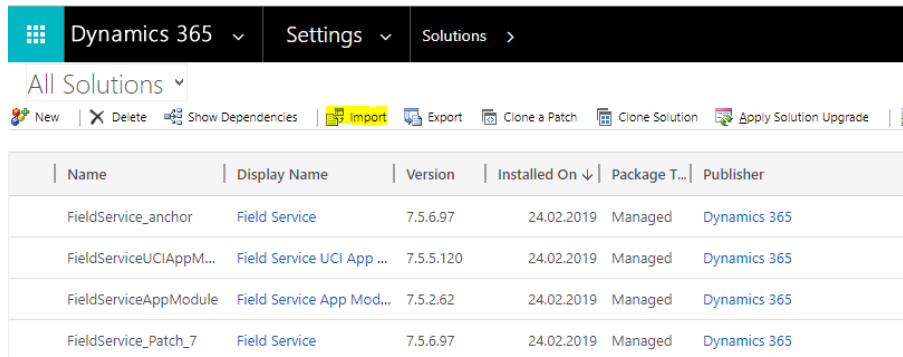


## Installation Guide: Managed Solution

Open the Solutions and click import:



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:

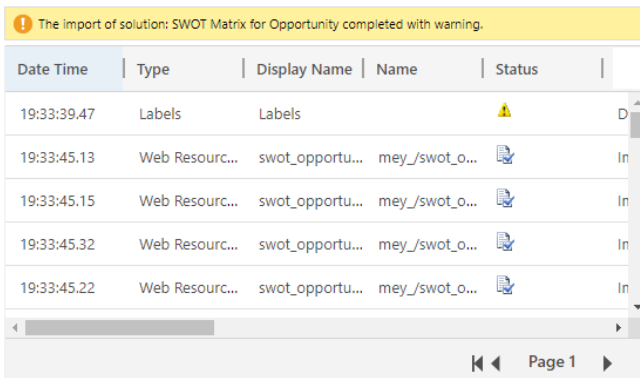
- SWOTMatrixforAccount\_1\_0\_0\_0\_managed.zip
- SWOTMatrixforOpportunity\_1\_0\_0\_0\_managed.zip

### 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

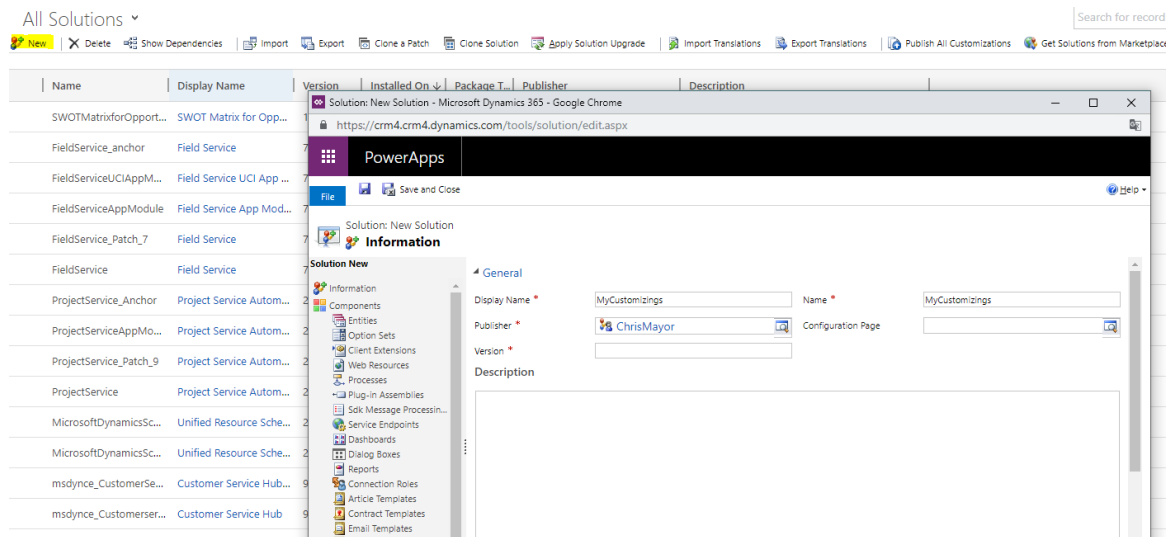


Date Time	Type	Display Name	Name	Status	
19:33:39.47	Labels	Labels			
19:33:45.13	Web Resourc...	swot_opportu...	mey_/swot_o...	In	
19:33:45.15	Web Resourc...	swot_opportu...	mey_/swot_o...	In	
19:33:45.32	Web Resourc...	swot_opportu...	mey_/swot_o...	In	
19:33:45.22	Web Resourc...	swot_opportu...	mey_/swot_o...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

