POWER OBJECTS

IMPORT GUIDE

PowerOneView

CRM 2013/2015

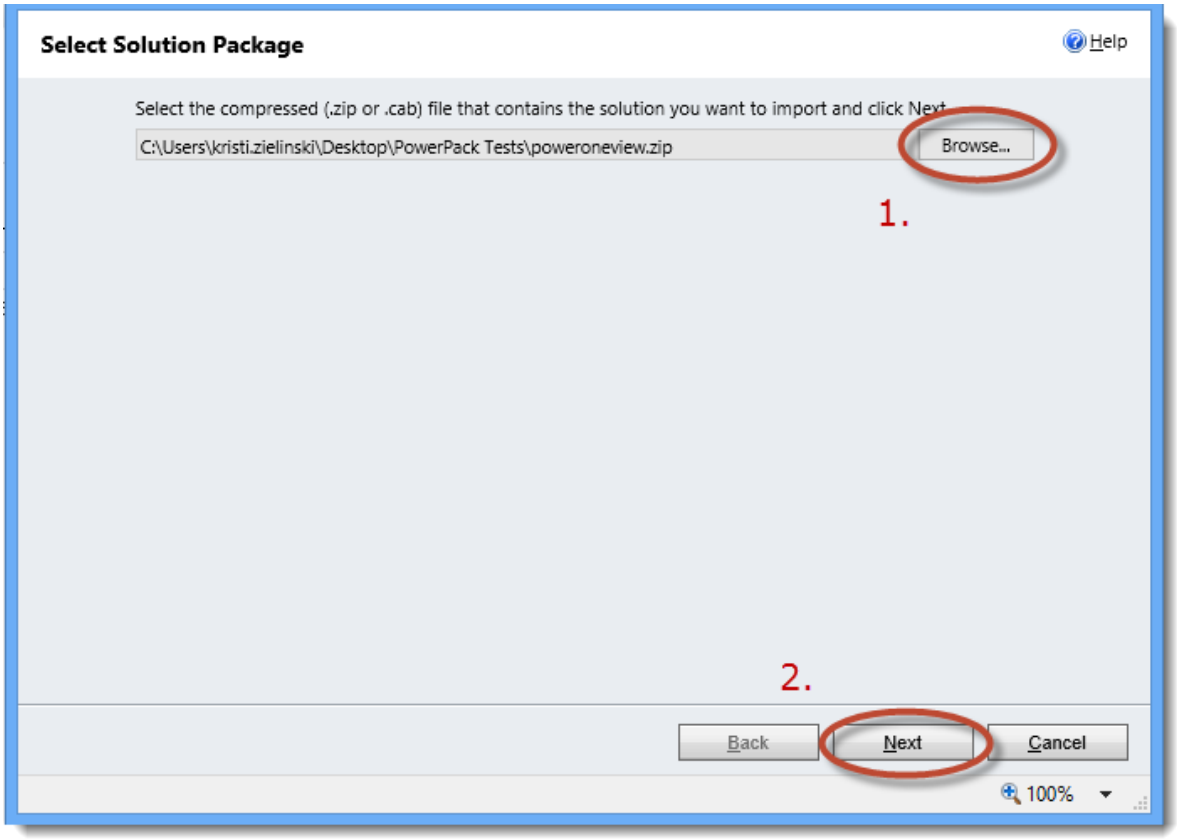
Service Support Education Add-ons

Contents

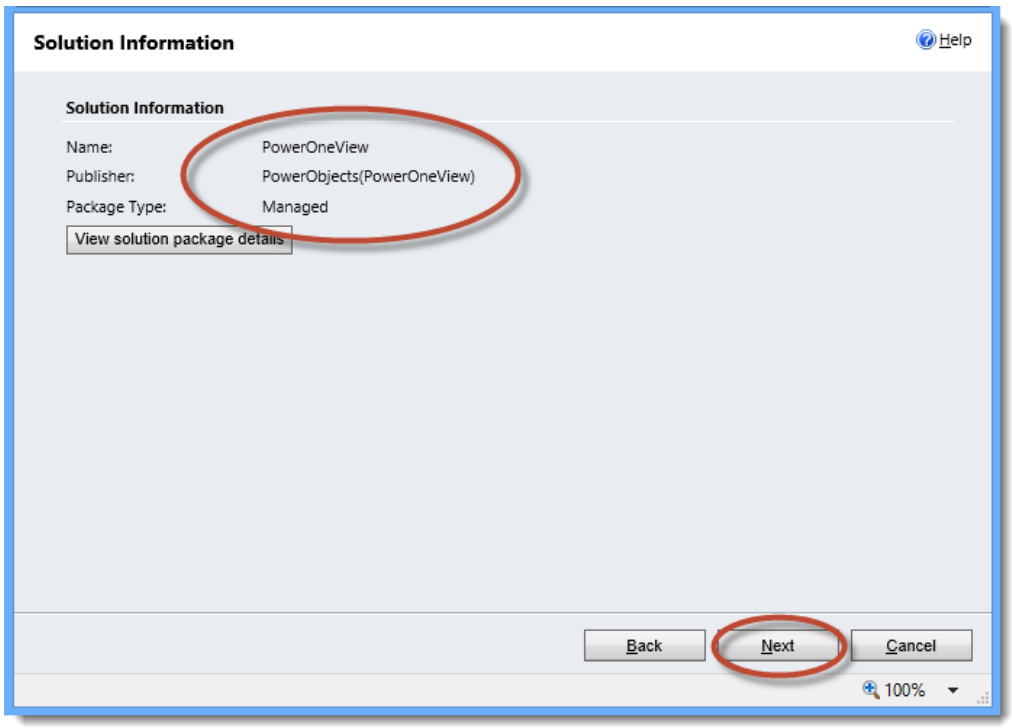
Import

The first step to installing any managed solution in Microsoft Dynamic CRM is to locate the file you want to install, download it and place it on your computer. In this instance, you would go to the PowerOneView webpage, click on Download Solution and save the file in a convenient place on your computer.

After you're done with that, log in to your Microsoft Dynamics CRM 2013 as a System Administrator or System Customizer – you must have administrative privileges. Navigate to Settings > Solutions and click on Import. The next window that opens will let you browse for the solution you are importing – navigate to the file, select it and click Next.

