

## Installation Guide / Managed Solution

Open the Solutions and click import:

Dynamics 365 ▾ Settings ▾ Solutions ▸						
All Solutions ▾						
New  Delete  Show Dependencies  Import  Export  Clone a Patch  Clone Solution  Apply Solution Upgrade						
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

Help

The import of solution: SWOT Matrix for Opportunity completed with warning.

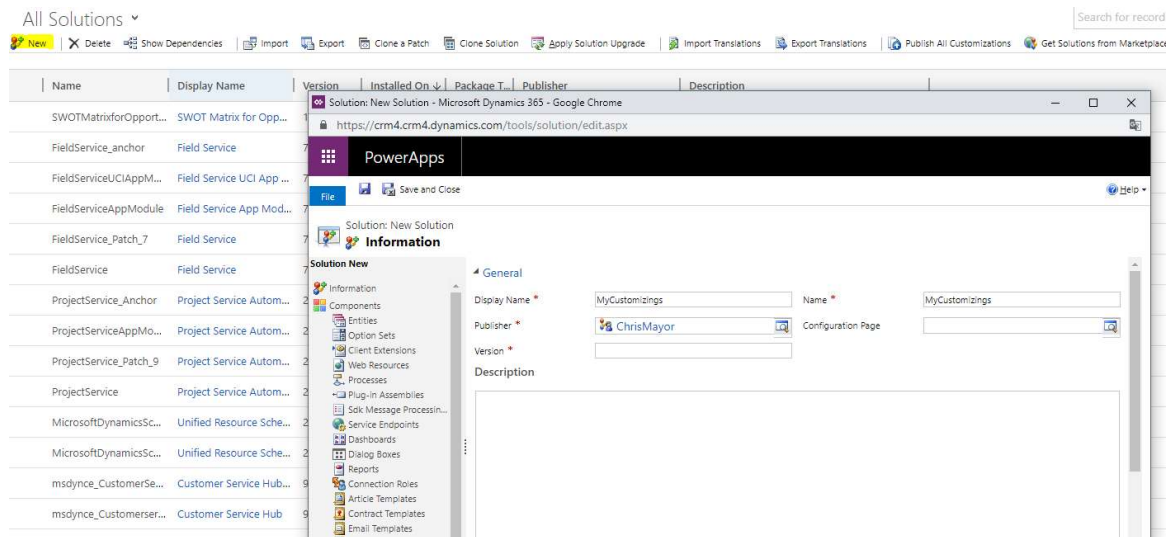
Date Time	Type	Display Name	Name	Status	
19:33:39.47	Labels	Labels			D
19:33:45.13	Web Resourc...	swot_opportu...	mey_/swot_o...		In
19:33:45.15	Web Resourc...	swot_opportu...	mey_/swot_o...		In
19:33:45.32	Web Resourc...	swot_opportu...	mey_/swot_o...		In
19:33:45.22	Web Resourc...	swot_opportu...	mey_/swot_o...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

Page 1

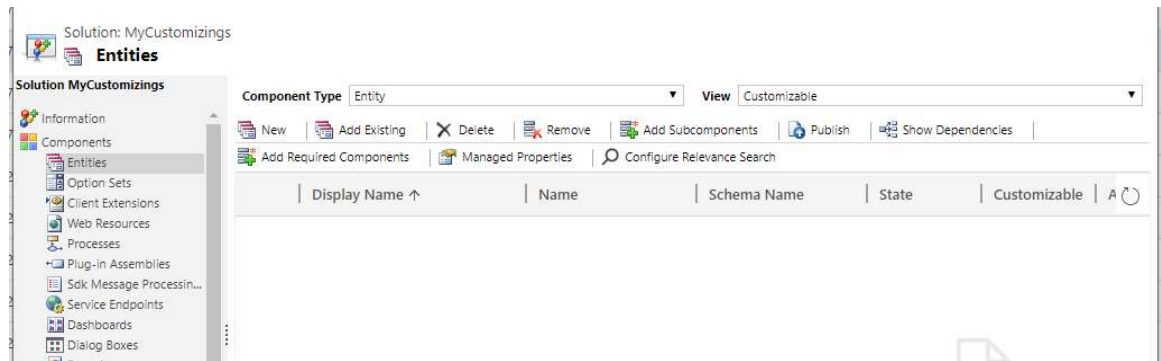
Ignore the warning of the label missing translations for 1031.

