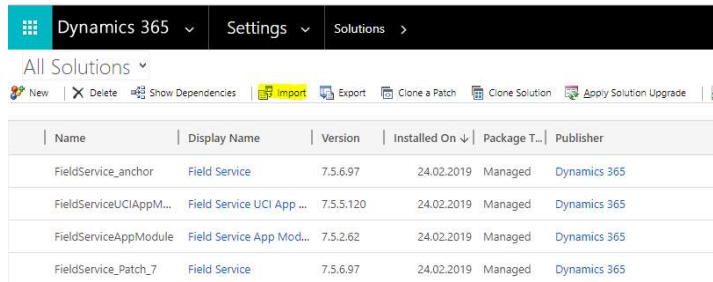


Installation Guide / Managed Solution

Open the Solutions and click import:



The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. Below the navigation bar, there's a search bar and several action buttons: New, Delete, Show Dependencies, Import, Export, Clone a Patch, Clone Solution, and Apply Solution Upgrade. A table lists the installed solutions.

Name	Display Name	Version	Installed On	Package T...	Publisher
FieldService_anchor	Field Service	7.5.6.97	24.02.2019	Managed	Dynamics 365
FieldServiceUCIAppM...	Field Service UCI App ...	7.5.5.120	24.02.2019	Managed	Dynamics 365
FieldServiceAppModule	Field Service App Mod...	7.5.2.62	24.02.2019	Managed	Dynamics 365
FieldService_Patch_7	Field Service	7.5.6.97	24.02.2019	Managed	Dynamics 365

Select the managed solution you want to import:

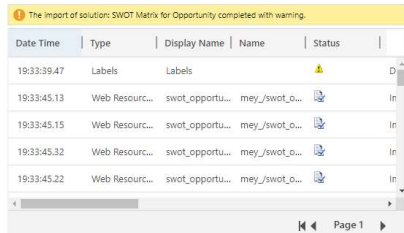
- SWOTMatrixforAccount_1_0_0_0_managed.zip
- SWOTMatrixforOpportunity_1_0_0_0_managed.zip

Select Solution Package

Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

SWOTMatrixforOpportunity_1_0_0_0_managed.zip

Importing Solution



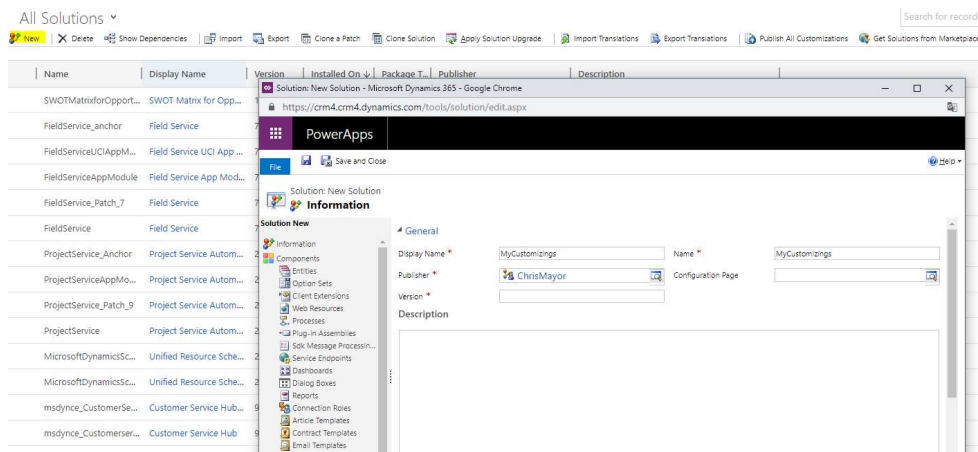
The screenshot shows the 'Importing Solution' dialog box. At the top, there's a yellow warning bar: 'The import of solution: SWOT Matrix for Opportunity completed with warning.' Below this is a table with columns: Date Time, Type, Display Name, Name, Status, and a dropdown arrow. The table lists several components imported at 19:33:45. The first row shows a warning for 'Labels'. The subsequent rows show 'Web Resource' components being imported successfully.

Date Time	Type	Display Name	Name	Status
19:33:39.47	Labels	Labels		Warning
19:33:45.13	Web Resource...	swot_opportu...	mey_/swot_o...	In
19:33:45.15	Web Resource...	swot_opportu...	mey_/swot_o...	In
19:33:45.32	Web Resource...	swot_opportu...	mey_/swot_o...	In
19:33:45.22	Web Resource...	swot_opportu...	mey_/swot_o...	In

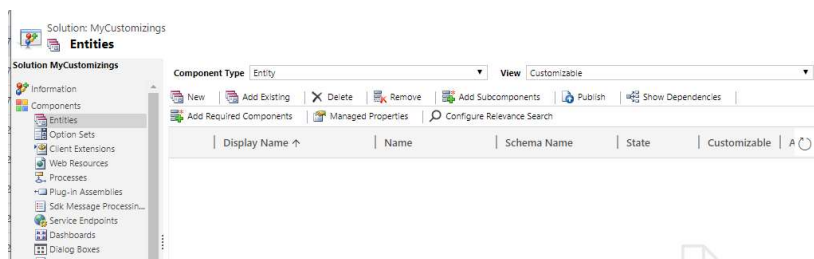
Ignore the warning of the label missing translations for 1031.

