Product:	M-Files for Microsoft Dynamics CRM
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Installing Dynamics CRM Integration

Summary

This article describes the methods and steps required for installing the Dynamics CRM solution for M-Files for Microsoft Dynamics CRM.

Prerequisites

Before beginning the installation an M-Files document vault must be configured against the target Dynamics environment. This requires creating the required object types, configuring them to be imported from Dynamics CRM and enabling Document browsing relationship for these object types. Please see the article *Installing and Configuring M-Files for Microsoft Dynamics CRM Extension* for more information on how to configure the Dynamics CRM Extension in M-Files.

Installing the solution into Dynamics CRM requires a Dynamics user with administrator privileges in the targeted Microsoft Dynamics CRM environment. The actual solution template should be bundled with this document.

Configuration

Before the solution can be imported into Dynamics the vault and object type settings must be configured. This is done by first unpacking the managed solution zip-file into a temporary folder. The settings are defined in WebResources\mfiles_commands[GUID] file. Open this file in notepad and modify the first rows as instructed in the file.

The Dynamics CRM integration is commonly used for e.g. conveniently viewing all documents related to a certain customer. To achieve this, a view that lists documents and automatically groups them to virtual folders by customers has to be created to the M-Files vault that is used with the integration. After this has been done the ID of the view is needed for the entity mappings.

Note that even though we use customers in this example, the same steps can be used to configure the integration for any other type of objects as well (e.g. contact persons, leads, activities etc.).

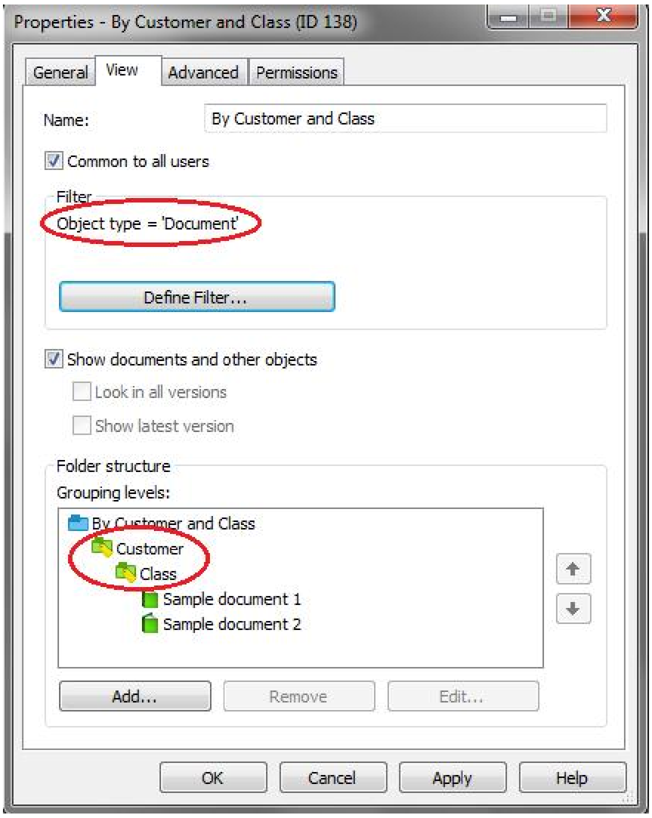


Figure 1 Sample filter settings for a view that lists documents and groups them by customer

