Landing Page accelerator for

Microsoft Dynamics 365 Customer Engagement

USER GUIDE

Change control

Version Control	Prepared By:	Reviewed by:	Change
1.0 05/10/2018	Jennifer Rozin	Ana Rodriguez	Initial version
1.1 05/02/2019	Ana Rodríguez	Jennifer Rozin	Adding new feature: ability to configure Landing Page by roles.

Company Review Approved version:	Name:	Post:	Date:

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This user document is valid for the **Landing Page Accelerator** *version 1.1* based on **Microsoft Dynamics 365.**

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1 INTRODUCTION

1.1 Objective

Many organizations and their users can struggle with the standard menu of Microsoft Dynamics 365 – for some it is too complex and not easy to find entities. This accelerator at company/organization level and provides the answer to this blockage in user adoption.

This accelerator gives users the ability to:

> Quickly access to main entities

> Quickly access to any URLs

> Easily create records

> Configure different main pages by role

This accelerator plugs into **Microsoft Dynamics 365**, and can be used for **Sales, Customer Service** and **Field Service** applications.

1.2 Application pack contents

The package should contain the following solutions:

> LandingPage

> FrameworkIP

The solution includes following languages: English, French, German, Spanish and Hebrew.

> Documentation is available in the accelerator section Corp Intranet Sharepoint site at this address:

https://prodwarecloud.sharepoint.com/sites/pww-ibs-public/SitePages/ProdwareSolutionCatalogue/CustomerEngagment/accelerators/sales/LandingPage.aspx

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2 SET UP AND INSTALLATION GUIDE

2.1 System requirements

This accelerator can be installed on:

> **Microsoft Dynamics 365 On premise V8.2 and later**
> **Microsoft Dynamics 365 Online**

To be able to use this functionality your license must be up to date, including the Prodware **accelerator**. If necessary, contact your reseller for more information about your license.

Currently this accelerator is just available for the web client; this version is not available for mobile apps.

2.2 Installation of the package on Microsoft Dynamics 365

Be careful, the installation can be done only by a system administrator user.

1. Open your browser
2. Open your Dynamics 365 CRM environment
3. Navigate to Settings> Solution
4. Then click on Import
5. And Follow the assistant

For more details consult this page: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/import-update-export-solutions.

2.3 Upgrading to a new version

Important: Before any installation and / or modification, you must create a backup of your solution you can restore if you encounter issues with your set-up.

When upgrading from a previous version, the actions are the same as for first installation, please refer to chapter 2.2.

All your previous data will be saved and no further action is needed.

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2.4 Module set up

To configure the module, we need to configure two items:

> Landing Page Dashboards. This is the container of the different quick access items. When we create a new Landing Page Dashboard, automatically a standard Dynamics 365 Dashboard is created. We will be able to assign security roles to these standard Dashboards (out-of-the-box feature).

> Landing Page Configurations. These are the quick access items. A Landing Page Dashboard has several Landing Page Configuration. You can reuse Landing Page configurations in different Landing Page Dashboards, for example: I can configure a My activities Landing Page Configuration and I will include it in the Sales Dashboard and in the Customer service Dashboard.

