powerxrm

Microsoft Dynamics® CRM 2013/2015/2016

XRM.WebForm Add-On

Installation and Configuration Guide

Table of Contents

XRM Community Registration 3
Registration and Solution Download 4
Import and Solution Installation 7
XRM.WebForm Configuration 11
Uninstall the Solution 14
Security Roles 15
WebForm Editor 15
WebForm User 17
WebForm Service User 19
Solution Package Information 21

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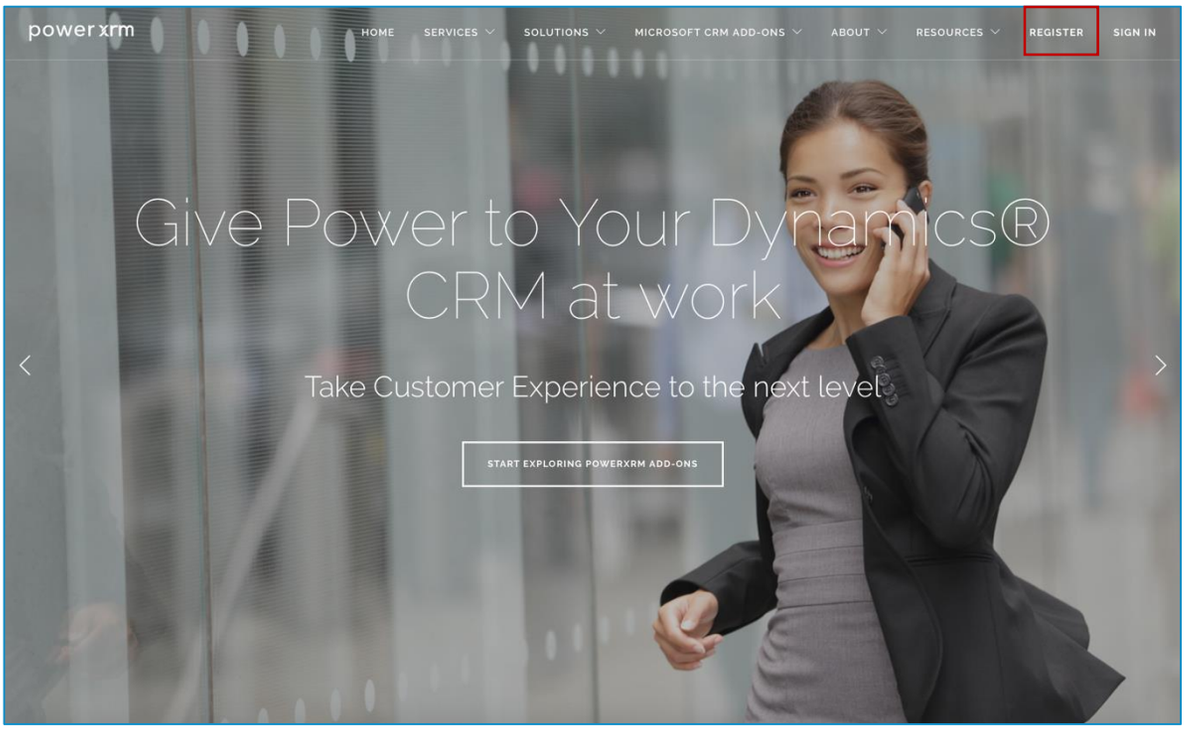
XRM Community Registration

XRM Community is a community of Dynamics CRM solutions and Dynamics CRM components to deliver a greater value to businesses around the world that enable Dynamics CRM customers to build their own CRM engagement solutions on Microsoft technologies.

These Add-On capabilities enable any business processes to become Customer-facing. The first step in using an XRM.WebForm Add-On is to register on our Community Registration at: www.powerxrm.com



The Add-Ons download will empower your own customers as well as our partner ecosystem to accelerate our efforts to embrace Microsoft Dynamics CRM so they can deliver personalized and predictive customer experiences.

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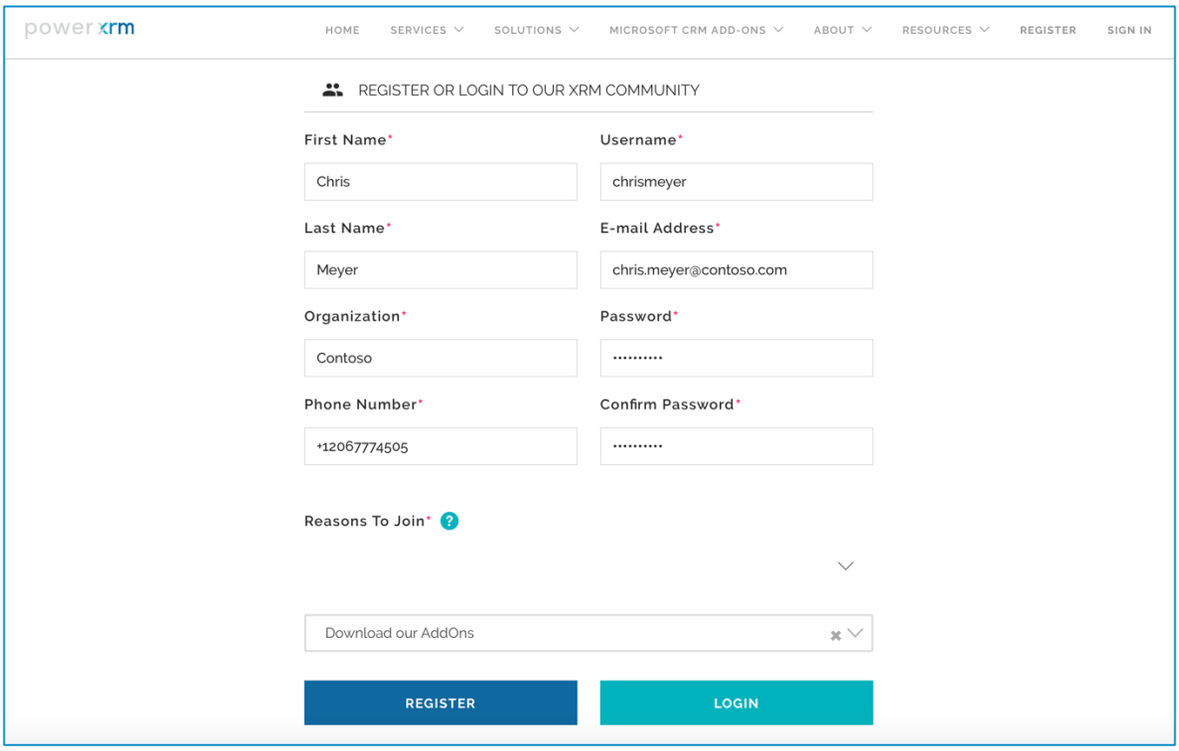
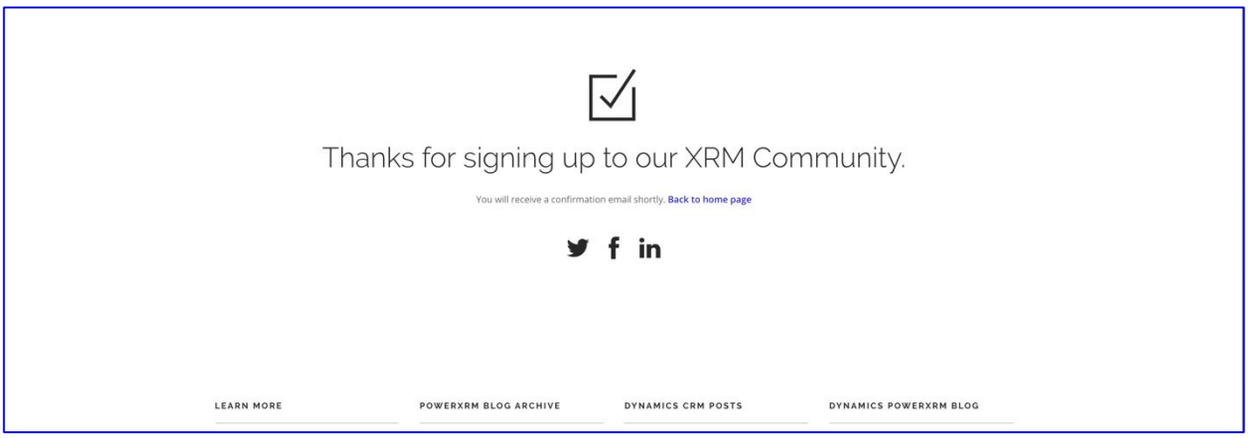
Registration and Solution Download

Download the Add-On from the PowerXRM Community. The Registration takes place at: http://www.powerxrm.com/register filling the registration form below:



To Register for our Free Add-Ons, you need to fill in your data, such as username (valid email address) that will be used as a License when using your Add-On, first name, last name, password, etc. And, at the bottom of the page, you need to select the reason of your registration. In this specific case select:

Download our Add-Ons. When you fill in the data and click Register, you will get an email with a Confirmation request. You need to confirm your email and registration:



