d.velop connect for Microsoft Dynamics 365 Sales: Administrator

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1. d.velop connect for Microsoft Dynamics 365 Sales: Administrator

1.1. Basic information about the application

This section contains general product information.

1.1.1. About d.velop connect for Microsoft Dynamics 365

d.velop connect for Microsoft Dynamics 365 creates a seamless connection between your ERP system and the digital archive systems of d.velop AG that features an exchange of information in both directions. As a result of the integration of the ECM system, all outbound documents printed in Microsoft Dynamics 365 are automatically stored in the central information management function. That means the documents are also available outside of the ERP system. This component forms only the adapter for d.velop cloud and works together with interfaces from Microsoft Dynamics 365.

1.2. Installing and uninstalling

This chapter contains information on the installation of d.velop connect for Microsoft Dynamics 365.

1.2.1. System requirements

Supported systems

- Microsoft Dynamics 365 Sales

> **Warning**
> Please note that you are obligated to run a software version supported by Microsoft in your systems. For older versions of Microsoft software that Microsoft no longer supports, d.velop does not guarantee compatibility. The version of the d.velop integration for Microsoft Dynamics 365 is supported by d.velop for twelve months after release. d.velop reserves the right to restrict functionalities after the twelve months have expired.

Operating mode

Install d.velop connect for Microsoft Dynamics 365 in the same location as the ERP system. If you operate the ERP system in the cloud, you must also operate d.velop connect for Microsoft Dynamics 365 in the cloud. If you operate the ERP system locally (on-premises), you must also install and operate d.velop connect for Microsoft Dynamics 365 locally.

1.2.2. Installing d.velop connect for Microsoft Dynamics 365

This chapter contains details about the installation of d.velop connect for Microsoft Dynamics 365. Information on download and installation are available in the software from d.velop and Microsoft.

Installation in your d.velop tenant

You want to install d.velop connect for Microsoft Dynamics 365 in your d.velop cloud tenant.

This is how it works

1. Click on the feature **Subscribe App** on the start screen of your d.velop cloud tenant.
2. Search for **d.velop connect for Microsoft Dynamics 365** and select the entry.
3. Click the button **Book now**.
4. Follow the configuration assistant.

5. Confirm the deployment by choosing **Subscribe for a fee**.

You have successfully deployed d.velop connect for Microsoft Dynamics 365 in your tenant. The app should now appear as a configuration area in the feature **Configuration** for your tenant.

Installation within sales

You can connect your Microsoft Dynamics 365 Sales environment with the d.velop connect for Dynamics 365 adapter.

This is how it works

1. In preparation, download the managed solution from the adapter configuration area.
2. Use an authorized user to open **Advanced settings** in your Sales environment.
3. Go to **Setup > Customizations > Solutions**
4. Click **Import** and follow the instructions.

You have now successfully installed d.velop connect for Dynamics 365 Sales.

Downloading the installation package

You will find the current installation package, which you can download, in the app d.velop connect for Microsoft Dynamics 365 in your d.velop cloud tenant.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Navigate to **Microsoft Dynamics 365 > Integration packages**.
3. Download the package for the desired Microsoft Dynamics 365 product.

> **Note**
>
> The following is important if you download an update for a product:
>
> If there is a critical change in the update, you will be notified. You must confirm that you are aware of this notice. If you perform the update without acknowledging the notice about critical changes, it may be the case that certain functions no longer work as they did previously.

1.2.3. Uninstalling in your d.velop tenant

You can remove d.velop connect for Microsoft Dynamics 365 from your d.velop cloud tenant. The configurations you have made to date will be lost if you remove the app and unsubscribe from it.

This is how it works

1. Click the feature **d.velop cloud management** on the start page in your d.velop cloud tenant.
2. Select the organization from which you would like to remove the app.
3. Click **Edit tenant**.
4. Click **d.velop connect for Microsoft Dynamics 365 > Unsubscribe app**.
5. Confirm that you want to unsubscribe from the app.

You have successfully unsubscribed from the app d.velop connect for Microsoft Dynamics 365 and removed it from your tenant.

1.3. Configuring d.velop connect for Microsoft Dynamics 365 (sales)

This chapter contains details about the installation of d.velop connect for Microsoft Dynamics 365. Information on download and installation are available in the software from d.velop and Microsoft.