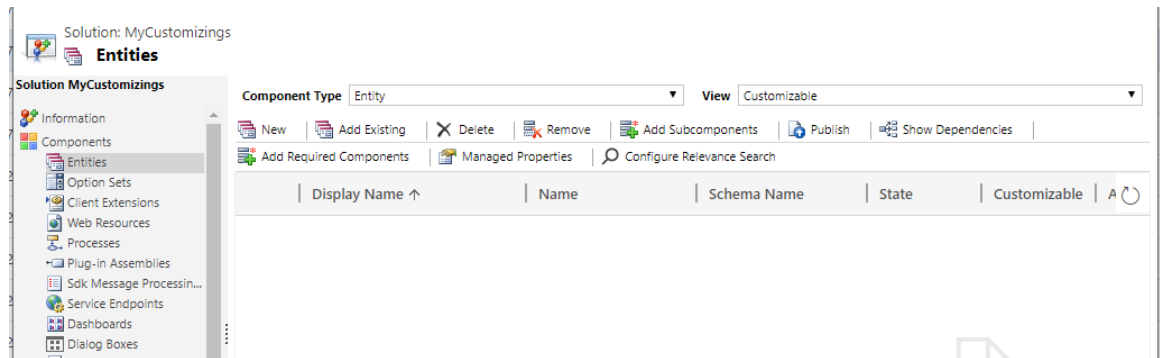
Ignore the warning of the label missing translations for 1031.

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 TypeEntityViewCustomizable

<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

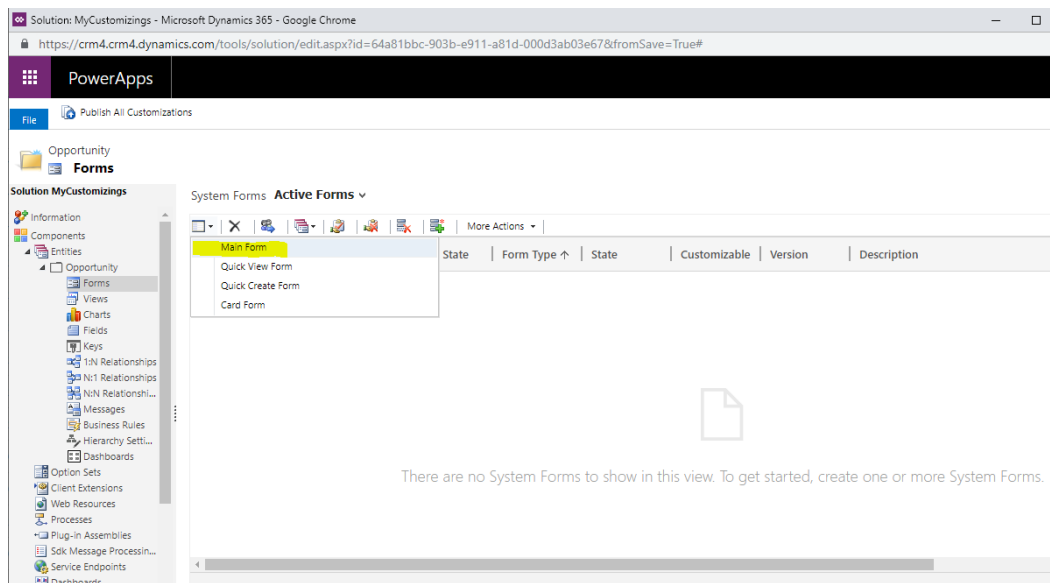
Forms Views Charts Fields Keys 1:N N:1 N:N Messages Business Rules Hierarchy Settings Dashboards

