

CRM Insights Admin Guide



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Introduction to CRM Insights

Microsoft Dynamics CRM Insights, powered by InsideView, automatically provides rich, up-to-the-minute information about the companies and people you care about.

CRM Insights provides three key elements that can help you win more deals—Company and Contact Data, Insights, and Connections:

- **Data** consist of detailed contact profiles, including email addresses and phone numbers. It also includes firm-o-graphic information about companies such as location, industry, number of employees and revenue. Get additional information about a company by clicking the tabs across the top of the CRM Insights frame.
- **Insights** includes current company news and events. The information in CRM Insights is constantly updated from 30,000 financial, media and social sources. These include articles from mainstream media, industry-specific publications, and regulatory filings.
- The **Connections** feature in CRM Insights aggregates your personal contact networks from Microsoft Outlook, Twitter, Facebook, and LinkedIn. Use Connections to get a warm introduction into an account.

CRM Insights is included with your Microsoft Dynamics CRM Online Professional license at no additional charge. To use CRM Insights, download the installation package and follow a simple install procedure.

Five ways CRM Insights can help you improve sales results

1. Research Companies

You need a timely, relevant pitch that addresses critical needs. CRM Insights can save you hours of time on pre-call research every month. All the information you need, from company information to current news, is at your fingertips in Microsoft Dynamics CRM.

2. Research People

You can use the People Tab in CRM Insights to help you locate and contact a potential buyer in a target account. Filter by job level, job function, or search for a specific name or job title.

Once you've located a prospect, you can quickly see their background, check current news, and scan social media posts to see exactly what's on your prospect's mind.

3. Update CRM Contact Data

CRM Insights includes a Sync feature that allows you to add or update Company or Contact data in your CRM with the push of a button. If you are updating a company or contact that already exists in your CRM, you can choose which fields to update.

4. Get Email Alerts

When you “follow” companies or people in CRM Insights, they are added to a Watchlist. You’ll get daily or weekly email alerts that include company news, job changes and social media posts—all right in your inbox.

5. Use Connections to Get an Introduction

See how you’re connected to a prospect with CRM Insights’ Connections feature. With the click of a button you can ask for a referral from someone in your network. Click “Start Conversation” to send a customizable email directly to a prospect. CRM Insights even suggests conversation starters based on current news and events.

Installing CRM Insights

Important

Before you begin installing CRM Insights in Microsoft Dynamics CRM, add <https://my.insideview.com> to the list of trusted sites in your browser and turn-off the pop-up blocker.

Follow the steps below to install CRM Insights in Microsoft Dynamics CRM:

Step 1: Download the CRM Insights solution package

You can download the CRM Insights solution package from here: <http://www.insideview.com/microsoft-social-insights>

The CRM Insights package is a compressed (.zip) file that includes the following components:

- Web Resources folder
- Content_Types.xml file
- Customizations.xml file
- Solution.xml file

Step 2: Import the CRM Insights solution

Important

All unmanaged solutions must be backed up before importing CRM Insights into CRM.

To import CRM Insights into your CRM, follow these steps:

1. Make sure you're signed into Microsoft Dynamics CRM using your administrator credentials.
2. On the navigation bar, click **Microsoft Dynamics CRM**. Then select **Settings**.
3. Under **Settings**, click **Solutions**.

4. On the **Actions** toolbar, click **Import**.
5. To browse through folders and locate the CRM Insights compressed (.zip) file, click **Browse**.

- OR -

In the text box next to the **Browse** button, type the path and file name of the compressed (.zip) file.

6. Click **Next**.

After the file is processed, you can click **View solution package** details to see a list of the solution components that were imported.

7. Click **Import**.

When the solution import is done, a message appears notifying you if it was successful. If any of the items could not be processed successfully, the dialog box displays error messages.

Step 3: Create a service account for data synchronization

Important

This task requires the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM Online and the Administrator role in the Windows Azure tenant.

CRM Insights includes a Sync feature that allows you to add or update Company or Contact data in your CRM. To allow CRM Insights to add data, you need to create a service account in your CRM.

A service account is a non-interactive user account with the proxy role assigned to it. It cannot access the user interface, and can add data only through the web service layer.

Follow these steps to create a service account for CRM Insights:

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select **Settings**.
2. Under **Settings**, click **Solutions**.
3. On the CRM Insights solution record, click the link under the Display Name column.
4. Click **Start**, and then click **Grant Access**.

Note: Once you click **Grant Access**, do not refresh the page, click back or forward buttons, or close the window until the service account is created.

Once this step is completed, CRM Insights creates the following in CRM:

- A non-interactive user account named InsideViewDelegate.
- A new security role called InsideView User.

Do not modify or delete the user or the security role to ensure sync functions properly.

Note: You will receive an email from the Microsoft Online Services team notifying you that an application has been granted access to data in Windows Azure AD.

For Upgrading CRM Insights:

1. Completely remove the older version of the InsideView Solution

Follow these steps to delete the CRM Insights solution from your CRM:

- Make sure you're signed into Microsoft Dynamics CRM using your administrator credentials.
- On the navigation bar, click **Microsoft Dynamics CRM**.
- Select **Settings**.
- Under **Settings**, click **Solutions**.
- Select CRM Insights solution and on the **Actions** toolbar, click **Delete**.

2. Install the latest version downloaded from the InsideView website, available [here](#).

3. [Follow the installation process outlined above.](#)

NOTE: [Step #3 will not be required if you have already setup the service account previously.](#)

Getting Help

If you have any questions, or need assistance in configuring CRM Insights in Microsoft Dynamics CRM Online, click the following URL to contact support: <http://www.microsoft.com/en-us/dynamics/crm-customer-center/default.aspx>

Changes in this version:

- a. Added: Steps to upgrade the CRM Insights solution in Microsoft Dynamics CRM Online
- b. Updated: Support URL