To configure a Landing Page Dashboard:
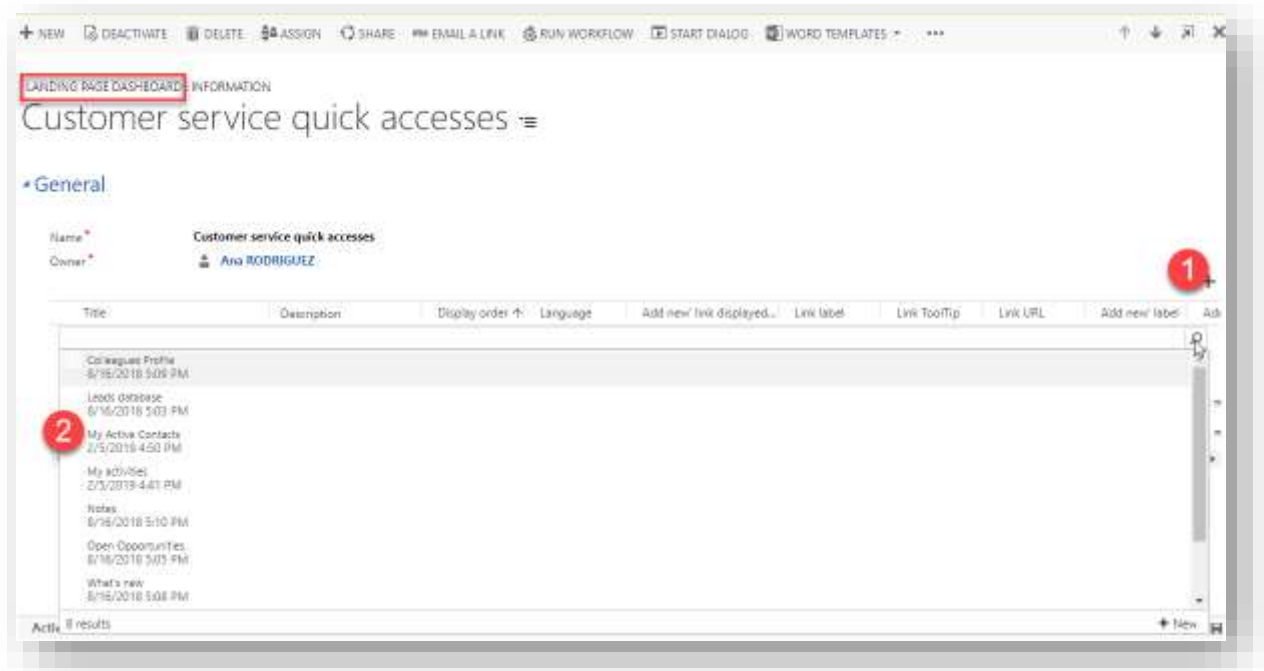
Go to **Settings > Landing Page Dashboard**.

Click **New** to create a new dashboard. You just have to give a name a click on **Save**. The Name of the Landing Page Dashboard will be the name the users will see.
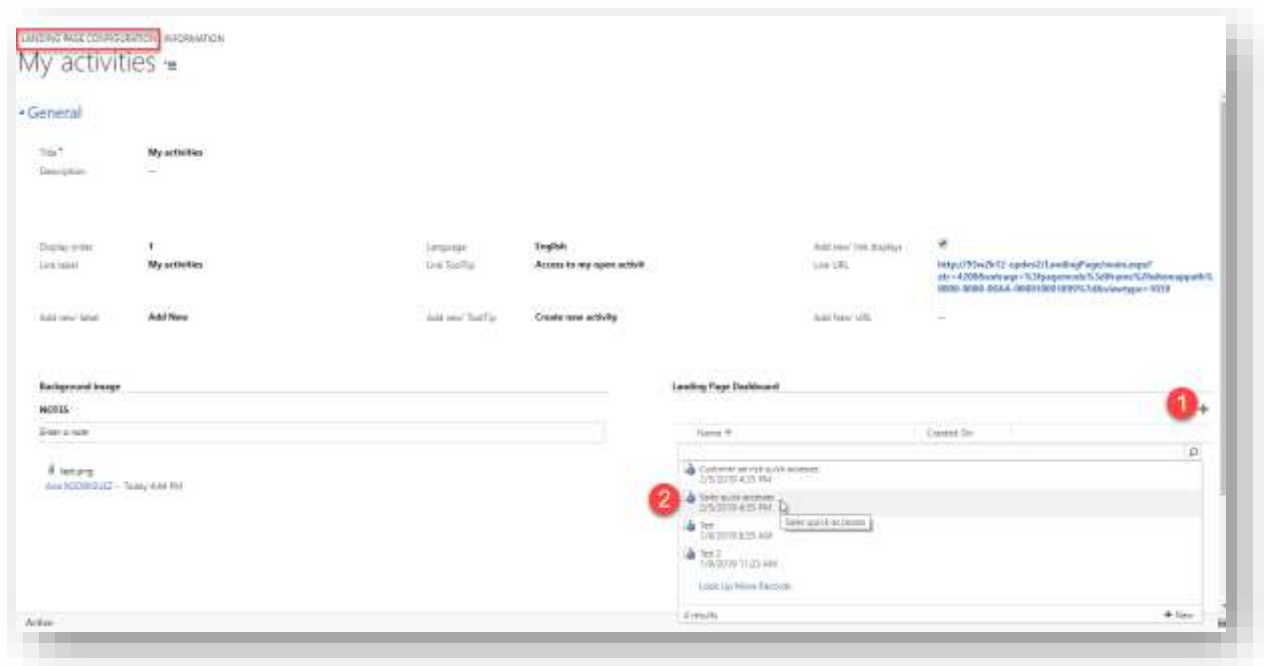