System Forms **Active Forms** ▾

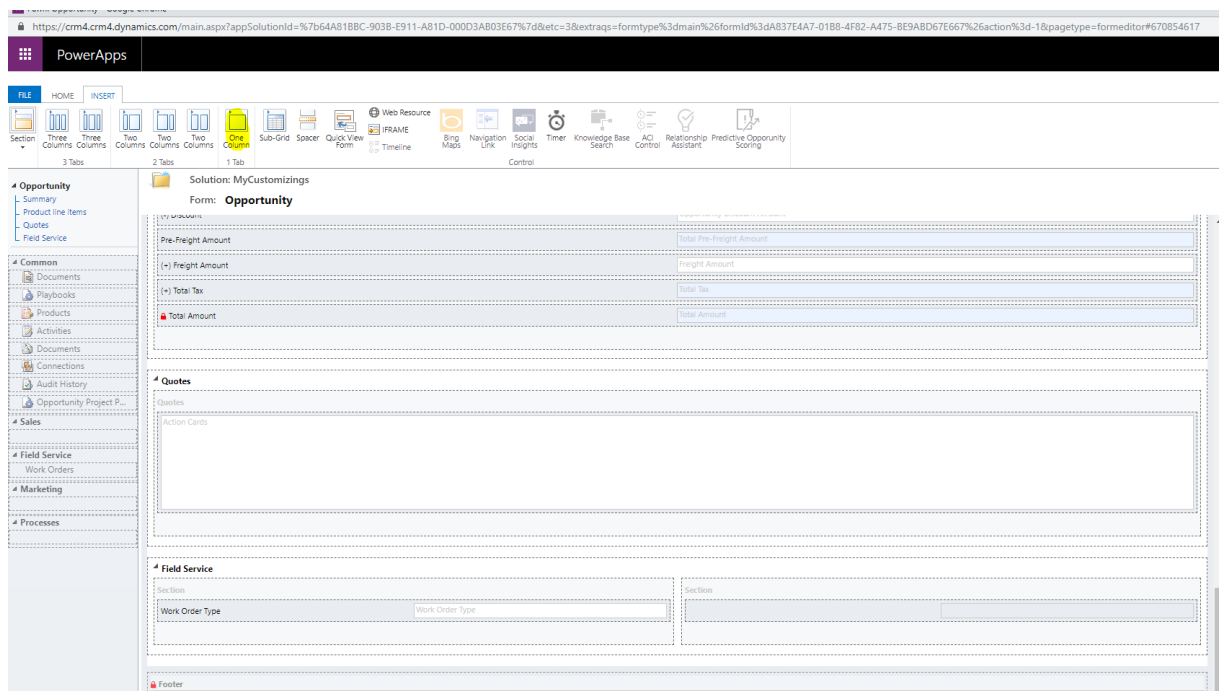
<input type="checkbox"/>	Name	Form State	Form Type ↑	State	Customizable	Version	
	Field Service Information	Active	Main	Managed	True	6.1.0.0	
	AI for Sales	Active	Main	Managed	True	1.0	
<input checked="" type="checkbox"/>	Opportunity	Active	Main	Managed	True	5.0.0.0	
	Project Information	Active	Main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

