

iDcrm Server Component version 1.0

Administrator Manual

Release date: 11/01/2010
Manual Version: 1.0
Component Build: 1.0 20101101

Introduction

What is the purpose of a server component for a solution like iDcrm, which is a plug and play App and reflects the users Microsoft CRM environment on iOS?

The server component has been released to answer to some of our customer needs. In large implementations, it can be painful to setup the environment of every users one by one. You may also want to give or not give access to iDcrm for some users. When you are only using the client you do not have any control on this.

So we have developed a server component to help the administration of your iDcrm implementation.

Is this a mandatory component to use iDcrm ?

NO! iDcrm is build to be plug and play. You can use this component only if you want to give specific rights to users on their iPhone or iPad.

Which version of iDcrm works with the Server component?

iDcrm 1.3 and over, iDcrm SFA 1.3 and over, iDcrm HD 1.3 and higher

Can I start working with iDcrm without the component and then install it?

Yes. The only change will be that iDcrm will apply the server component settings and replace your existing settings on the iPhone/ iPad (if there is any for you on the server).

How can I buy the server component?

You can buy the server component directly via Numenes: sales@numenes.com or via your Microsoft Dynamics CRM Business Partner.

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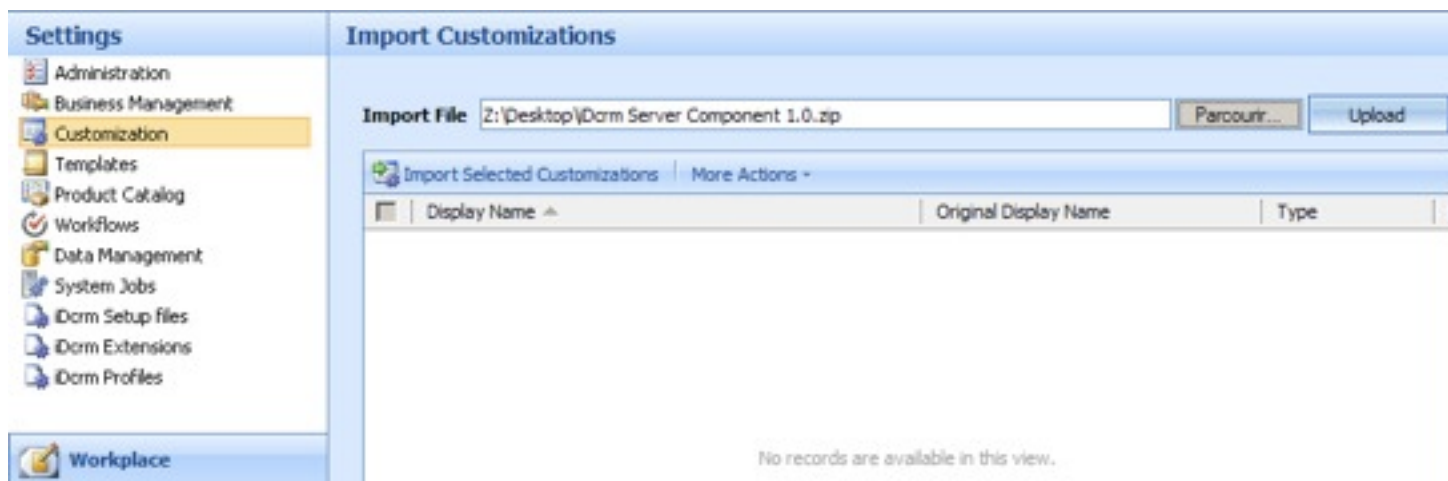
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Installation

The Server component is a standard Microsoft CRM customization. To install it, you have to follow the normal Microsoft CRM process to install customizations. It can be installed on Microsoft CRM 4 On-premise, Internet Facing Deployment and Microsoft CRM online.

- 1- Go to Settings > Customizations > Import Customizations
- 2- Select the file "iDcrm Server Component 1.0.zip"



- 3- Click on Upload

Display Name	Original Display Name	Type
iDcrm Profile	iDcrm Profile	Entité personnal...
iDcrm Setup file	iDcrm Setup file	Entité personnal...

