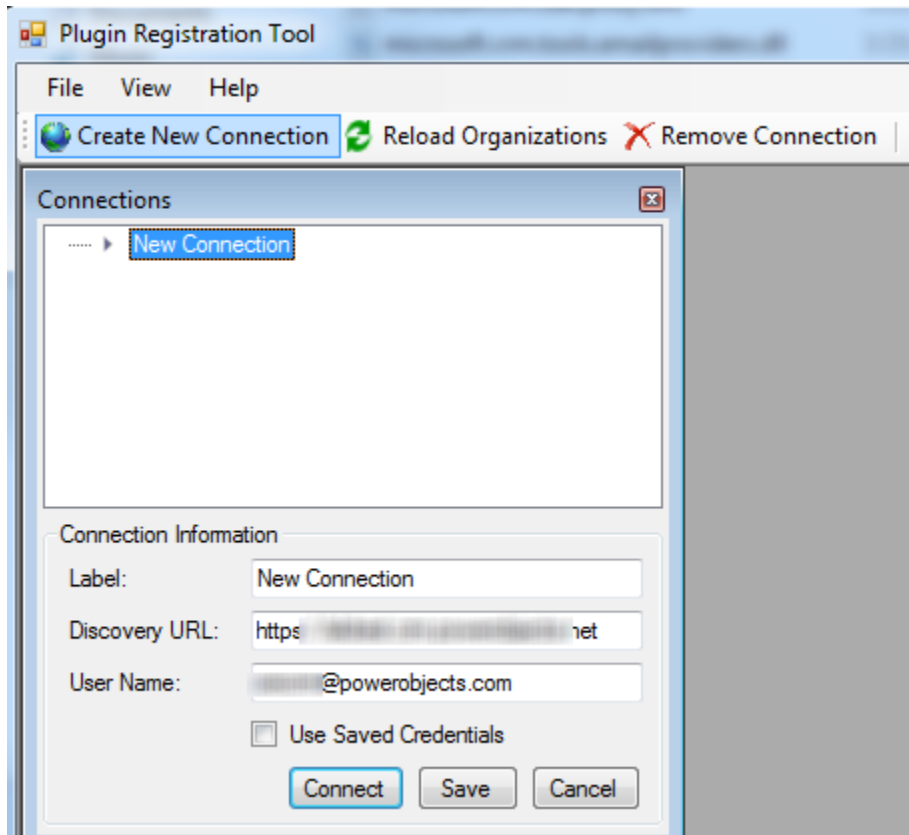


Registering and Deploying Plug-ins

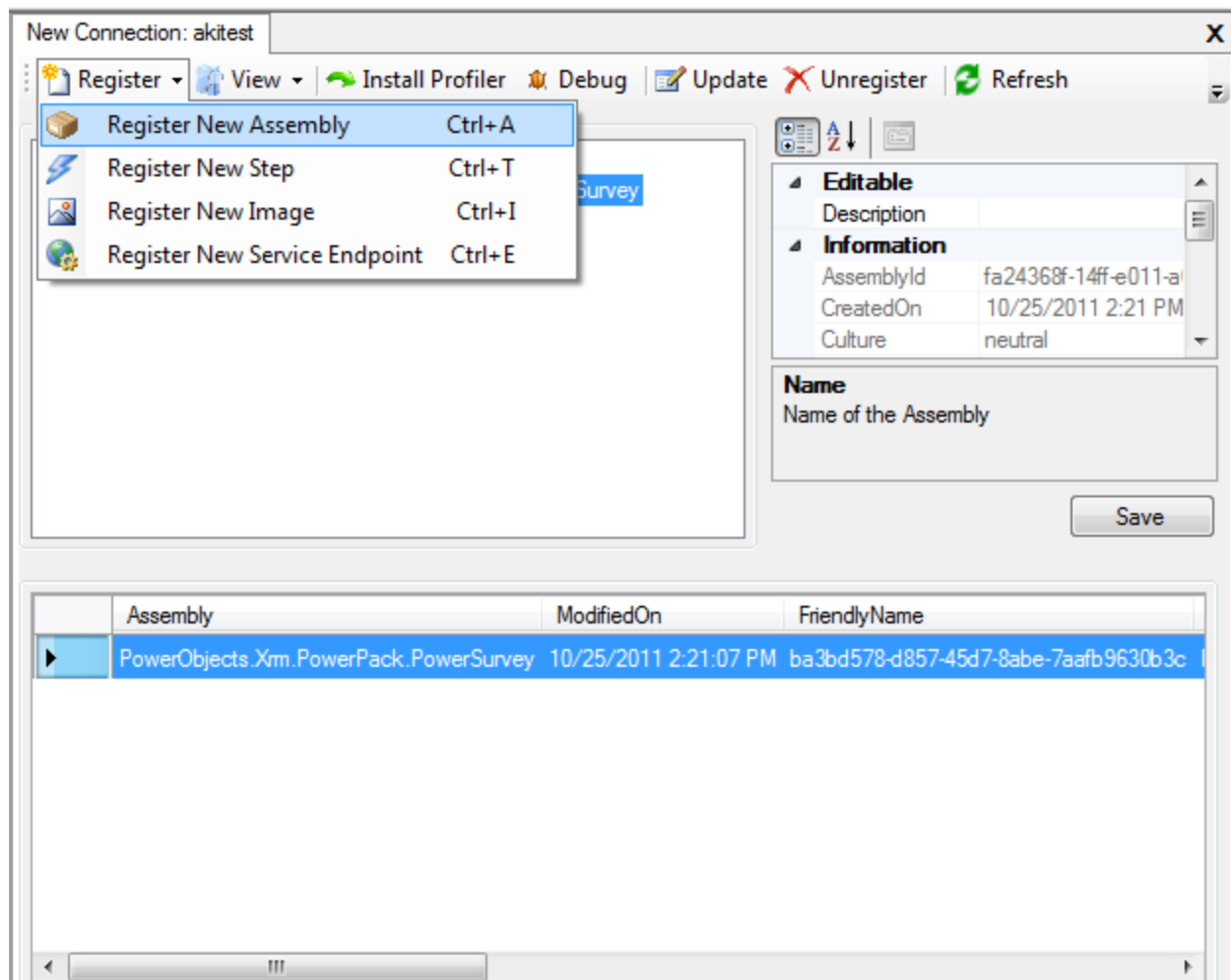
Registering and deploying plug-ins can be done using the plug-in registration tool. The tool is available in [CRM SDK](#). Here's how to do it:

1. Connect to your organization.



If you have access to multiple organizations in the server, choose the one to connect to.

2. Register a new assembly.



3. Browse the assembly file, select **Isolation Mode** and specify where the assembly is stored.

Register New Plugin

Step #1: Specify the Location of the Assembly to Analyze

Load Assembly

Step #2: Select the Plugins & Workflow Activities to Register

☒ Select All / Deselect All

Step #3: Specify the Isolation Mode

☒ **Sandbox**
All code in this assembly will be run in a secure sandbox (reduced functionality)

☐ **None**

Step #4: Specify the Location where the Assembly should be stored

☒ **Database**
Assembly is stored and loaded from the database. For debugging purposes, the Symbols (.PDB files) must be in \Server\bin\assembly of the main installation folder for each server that needs to be debugged.

☐ **Disk**
Assembly is stored and loaded from \Server\bin\assembly in the main installation directory for each server. For debugging purposes, the Symbols (.PDB files) must be located in the same place as the assembly.

File Name on Server:

☐ **GAC**
File is placed in the GAC of each server where it will used.

Log

Register Selected Plugins Close

4. Next you'll need to select the registered assembly. It can contain multiple plug-ins. Select the plugin you are adding steps to, and register one or more steps.