After creating the dashboard, we need to add the Landing Page configurations. We can add existing ones or create a new one specifically for this dashboard.

To add an existing Landing Page configuration to a Landing Page Dashboards, we can do it from both the Landing Page Dashboard form and the Landing Page configuration.
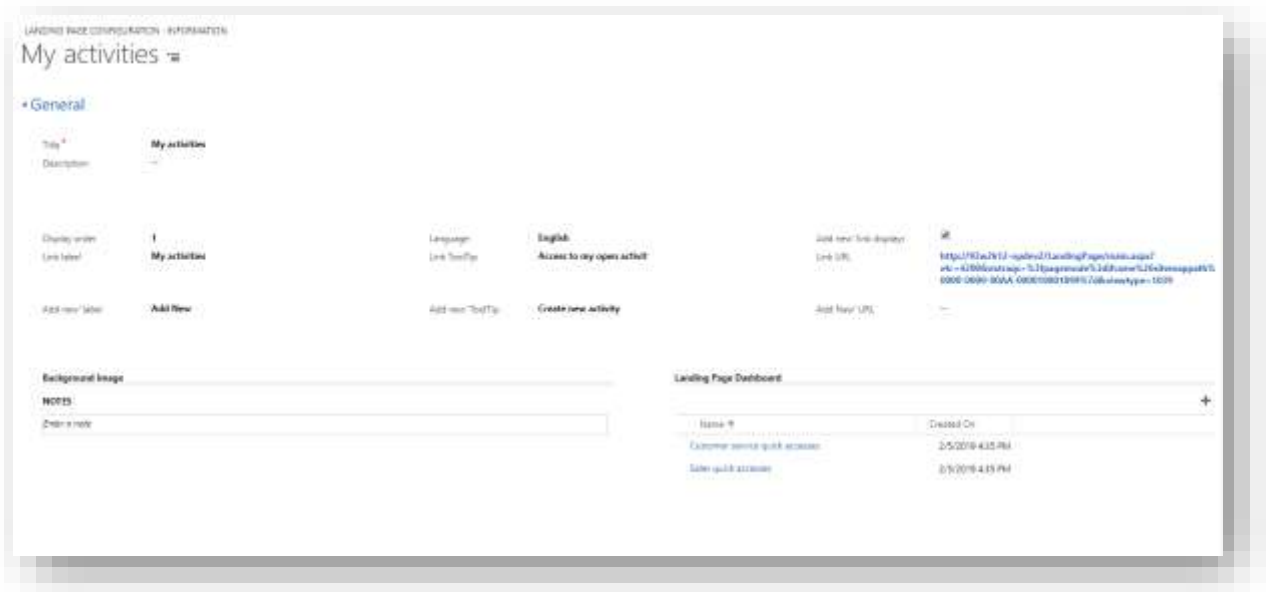
From the Landing Page Dashboard:

From the Landing Page Configuration:

To create a New Landing Page Configuration one we can do it from the above form or directly from the main menu.

Go to **Settings > Landing Page Configuration**.

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Click **New** to create a new configuration.