- 4- Select "iDcrm Profile" and "iDcrm Setup files" and click on "Import selected customizations"
- 5- The server component is installed and ready to work!

Important facts

To start using the server component, you'll have to decide what you are planning to do with your users.

CAUTION:

You don't need to give a user a profile to give him access to iDcrm! It is only required if you want him to have different rights in iDcrm than the ones he already has in Microsoft CRM.

1- Concept of Profile

A profile is a group of parameters that you want to apply to a specific user.

2- Concept of Setup

A setup is a group of settings applied to iDcrm. It includes:

- synchronization filters (like My data only, Opportunities Yes/No ...)
- available Entities
- list options (how list are designed for every entity)
- design of the Home Screen

3- Global Philosophy of the Server component

The aim of the component is to:

- limit the rights of some MS CRM users in iDcrm
- prevent some MS CRM users to use iDcrm
- specify the Setup of iDcrm to limited users to avoid having to setup each iDcrm individually.

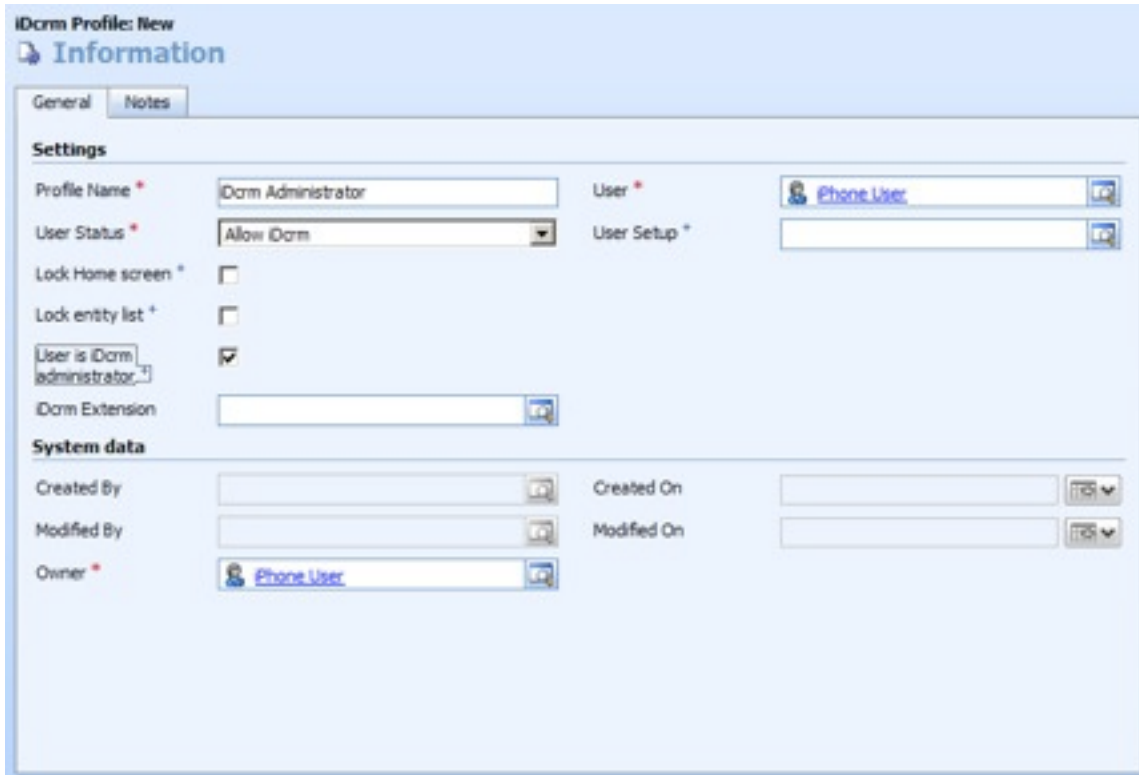
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How to create Setups

A- First you need to define which user is the “iDcrm Administrator”



iDcrm Profile: New
Information

General Notes

Settings

Profile Name * iDcm Administrator User * Phone User

User Status * Allow iDcm User Setup *

Lock Home screen *

Lock entity list *

User is iDcm administrator *

iDcm Extension

System data

Created By Created On

Modified By Modified On

Owner * Phone User

- 1- Create a new iDcrm Profile
- 2- Populate the record as in the screenshot and don't forget to select the correct user
- 3- Launch iDcrm and do an initial synchronization with this user
- 4- You are ready to make your own setup in iDcrm