1.3.1. Connecting your Sales environment to the d.velop cloud

After installing this module, you will be able to connect your Sales environment to the same d.velop cloud platform on which d.velop connect for Microsoft Dynamics 365 is installed.

Prerequisites

- You have registered in d.velop cloud and created an organization and tenant there.
- You have subscribed to the app d.velop connect for Microsoft Dynamics 365 with your d.velop cloud tenant.
- The d.velop connect solution is installed on your Dynamics Sales tenant.

As the first configuration step, create an API key in your d.velop cloud tenant.

You can find more information about creating and using API keys in the configuration instructions for d.velop infrastructure components under Using API keys for inter-app communication.

> **Note**
> If you are using d.velop connect in combination with Microsoft SharePoint, you must select a user with which you can also log into d.velop cloud. This is required because a specific SharePoint user for storing documents must be defined for the technical user.

Creating the app registration

Create an app registration within your Microsoft Entra ID.

This is how it works

1. Go to the portal of your Microsoft Entra ID tenant and log in there with a user with administrative rights for Microsoft Entra ID.
2. Go to the area **Microsoft Entra ID > App registrations**.
3. Choose **New registration** to create a new app.
4. Enter a descriptive name for the app (e.g. D365 Connection).
5. Select **Accounts in this organizational directory only** as the supported account type.
6. To finish creating the app, click **Register**.
7. Open the app you just created and go to **API permissions**.
8. Switch to your Sales environment.
9. Add the following delegated API permission from the area **Microsoft APIs > Dynamics CRM**: **user_impersonation**.
10. Go to the **Certificates & secrets** area in your app.
11. Create a new client secret in the **Client secret** section.
12. Enter a descriptive name for the key (e.g. D365-Client-Secret).
13. Assign a validity period to the key.
14. Note the key for the next configuration step. You cannot view the key afterwards.
15. Go to the **Summary** section and note down the **Application ID (Client)** and **Directory ID (Client)** for the further configuration steps.

You have now successfully created an app registration in your Microsoft Entra ID that can be used for the further configuration steps.

Creating the connection from the sales environment to d.velop cloud

In the next step, you can establish the connection from your Sales environment to d.velop cloud.

This is how it works

1. Use an authorized user to log into Power Platform Admin Center.

2. Go to the **Environments** area and select the appropriate environment.
3. Go to **Settings > Users and permissions > Application user**.
4. Click **New app user** to create a new application user.
5. Select the Dynamics 365 Sales app under **App**.
6. Select your environment.
7. Select the security role **d.velop connect - Application User**.
8. Click **Create** to create the application user.
9. Click **Advanced settings** and navigate to **Power Platform Environment Settings > d.velop connect > Connection settings**.
10. Click **Add** to create a new connection.
11. Enter a descriptive name for the connection.
12. Under **d.velop connect endpoint**, enter the URL of your d.velop cloud tenant.
13. Under **API key**, enter the API key that you created earlier.
14. Under **Directory ID (tenant)**, enter your directory ID (tenant).

You have now successfully established a communication path between your Sales environment and your d.velop cloud tenant.

Creating the connection from d.velop cloud to the sales environment

Now you establish the connection from the d.velop cloud environment to the Sales environment.

This is how it works

1. Open your d.velop cloud tenant and go to **Configuration > Microsoft Dynamics 365 > Connection data**.
2. Open the configured connection data that was automatically created earlier.
3. Under **Target system for the storage of documents**, select an export system and a repository.
4. Go to **Microsoft Dynamics 365 Sales**.
5. Under **Application ID (Client)**, enter the corresponding value from the Microsoft Entra ID app you created. You can find the ID on the app overview page.
6. Under **Client secret**, enter your generated client secret from the Microsoft Entra ID portal.
7. Click **Test connection** to test the connection.
8. Then click **Save**.

You have now successfully set up a communication path from the d.velop cloud platform to your Sales environment.

Note

Four predefined security roles are provided for you with the installation of d.velop connect for Dynamics 365.