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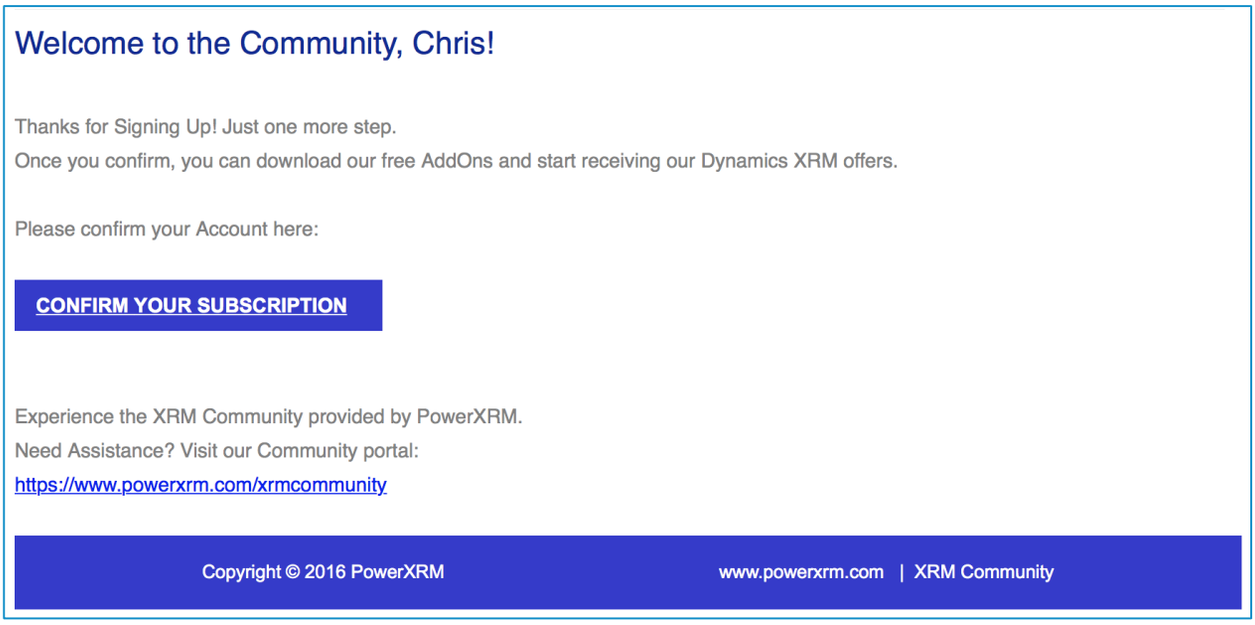
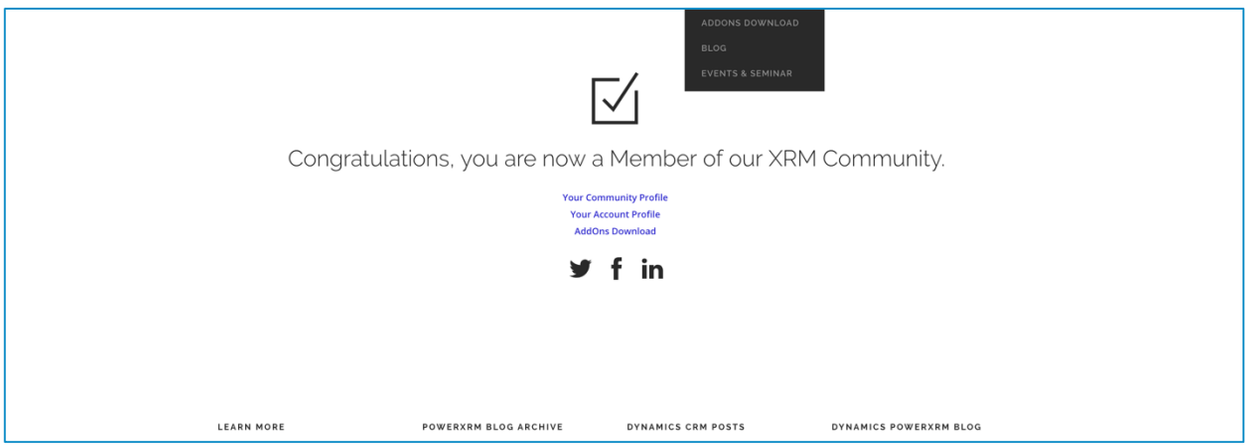
Email Confirmation request:



Once Confirmed, you will be redirected to the Community Confirmation page:



Once you have registered, you will be able to download your Solution. On http://www.powerxrm.com/, select the appropriate Microsoft CRM Add-Ons, and choose the Add-On you want to download.

You can check your Community profile and add your details, by selecting Community Portal: Community profile

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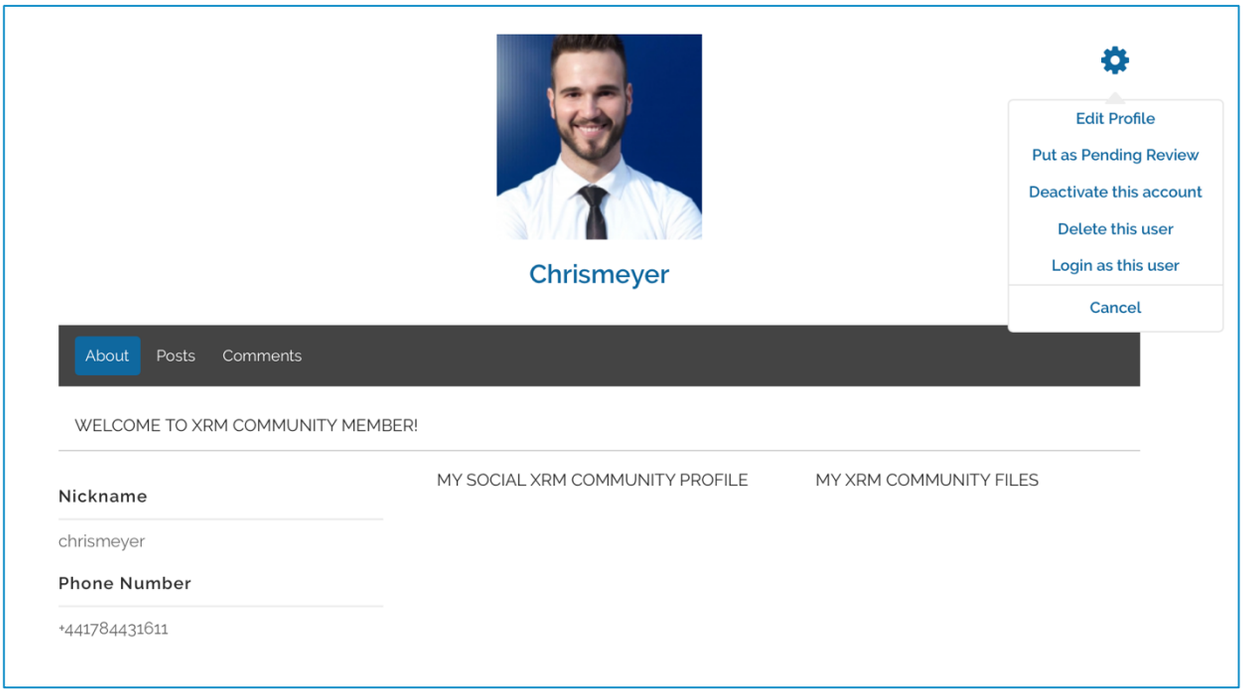
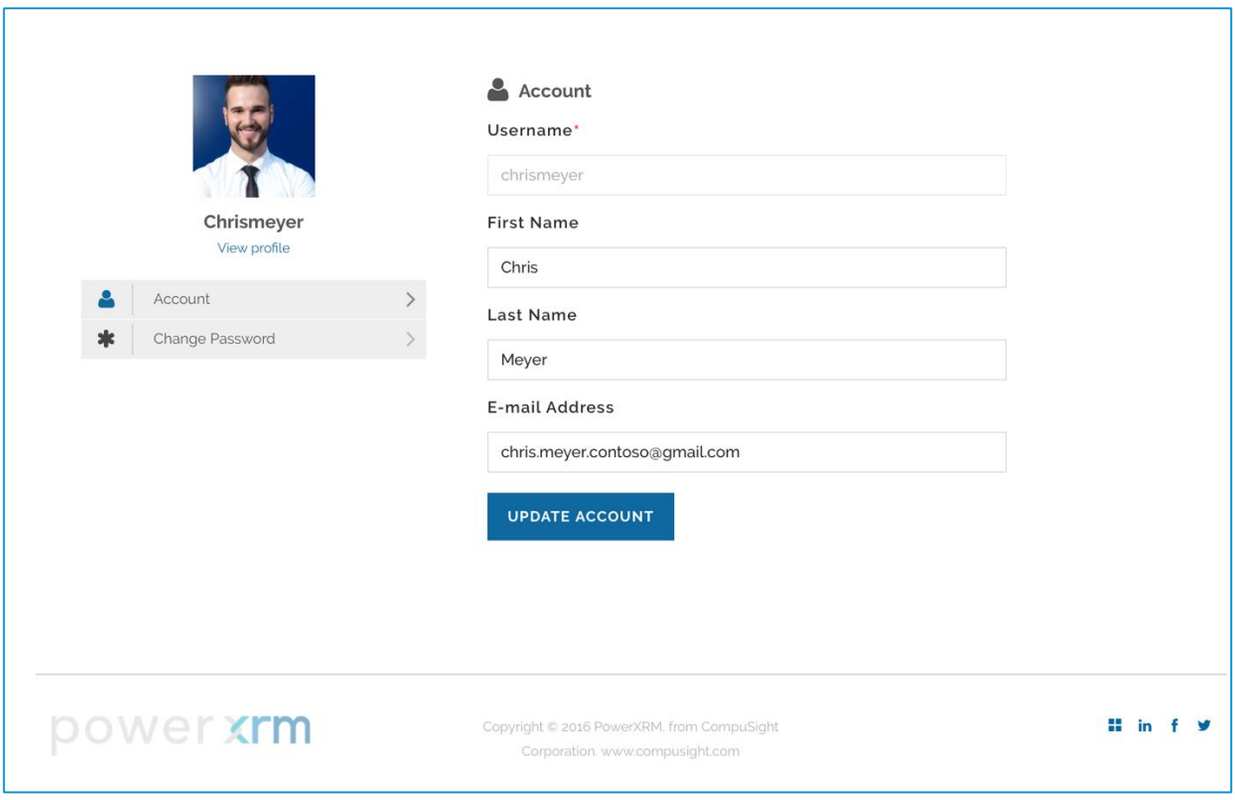


Your can access your Account Profile and change your Account details except your username (your email address used to register for free Add-Ons). Account profile is under the Community Profile, My Account:



The Registration will allow you to download the Add-Ons where you can read more about its features and download the Solution by clicking Free Download and save it on your local machine.

