



**Predict**  
Actionable Data Intelligence



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# Versium Predict Setup Guide:

## Microsoft Dynamics 365 and Dynamics CRM

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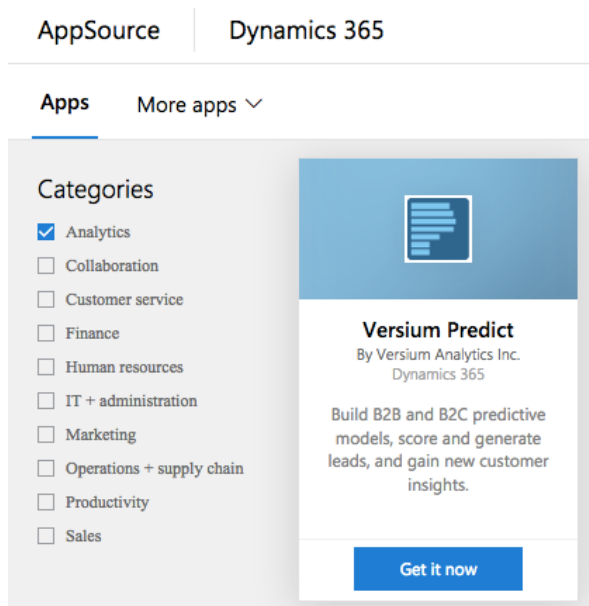
# Install Versium Predict

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You can install Versium Predict in Microsoft Dynamics CRM 2016 or Dynamics 365 for Sales.

## *To install Versium Predict from AppSource*

1. Sign in to a Dynamics CRM 2016 or Dynamics 365 account that has system administrator permissions and go to Settings.
2. Under Customization, select Dynamics Marketplace (or go directly to [apps.microsoft.com](https://apps.microsoft.com)).
3. Under Categories, check Analytics.
4. On the **Versium Predict** tile, select **Get**.



5. Agree to the terms to start the install process.
6. Select the CRM organization to which you want to add Versium Predict, read and check the agreements, and then select **Agree** to complete the installation.

## Uninstall Versium Predict

You can uninstall Versium Predict by removing the solution from Dynamics 365.

### *To uninstall Versium Predict*

1. In Dynamics 365, go to **Settings**, and under **Customization**, select **Solutions**.
2. Select **Versium Predict**, and then select **Delete**.

For more information on removing a solution, see Dynamics 365 help.

# Give Users Access to Versium Predict

To grant users access to Versium Predict, you may need to edit the custom or standard security roles assigned to those users.

## *To grant security role privileges*

1. Sign in to Dynamics 365 as a system administrator.
2. In Dynamics 365, [edit the security role](#) that you want to grant permissions for Versium Predict to.
3. Make sure the role has the following minimum privileges, at any access level:

Privilege	Create	Read	Write	Delete	Append	Append To
<b>Core Records tab</b>						
Account	Y	Y	Y		Y	Y
Contact	Y	Y	Y		Y	Y
Lead	Y	Y	Y		Y	Y
<b>Marketing tab</b>						
Marketing List	Y	Y	Y		Y	Y
<b>Business Management tab</b>						
User		Y				
<b>Custom Entities tab</b>						
new_versiumscorecontact	Y	Y	Y	Y	Y	Y
new_versiumscorelead	Y	Y	Y	Y	Y	Y
new_versiumscoreaccount	Y	Y	Y	Y	Y	Y

# Authenticate Versium Predict

The first time you run Versium Predict, you may need to grant Predict permissions to access the CRM as you. Predict functionality requires these permissions to access your CRM records for generating predictive models, and add insights, scores, and validation grades to your CRM records.

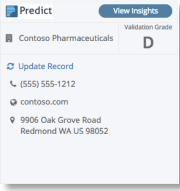
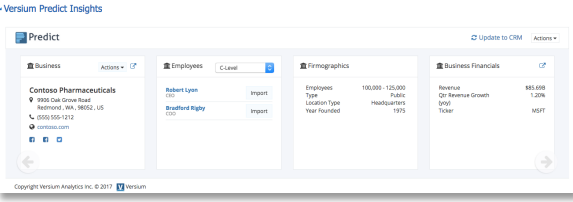
This access is used to provide the integrated functionality of Predict. None of your data is sent outside your CRM, and you should only need to authenticate the first time you use Predict.

## To authenticate Predict

1. Select **Authenticate**.
2. Review the permissions, and then select **Accept**.

# Set up Custom Views in Dynamics 365

You can add the Predict Heads-Up view and Versium Predict Insights cards using Web Resources to Account, Lead, Contact, and Opportunity custom forms in Dynamics 365. The names of the Web Resources are shown in the table below:

Predict View	Versium Predict Heads-Up	Versium Predict Insights
Web Resource	<code>new_VersiumPredictHeadsup.html</code>	<code>new_VersiumPredictInsights.html</code>
Sample		

For details on how to add a web resource, see the procedure below, and the Dynamics help topic, [Add or edit a form web resource](#).

## *To add the Versium Predict Heads-Up view or Insights cards to a custom form*

1. Open the custom form to edit.
2. For Predict Insights cards, create or select the section where you want to add the web resource.
3. On the **Insert** tab, select **WebResource**.
4. On the **General** tab, in Web resource, search for and select:
  - For the Heads-Up view, select *new\_VersiumPredictHeadsup.html*
  - For Predict Insights cards, select *new\_VersiumPredictInsights.html*
5. Under Field Name and Properties, enter a Name and Label.
6. Clear the **Restrict cross-frame scripting, where supported** box.
7. On the **Formatting** tab:
  - Select One Column
  - **For the Headsup view**, set the number of rows to 14.  
**For Predict Insights cards**, set the number of rows to 17
  - Clear the **Display Border** box.
8. Select OK, and place the webresource on your form.