Security role	Description
d.velop connect - Administrator	Incorporates all the rights required for the technical operation of the integrating application. This role includes all the dedicated rights below.
d.velop connect - Export Configuration Administrator	Incorporates all the rights that a dedicated administrator requires to configure the export interface. This role is optional.
d.velop connect - Job Administrator	Incorporates all the rights that a dedicated administrator requires for job processing. This role is optional.
d.velop connect - Application User	All the entities that need to be read out from the archiving/field mapping must have read rights in this role.
d.velop connect - User	Provides all specific permissions for the use of the d.velop connect integration. As of version 1.3.X, this role must be assigned to all users.

The user requires read access to all the entities that have to be queried through manual storage or property extensions. Either add the **Application User** role or grant the read access directly.

1.3.2. Configuring export systems

This chapter contains information about creation and configuration of forms.

Creating an export system

When you create the connection to the d.velop cloud, the export system is also created automatically.

Customizing an export system

You can customize an existing target system.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Microsoft Dynamics 365 > Connection data**.
3. Click on the required connection.
4. Under **Information about the connection data > Target system for the storage of documents**, you can find the settings for the **Export system** and the **Repository**.
5. If a system is missing, click the update arrow at **Export system**. This fetches the data again.
6. Click **Save** to finish.

You have successfully changed your target system for the storage of documents.

Removing the use of an export system

You can delete an existing target system.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Microsoft Dynamics 365 > Connection data**.
3. Select the required connection.
4. Navigate to **Information about the connection data > Target system for the storage of documents > Export system**.
5. Select **Without export system** from the drop-down menu.

You have successfully deleted the existing target system.

1.3.3. Configuring entities

This chapter contains information about creation and configuration of forms.

Configuring automatic file creation

When creating new objects in your Sales environment (e.g. a new customer), you can automatically create dossiers (e.g. a customer record) in your DMS.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Open the advanced settings.
3. Under the group, choose **d.velop connect > Automatic export**.
4. Choose **New** to add a new entry.
5. Enter the desired entity (for example, **account** for companies) in the **Entity for the export** field.
6. Enable **Automatic dossier storage** if you want to automatically create a dossier in DMS when this entity is created or reactivated.
7. Enable **Automatic dossier synchronization** if you want to automatically synchronize the properties of the dossier in DMS as soon as the entity is changed. Dossier synchronization only works for dossiers that were created via the interface. An entry in the internal job list is required to identify the correct dossier for synchronization.

8. In the **Property filter for dossier synchronization** field, enter the technical field names to which the automatic dossier synchronization should react in the event of a change. Separate the individual field names with a comma.
9. Save your setting.

You have successfully created entities for which automatic dossier storage is enabled. If necessary, you now configure the mappings on the DMS side.

Configuring automatic annotation storage

You can determine the entities for which attached documents are supposed to be exported.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Open the advanced settings.
3. Under the group, choose **d.velop connect > Automatic export**.
4. Choose **New** to add a new entry.
5. Enter the desired entity (for example, **account** for companies) in the **Entity for the export** field.
6. When using the time axis, enable **Automatic annotation storage** if you want to transfer the documents stored there to the relevant dossier on the DM side.
7. Save your setting.

You have the option of setting the configuration so that exported documents are removed from your CRM system and replaced by a link to the document in the annotation.

This is how it works

1. Perform steps 1 to 6 for the configuration of automatic annotation storage.
2. Enable **Remove attachments** if you want to remove exported documents from your CRM system and replace them with a link in the annotation.
3. Save your settings.

You have successfully created entities for which automatic annotation storage is enabled. Keep in mind that you may also have to configure settings in the mappings on the DMS side.

Configuring the automatic storage of e-mail attachments

You can choose the entities for which you want e-mail attachments to be exported.

This is how it works – Configuring the automatic storage of e-mail attachments

1. Log in to your Sales environment with administrator rights.
2. Open **Advanced settings**.
3. Select **d.velop connect > Automatic export**.
4. Choose **New** to add a new entry.
5. Enter the desired entity (for example, **account** for companies) under **Entity for the export**.
6. Enable **Automatic storage of e-mail attachments** if you want to export e-mail attachments that are attached to an entity of the selected type.
7. Save your settings.

You have successfully configured the automatic storage of e-mail attachments for an entity.

You also have the option of setting the configuration so that images from the e-mail body are also exported.