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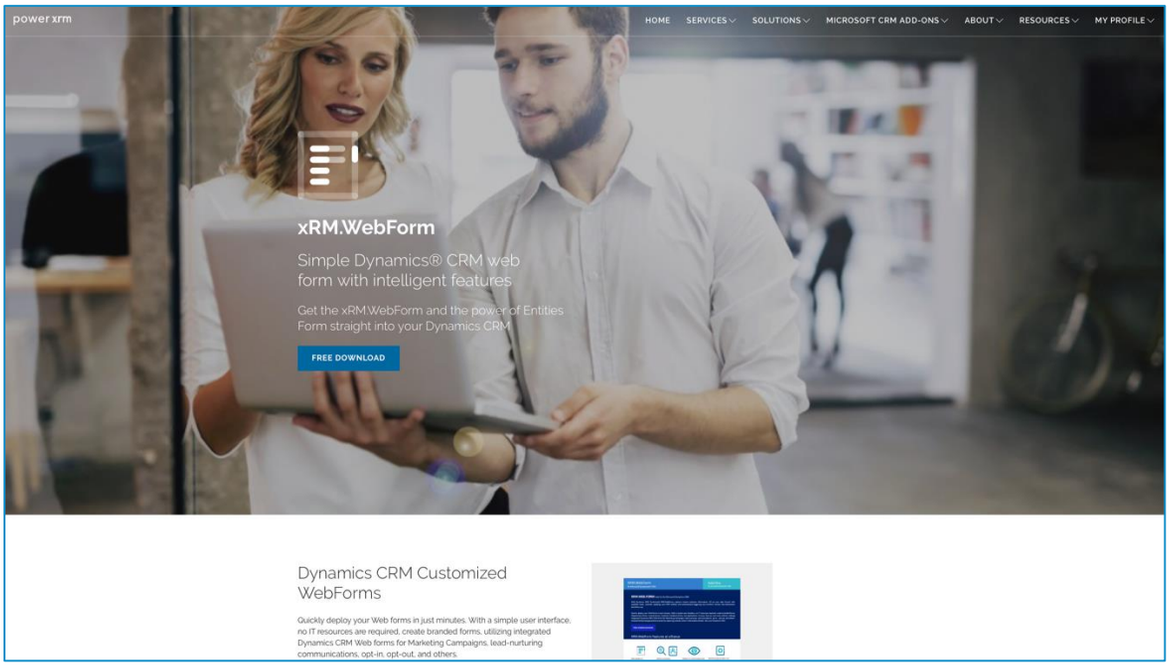

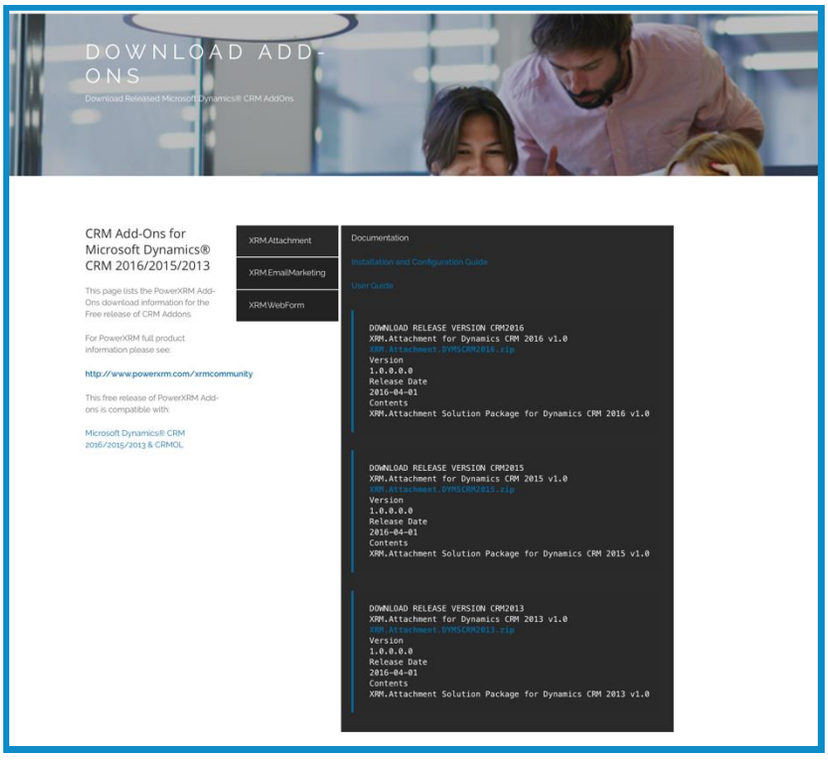

Import and Solution Installation

The following instruction will guide you through the import and installation process of your Add-On.

- Login to CRM using a System Administrator account

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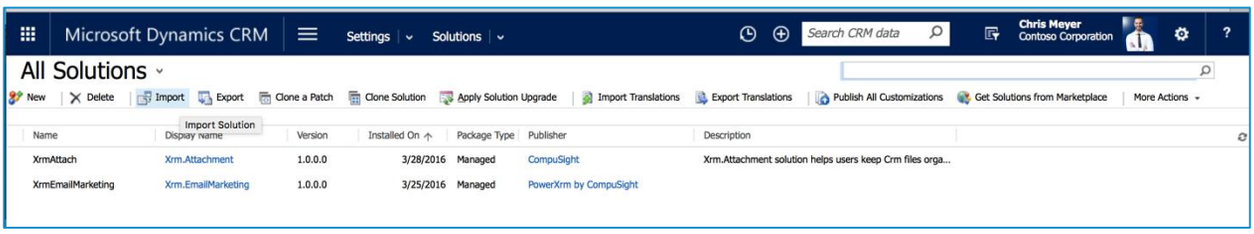
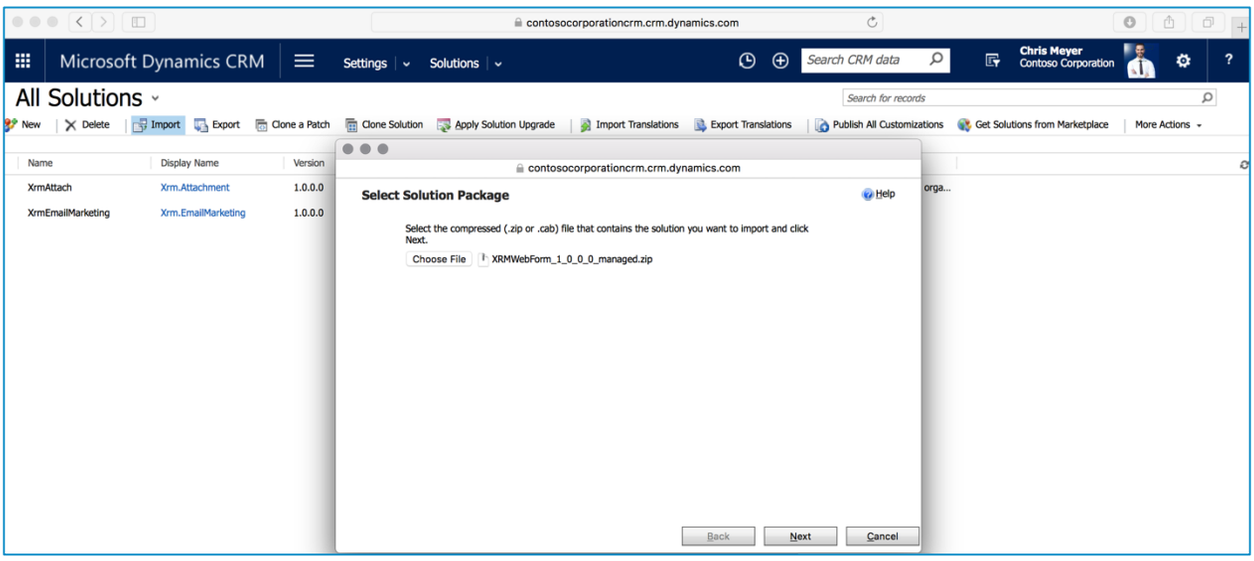
- Navigate to Settings
- Click Solutions
- Click Import
- Publish All Customizations

The downloaded Solution is imported in Microsoft Dynamics CRM, simply by navigation to the Solutions page in Dynamics CRM. On the Solution page, click Import.



The Import opens a new setup wizard where the CRM user locates and selects the downloaded zip executable file for import. The following solution package: XrmWebForm_1_0_0_0 must be installed in the Dynamics CRM, prior to running the XRM.WebForm Solution:

The Import opens a new form where the CRM user locates and selects the downloaded zip file for import. The following solution package: XrmWebForm_1_0_0_0 must be installed on the CRM Organization prior to running the XRM.WebForm Add-On:



Click next, and on the next step, the form displays the Solution Information.