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

## Select solution components

Select one or more solution components

Component Type







Entity

▼

View

Customizable

▼

<input type="checkbox"/>	Display Name ↑	Name	Type	State	Customizable	↻
	New Process	newprocess	Entity	Managed	True	N
	Note	annotation	Entity	Managed	True	N
	Notes analysis Config	msdyn_notesanalysisisc...	Entity	Managed	True	
<input checked="" type="checkbox"/> 	Opportunity	opportunity	Entity	Managed	True	Pc
	Opportunity Close	opportunityclose	Entity	Managed	True	Ac
	Opportunity Line	opportunityproduct	Entity	Managed	True	As

◀

▶

1 - 324 of 324 (1 selected)

OK

Cancel

Add only the opportunity main form:

### Opportunity - 1 of 1

Select Entity Assets to Include in the solution

☒ Include entity metadata ☐ Add All Assets

Forms Views Charts Fields Keys 1:N N:1 N:N Messages Business Rules Hierarchy Settings Dashboards

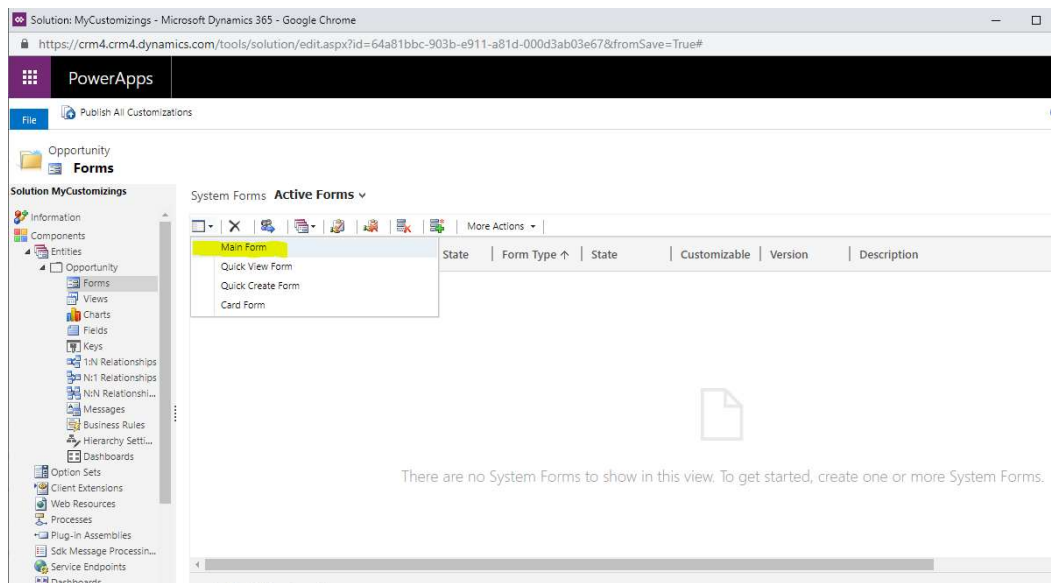
System Forms **Active Forms** ▾

<input type="checkbox"/>	Name	Form State	Form Type ↑	State	Customizable	Version	
	Field Service Information	Active	Main	Managed	True	6.1.0.0	
	AI for Sales	Active	Main	Managed	True	1.0	
<input checked="" type="checkbox"/>	Opportunity	Active	Main	Managed	True	5.0.0.0	
	Project Information	Active	Main	Managed	True	1.0.0.1	
	Opportunity	Active	Quick Create	Managed	True	6.0.0.0	