This is how it works – Automatic storage of images from the e-mail body

1. Perform steps 1 to 6 of the configuration of the automatic storage of e-mail attachments.
2. Select **Export e-mail images** if you also want to export images from the body of an e-mail. Exporting images from the e-mail body is only possible in combination with exporting file attachments.
3. Save your settings.

You have successfully configured an entity for which the automatic storage of e-mail attachments is enabled.

You also have the option of setting the configuration so that exported documents are removed from your CRM system and replaced by a link to the document in the annotation.

This is how it works – Automatic removal of attachments after storage

1. Perform steps 1 to 6 of the configuration of the automatic storage of e-mail attachments.
2. Enable **Remove attachments** if you want to remove exported documents from your CRM system and replace them with a link to the document.
3. Save your settings.

You have successfully configured an entity for which the automatic storage of e-mail attachments is enabled. Note that you may also have to configure settings in the mappings on the DMS side.

Configuring property extensions with dependent entities

You can also add values to an entity from a dependent entity at the time that the document is exported. For example, when storing a quotation within the **Company/account** entity, you require a property (a project name, for example) from the dependent entity **Project**, but you currently only have the property **Project number**. You can set the **Project name** property to be determined at runtime and used during storage without any need for manual intervention by the end user.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Switch to the advanced settings.
3. Go to the area **d.velop connect > Property extensions**.
4. Choose **New** to add the desired property extension.
5. Under **Entity name**, enter the technical name of a CRM entity whose properties you want to extend. For example, **account**.
6. Under **Field name**, enter the technical name of the extended property. In JSON, this entry appears with the prefix **ext_**.
7. Enter a meaningful name for the end user under **Display name**. This name can also be used to find the extended property in the mappings for the specific document storage location.
8. Under **Query field**, enter the property from the Fetch XML query (that is, from the dependent entity to be used as the extended property).
9. The only possible query type is **Fetch XML**. The query type may also be extended with OData in the future.
10. Enter your Fetch XML under **Query**.
11. Close the entry by choosing **Save**.

You have added a property to an entity from another, dependent entity.

Example for Fetch XML

You can visually create a Fetch XML in your Sales environment using the funnel icon or advanced search and copy it for further use. A sample query may look as follows, for example:

```
<fetch>
  <entity name="msdyn_project" >
    <attribute name="msdyn_description" />
```

```
    <attribute name="msdyn_subject" />
    <filter>
      <condition attribute="msdyn_customer" operator="eq"
value="{$accountid}" />
    </filter>
  </entity>
</fetch>
```

In this example, the query field **msdyn_subject** is added to the entity name **account**. The extended property should have the field name **project_name** and the display name **Project name**. The query type is **FetchXML .**

In the XML tag **condition**, the field **msdyn_customer** of the **msdyn_project** entity to be determined should be identical to the field **accountid** of the **account** entity to be extended. This condition determines the specific object to be used.

Configuring property transfers for manual storage

If you use the manual export function in a form, you can transfer properties from the calling entity to the document export. By doing so, you reduce the manual effort required and avoid a source of error during exports.

You configure the transfer at two points: In your Sales environment and for the mappings in the d.velop cloud platform.

This is how it works – configuring the categories and properties

1. Log in to your Sales environment with administrator rights.
2. Switch to the advanced settings.
3. Open the section **d.velop connect > Category for manual export**.
4. Use the button **New** to add the desired category.
5. Enter the technical designation of a CRM entity that should be transferred from the properties under **Key**. For example, **account** or **quote**.
6. Enter a meaningful name for the end user under **Display name**.
7. Close the entry by choosing **Save**.
8. Open the section **d.velop connect > Properties for manual export**.
9. Use the button **New** to add the desired attribute.
10. Enter the technical designation of a CRM entity property that should be transferred under **Key**.
11. Enter a meaningful name for the end user under **Display name**.
12. Close the entry by choosing **Save**.

You have now configured categories and properties for automatic transfers during manual export on the CRM side.

Enter all the desired properties so they are entity-dependent one below the other. If a property is used several times, you need to make only one entry. Afterwards, the export dialog finds the right properties when the correct entity is used.