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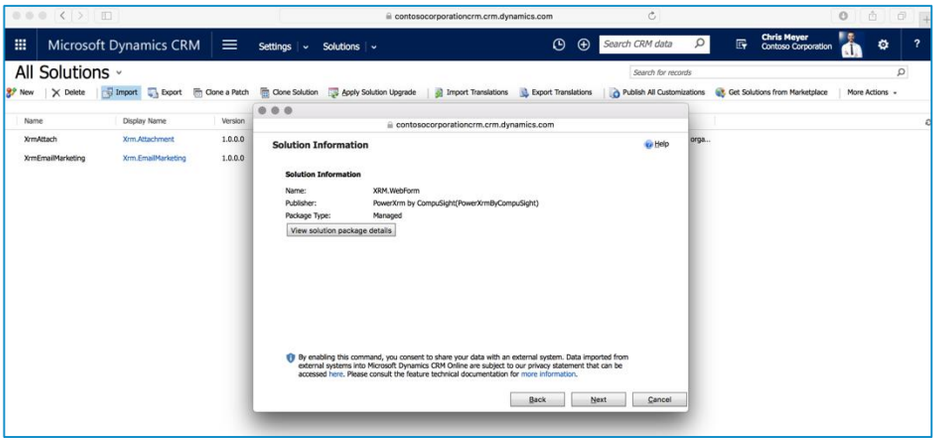
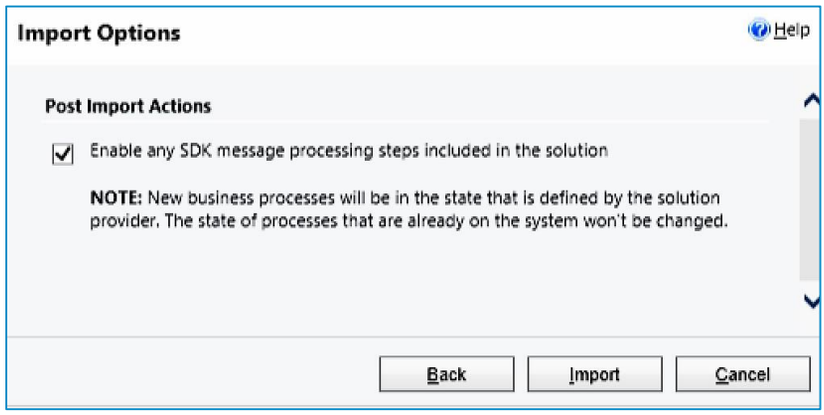


Click next, there is a check-box message: Enable any SDK message processing steps included in the solution. This message is checked by default, and you should leave it checked.



Click Import. This starts the importing process, and when the process is done, a window of confirmation is displayed. Besides the message about successful import, there is a list of installed components and status of their import. There is an option to Download Log File at the bottom of the page. Click close, when the import is finalized and the solution is ready to be used.

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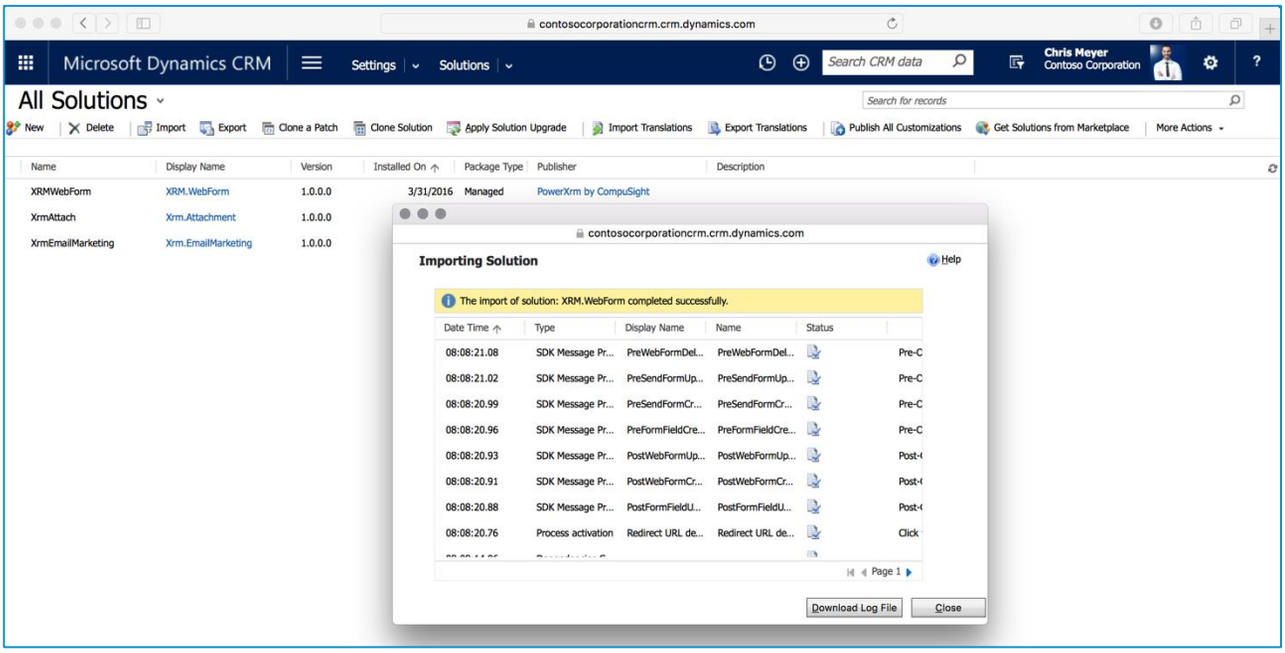
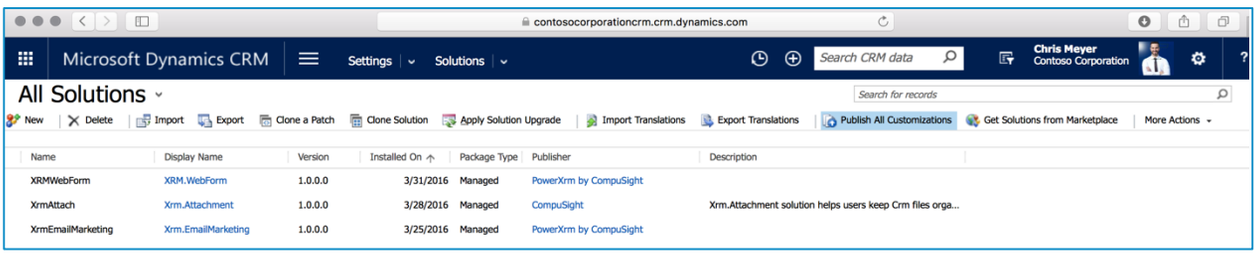


The XRM.WebForm solution import is complete. At the Solution page, there is the solution that was just imported.



In order for all components to be published and ready to be used, you can select the newly imported solution and click Publish All Customizations.

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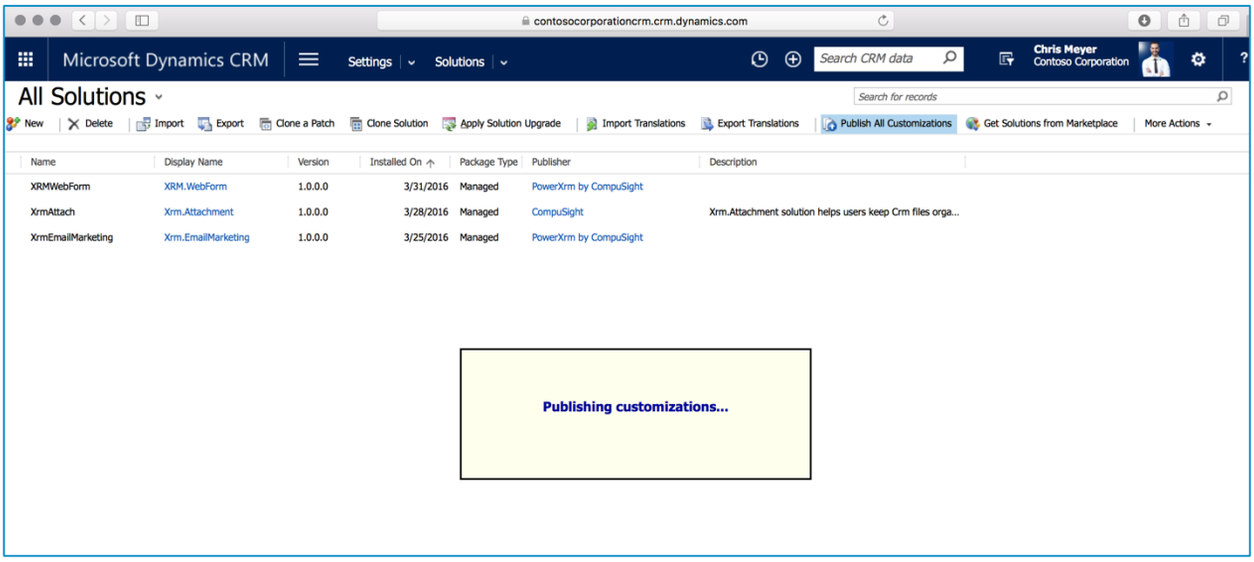

Next step in using XRM.WebForm solution is to set configuration in Configuration page.

XRM.WebForm Configuration

Open your solution, and navigate to the PowerXRM Configuration page.