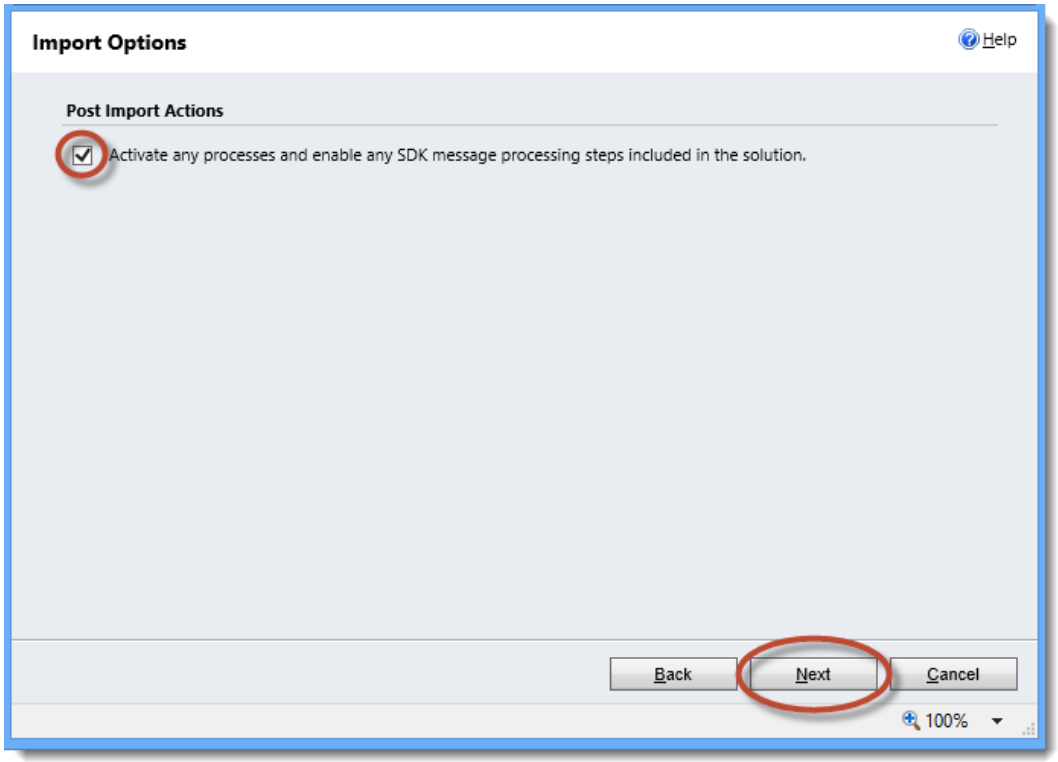


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerOneView from PowerObjects.

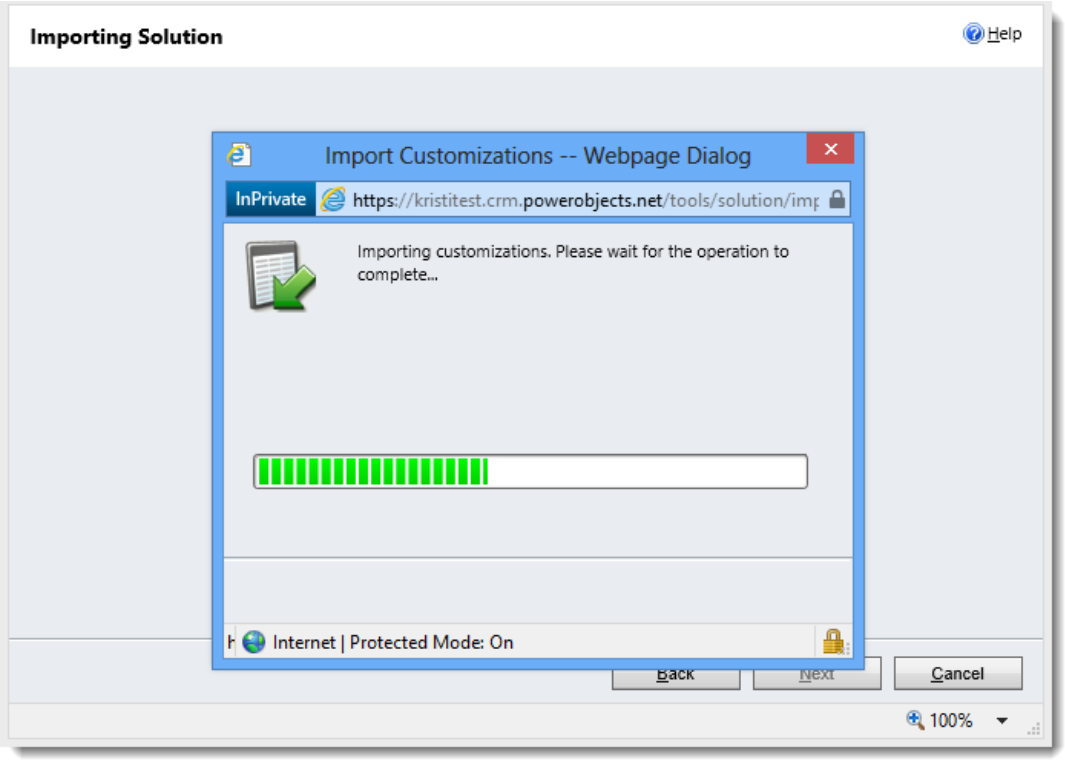


Click Next, and make sure to check the "Activate all processes…" checkbox, and click Next