Register New Step

General Configuration Information

Message: Update

Primary Entity: opportunity

Secondary Entity:

Filtering Attributes: statecode, salesstagecode

Event Handler: (Plugin) Xrm.Plugin.OpportunityLog - Isolatable

Name: Xrm.Plugin.OpportunityLog: Update of opportunity

Run in User's Context: Calling User

Execution Order: 1

Eventing Pipeline Stage of Execution

☐ Pre-validation

☐ Pre-operation (CRM 2011 Only)

☒ Post-operation (CRM 2011 Only)

☐ Post-operation (CRM4 Only)

Execution Mode

☐ Asynchronous

☒ Synchronous

Deployment

☒ Server

☐ Offline

☐ Delete AsyncOperation if StatusCode = Successful

Triggering Pipeline (CRM4 Only)

☒ Parent Pipeline

☐ Child Pipeline

Description

Unsecure Configuration

Secure Configuration

Register New Step Cancel

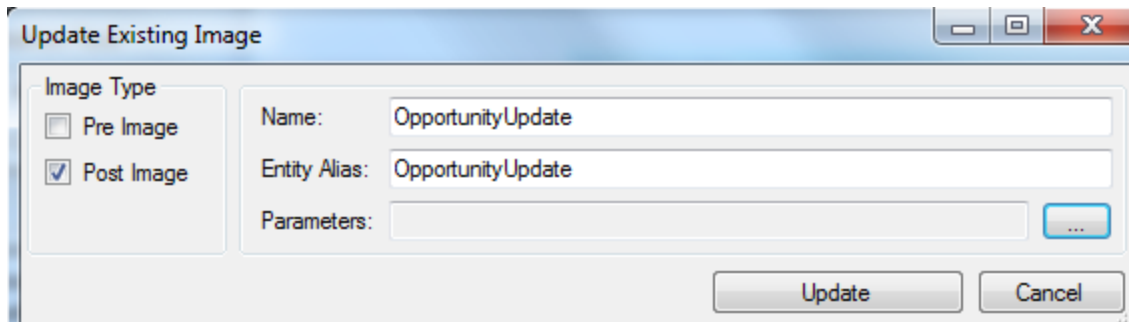
5. Fill in the following information for the steps:

- Message
- Entity
- Filtering Attributes if applicable. In above example, the plugin will only trigger for statecode or salesstagecode updates. Selecting the attributes will prevent plugin triggering accidentally or needlessly when unrelated field is updated.
- Event Pipeline
- Execution Mode

6. Fill in the **Unsecure Configuration/Secure Configuration** sections. These sections can be used to pass configuration information to the plug-in, such as user credentials or URLs. The difference between secure and unsecure configuration is as follows:

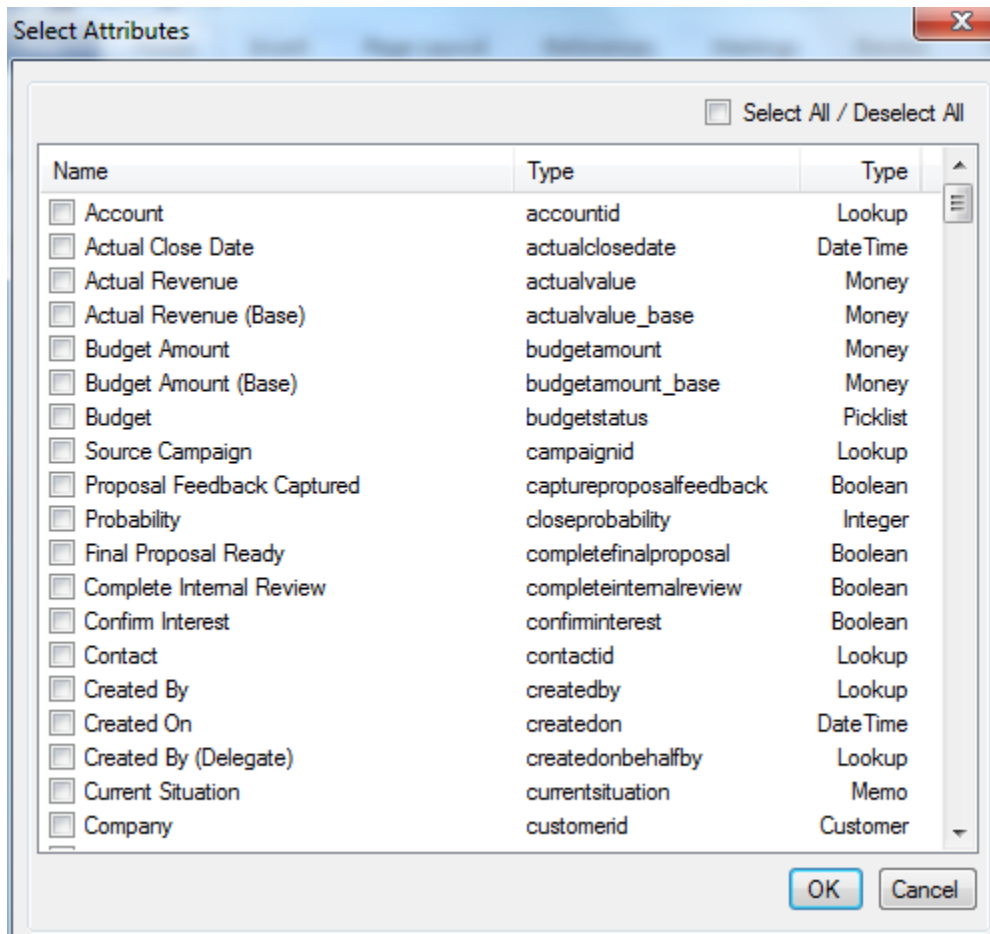
- Secure Configuration does not move with solutions. It has to be re-configured for each environment.
- Secure Configuration can be viewed only by CRM administrators.