Configuring the Solution:

1. Navigate to Configuration Page
2. Activate the License key by entering the PowerXRM Credentials
3. Setup by entering the CRM Credentials

If you are starting XRM.WebForm solution for the first time (no added configuration), you will get a pop-up message about non-existing configuration. On the displayed tab, there are two fields that need to be filled: username and password. Enter username and password you used to register to PowerXRM page before downloading solution. Insert your credentials data and click submit.

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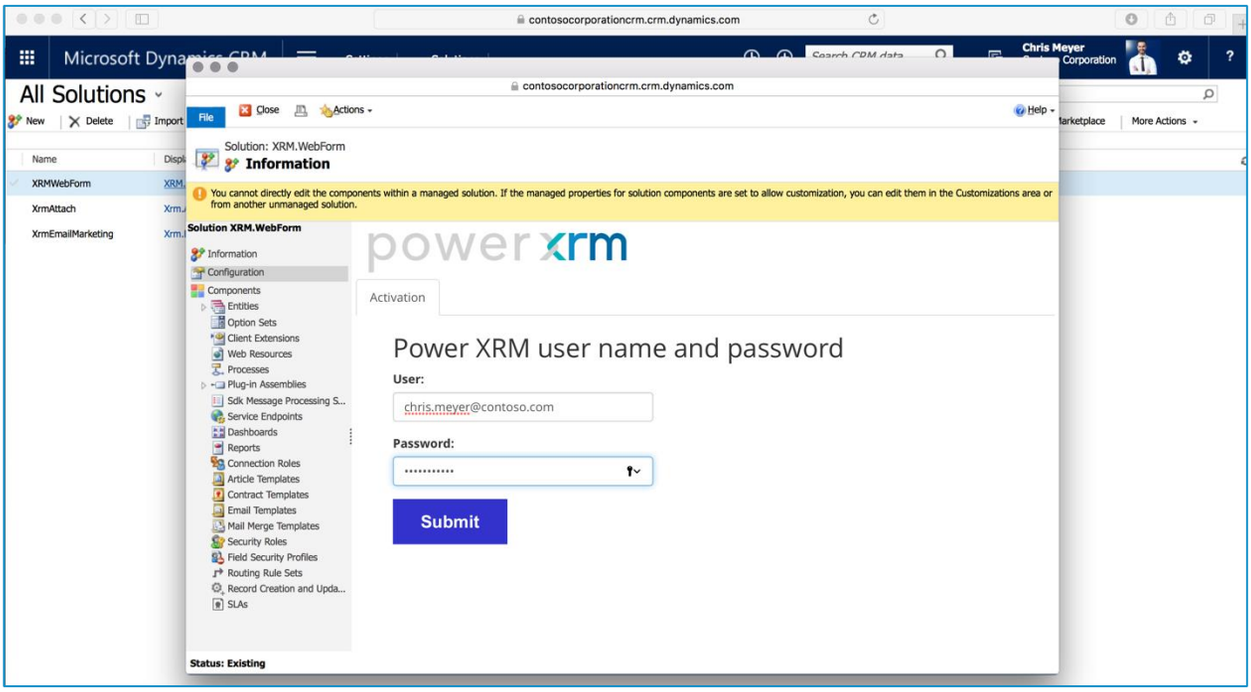

If the login is successful, a pop-up message will appear. Next step is to enter the CRM user credentials Setup tab. Those user credentials (username and password) can be credentials of any Administrator user or a user who has security role of “WebForm Service User”. Therefore, it does not need be necessarily credentials of currently logged in user. In addition, URL of the organization needs to be entered. By default, XRM.WebForm offers origin of the website as the URL. However, if that is not the URL of the organization that can be used for accessing its end-point, then correct URL needs to be entered. That would be a case if the CRM is on premise or in case that it is online and the domain is masked.

Important thing to notice here is the case with CRM on premise. XRM.WebForm in current version can be used in CRM on premise only if it has internet-facing deployment, meaning that it can be accessed over the Internet. That is required so that new entity records can be created from third-party locations. In the following versions of XRM.WebForm, it will be extended with ability to be used from CRM on premise which are installed locally and which are not accessible via Internet.

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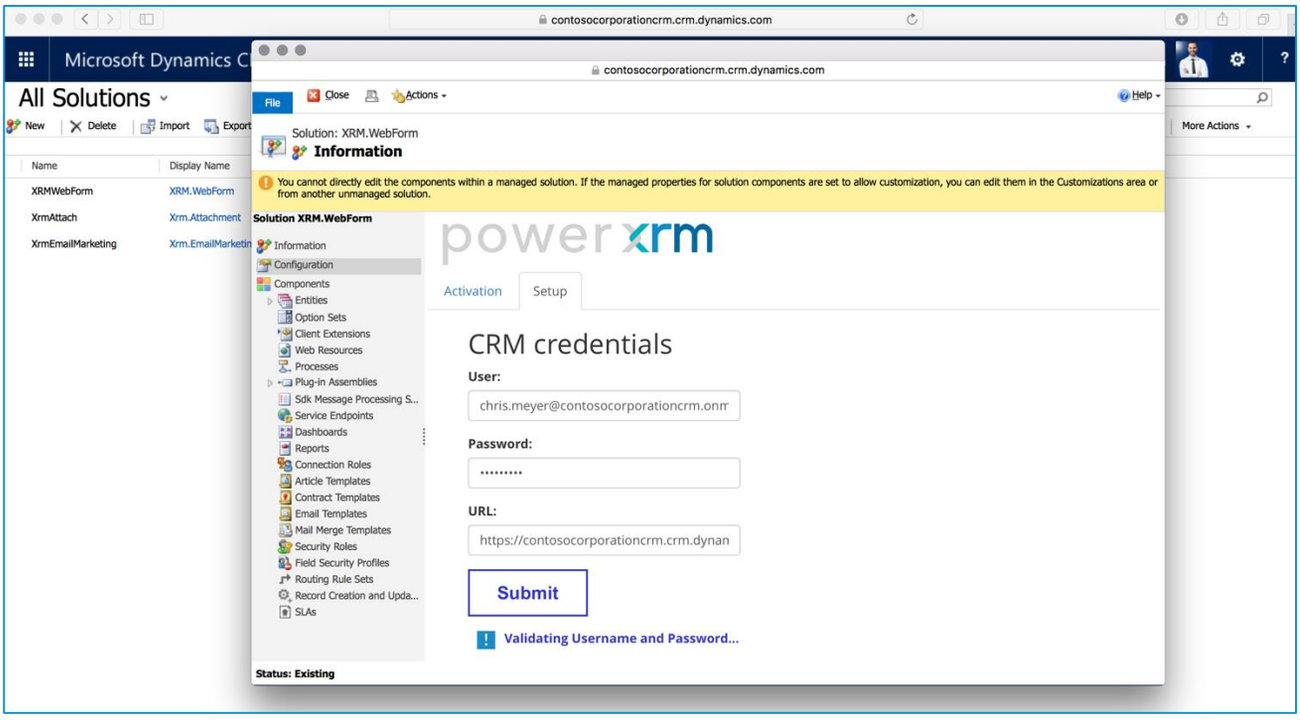