At this point 4 Fields and the web resource components are imported.

Use/Create your own solution to add the web resource to the form.

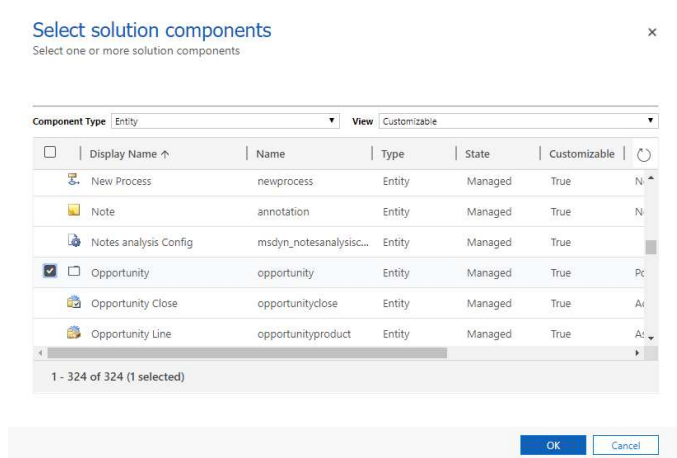


Go to entities:

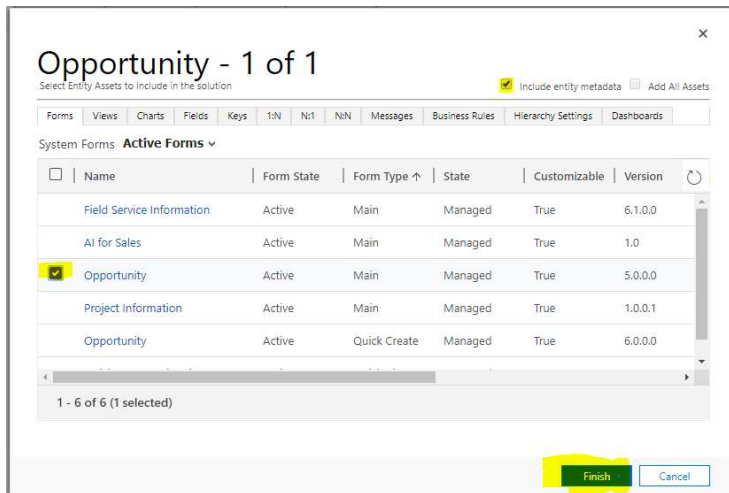


Click „Add Existing“

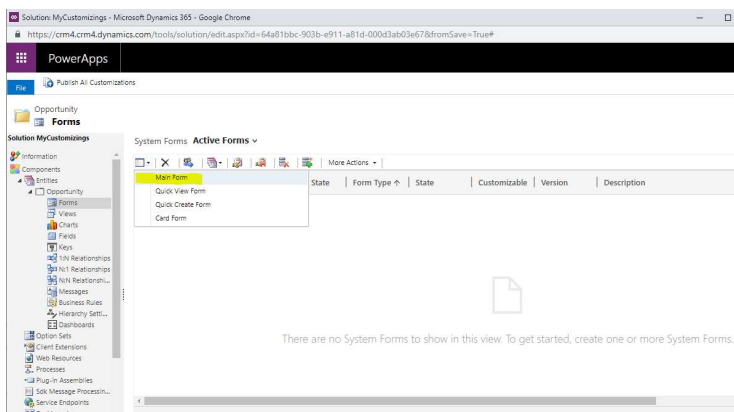
Add the Opportunity Entity



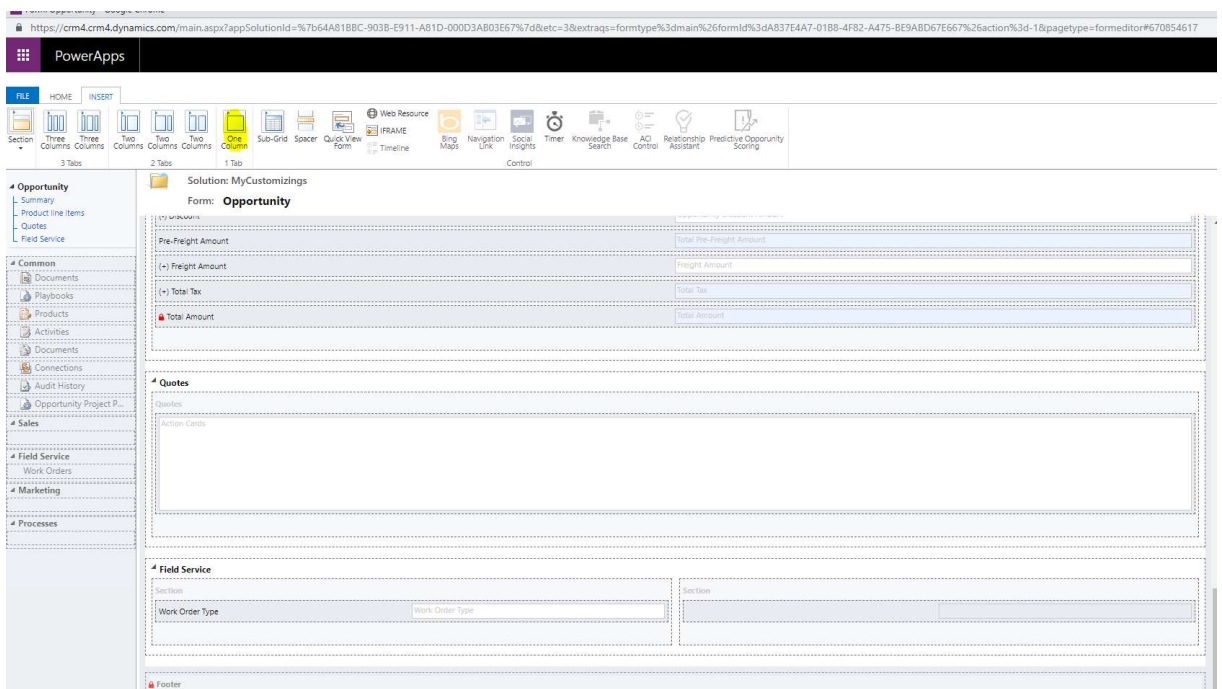
Add only the opportunity main form:



Edit the main form:



Add a new one column section:



Insert a SWOT Matrix section:

The screenshot shows the Salesforce Lightning Design System (SLDS) Builder interface. The left sidebar contains a tree view with the following sections: Opportunity (Summary, Product line items, Quotes, SWOT Matrix, Field Service), Common (Documents, Playbooks, Products, Activities, Documents, Connections, Audit History, Opportunity Project P...), Sales, Field Service (Work Orders), Marketing, and Processes. The main area displays the 'Form: Opportunity' layout. The 'SWOT Matrix' section is highlighted in the sidebar and is currently empty in the main form area. The form layout includes sections for 'Total Amount', 'Quotes', 'SWOT Matrix', and 'Field Service'.

Add a new web resource to the section:

The screenshot shows the Salesforce Lightning Design System (SLDS) Builder interface. The left sidebar contains a tree view with the following sections: Opportunity (Summary, Product line items, Quotes, SWOT Matrix, Field Service), Common (Documents, Playbooks, Products, Activities, Documents, Connections, Audit History, Opportunity Project P...), Sales, Field Service (Work Orders), Marketing, and Processes. The main area displays the 'Form: Opportunity' layout. The 'SWOT