The configured categories and properties automatically appear when the fields are assigned under the source **Dynamics 365 Sales**. The Sales user requires read access to all the entities that have to be retrieved through manual storage or property extensions. Either add the **Application User** role or grant the read access directly. Properties are automatically transferred for the end user in the export dialog only after you have assigned a category to a document type in DMS with the corresponding properties on the DMS side as well. The rule applies during the usage of both d.3ecm and the adapter d.velop connect for Microsoft SharePoint Online.

You also configure the correct call of the storage dialog for your Sales environment as an integrating application within d.velop cloud.

This is how it works – configuring the integration settings

1. Open your d.velop cloud tenant and go to **Configuration > Miscellaneous > Integration settings**.
2. Click **Add domain**.
3. Enter the URL of your Sales environment. You can also read the URL from the connection settings under **API endpoint**.
4. Click on **Apply changes**.

You have successfully configured the integration settings for your Sales environment.

> **Note**
> **Defining the default category**
>
> You can set a category as the default category. For manual storage, the default category is the preselected category without an end user having to select this category.
>
> To preselect a category, set the value in the **Default export category** column when creating **Categories for manual export** to **Yes**.

1.3.4. Configuring of forms

This chapter contains information about creation and configuration of forms.

Integrating manual storage as an HTML web resource

You can add a manual storage option to an entity form (as a button, for example).

> **Warning**
> Adding manual storage as an HTML web resource is now obsolete. We recommend integrating it as a command; see Integrating manual storage as a command.

This is how it works

1. Log in to your Sales environment as a user with administrator rights.
2. Switch to the advanced settings.
3. Navigate to the section**Customization >Forms**.
4. Select a form you would like to customize from the list.
5. Select the section **Insert** in the menu.
6. Click **Insert > Web resource** and select **dv_/html/openManualImportDialog.html**.
7. Enter a name and a designation.
8. Activate the checkbox **Pass record object type code and unique Identifier as parameters**.
9. Switch to **Formatting**.
10. Select **One column**.
11. Set **Number of rows** to **1**.
12. Set **Scroll type** to **Never**.
13. Deactivate **Show border**.
14. Confirm the settings by choosing **OK**.
15. Save and release the modifications.
16. You can also include the storage option as a button in the menu ribbon (ribbon button). Use the ribbon workbench application for this alternative option. You can find the exact procedure on the website: Ribbon workbench
    Create a command with the specified resources for the ribbon button:
    - Library: **$webresource:dv_/js/openManualImportDialog.js**
    - Function name: **dvelopConnect.ManualImport.OpenDialog**

- CrmParameter: **PrimaryControl**

> **Note**
> In on-premises systems, you must use the ribbon button.

You have now successfully added the manual storage option to the form.

Additional configuration steps are needed so that end users can properly use the storage dialog. You can find these steps in the chapter “Configuring property transfers for manual storage”.

> **Note**
> If you are using a hybrid system, you also have to create an entry in the **web.config** file. Otherwise, users receive an error message during manual storage.
>
> To ensure that d.velop documents permits the upload of the documents, you must add the host to the include list (whitelist). Go to C:\d3\d.3one\dms\, find the file **web.config** and add the entry **<add key="ContentUri.Whitelist" value="https:\/\/s3.eu-central-1.amazonaws.com" />**.

Integrating manual storage as a command

In forms, you can also include the manual storage option as a button in the ribbon.

This is how it works

1. Log in to Microsoft Power Apps with a user account with sufficient permissions.
2. Go to **Apps**.
3. Select the app that you want to customize.
4. Click **Edit**.
5. Under **Pages > Navigation**, select the view to which you want to add the manual storage button.
6. Click **Edit command bar**.
7. Select **Main form** and click **Edit**.
8. Go to **Commands** and click **New > Command**.
9. Select **JavaScript** as the command type and click **Continue**.
10. Enter a descriptive name for the button, e.g. “Manual document import.”
11. Go to **Action** and click **Run JavaScript**.
12. Select the library **dv_/js/openManualImportDialog.js**. If **dv_/js/openManualImportDialog.js** is not available in the default list, click **Add library**. Search for the library and then add it.
13. Enter **dvelopConnect.ManualImport.OpenDialog** as the **Function**.
14. Click **Add parameter**.
15. Under **Parameter 1**, select **PrimaryControl**.
16. Save and release the modifications.