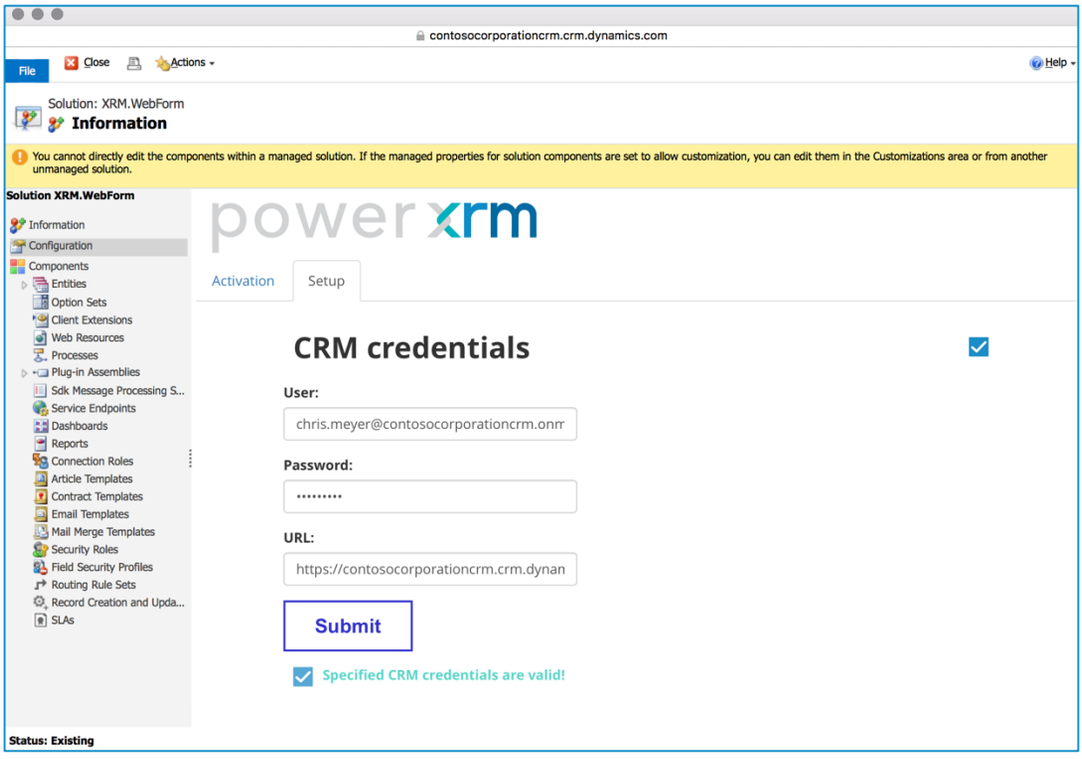

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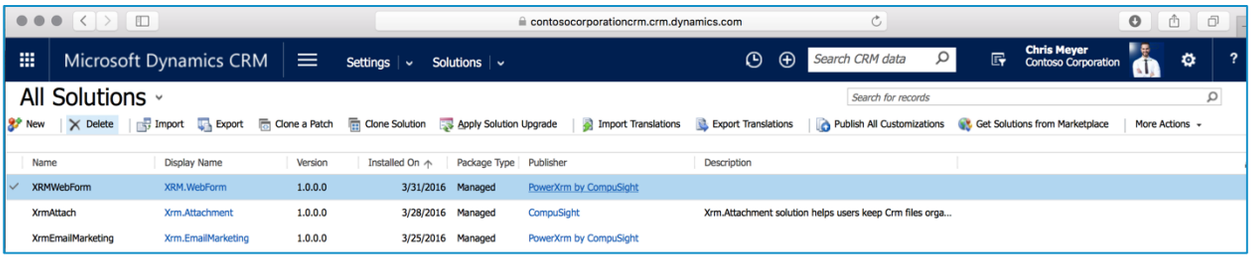
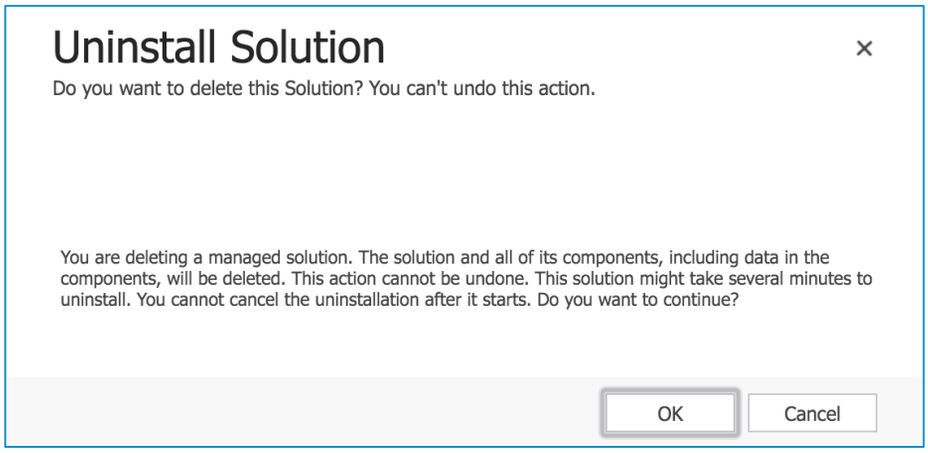
Uninstall the Solution

The process of uninstalling the solutions is to delete the Add-On solutions in the reverse order that they were installed.





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Security Roles

There are three security roles included in imported solution:

- WebForm Editor
- WebForm User
- WebForm Service User

Each of these security roles has default set of privileges, however, they are, unlike other components of this solution, left customizable so that they can be adjusted to requirements of each organization. However, it is highly recommended not to edit these security roles since it might cause malfunctioning of the complete solution. If some user needs wider set of privileges than those included into these security roles, better practice would be to add those privileges into custom security role and to add that security role to the user.

Let's see which privileges are included by default to each security role and to what kind of user is each security role intended.

WebForm Editor

Users with this security role will be able to read, create, update/write, delete and deploy all WebForms. User will have permission to modify not only WebForms created by herself, but also WebForms created by other users. Therefore, seats attached to license key are reserved for users with this security role. Seat reservation happens when the user creates and deploys WebForm for the first time.

This user does not have any permission over WebForm submission – he/she cannot read WebForm Activities nor created entity records. Also, this user does not have any permission over selecting user account which will create entity records with each submission.

These privileges are reserved for WebForm Editor:

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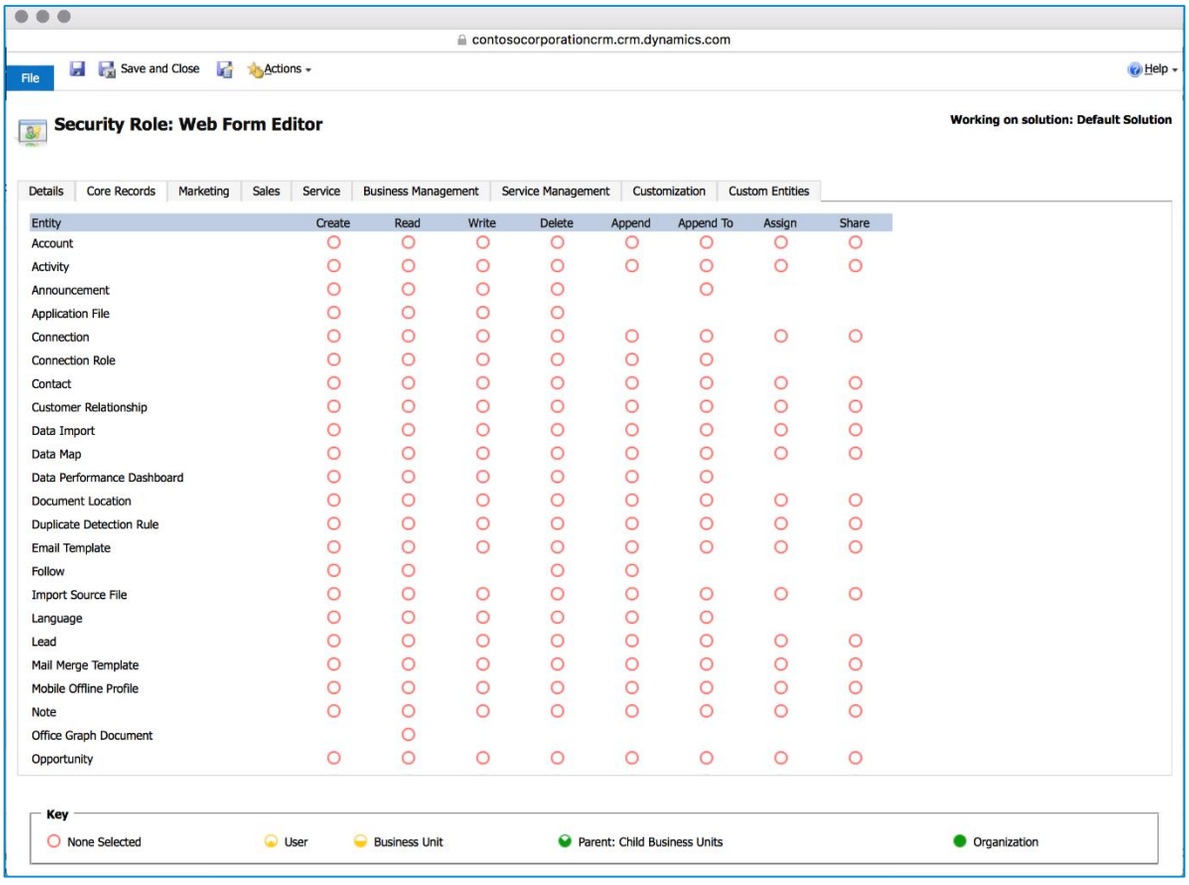

Privileges over Core records

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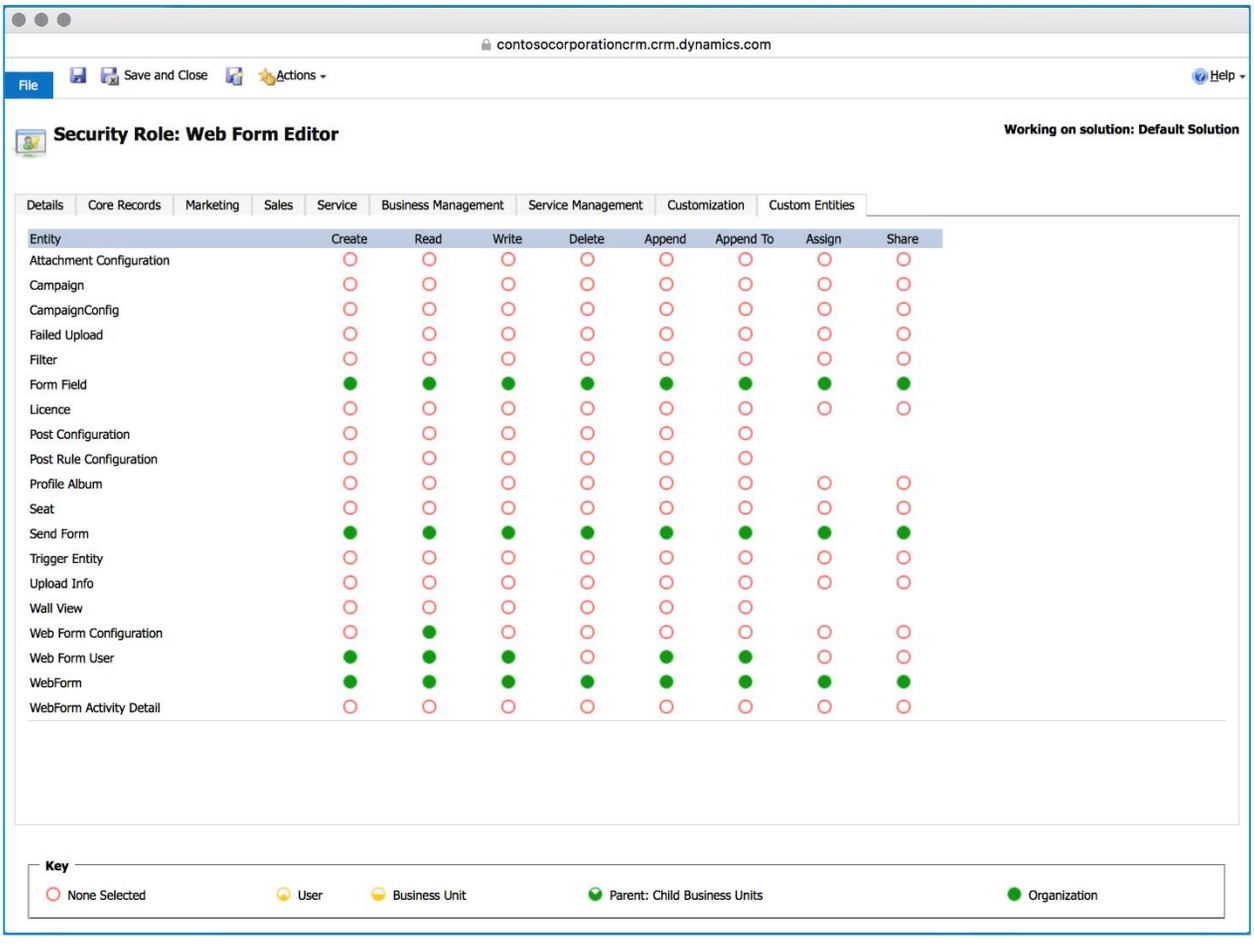