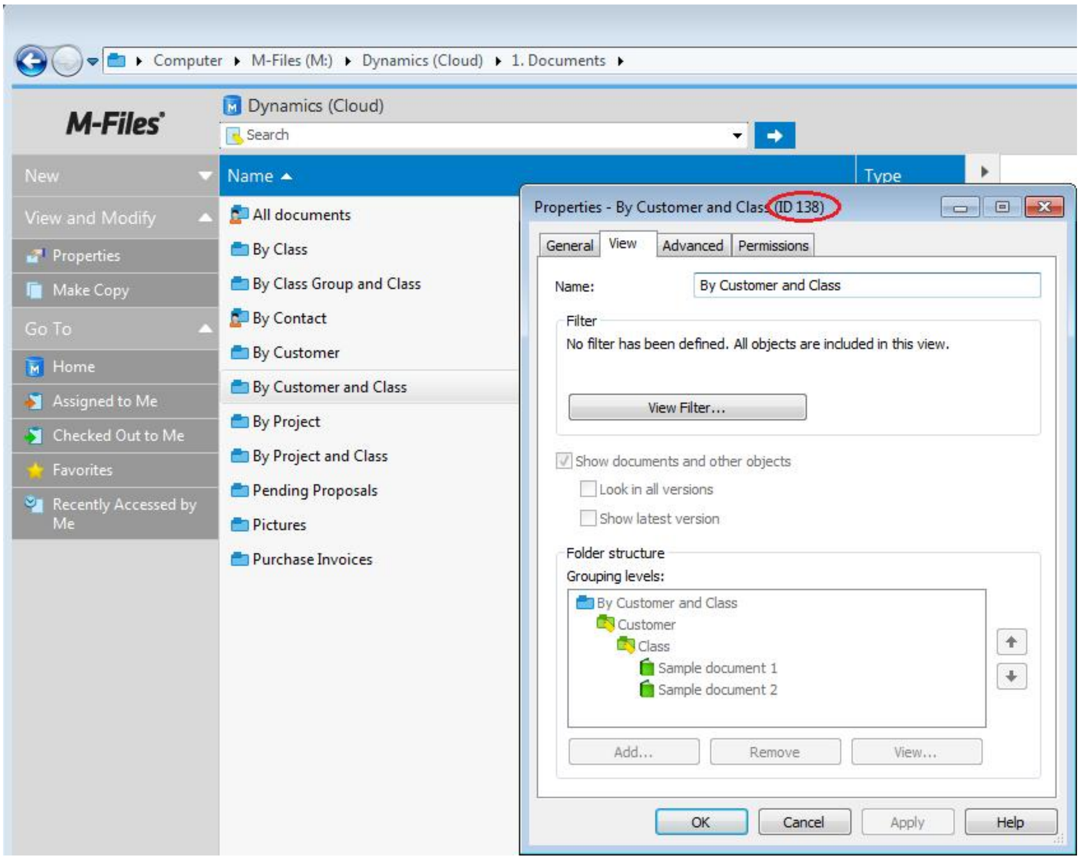


Figure 2 How to find out the view id

To find out the View ID, right click on top of a view and open *Properties*. In this example the View ID is 138 (see picture above).

mfiles_commands9DD9F8DB-F51E-E011-A0C1-000C296BE24A - Notepad

File Edit Format View Help

```
// Configuration section

// Vault GUID without braces.
var vault = "00000000-0000-0000-0000-000000000000";

// Entity mappings.
// Dynamics entity name, followed by view id and object type id:
// [dynamics entity name]: "[view id]/[object type id]"
var mfviews = {
    account: "136/101",
    contact: "106/104"
};

// Configuration section ends.

function showDocuments(formType, gridType, formGuid, gridGuid) {
    type = formType;
    if (!type) type = gridType;

    var guid = formGuid;
    if (!guid) guid = gridGuid;

    guid = guid.substring(1, guid.length-1).toLowerCase();
    mfurl = "m-files://viewid/" + vault +"/" + mfviews[type] + "-'" + guid + "'";
    top.location = mfurl;
}

function createDocument(formType, gridType, formGuid, gridGuid) {
    type = formType;
    if (!type) type = gridType;

    var guid = formGuid;
    if (!guid) guid = gridGuid;
    guid = guid.substring(1, guid.length-1).toLowerCase();
    mfurl = "m-files://newobject/" + vault +"/0?view=" + mfviews[type] + "-'" + guid + "'";
    top.location = mfurl;
}
```

Figure 3 WebResources\mfiles_commands[GUID] file contents

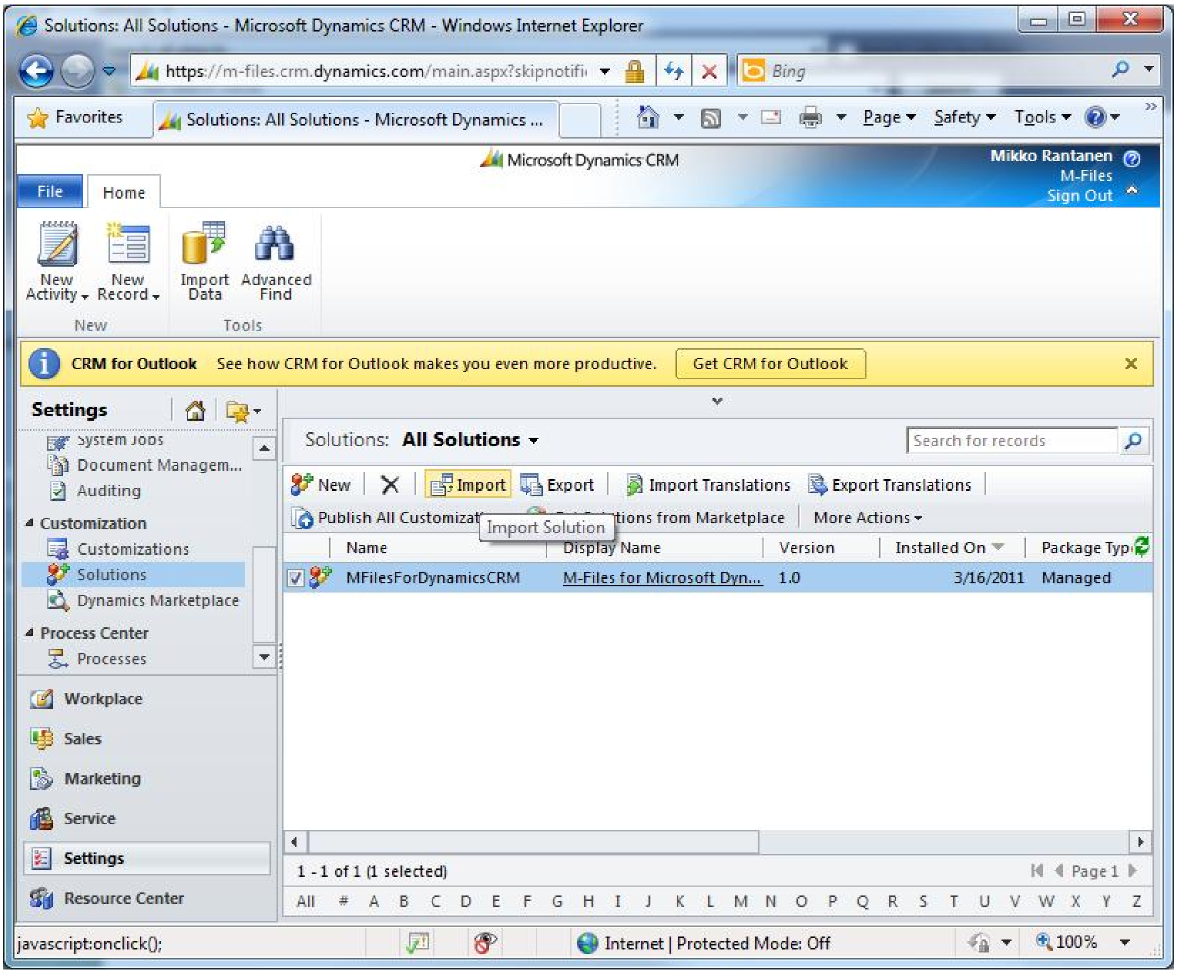
If you added or removed entity mappings, the display rules in customization.xml must be modified as well. Open this file in notepad and add or remove the required Or-conditions in the display rule with Id attribute of “Motivesys.MFiles.Dynamics.DisplayRules.IntegratedTypes”. The correct place is found easily by searching for the Id value. If you are only integrating accounts and contacts the Or-rules should be correct and do not need to be modified. Below is an example of an OrRule that provides integration for account, opportunity and quote entities.