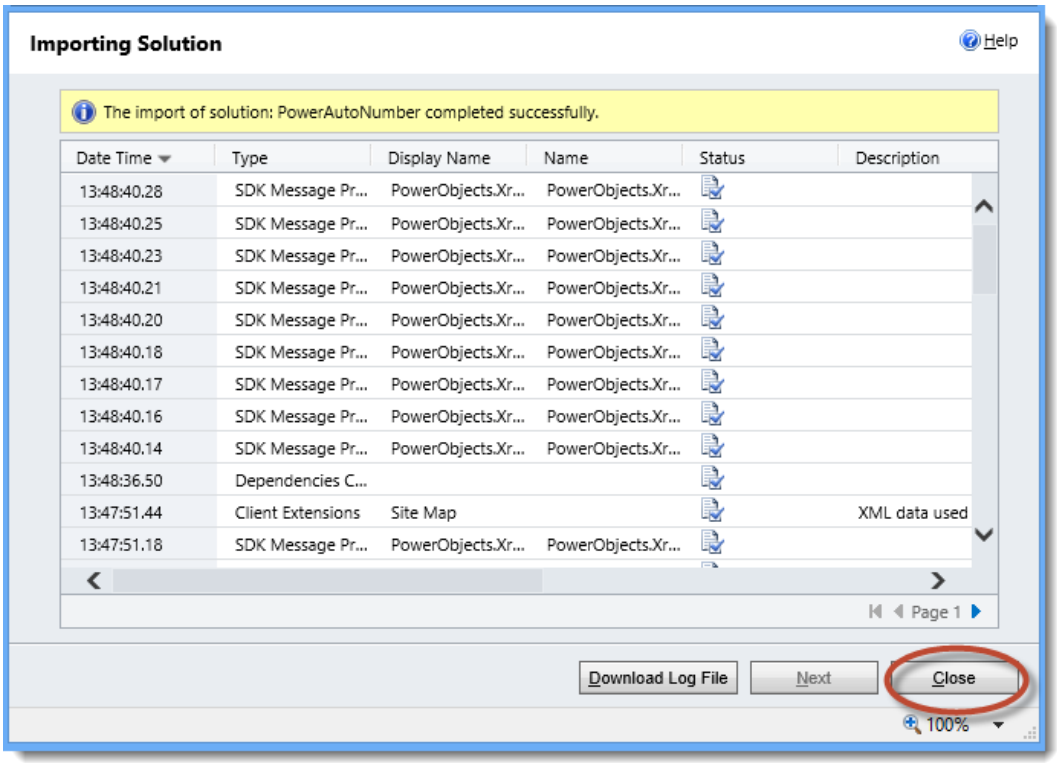
<u>IMPORTANT:</u> *If you do not check this box, the add-on* **WILL NOT FUNCTION CORRECTLY!**



A green progress indicator will display while the solution imports.

