

Contents

Overview 3

Features 3

Setup Settings Configurator 3

Export Settings..... 4

Import Settings 5

Settings Configuration Log..... 7

Uninstall - Settings Configurator..... 8

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Applies To: Dynamics 365, Dynamics CRM 2016 Online & On-Premise

Overview

Dynamics 365 - Settings Configurator allows to capture the Dynamics one time setting configuration requirement in a excel sheet template during requirement workshops and apply the same in one click. Serving as a check list to ensure configuration settings are not missed in requirement gathering. This helps the business users to apply the configuration without the knowledge of Dynamics CRM and in one click.

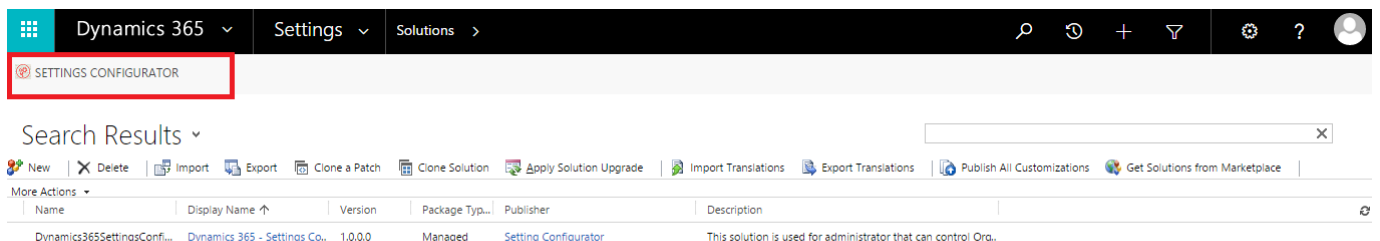
Features

- Import and apply the configurations settings in the system
- Export the configuration from one instance to other.
- Put the configuration under version control
- Automate the deployment process.

Setup Settings Configurator

After importing the solution to Microsoft Dynamics CRM system the user with system administrator and system customizer can view Settings Configurator tool.

- Navigate to Settings -> Solutions > Settings Configurator button as show below



- On Click of “Settings Configurator”, new window displays with Import/Export options.
- “Export” button will generate Dynamics 365 – Settings Configurator template with existing CRM organization settings.
- “Import” button will allow user to import updated organization setting values provided in actual values column of Dynamics 365 – Settings configurator template.
- Import/Export operation will be logged to setting configurator log entity for future reference.

Import Settings

This will update the organization settings from Excel

File Name: No file chosen

Export Settings

This will export the existing organization settings to Excel

Export Settings

Dynamics 365 - Settings Configurator provides a functionality to export a template with existing CRM organization settings.

Dynamics 365 - Settings Configurator

Import Settings

This will update the organization settings from Excel

File Name: No file chosen

Export Settings

This will export the existing organization settings to Excel

Processing...Please Wait.

Click of Export > Generates a Dynamics 365 – Settings Configurator template with

Instructions tab – Provides overview of the template

Settings tab – Allows to provide input values to update. List of columns below

- Name: Name of the CRM organization setting (field)
- Description: Description of the CRM organization setting (field)
- Preferred Value: Allowed values for this settings
- Current Value: This value is the current organization setting value in CRM

- Actual Value: User need to enter the to be updated value of the setting

Rows highlighted in the template are the primary values to focus as part of requirement analysis.

A	B	C	D	E
HCL - Dynamics 365 - Settings Configurator Template				
Display Name	Description	Preferred Value	Current Value	Actual Value
Allow Automatic Response Creation	Indicates whether automatic response creation is allowed.	TRUE/FALSE	true	
ACI Tenant URL	ACI Web Endpoint URL	String		
Sync interval for mobile offline.	Sync interval for mobile offline.	0 to 2147483647	60000	
Use Read-Optimized Form	Indicates whether the read-optimized form should be enabled for this organization.	TRUE/FALSE	true	
Allow Export to Excel	Indicates whether Web-based export of grids to Microsoft Office Excel is allowed.	TRUE/FALSE	false	
Pricing Decimal Precision	Number of decimal places that can be used for prices.	0 to 4	2	
Quick Find Record Limit Enabled	Indicates whether a quick find record limit should be enabled for this organization (allows for faster Quick Find queries but prevents overly broad searches).	TRUE/FALSE	false	
Days to Expire Subscriptions	Maximum number of days before deleting inactive subscriptions.	0 to 2147483647	90	

A System administrator/Customizer can export the template and can update values in actual value column as per business needs and based on preferred value options.

Preferred Value displays

- True/False for Boolean field
- Range for Integer
- Options with number appended for Option set field.

Refer Template -



Dynamics 365 -
Settings Configurat

Import Settings

Dynamics 365 - Settings Configurator provides a functionality to import the exported template with actual value based on the user confirmation and allows to update the organization settings of Dynamics CRM instance.

As defined in Export settings, user need to update actual value column based on preferred value options. There is no restriction on updating the number of settings, based on the business requirement user can update any number of settings.

Steps:

- Click on “Choose File” button, then select the input template path
- After choosing the file from preferred path, click on “Import” button.
- After the completion of import, a message will be displayed alert with success or partial success details.

Dynamics 365 - Settings Configurator

Import Settings

This will update the organization settings from Excel

File Name: Dynamics 36...mplate.xlsx

Export Settings

This will export the existing organization settings to Excel

Dynamics 365 - Settings Configurator

Import Settings

This will update the organization settings from Excel

File Name: Dynamics 36...mplate.xls

Processing...Please Wait.

Export Settings

This will export the existing organization sett

This will update your organization settings. Do you still want to proceed?

On successful import of the template user will view below screen and new record will be added to Settings Configurator log with the template and success details.

Import Settings

This will update the organization settings from Excel

File Name: Dynamics 36...mplate.xlsx

Export Settings

This will export the existing organization settings to Excel

✕

Organization Settings Updated Successfully

Prevent this page from creating additional dialogs.

Settings Configuration Log

Settings Configurator Log entity provides audit of all operations performed through Settings Configurator tool. Log entity capture the template as attachment to note, time the operation is done and user used the tool.

⋮Dynamics 365 Settings Settings Configurator.. > New Settings Config...

💾 SAVE 💾 SAVE & CLOSE + NEW 📄 FORM EDITOR

SETTINGS CONFIGURATOR LOG : INFORMATION

New Settings Configurator Lo..

General

Name *	--
Created On	🔒 --
Created By	🔒 --
Results Log	--

Note Text **NOTES**
No records found.

Uninstall - Settings Configurator

Uninstall Dynamics 365 - Settings Configurator by deleting the solution from the solutions list in CRM. Deleting the solution will remove all pieces of Settings Configuration Log from your CRM system.