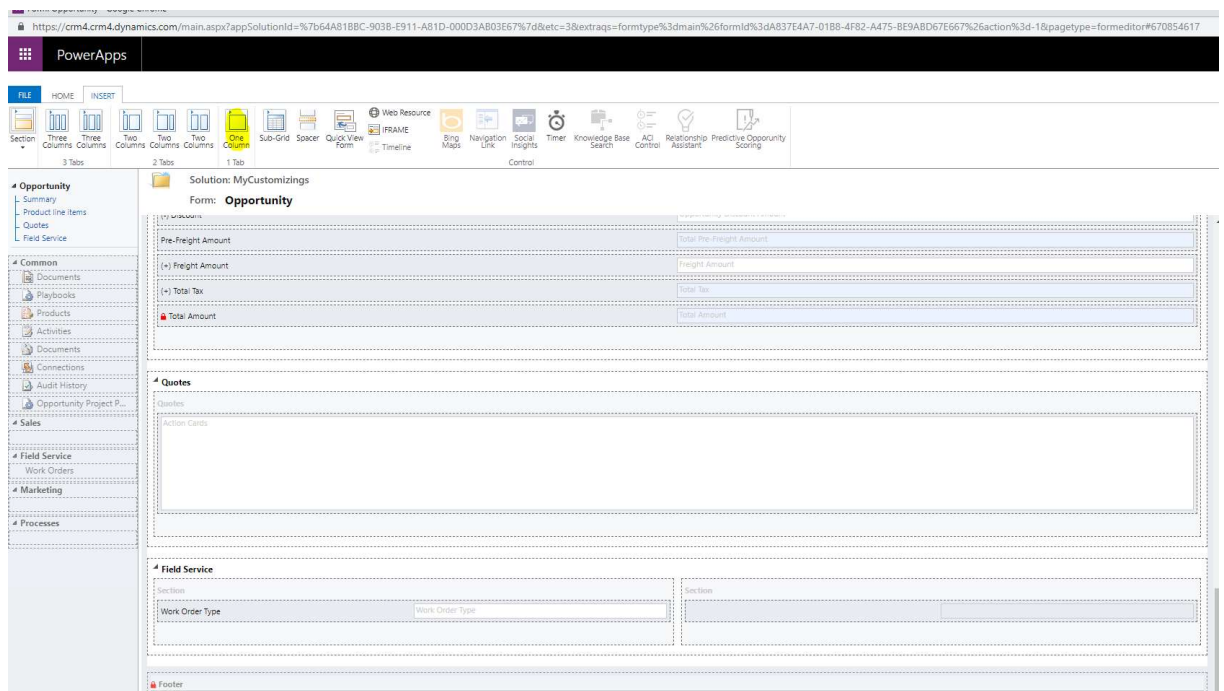
1 - 6 of 6 (1 selected)

**Finish** Cancel

Edit the main form:



Add a new one column section:



Insert a SWOT Matrix section:

FILE HOME INSERT

Save Save As Save and Close Publish Change Properties Remove Undo Redo Header Footer Navigation Select Business Rules Form Properties Preview Show Dependencies Managed Properties Merge Forms Upgrade

Solution: MyCustomizings  
Form: **Opportunity**

▲ **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**

▲ **Processes**

Total Amount Total Amount

▲ **Quotes**  
Quotes  
Action Cards

▲ **SWOT Matrix**  
Section

▲ **Field Service**  
Section  
Work Order Type Work Order Type

Add a new web resource to the section:

FILE HOME INSERT

Section Three Columns Three Columns Two Columns Two Columns Two Columns One Column Sub-Grid Spacer Quick View Form Web Resource IFRAME Bing Maps Navigation Link Social Insights Timer Knowledge Base Search ACI Control Relationship Assistant Prediction

Solution: MyCustomizings  
Form: **Opportunity**

▲ **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**

▲ **Processes**

Total Amount Total Amount

▲ **Quotes**  
Quotes  
Action Cards

▲ **SWOT Matrix**  
Section

▲ **Field Service**

## Add Web Resource



Add an existing web resource to the Form.

General

Formatting

Dependencies

Web resource

Web resource \*  mey\_/swot\_opportunity/index.html 

Field Name and Properties

Name \*

WebResource\_ swotmatrix

Label \*

swotmatrix

☐ 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

25

☐ 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