Fields

Field	Description
Title	Name of the configuration.
Description	Enter the description that will be displaying in the Landing Page. This field is limited to 50 characters.
Display Order	Enter a number. It indicates in what order the different configuration should be displayed.
Link Label	Enter the label that will display on the right button. This field is limited to 50 characters.
Link ToolTip	Enter the text that will display when the user hovers the pointer over the right button. This field is limited to 25 characters.
Link URL	Enter the URL that will be opened by clicking the button.
'Add new' label	Enter the label that will display on the left button. This field is limited to 50 characters.
'Add New' ToolTip	Enter the text that will display when the user the user hovers the pointer over the left button. This field is limited to 50 characters.
'Add new' URL	Enter the URL that will be opened by clicking the left button.
'Add new' link display	Yes/No. You can choose if you want to display the new button or not.
Note Section	You can customize the background of each configuration by adding a picture in Note.

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TIP: How to open forms, views, dialogs and reports with a URL

URL addressable elements enable you to include links in your Landing Page. If you want to know how, open the link below:
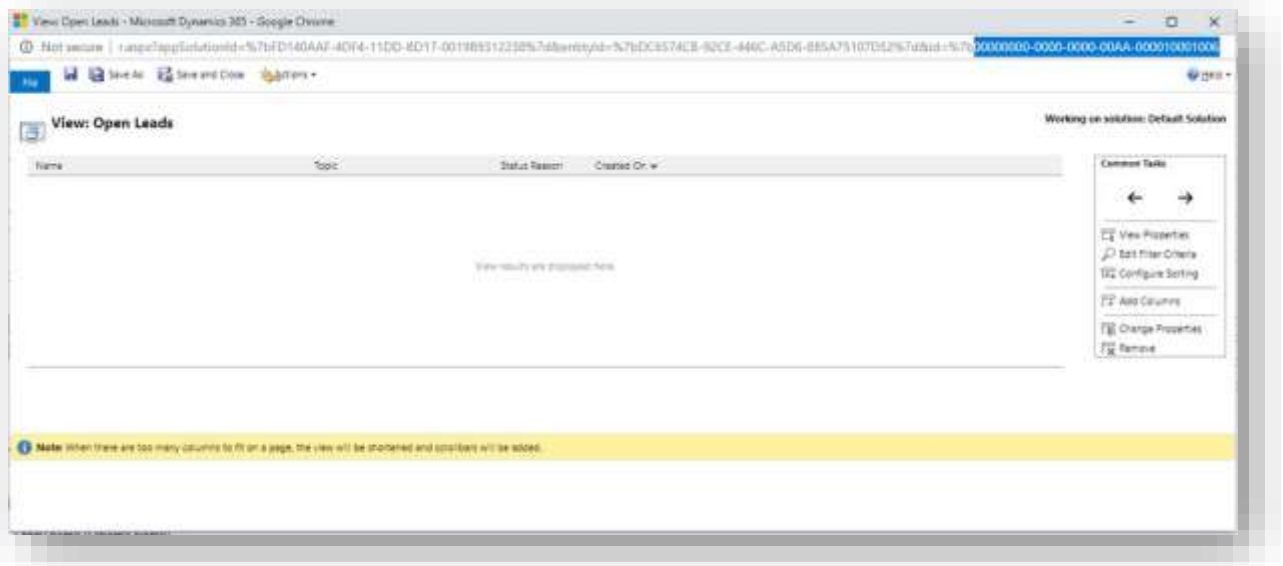
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/open-forms-views-dialogs-reports-url
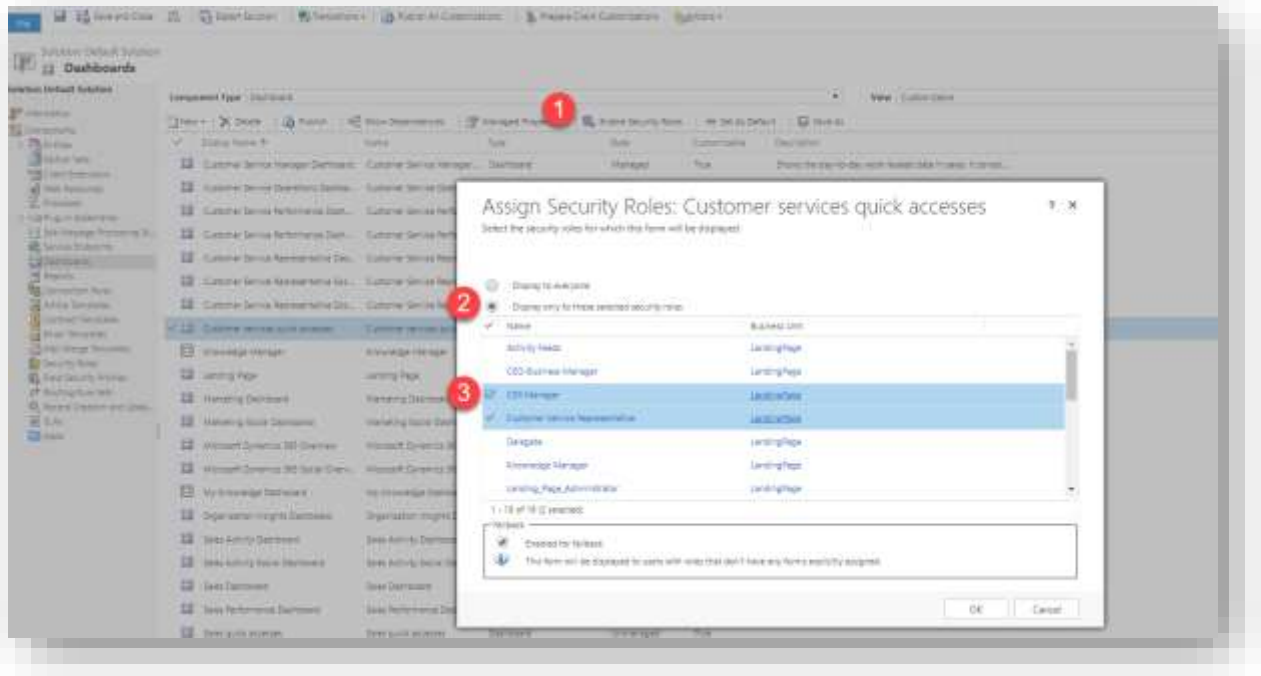
Example of a URL to display leads:

