

# Installation and Configuration Guide

## CC | CRM Politics

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## 1 Introduction

Politics for Dynamics 365 Customer Engagement is an industrial-proven add-on, implementing an intuitive way in dealing with the political challenges employees are faced to daily, while interacting with their customers.

The standard feature of the CRM connections is helpful, but for the majority of users not intuitive enough. Visualization is missing and a real relationship network is only visible after a lot of manual work.

Politics enables CRM users to see and understand the relationship details and displays the relationship network in the most important entities of CRM like accounts, contacts or opportunities. Due to this insights the users can act accordingly and not only the users take benefit, but also the whole organization out of this.



## 2 Core features

The core feature of the CRM add-on Politics are:

- Visualization of CRM connections in an easy and helpful way
- Management of interpersonal relationships and contacts in the company
- Management of sentimental influences between relationships
- Flexible setup of influences and relations
- Customization options to fit exactly the organization needs



## 3 Installation

### 3.1 Solution installation

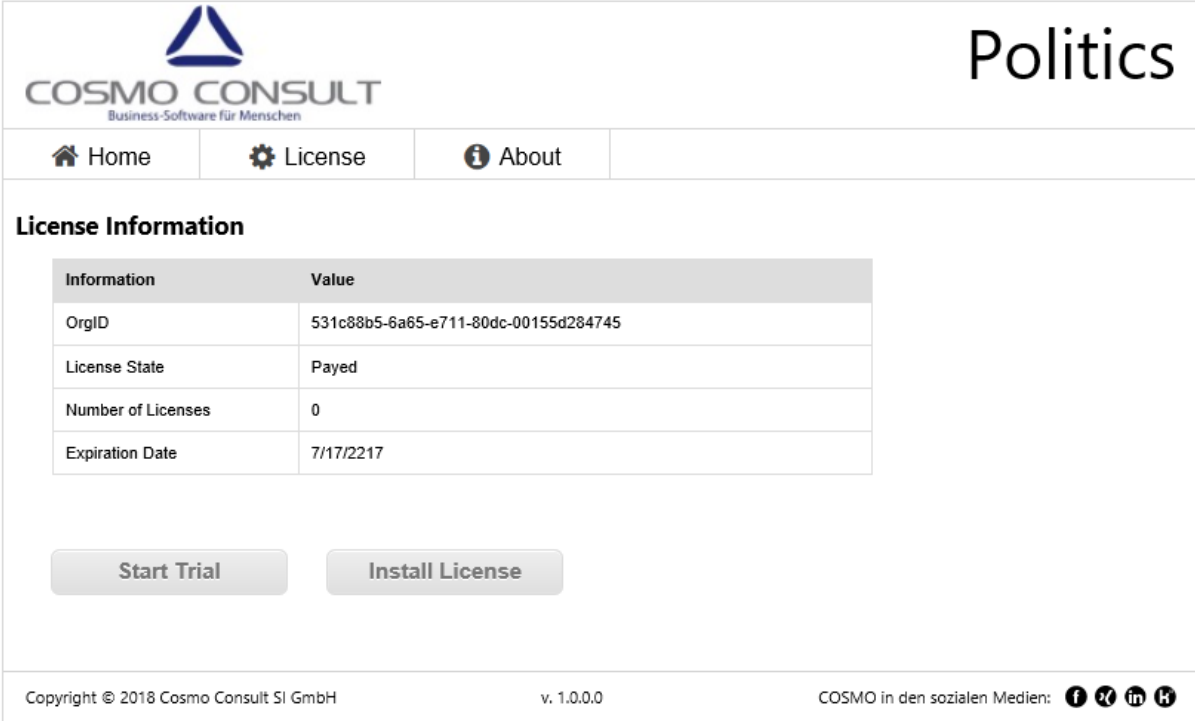
Politics will be automatically installed through AppSource to your system. If you are not installing the Politics solution through AppSource, please simply import the solution to your system as any other managed solution.

### 3.2 Licensing

Politics is only working if a valid license file is available. This is established in two ways. First you can use the trial mode to elaborate the functionality of Politics for 30 days or second you purchase a valid license file through our sales channel which will be then sent to you.

#### Trial Mode

To give the best value out of the trial, the trial is not automatically started after the solution is imported. The 30 day trial can be started as you wish to. So you can do the configuration at a time where it is the most suitable for you and then start the trial afterwards. For doing this please navigate to the Politics solution, access the configuration page and press the „Start trial“ button in the license section, as seen below.



The screenshot shows the Politics solution configuration page. At the top left is the COSMO CONSULT logo with the tagline "Business-Software für Menschen". At the top right is the word "Politics". Below the logo is a navigation bar with three items: Home (with a house icon), License (with a gear icon), and About (with an information icon). The main content area is titled "License Information" and contains a table with the following data:

Information	Value
OrgID	531c88b5-6a65-e711-80dc-00155d284745
License State	Payed
Number of Licenses	0
Expiration Date	7/17/2217

Below the table are two buttons: "Start Trial" and "Install License". At the bottom of the page, there is a footer with the following text: "Copyright © 2018 Cosmo Consult SI GmbH", "v. 1.0.0.0", and "COSMO in den sozialen Medien:" followed by icons for Facebook, X, LinkedIn, and YouTube.