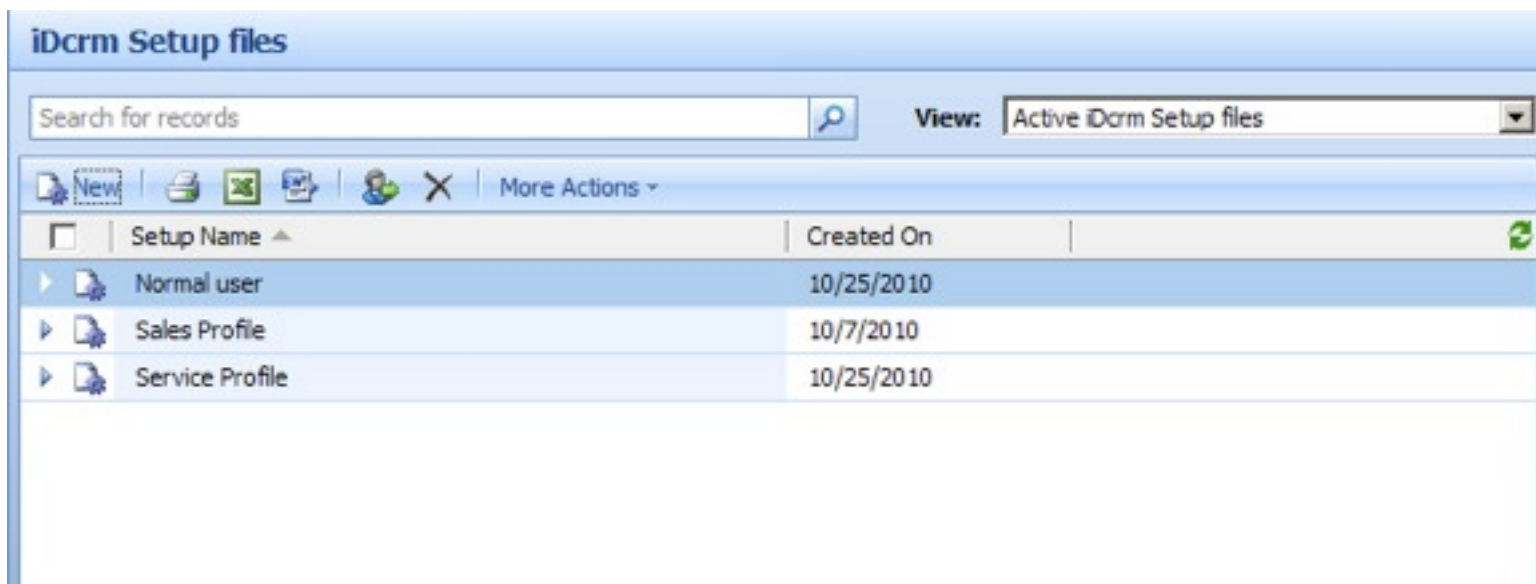
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B- Build the Setup in iDcrm

- 1- In iDcrm, specify the way you want to use it as usual (sync filters, custom entities, home screen and Entity list filters).
- 2- Then in "Setup" click on "Share Setup to server", give a name to the setup and you're done
- 3- Do it as many time as you need
- 4- You have now defined the possible setups for iDcrm in Microsoft CRM



The screenshot shows a table titled "iDcrm Setup files" with a search bar and a "View" dropdown set to "Active iDcrm Setup files". The table has columns for "Setup Name" and "Created On".

Setup Name	Created On
Normal user	10/25/2010
Sales Profile	10/7/2010
Service Profile	10/25/2010

CAUTION:

Do not create Setups directly in Microsoft CRM !