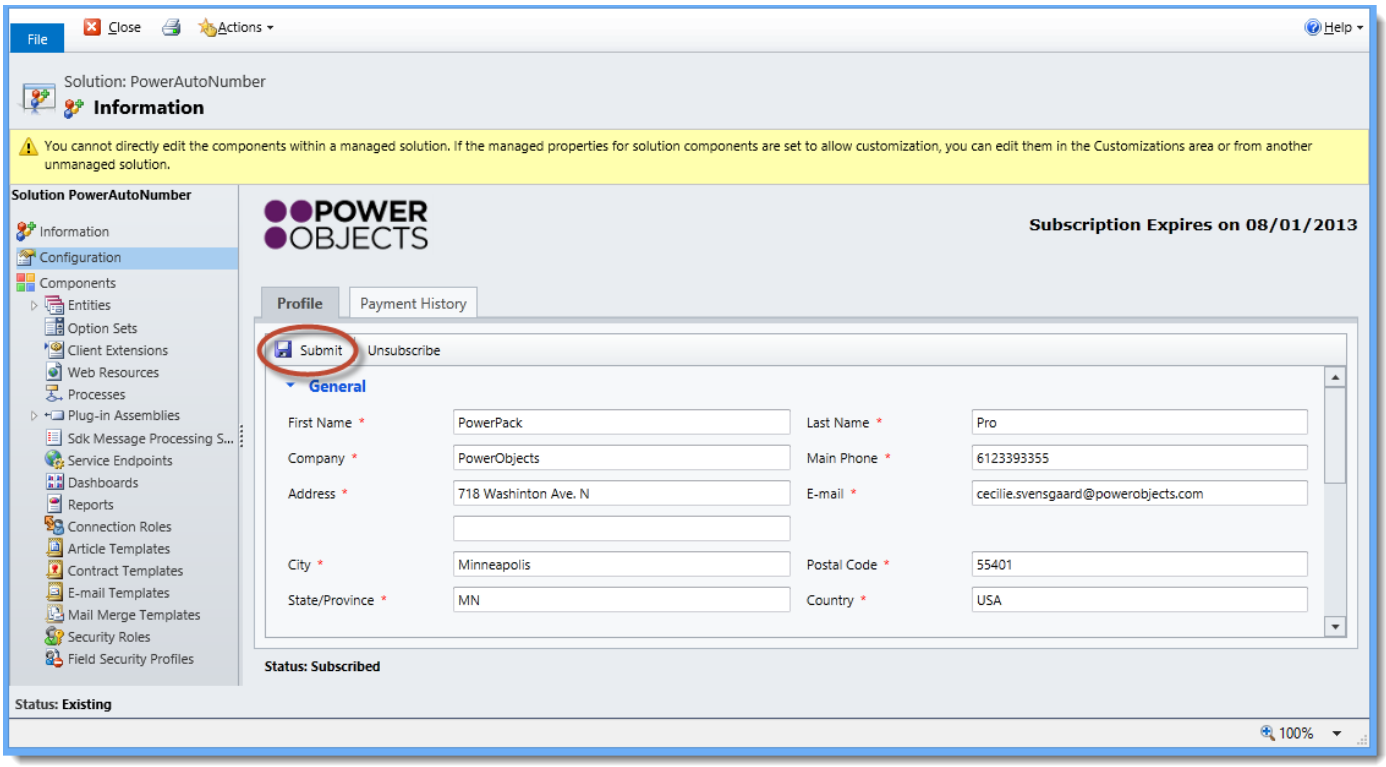


Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



Registration

In the Solutions Window, double click on PowerOneView. Fill in your information and click Submit. Be patient while the information is submitted.