Privileges over Custom Entities

WebForm User

Users with this security role can preview Web Form Activities and their details. So, their elementary role is to oversee WebForm submissions. They can read all details of WebForm submission through WebForm activities, but they cannot read entity record created by that WebForm submission. On the other side, they have privilege to read all WebForms so that they can see the definition of submitted WebForm, but they do not have permissions to modify them, create new Web Forms or to deploy them. Seats are not reserved for users with this security role.

These privileges are reserved for WebForm User:

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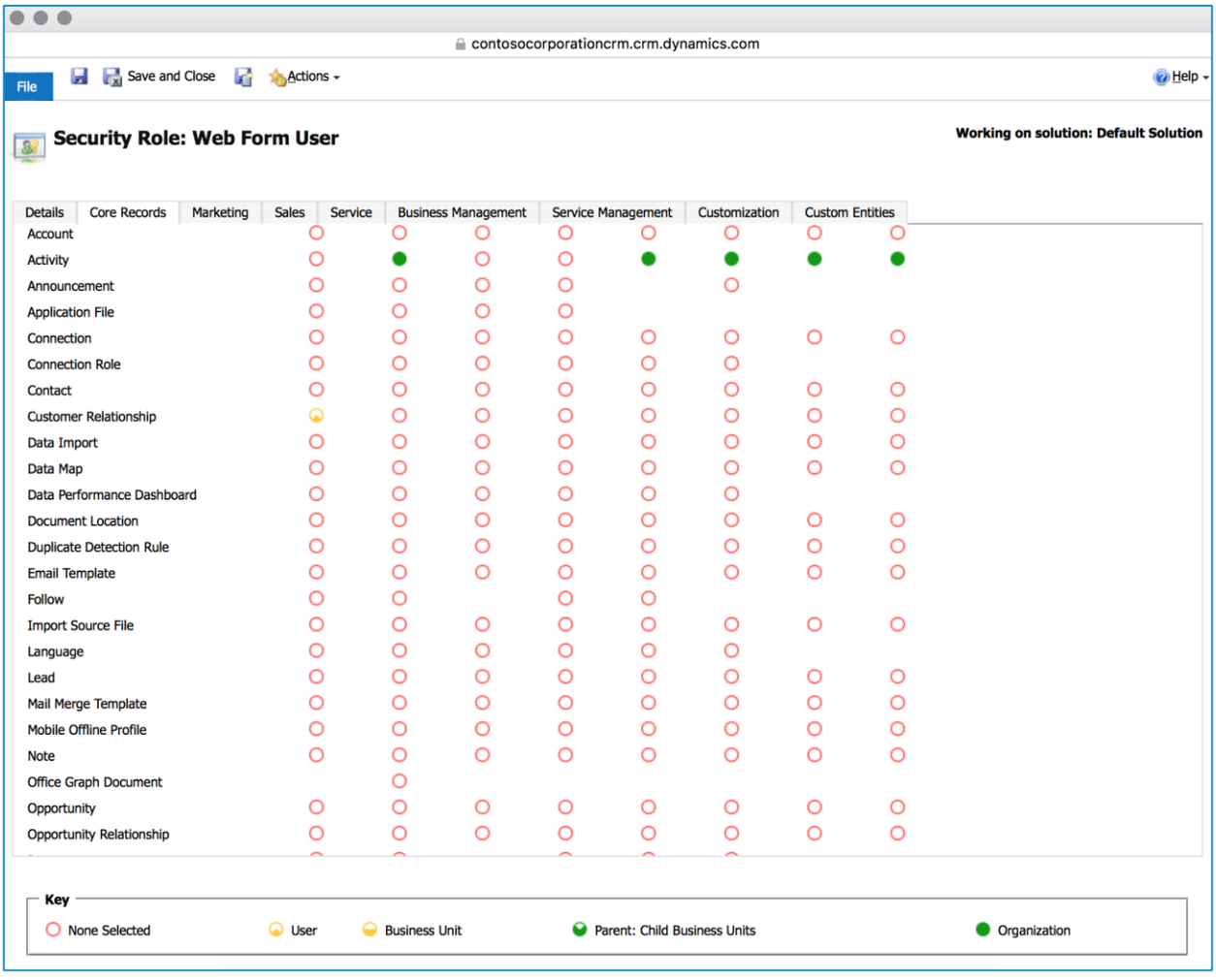

Privileges over Core records

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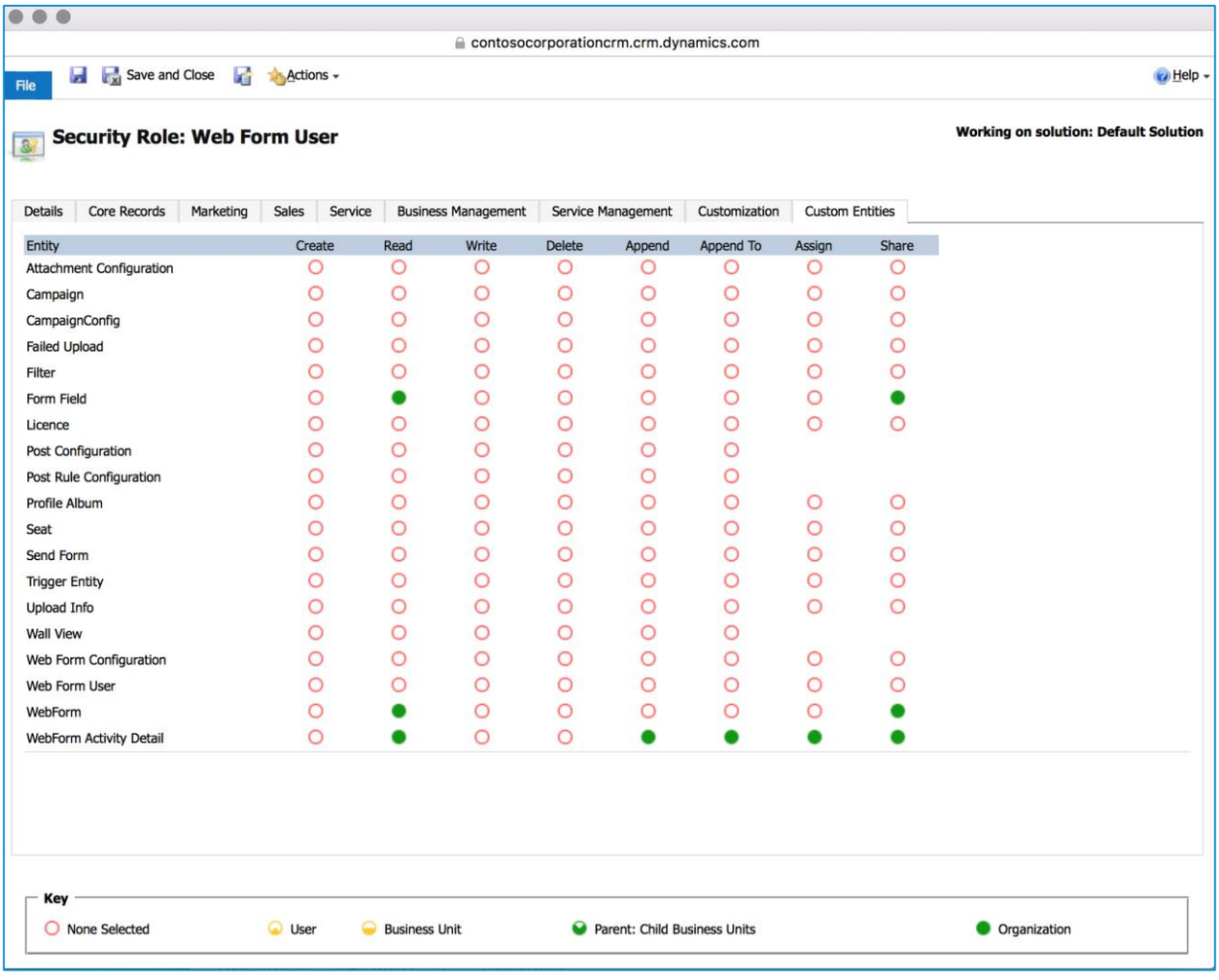

Privileges over Custom Entities

WebForm Service User

As it could be seen under Configuration chapter, CRM credentials should be entered into the form on Configuration page. Those CRM credentials will be used for creating entity records and WebForm Activities after each WebForm submission. Every activity will be assigned to the user whose credentials are used and every entity record will be created by this user.