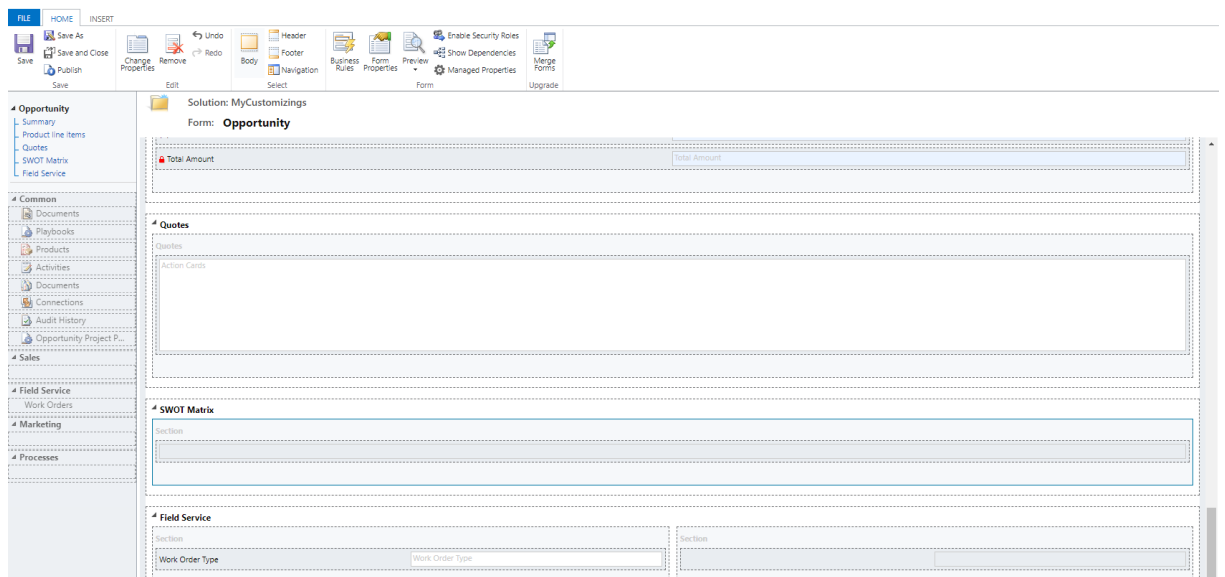


Add a new one column section:

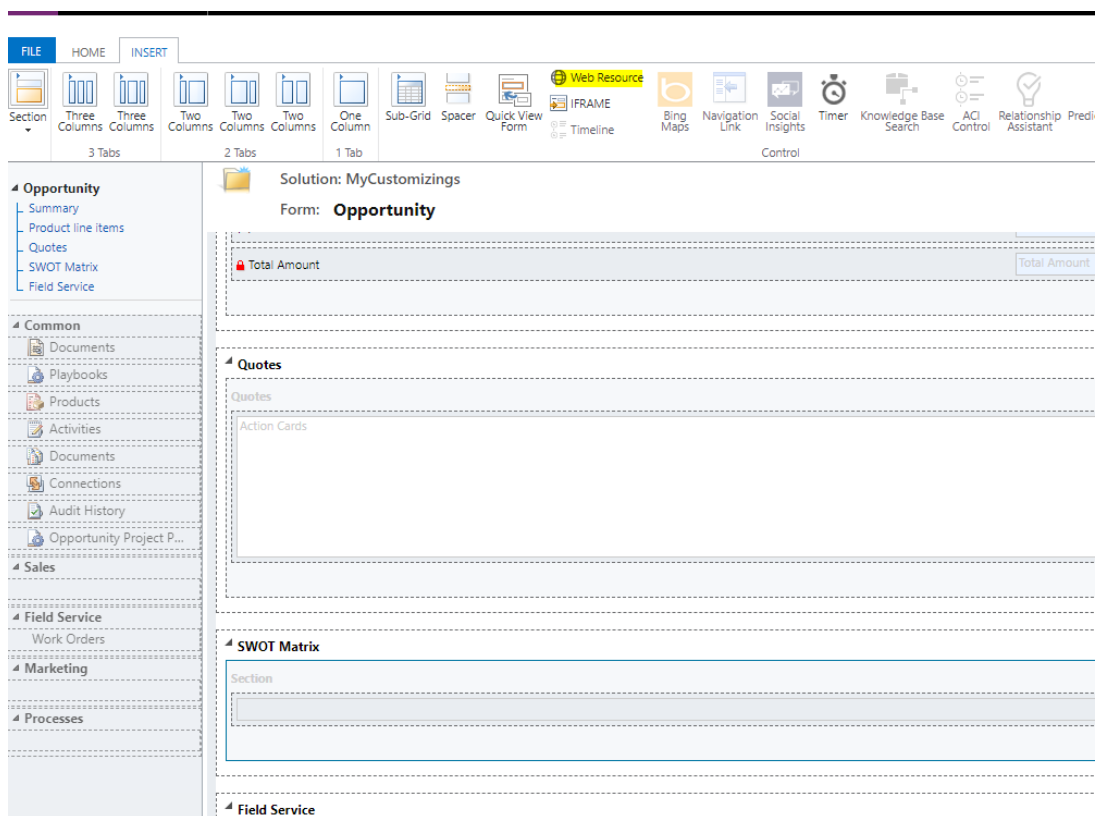


## Installation Guide: Add component to form

Insert a SWOT Matrix section:



Add a new web resource to the section:





## 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

- Important: Click „Pass record object-type code and unique identifier as parameters”

## 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

- The row size of 25 fits well ...

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

- ... so scrolling and border are not required

Click ok.

Publish Customizations.

Open the form:



Opportunity: Opportunity ▾  
My Opportunity

Est. Close Date  
---



Est. Revenue  
---

Status  
In Progress

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