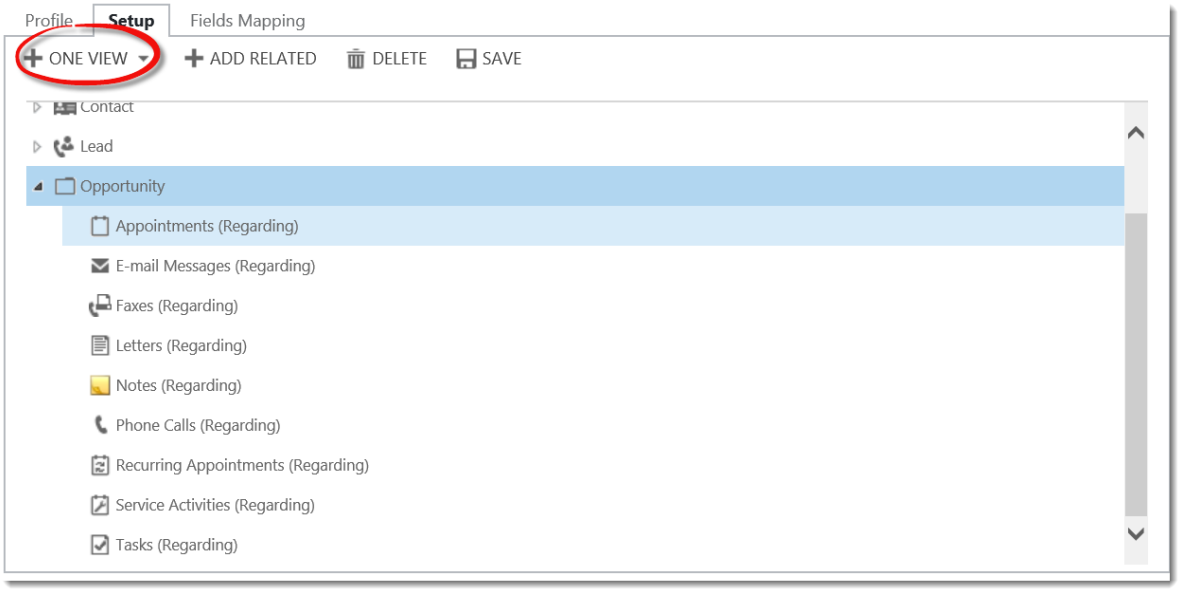
Configuring PowerOneView

Set-up Tab

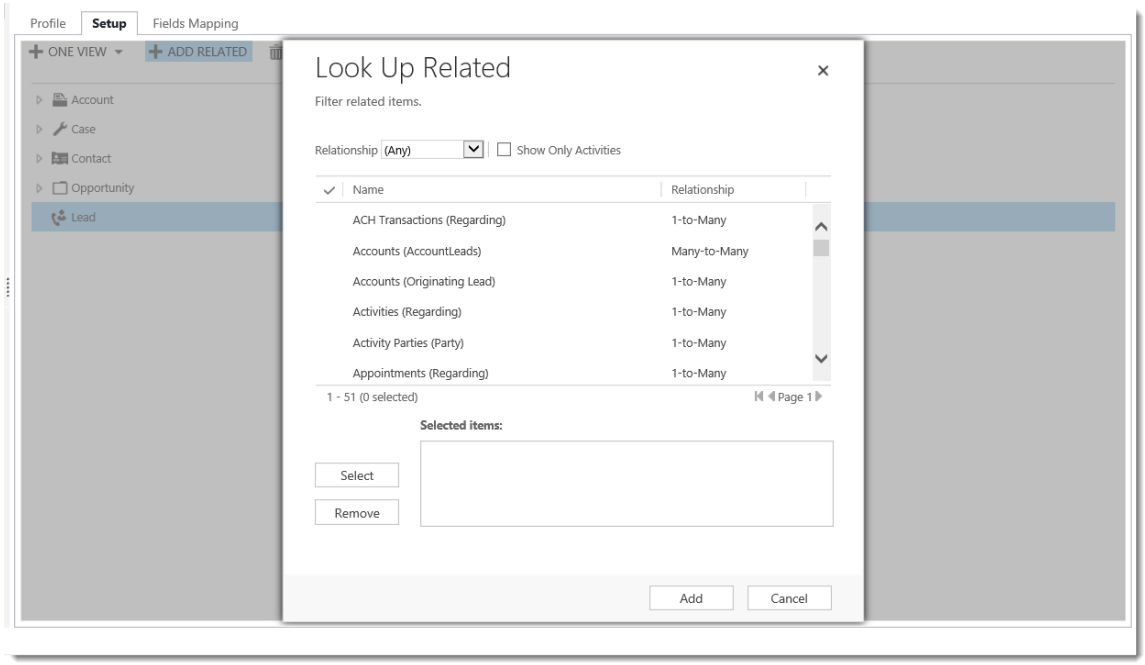
Configuring PowerOneView will allow you to choose exactly what is shown for each individual entity when searched with PowerOneView. To add PowerOneView to your entities, please reference the instructions located in the PowerOneView User Guide.

Navigate to the setup tab, the default configuration that comes with PowerOneView will be displayed. Anything in this default configuration can be edited to reflect what you'd like to see within PowerOneView for each particular entity. The setup of PowerOneView is like a tree structure. The entities aligned to the very left side of this view are the highest level entities. Below the