Most probably, Dynamics CRM Administrator who imports the solution will use his/her credentials for solution configuration and that will work fine because Administrator has all privileges needed by default. However, it is also possible to enter CRM credentials of a user who is not Dynamics CRM Administrator. In that case, that user needs to have privileges for creating, reading, deleting and appending to the entity that is used as a target entity of a WebForm. That user needs to have privileges of creating, reading, deleting, appending and appending to activities and WebForm Activity Details and appending and appending to WebForms. All these privileges are part of WebForm Service User security role.

When the CRM credentials of a user who is not Dynamics CRM Administrator are used for configuring solution, then it is necessary to assign security role of WebForm Service User to that user. That security role will enable WebForm editors to choose any system entity as target entity for WebForms. However, if target entity of some WebForm is a custom entity, then privileges of creating, reading, deleting and appending to

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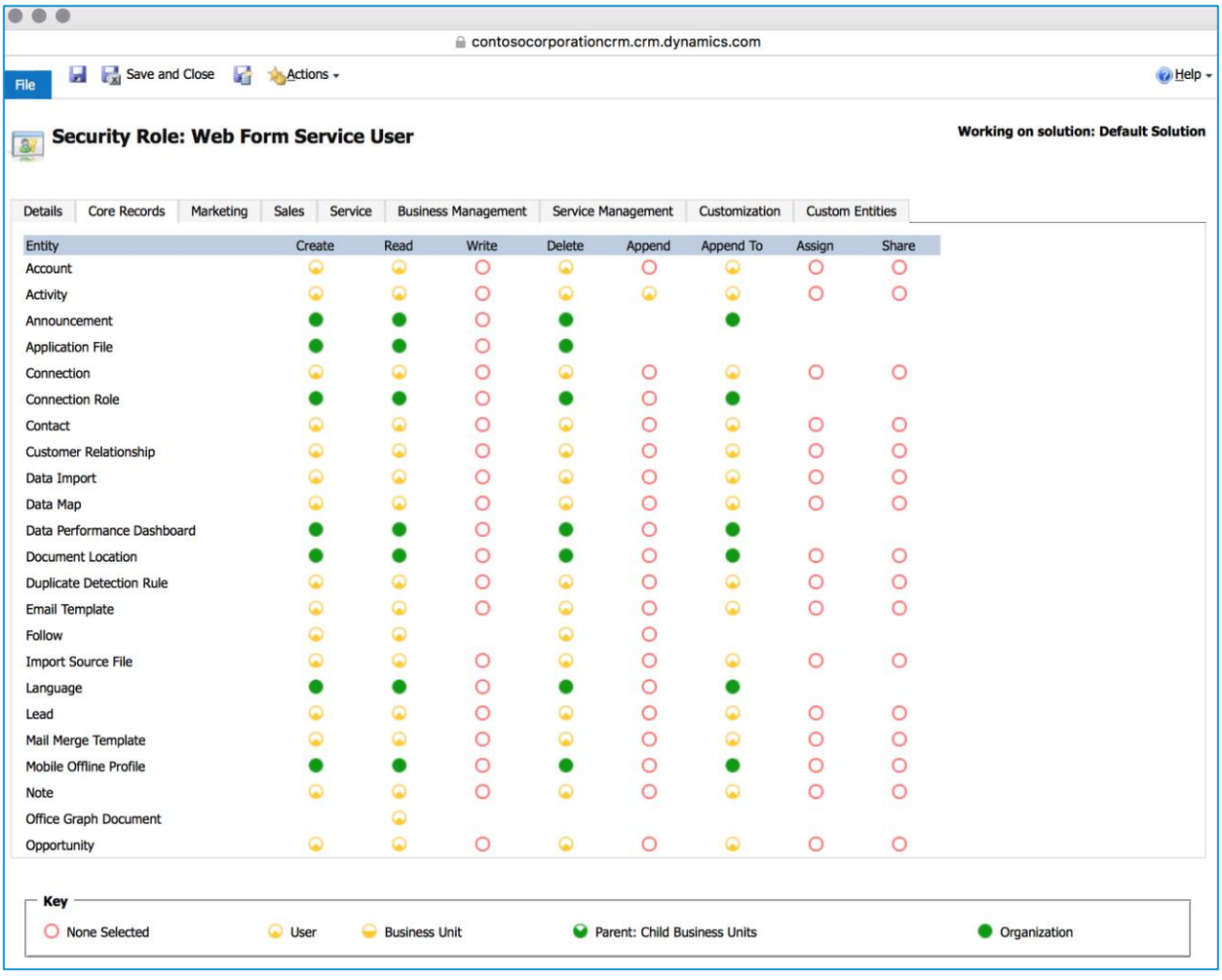
that custom entity need to be given to the user whose CRM credentials are used. It can be done by giving those privileges to WebForm Service User security role or to any other security role assigned to that user.

These privileges are reserved for WebForm Service User by default:



Privileges over Core records

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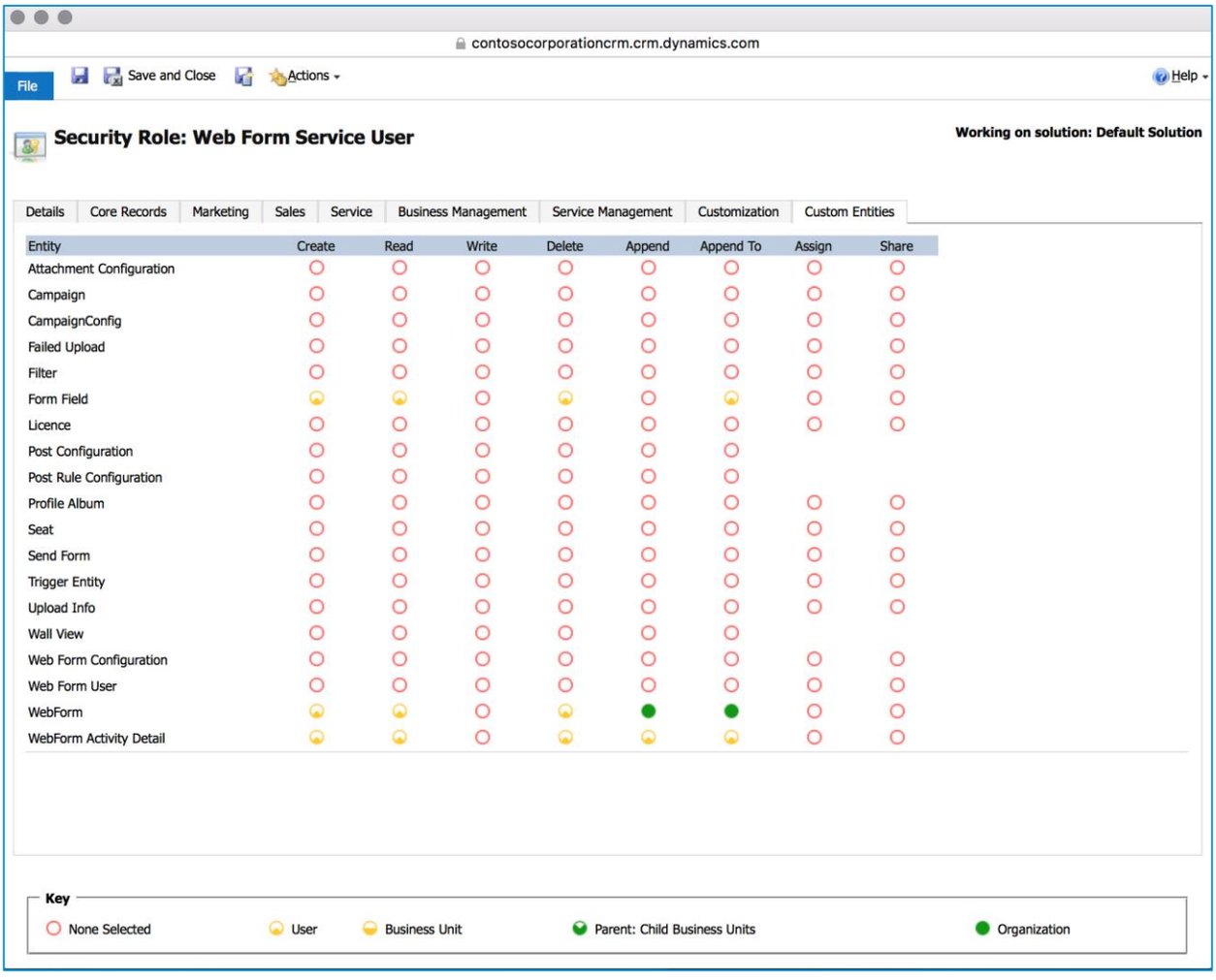

Privileges over Custom Entities

Solution Package Information

For more details regarding the XRM.WebForm solution, please visit:
http://www.powerxrm.com/xrmwebform

For more information regarding User Guide, see: User Guide

For more details regarding CRM Solution Packages please visit the following documentation on MSDN http://msdn.microsoft.com/en-us/library/gg334530

or contact PowerXRM at:

http://www.powerxrm.com/contact

contact@powerxrm.com

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