Matrix' section is highlighted in the sidebar and is currently empty in the main form area. The form layout includes sections for 'Total Amount', 'Quotes', 'SWOT Matrix', and 'Field Service'. A 'Web Resource' component is being added to the 'SWOT Matrix' section.

Add Web Resource

Add an existing web resource to the Form.

General Formatting Dependencies

Web resource

Web resource *

Field Name and Properties

Name *

Label *

☐ Display label on the Form

Visibility

☒ Visible by default

☐ Enable for mobile

Web Resource Properties

Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.

☒ Pass record object-type code and unique identifier as parameters.

OK Cancel

Add Web Resource

Add an existing web resource to the Form.

General Formatting Dependencies

Layout

Select the number of columns the control occupies:

☒ One column

☐ Two columns

☐ Three columns

☐ Four columns

Row Layout

Select the number of rows the control occupies.

Number of Rows

☐ Automatically expand to use available space.

Scrolling

Row Layout

Select the number of rows the control occupies.

Number of Rows

☐ Automatically expand to use available space.

Scrolling

Select the scrolling type for the IFRAME.

Scrolling

Border

Specify whether a border is displayed.

☒ Display border

Click ok.

Publish Customizations.

Opportunity: Opportunity

My Opportunity

Est. Close Date

Est. Revenue

Status
In Proj

Opportunity Sales Process
Active for 8 minutes

Qualify (8 Min)

Propose

Contract

Summary

Product line items

Quotes

SWOT Matrix

Field Service

Related

Strengths

empty - drop below

Weaknesses

empty - drop below

Opportunities

empty - drop below

Threats

empty - drop below