highest level entities, you may see a list of sub-entities, indented slightly. These are the entities that will be rolled up in the highest level entity's PowerOneView window.

To add an additional high-level CRM entity to include PowerOneView on, click "+ One View."



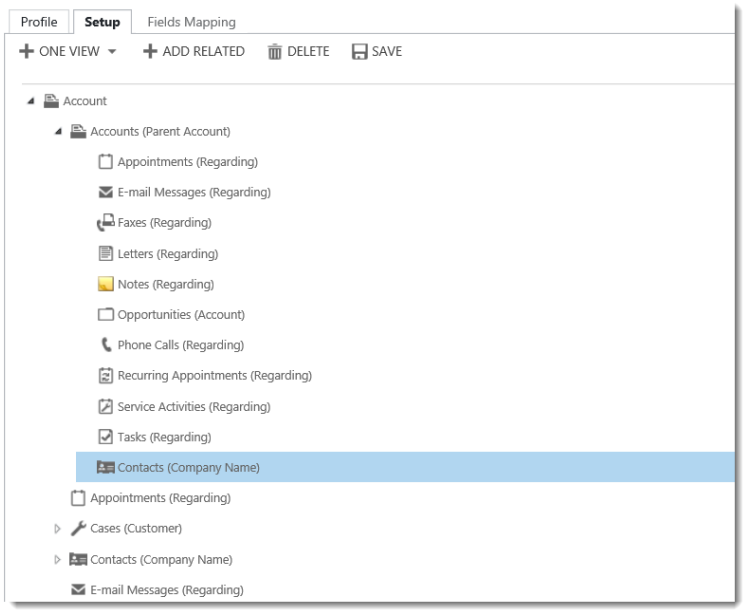
Then select the entity you would like to add, the window will close, and you'll see the entity at the bottom of the list. After the entity has been added, select the "+ Add Related" button and choose which related records you'd like to rollup under the entity. You can narrow down the related records by Relationship through the dropdown or if you'd only like to see related activities, select the checkbox next to "Show Only Activities".