## Payed Mode

The payed mode of Politics is started, if a valid license key and hash is entered. For doing this please navigate to the configuration page of the solution and click the „Install License“ button in the License Tab. After this a new screen is shown to enter the license key and hash.

**Enter Key**

License Key:

License Hash:

After entering the valid license information, Politics will switch to payed. You will be then able to use the Politics functionality as long as your license is valid. For checking the license state, please navigate to the license section in the configuration page of the solution.



## 4 Configuration

### 4.1 Default Configuration

To have a turnkey solution and enabling the users directly to use the functionality of Politics, the solution is shipped with a default configuration. The web resources of the solution is configured directly in following entities and forms:

- Accounts – Default Form „Account“
- Contacts – Default Form „Contact“
- Opportunity – Default Form „Opportunity“
- Users – Default Form „User“

If this configuration is undesired, it should be removed directly after the solution installation. For the configuration of the functionality to additional forms it need to be configured as described in chapter 4.4 of this guide.

### 4.2 Custom Entities

The CRM solution is based on two custom entities. First „Politics Relations“ and second „Politics Influences“. Both entities are accessible through the Settings section in the the sitemap.

#### Politics Relations

Sometimes the connection roles of CRM are not enough to describe the relation between to entities. The entity „Relation“ gives Politics an additional type relation, which can be added to all connections in the CRM. This additional relation will be then shown in the network view of Politics.

To use the feature of additional relations, the data needs to be added to the „Politics Relation“ entity by an administrator or any user with the „Politics Administrator“ security role.

#### Politics Influences

Not only additional relations makes the default feature of connections better, but also in defining the influence of one entity to another. The influence entity is intended to define a connections sentiment.

To use the feature of showing influences, the data needs to be added to the „Politics Relation“ entity by an administrator or any user with the „Politics Administrator“ security role.



### 4.3 Security Roles

Politics will create two new security roles in the system, an user security role and an administration security role.

#### Politics User

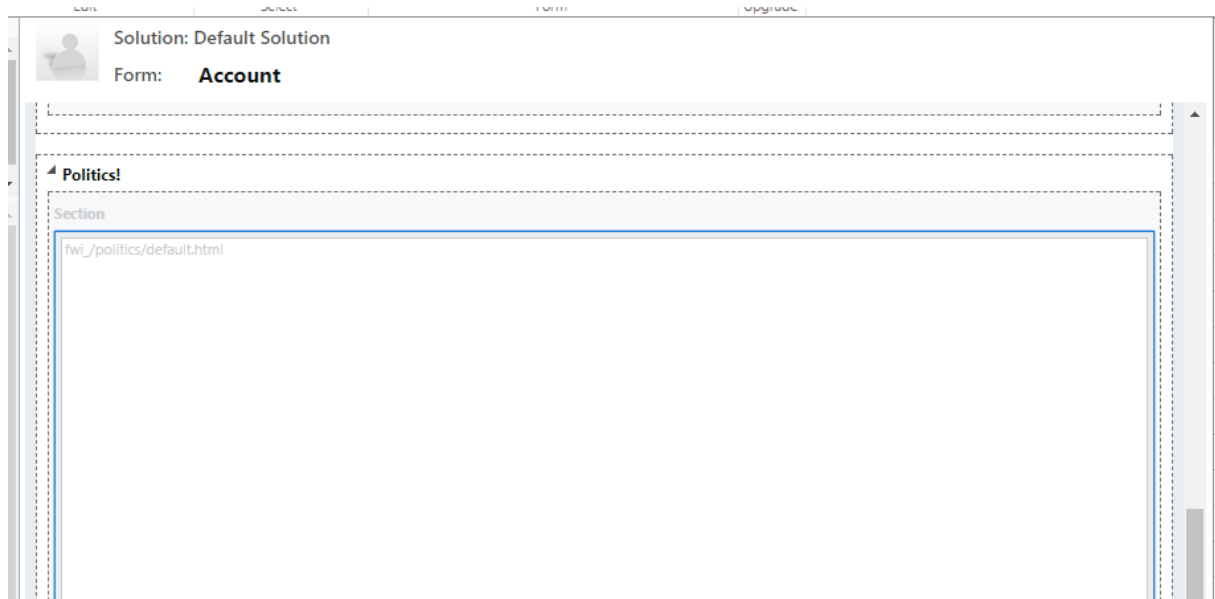
This security role is needed for all users who should use the Politics add-on. Without this security role the web resource of Politics wont be shown to the user.

#### Politics Administrator

This security role will enable users to maintain additional „Politics Relations“ and „Politics Influences“.

### 4.4 Web resources

To use Politics also on custom forms, where it is required, the web resource of Politics needs to be added to the form. In doing so, we recommend to add a new tab to the form and then add a new web resource to this tab.





After this you need to configure the web resource accordingly. The parameters which need to be entered can be seen in the following screen capture.

Web Resource Properties

Modify this Web resource's properties.

General Formatting Dependencies

Web resource

Web resource \* fwi\_/politics/default.html

Field Name and Properties

Name \* WebResource\_Politics

Label \* Politics

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

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Additional to this we recommend to set, in the „Formatting“ section of the webresource properties, following settings.

- Set „Number of rows“ to „25“
- Enable „Automatically expand to use available space“
- Set „Scrolling“ to „Never“
- Disable „Display Border“

After doing this, save and publish the changes and Politics is also available on your custom form.