http://93w2k12-opdev2/LandingPage/main.aspx?etn=lead&pagetype=entitylist&viewid={00000000-0000-0000-00AA-000010001006}&viewtype=1039&navbar=on&cmdbar=true&web=true&page=SFA

In this URL example, the colored parts are parameters:

- Organization URL
- Entity name (Schema Name)
- View Id : You can find this information in Customizations, select the entity and then Views. Click on the view you want to display. The view will open: Take the end of the URL: &id=%7bVIEWid %7d

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Use the out-of-the-box feature to configure security roles to specific Landing Page dashboards.
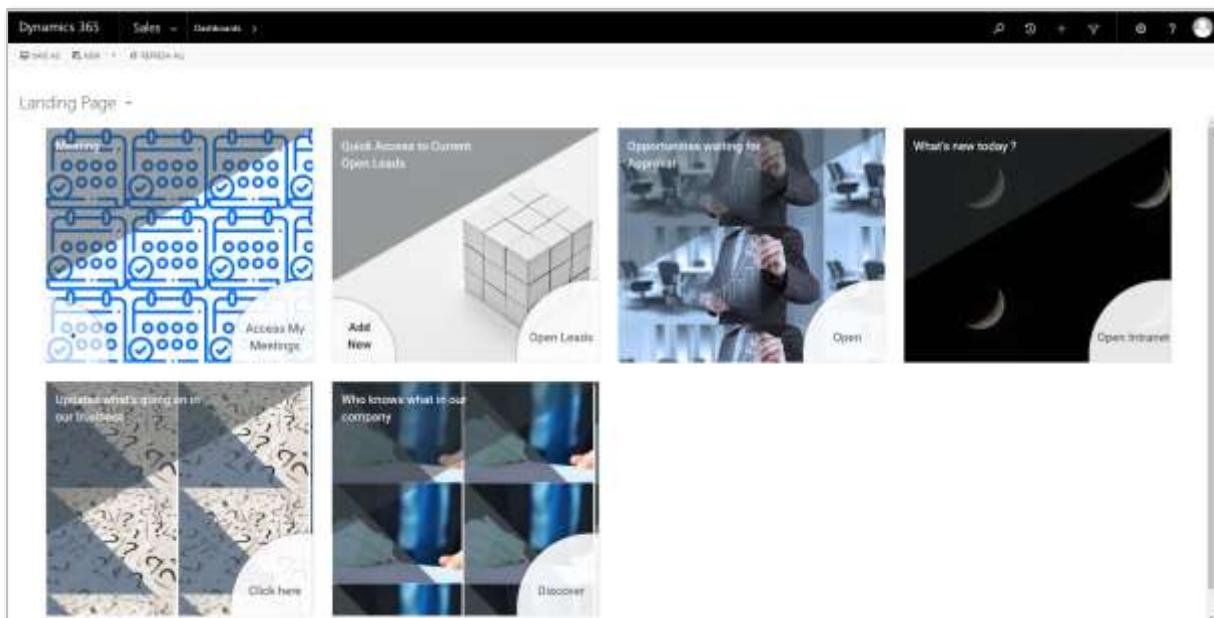