Activities that you have specified in the highest level PowerOneView from all related entities will automatically roll up to the PowerOneView on the highest level entity.

Hint: *It may be helpful to have the configuration screen open at the same time as the entity you are trying to configure. After you change something in the configuration, save, and refresh the PowerOneView of the entity you're configuring to view the changes you just made.*

With PowerOneView, you can choose to go as far down the hierarchy as you want. For example, if you wanted to show contacts related to a sub-account that is related to a high-level account, then on the high-level account's PowerOneView, you could add an additional rollup entity by clicking "+ Add Related" at the top of the PowerOneView configuration.

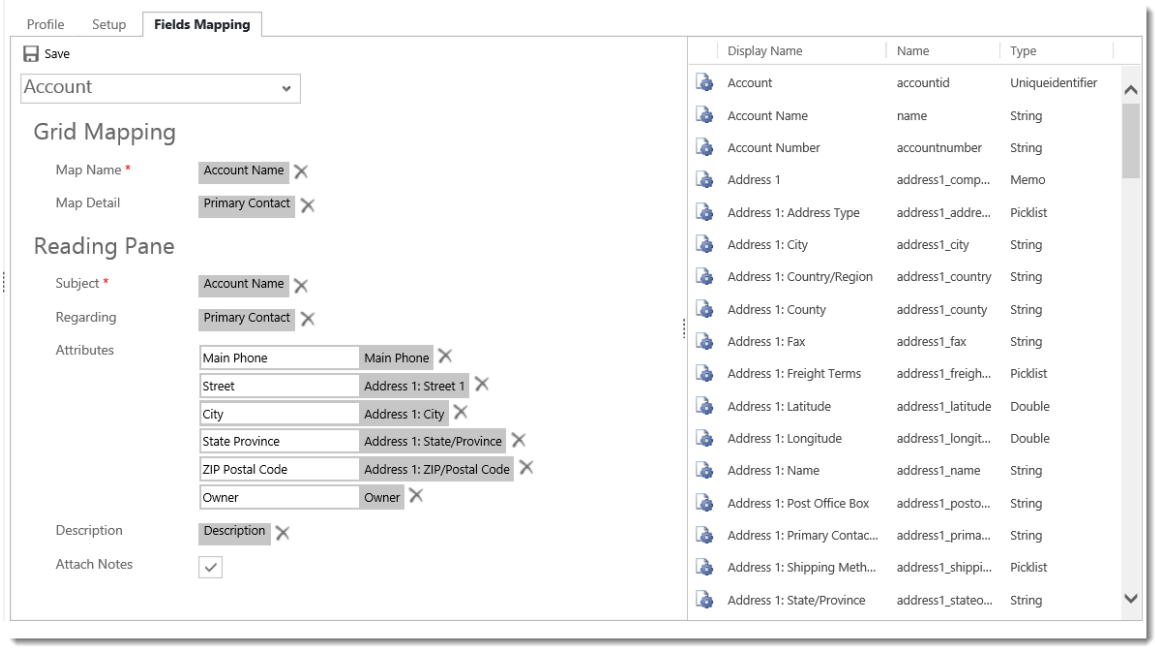


Note: *Do not add activities as a high-level entity in the PowerOneView configuration, this will cause an error in PowerOneView. Configure which activities are rolled up in PowerOneView by clicking "+ Add Related" while the highest-level entity is selected.*

Field Mapping Tab

Under the Field Mapping tab, you'll configure the Name and Detail columns as well as the reading pane by dragging and dropping the record's fields. To choose what is shown in the "Name" and "Detail", drag the record field's you desire into the Map Name and Map Detail fields.