You have now successfully added the manual storage option to the form in d.velop documents. You have to carry out further configurations in order for users to be able to use the storage dialog. These further configuration steps are described here: Configuring property transfers for manual storage

> **Note**
> If you are using a hybrid system, you also have to create an entry in the **web.config** file. Otherwise, users receive an error message during manual storage.
>
> To ensure that d.velop documents permits the upload of the documents, you must add the host to the include list (whitelist). Go to C:\d3\d.3one\dms\, find the file **web.config** and add the entry **<add key="ContentUri.Whitelist" value="https:\/\/s3.eu-central-1.amazonaws.com" />**.

Integration of an e-dossier as an iFrame

You can integrate e-dossiers from your DMS into the forms of selected entities as IFrames. This process is different depending on the application scenario. These instructions are therefore an example.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Switch to the advanced settings.
3. Go to **d.velop connect > Viewer URLs**.
4. Create a new entry.
5. Enter a unique ID under **URL ID**.
6. Under **Viewer URLs**, enter the URL that you want to display as an integration. The URL can contain placeholders, so that values can be applied dynamically from the integration context. Placeholders are defined as follows: **${<table>.<attribute>}** e.g. **${account.accountnumber}** or **${contact.lastname}**.
7. Click **Save**.
8. Log in to Microsoft Power Apps with a user account with sufficient permissions.
9. Select the environment in which you previously added the viewer URL.
10. Click **Solutions** and open the solution in which you want to make the adjustments.
11. Click **Tables** and expand the table for which you configured the viewer URL.
12. Click **Forms**.
13. Select the form to which you want to add the integrated viewer. Alternatively, you can create a new form.
14. Open the form editor.
15. Go to **Components > 1-column tab**.
16. Add a new tab where you want the e-dossier to appear in the form.
17. Rename the tab, e.g. **Documents**.
18. Add a **Text**-type column to the new tab using drag and drop. You can use any column, as the column merely acts as a placeholder and defines the position of the integrated viewer.
19. Select the previously added column and add the **iFrameControl** component to the column.
20. Enter the previously entered URL ID under **viewerUrlId**.
21. Optional: Use **integrationWindowHeight** to define the height of the integrated viewer in pixels. If you do not specify a value, a default height is used.
22. Click **Done**.
23. Save and release the form customization.

You have successfully added an IFrame that includes a context-sensitive e-dossier to your form.

Example jump URL in d.3

```
https://yourcloudtenant.d-velop.cloud/dms/r/720d818b-53a6-4766-ade7-
fea752bf3e2c/sr/?
objectdefinitionids=%5B%22XAD11%22%5D&properties=%7B%22100124%22%3A%5B%22${account.accountnumber}
%22%5D%7D&propertysort=property_last_modified_date&ascending=false&showdetails=true
```

Perform a search for the desired dossier in your d.velop documents environment. Copy the URL from your browser and replace the specific values with values from properties, such as **accountnumber**.

Example jump URL in d.velop for Microsoft 365

You create URLs for jumping to a d.velop for Microsoft 365 dossier using d.velop integrator.

```
https://integrator.ecspand.cloud/navigate?target=d365sales&customer=${account.accountnumber}
```

The manual for d.velop for Microsoft 365 contains additional information.

To ensure that d.velop documents accepts your Sales system as the querying system from a technical security perspective, you have to configure some security settings on the d.velop documents side.

This is how it works – d.velop documents (cloud)

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Navigate to **Routing > Integration settings**.
3. Add the domain of the requesting Sales system with **Add Domain**, e.g. https://<YourSalesEnvironment>.crm4.dynamics.com
4. Finish the configuration with **Apply changes**.

You have now successfully set up d.velop documents IFrame integration in your sales environment.

This is how it works – d.velop documents (on premises)

1. Start d.ecs http gateway.
2. Go to **Configuration**.
3. Modify the entry **Content-Security-Policy** as follows: frame-ancestors 'self' <your Sales environment>.crm4.dynamics.com

You have now successfully set up d.velop documents IFrame integration in your sales environment.

If you are working with a hybrid system, perform both steps.

Integration of an e-dossier as a button

> **Warning**
> Integration as an HTML web resource is now obsolete. We recommend integrating as a command.

This process is different depending on the application scenario. These instructions are therefore an example.

