
	Damien Swendsen Contact: Created By Svettana Day. On Damien Swendsen's wall 2/13/2019 12:25 AM						
→ Get more apps	Loree Farrar Contact: Created by Svetlana Day. On Loree Farrar's wall 2/12/2019 5:12 AM						

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



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

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Ŀ	Recent	\sim		Search for companies of	or people	_	Q			watch	111313			
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Fea	tures		Companie	es and people you recently view	wed					This \	Veek: 0 A	Articles No news avai	able	
Ж	Discovery Center													
Ξ	List Build		-								m and recei	and contacts i ive relevant n	ews alerts he	
Set	tings										di	rectly to your	inbox.	
. .	User Settings			No recently viewed companies or	r people are available at this tim	ne.						+ NEW		
٩	Org Settings											Add to watch	est	
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"	InsideView Insights	\$												

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.**

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	My apps	>
Â	Home	
♪	Dynamics 365 — custom	
අප්	Connected Field Service	
இ	Customer Service	••••
Ф	Customer Service Hub	
4 7	Field Service	
₽	Project Resource Hub	
망ං	Project Service	
Ŀ	Sales	
Ŀ	Sales Hub	
Q	Sales Hub With InsideVie	
RR	Universal Resource Sched	

• Select the InsideView Insights item in the sitemap as illustrated below:

	Dynamics 365	✓ Sales Hub Ins	sideView Insights > Dashboards		Q	Q	Ô	+	∇	۲	?	test use	r R
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影	Dashboards	 1-Qualify 		(blank) Advertisement					Business insights				
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Sal	25			2									
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	Opportunities		- \$2,470,860.00			3							
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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.*

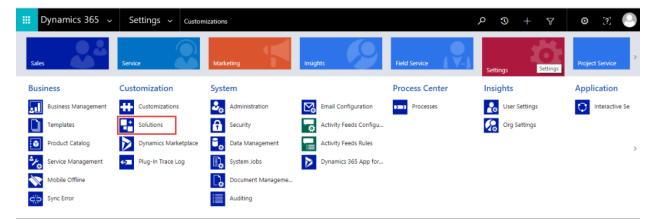
Chapter 8: Troubleshooting

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.

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1	Name	Display Name	Version Inst	alled On ↓	Package T	Publisher	I	Description				
1	InsideView	InsideView Insights	4.3	2/25/2019	Managed	InsideView, Inc.		InsideView Insights makes it eas	sy to find and en			
	ProjectServiceDemoD	Fabrikam Manufacturi	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 b	box Microsoft Dy			
	msdyn_FieldServiceGe	Geofencing for Field S	1.0.0.225	1/26/2019	Managed	Microsoft Dynamics 365		Configures Field Service for geol	fencing, generati			
	msdyn_Geofencing	Geofence Management	1.0.0.225	1/26/2019	Managed	Microsoft Dynamics 365		Define Geofences and the record	ds that should b			
	ConnectedFieldService	Connected Field Servi	1.0.18338.3	1/26/2019	Managed	Microsoft Dynamics 365		Use Connected Field Service to r	monitor connect			
	IoTConnector	IoT Connector for Mic	1.0.18338.3	1/26/2019	Managed	Microsoft Dynamics 365		Enables IoT scenarios in Dynam	nics 365.			
	FieldService	Field Service	8.3.0.225	1/26/2019	Managed	Microsoft Dynamics 365		Microsoft Dynamics 365 for Field	d Service allows			
	msdynce_3DViewer	3D Viewer	1.0.0.0	1/26/2019	Managed	Microsoft Dynamics 365		3D Viewer provides the ability to	o view 3D model			
	ProjectService	Project Service Autom	3.3.0.258	1/26/2019	Managed	Microsoft Dynamics 365		Microsoft Dynamics 365 for Proj	ject Service Auto			
	MicrosoftDynamicsSch	Universal Resource Sc.	3.3.0.307	1/26/2019	Manaoed	Microsoft Dynamics 365		The Universal Resource Scheduli	ling solution pro			

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



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

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More Actions +												
Name	Display Name	Version	Installed On \downarrow	Package Type	Publisher	Description						
VersiumPredict	Versium Predict	4.0.0.0	2/23/2017	Managed	Versium 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	s 365 for Project Service A	Automatio	-			
ProjectServiceAppModule	Project Service Automation	1.0	1/14/2017	Managed	Dynamics 365	Project Service Automa	ation App Module					
ProjectService	Project Service Automation	1.1.0.62	1/14/2017	Managed	Dynamics 365	Microsoft Dynamics 36	55 for Project Service Auto	mation is				
MicrosoftDynamicsSchedul	Unified Resource Scheduling	1.0.2.152	1/14/2017	Managed	Dynamics 365	Unified scheduling solu	ution provides the infrast	ucture to	-			
msdyn_CustomerServiceApp	Dynamics 365 Customer Se	1.0.0.1	1/14/2017	Managed	Dynamics 365	Empower agents to ma	anage cases and allow set	vice mana	-			
msdyn_SalesApp	Dynamics 365 Sales Applic	1.0.0.1	1/14/2017	Managed	Dynamics 365	Automate sales proces	ses and monitor perform	ance with	-			

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