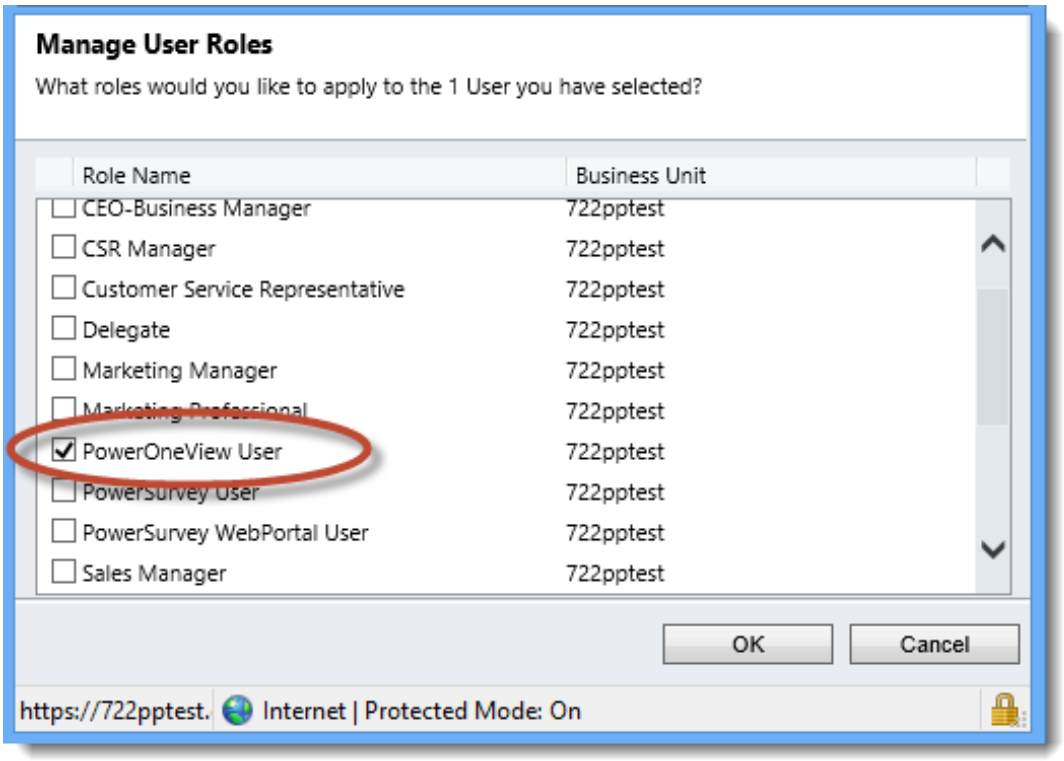
The next step is to configure the reading pane. There is a default configuration in place, but the reading pane is fully customizable and allows you to easily adjust the information shown to meet your organization's preferences. To update the default view select an entity from the dropdown at the top of the page, then select a field you would like to displayed from the list on the left, and drag and drop that field onto the reading pane, located on the right side. You can removed any of the fields from the mappings or reading pane by selecting the "X" next to it.



Once you've finished, select Save.

Security Roles

Every user who would like to have access to PowerOneView will need the PowerOneView User security role assigned to them. System Administrators will automatically see PowerOneView on the entities, without having the security role assigned.



Note: *Users will only see records that they have read access to, in the PowerOneView area. For example, if the administrator has set PowerOneView up to show Appointments, and the user does not have read privileges to the Appointment entity, they will not see Appointments in PowerOneView.*

Uninstalling PowerOneView

To uninstall, first delete PowerOneView from the left navigation of any entities that you manually added it to. Then uninstall as usual, by deleting the solution. Deleting the solution will remove PowerOneView on all out-of-the-box entities that it was added to.

Thanks for your interest in PowerOneView. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged $1/CRM user/month.

Interested in more CRM tips and tricks? Check out our blog or subscribe to our newsletter.