> **Note**
> In on-premises systems, you have to use the integration of an e-dossier as the IFrame.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Switch to the advanced settings.
3. In the dropdown menu, choose**Customizations**.
4. In the new menu, choose **Customize the System**.
5. Select a form you would like to modify from the list.
6. Select **Insert** in the form.
7. Add the calculated field **dv_viewer_uri** to the form if it was not added already. The display name is **Viewer Uri**.
8. Use the formula to define the jump URL. The jump URL is structured as follows: Concat("<The URL to the e-dossier in your DMS>", <field name for inserting a value, such as customer number or lead number, "<additional parameters of the URL>"). Specific examples are listed at the end of the chapter.
9. To do so, click **Insert > Web resource.**
10. Under **Web resource**, select the entry **dv_openViewerUriTargetBlank.html**.
11. Enter a meaningful name and a designation.

12. Click **OK**.
13. Open the web resource by double-clicking it.
14. Switch to **Formatting**.
15. Select **One column**.
16. Set the **Number of Rows** to **1**.
17. Set **Scroll type** to **Never**.
18. Deactivate **Show border**.
19. Confirm the settings by choosing **OK**.
20. Save and release the modification.

You have now added a button to your form that opens context-sensitive dossiers.

Example of a jump URL in d.3

Concat("https://yourcloudtenant.d-velop.cloud/dms/r/720d818b-53a6-4766-ade7-fea752bf3e2c/sr/?objectdefinitionids=%5B%22XAD11%22%5D&properties=%7B%22100124%22%3A%5B%22", accountnumber, "%22%5D%7D&propertysort=property_last_modified_date&ascending=false&showdetails=true")

Perform a search for the desired dossier in your d.3 or d.velop documents environment. Copy the URL from your browser and replace the specific values with values from properties, such as accountnumber.

Example of a jump URL in d.velop for Microsoft 365

You create URLs for jumping to a d.velop for Microsoft 365 dossier using d.velop integrator.

Concat("https://integrator.ecspand.cloud/navigate?target=d365sales&customer=",accountnumber)

The manual for d.velop for Microsoft 365 contains additional information.

Integrating an e-dossier as a command

This is how it works

1. Log in to Microsoft Power Apps with a user account with sufficient permissions.
2. Go to **Apps**.
3. Select the app that you want to customize and click **Edit**.
4. Under **Pages > Navigation**, select the view to which you want to add the manual export button.
5. Click **Edit command bar**.
6. Select **Main form** and click **Edit**.
7. Under **Commands**, click **New > Command**.
8. Select **JavaScript** as the command type and click **Continue**.
9. Enter a descriptive name for the button, e.g. **Documents**.
10. Under **Action**, select the option **Run JavaScript**.
11. Select the library **dv_/js/openViewerUriTargetBlank.js**. If the library is not available in the default list, click **Add library** to add the library.
12. Enter **dvelopConnect.OpenViewerUri.OpenViewerUrl** as the **Function**.
13. Click **Add parameter** and select **PrimaryControl** for **Parameter 1**.
14. Add another parameter, then select **String** and enter the ID of a d.velop connect viewer URL.
15. Save and release the modifications.

You have now successfully added the option to open an e-dossier to the form.

1.3.5. Configuring the conditions for export

You can define conditions for exporting documents (e.g., notes or email attachments) from your Sales environment to the DMS. You need at least version 1.5.0.2 of the integration for this configuration.

This is how it works

1. Use an authorized user to log into Power Platform Admin Center.
2. Go to the **Environments** area and select the appropriate environment.
3. Open **d.velop connect for Dynamics 365**.
4. Open the table **d.velop connect-Conditions for Export**.
5. Define the conditions as follows:
   - **Conditionfield**: The field for which the condition is checked.
   - **Automatic Export Setting**: The export setting of the condition.
   - **Technical Id**: The unique, logical identifier of the condition.
   - **Values**: The values that the condition field must have in order for the condition to be met. You can negate values with an exclamation mark (!).
   - **Source category**: The source category used for export when the condition is met.
   - **ExportType**: Specifies the export type of the condition (**Mail**, **Annotation**, or **Dossier**).
   - **ExclusionActive**: Specifies whether this condition is an exclusion condition. If the value is **Yes** and the condition is met, the export will not be performed. If the value is **Yes**, the source category must be empty.

