

Fundraising and Engagement

for Dynamics 365 Sales

Known Issues

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**Release Version**: v1.2.3.0

# Known Issues for Fundraising and Engagement

## **Common Issues**

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| Issue | Solution |
| Fundraising and Engagement will not work with Dynamics 365 Sales Pro | Fundraising and Engagement has a dependency on Dynamics 365 Sales Enterprise. If a user tries to deploy it into a Sales Pro environment, they will not have access to a number of important entities since the Sales Pro license is limited to 15 custom entities. Please refer to the [D365 licensing information](https://go.microsoft.com/fwlink/?LinkId=866544&clcid=0x1009). |
| The configuration record and security roles control the visibility of much of the system | If a user runs into an issue where they can’t see parts of the system or the web resource forms appear to not be working, check that the component is configured properly in the configuration record. Ensure the user has the proper security roles. For details on the configuration record and the security roles, please review the [User Guide](https://aka.ms/feuserguide). |
| All Receipt, Thank You, and Invoice functionality requires the user to pre-configure a Dynamics template | Throughout the system, there are opportunities to generate physical receipts, thank you notes, and invoices. These functions will only work if the user has pre-configured a Dynamics template in their environment. If there is not a template pre-configured, nothing will occur when those options are selected in the system.  For details on how to pre-configure these templates please see the [User Guide](https://aka.ms/feuserguide). |
| When doing a Donation Import, it is key to use the Donation Import Template | The Donation Import Template maps directly to Fundraising and Engagement. The out-of-the-box Dynamics import templates standardize a user’s data entry and ensure that a user can only enter values that will be accepted by the solution. When utilizing the .csv import (not recommended), no validation occurs. |
| When processing a Transaction or Payment Schedule, the ‘Processing’ message does not finish and the record is not created | The processing of Transaction or Payment Schedule records requires a ‘Payment Processor’ to be set up on the user's configuration record. Each configuration record requires at least one payment processor and each user requires one configuration record.  The Payment Processor entity is required regardless of whether an integration to the Payment Gateway is being used or not. In the case where a Payment Gateway is not available, the payment gateway field is optional and not required. |
| When clicking the ‘Process’ button on a new Transaction, nothing happens. | To process new transactions, two things need to be configured:   * The user needs to have a Configuration record associated, and * The Configuration record needs to have a PaymentProcessor defined.   Note that a PaymentProcessor is needed even for cash transaction. Please refer to the ‘Configurations: Primary Configuration Record’ section in the [User Guide](https://aka.ms/feuserguide) for information about the Configuration record, and ‘Payment Processor’ section for details about payment processors. For cash transactions, the payment processor does not need to be fully configured with a payment back-end, it’s enough to just have a PaymentProcessor entry associated with the Configuration record. |

## **Error Messages**

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| Issue | Solution |
| ISV Error on save of a record (Exception Logged in the Web API) | A common error for any system that utilizes a disconnected architecture is a foreign key constraint violation. This occurs when a related record is not found in the Azure SQL database but does exist in Dynamics. From the available related records on the form that is presenting the error, make a change on the related record to trigger the update to Azure and rectify the problem. If you are unsure about what foreign key exception is being thrown, utilize the logs form in the Web API in Azure which will list the offending constraint. |
| ISV Error on save of a record (No Exception Logged in the Web API) | When an ISV exception occurs and no corresponding exception is logged in the Web API, this means Dynamics cannot get to the Web API at all. There are various reasons this can occur. To resolve the issue:   * Ensure the user experiencing the error has a configuration record set on their user record. * Ensure that the database tables have been created using the migrations in the project. * If the Web API URL is filled in the Configuration record, remove it (see Deployment Guide on the deprecation of Web API URL and API Padlock fields) |

## **Managed Package Deployment Considerations**

When building the Fundraising and Engagement managed package using the SolutionPackager, developers and database administrators may experience a series of warning messages displayed by the utility that look this:

Following root components are not defined in customizations:

Type=’SystemForm’, Id (or schema name)=’{00a8af62-bfa3-48b4-abc7-f81e7456fb1e}’,

Type=’SystemForm’, Id (or schema name)=’{01d7135d-ba58-433d-8f5e-6b681ad4d450}’,

These are known warnings that are okay to proceed beyond. If you proceed, the managed package should deploy as expected. We will be looking to resolve this issue in a future release.