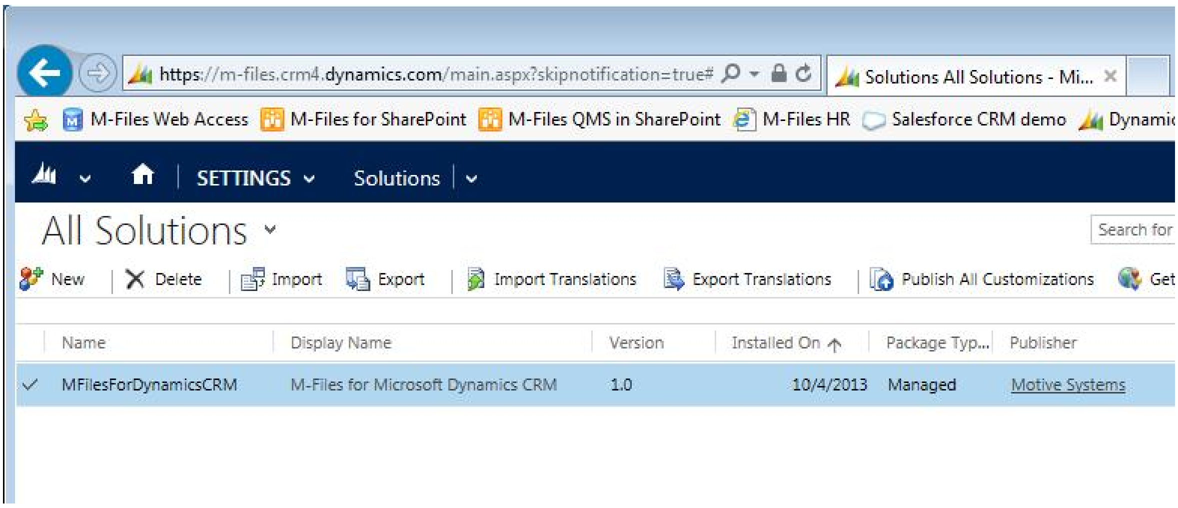
```
<OrRule>
  <Or>
    <EntityRule EntityName="account" />
  </Or>
  <Or>
    <EntityRule EntityName="opportunity" />
  </Or>
  <Or>
    <EntityRule EntityName="quote" />
  </Or>
</OrRule>
```

Installation

Once the solution has been configured it can be zipped again on the top level. Please make sure you do not zip the temporary folder but only its contents. When extracting the zip file it shouldn't place the customization.xml into a new folder.

Now that you have the solution package, navigate to the Solutions category in the Dynamics CRM settings and choose Import from the grid toolbar as shown in **Error! Reference source not found.**. Select the modified zip file and proceed with the instructions on the screen.





Applies to

- M-Files for Dynamics CRM 1.0
- On-premise or online version of Microsoft Dynamics CRM (4.0, 2011, 2013)
- M-Files 7.0.2591.34 and later