7. If applicable, select step and register an image. Choose whether it's a **Pre Image** or **Post Image**.



The 'Update Existing Image' dialog box has a title bar with standard window controls. On the left, under 'Image Type', there are two checkboxes: 'Pre Image' (unchecked) and 'Post Image' (checked). To the right, there are three text input fields: 'Name:' containing 'OpportunityUpdate', 'Entity Alias:' containing 'OpportunityUpdate', and 'Parameters:' which is empty. A small blue button with three dots is to the right of the 'Parameters' field. At the bottom right, there are 'Update' and 'Cancel' buttons.

You'll also need to select attributes that you would like to be contained within the image.



The 'Select Attributes' dialog box features a title bar with a close button. At the top right, there is a checkbox labeled 'Select All / Deselect All'. Below this is a table with three columns: 'Name', 'Type', and 'Type'. The table contains 20 rows of attributes, each with a checkbox in the 'Name' column. At the bottom right, there are 'OK' and 'Cancel' buttons.

Name	Type	Type
<input type="checkbox"/> Account	accountid	Lookup
<input type="checkbox"/> Actual Close Date	actualclosedate	Date Time
<input type="checkbox"/> Actual Revenue	actualvalue	Money
<input type="checkbox"/> Actual Revenue (Base)	actualvalue_base	Money
<input type="checkbox"/> Budget Amount	budgetamount	Money
<input type="checkbox"/> Budget Amount (Base)	budgetamount_base	Money
<input type="checkbox"/> Budget	budgetstatus	Picklist
<input type="checkbox"/> Source Campaign	campaignid	Lookup
<input type="checkbox"/> Proposal Feedback Captured	captureproposalfeedback	Boolean
<input type="checkbox"/> Probability	closeprobability	Integer
<input type="checkbox"/> Final Proposal Ready	completefinalproposal	Boolean
<input type="checkbox"/> Complete Internal Review	completeinternalreview	Boolean
<input type="checkbox"/> Confirm Interest	confirminterest	Boolean
<input type="checkbox"/> Contact	contactid	Lookup
<input type="checkbox"/> Created By	createdby	Lookup
<input type="checkbox"/> Created On	createdon	Date Time
<input type="checkbox"/> Created By (Delegate)	createdonbehalfby	Lookup
<input type="checkbox"/> Current Situation	currentsituation	Memo
<input type="checkbox"/> Company	customerid	Customer

8. After the plug-in and the steps have been registered, they can now be included in CRM solutions and deployed with unmanaged or managed solutions.