Note: Only the Landing Page Administrator can set up the configuration. To assign security roles to CRM dashboards, the user needs to have a Customization role.

Note: Prodware recommends creating a minimum of four and a maximum of eight Landing Page Configurations to render the best display (i.e. users will not need to scroll down).

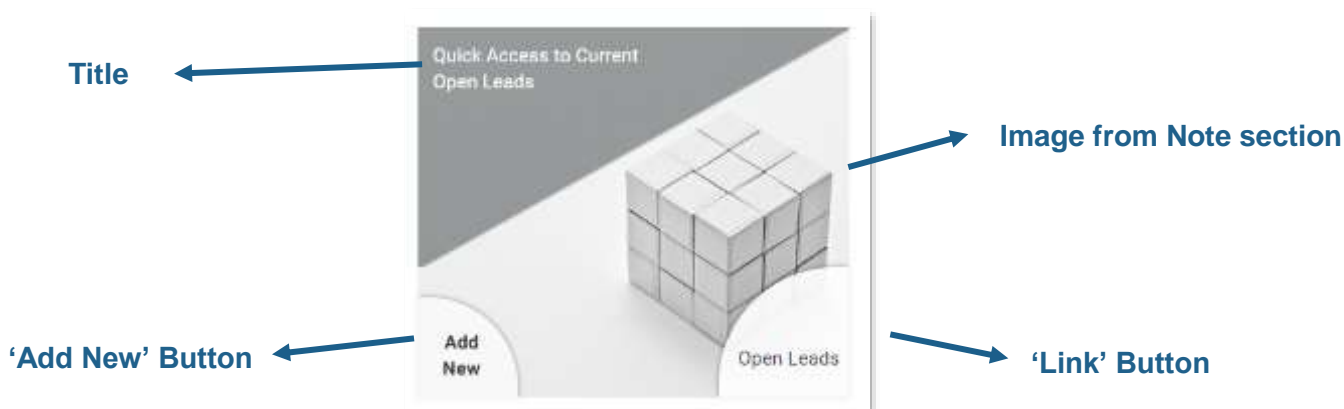prodware

3 WORKING WITH THE LANDING PAGE ACCELERATOR

The Landing Page Dashboards are accessible from **Sales > Dashboards**

> Note: Every user can select a Landing Page Dashboard and define it as default if another Dashboard has been defined as default.

A Landing Page Dashboard is composed of the different 'Landing Page Configurations' records created in paragraph 2.4.

Each Configuration is composed of:

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By clicking 'Add New' or 'Link' Button, the user will be redirected to the URL configured in the Landing Page Configuration.

3.1 Security Roles

The solution contains two security roles:

> Landing_ Page_User: Gives access to the Landing Page Dashboards
> Landing_Page_Administrator: Gives access to the Landing Page Dashboard and to the Landing Page Configuration Entity

The Landing_Page_User Security Role should be granted to all users.

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