1.4. Configuring the automatic deletion of active users' data

> **Notice**
> This configuration is only required as of version 1.3.X of the integration and is an optional, yet recommended configuration step.

For license verification and billing, the integration stores which users use features of the integration.

This data is relevant only for the current and last calendar year and can then be deleted to save storage space.

This is how it works

1. Use an authorized user to log into Power Platform Admin Center.
2. Go to the **Environments** area and select the appropriate environment.
3. Go to **Settings > Data Management > Bulk Deletion**. A separate browser tab opens for configuration of the bulk deletion.
4. Click **New** to create a bulk deletion job.
5. Click **Next**.
6. In the selection menu, select **Look for** the entity **d.velop connect - active user usage**.
7. Under **Fields**, select **Data record created on**.
8. Select the comparison option **Older than X years**.
9. Enter **2** as the value for the comparison.
10. Click **Next**.
11. Enter a descriptive name for the bulk deletion, such as **d.velop connect: Clean up old usage data**.
12. Activate **Run this job after every** and select **365 days** as the interval.
13. Click **Next**.
14. Check your entries.
15. Click **Submit**. The job is created in the system.

You have successfully created a bulk deletion job to delete old data records once a year.

1.5. Tips and tricks

In this section you will discover additional options available in the application to help you achieve your goal faster.

1.5.1. Configuring global settings

You can configure various global settings for the d.velop connect integration.

You can configure the number of jobs created for subsequent dossier creation.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Open the advanced settings.
3. Under the group, choose **d.velop connect > Globale settings**.
4. Choose **New** to add a new entry.
5. Enter a descriptive name for the global settings.
6. Under **Subsequent dossier creation > Maximum number of jobs (subsequent dossier creation)**, select a value between **1** and **2000**.
7. Save the configuration.

You have successfully configured a global setting for the d.velop connect integration.

1.5.2. Subsequent creation of dossiers for existing entities

You can also create dossiers for existing entities in your DMS at a later stage. This may be useful, for instance, if the integration is introduced into an existing system.

This is how it works

1. Log in to your Sales environment with administrator rights.
2. Open the advanced settings.
3. Under the group, choose **d.velop connect > Automatic export**.
4. Select the entity you created for the automatic export. Automatic dossier storage should be activated for this entity.
5. Click **Create dossier**.
6. Confirm the information message. Be aware that the dossiers created from the CRM system are used as the basis for validating whether or not a dossier was created already. That is, if the desired dossiers are already available in the DMS system, the dossiers may sometimes be created twice.

You have now successfully created dossiers for your existing entities in your DMS system.

1.5.3. Restarting or canceling an incorrect export order

You can restart or cancel a failed export after making a correction or mapping fields to your DMS.

This is how it works

1. Open **Advanced settings** with an authorized user.
2. Go to **Settings > d.velop connect > Job overview**.
3. Set the filter to **Active d.velop connect Jobs**.
4. Select the necessary document with **Reason for status: Error** and click the blue ID, which is a link to the entity.
5. Click **Restart job** to restart the export.
6. If the document to be exported is no longer relevant, you can cancel processing by clicking **Cancel job**.

You have successfully triggered a document for export after correcting the error status.

1.5.4. Monitoring document processing

You can monitor and view the document processing for your documents that are to be exported.

This is how it works

1. Use an authorized user account to open **Advanced settings**.
2. Go to **Settings > d.velop connect > Job overview**.
3. Choose either **Active d.velop connect jobs** or **Inactive d.velop connect jobs** as the filter.
4. In the **ID of the referenced entity** column, click the ID highlighted in blue to go to the details of an export

You can view the status of the export order here: The URL for the physical document is shown if successful, or the error message if not.

You have successfully viewed and monitored document processing.

The status **Active** is provided for documents that still have to be exported, or that were canceled with an error. The reason for the status is then **Error**. The documents are inactive if the documents were processed successfully. The reason for the status is then **Inactive**.

If an error occurs, the export of a document is repeated iteratively five times with an interval of ten minutes. This is intended to robustly intercept any failure of a service to accept and store the document or target repository over an extended period of time.

1.6. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.