You HAVE to create them in iDcrm

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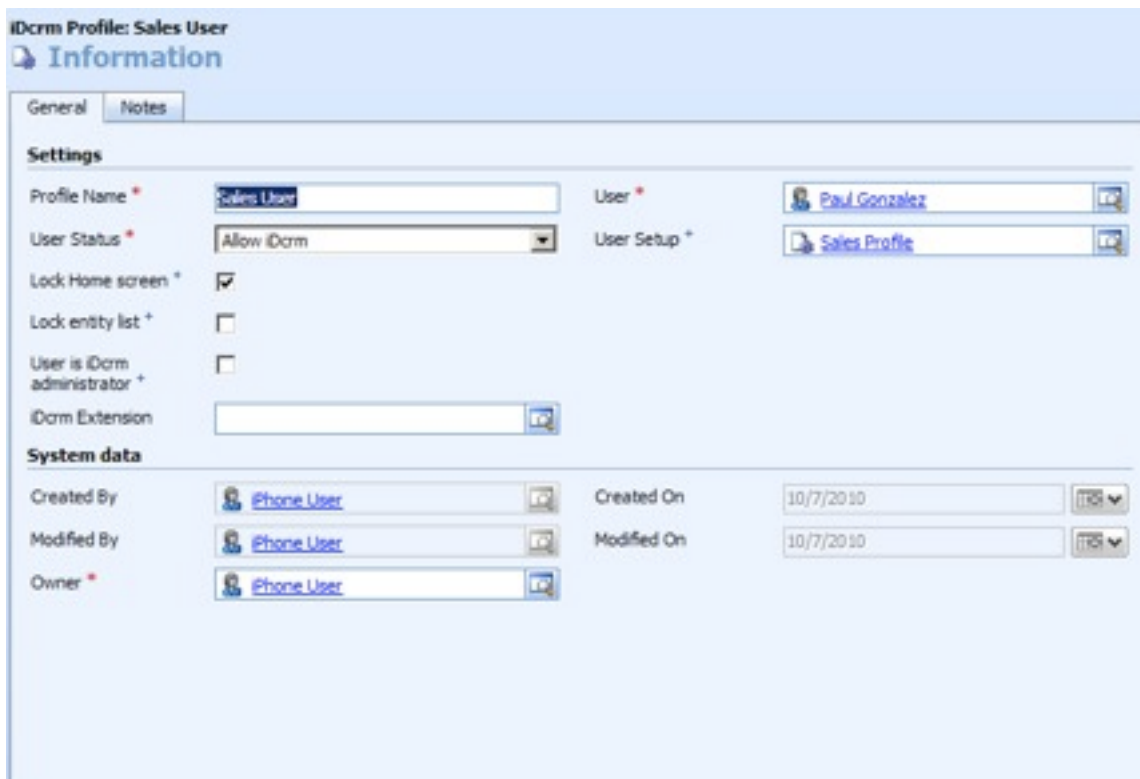
Manage User Profiles

Now that you have enough Setups, you can manage your users.

CAUTION:

Setups are not mandatory, you can limit user rights without having to create full setups

Which options are available?



The screenshot displays the 'iDcrm Profile: Sales User' configuration page. It features two tabs: 'General' and 'Notes'. The 'Settings' section includes the following fields:

- Profile Name: Sales User
- User Status: Allow iDcrm
- Lock Home screen:
- Lock entity list:
- User is iDcrm administrator:
- iDcrm Extension: [Empty field]

The 'System data' section includes the following fields:

- Created By: iPhone User
- Modified By: iPhone User
- Owner: iPhone User
- Created On: 10/7/2010
- Modified On: 10/7/2010

Additional fields include 'User' (Paul Gonzalez) and 'User Setup' (Sales Profile).

1- Profile Name:
You are free to decide the name of the profile.

2- User:
You select the user targeted by this profile.

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3- User status:

It can be either:

- Allow iDcrm: you will then add specific limitations,
- iDcrm disallowed: the user cannot connect to this server with iDcrm
- Read-only: iDcrm will be read-only

4- User Setup:

Here you'll select the Setup that will be applied to this user.

5- Lock Home Screen:

If you have specified a setup, the home screen will be the one specified in the setup and the user will not be able to change it.

If the user has no setup, iDcrm will use the standard one but it will be locked.

6- Lock entity list:

If you have specified a setup, the list of every entities will be the ones specified in the setup and the user will not be able to change them.

If the user has no setup, iDcrm will use the standard ones but they will be locked.

7- iDcrm extension

Not available yet.