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Chapter 1: Introduction to Insights, powered by InsideView

Insights, powered by InsideView for Dynamics 365 and Dynamics CRM Online helps you find more leads, win more deals, grow your business and retain your accounts. It infuses Dynamics 365 and CRM Online with essential company and contact data, business insights and selling triggers; and connects directly to your largest referral networks and social media feeds. The Information in Insights is updated continuously from more than 40,000 financial and social media sources and validated with InsideView’s MTV data science technology to ensure that you have the most accurate and complete lead information.

Note: Throughout this document, you will find the word “Insights.” Most of the time it refers to the solution, Insights, powered by InsideView. In some instances, “Insights” is used to refer to specific features, such as Tab names and user interface (UI) elements. The context will make it clear.

Insights, powered by InsideView provides the following key elements that can help you win more deals:

- **Insights**, which include current company news, key business events, and social buzz, helping you to prepare for sales calls with articles from mainstream media, industry-specific publications, and regulatory filings.
- **Research** provides comprehensive and up-to-the-minute information about companies so you can identify industry information, similar accounts (competitors) and financial data before you approach them for business conversations.
- **Find Contacts** enables you to sell more effectively by helping you find the right contact, identify your mutual connections, and learn more about them so you can quickly and easily establish rapport and build credibility.
- **Start a Conversation** lets you view contact’s demographic information, which includes email address, phone number as well as employment details. It also helps you to find out how you are connected with contact’s personal connections and previous co-workers so that you can start a business conversation with right contact information.
- **Discovery Center** allows you to research about a company even if that company is not in Dynamics 365 or your CRM as an account entity. You can view the firmographic data, key contacts and company news. You can also add a company to Dynamics 365 or your CRM or to a Watchlist from the search results. The Discovery Center also provides an intuitive “Activity Stream” that tracks and displays various activities that any user completes on the go.
- **Family Tree** lets you discover subsidiaries, acquisitions, international divisions, and a host of other corporate relationships.
- **Tech Profiler** empowers you to find new prospects, plan account strategies and keep tabs on key target accounts based on technologies they use that are relevant for your sales and marketing teams. Tech Profiler is an add-on to Insights, powered by InsideView. In Insights solution, it appears only when you purchase Tech Profiler add-on for your Insights account separately as an additional tab on the Company Insights page.
• **List Build** lets you identify companies or executives that match a particular set of search criteria. You can view the company and executive’s firmographic data, save a search criteria, modify a saved search, and export the list of companies or people in an Excel spreadsheet.

• **Multiple Watchlists** allows you to create Watchlists for a company/contact instantly. You can create multiple Watchlists in the User Settings page. This feature makes your job is easy by letting you track companies/contacts in various Watchlists. It gives you the flexibility to keep a watch while using other functions.

• **Add company/contact** lets you add a company/contact that does not exist in the Insights database. If you don’t find a company/contact in the search results, you can just add basic company/contact details, which will be verified and included in the Insights database.

• **Custom Agents** allow organizations to extend and personalize the monitoring capabilities of Insights beyond the standard agents provided with the Insights solution. Organizations can create Custom Agents to find media coverage, business events, and discussions using a set of conditions specific to their sales efforts.

• **Team Agents** are available only to users who have purchased Insights Enterprise license directly from InsideView. Team Agents are agents created for you, according to your requirements, by your InsideView customer success manager (CSM), which you can share across your team.

• **Find Contact** lets you add an executive as a contact or a lead in the Microsoft Dynamics CRM, when an executive is not found in the CRM.

**Note:** Insights, powered by InsideView is included at no additional cost with following subscriptions in the U.S. and Canada: Dynamics CRM Online Professional and Enterprise, Dynamics 365 Plan 1 and Plan 2, Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Sales – Customer Engagement Plan, Dynamics 365 for Sales – Microsoft Relationship Sales, and Dynamics 365 for Project Service Automation.

**What’s New in this Release?**

The following new features are introduced in this release of Insights, powered by InsideView:

• **About Insights** lets you view new features and functionality within Microsoft Dynamics CRM integrated view.

• **Insights Dashboard** allows you to view your Watchlist Activity Stream and Agents directly from Microsoft Dynamics Home page.

• **Add company/contact** lets you add a company/contact that does not exist in the Insights database.

• **List Build**: identify companies or executives that match a particular set of search criteria.

• **Multiple Watchlists**: Create various Watchlists for companies that you wish to track.
• **Custom Agents:** Find media coverage, business events and discussions using a set of conditions specific to your business.

• **Team Agents:** Available only to users who have purchased Insights Enterprise license directly from InsideView.

• **Find Contact:** Add an executive as a lead or contact and add company in the CRM.
Chapter 2: Installation and Configuration

Setting Up Insights, powered by InsideView

Before you install Insights, powered by InsideView, please check the following system and software requirements for your CRM Online version.

Supported Version of Microsoft Dynamics 365, CRM Online and On-premises

This table shows the supported Microsoft Dynamics 365, CRM Online and On-premises versions for Insights, powered by InsideView:

<table>
<thead>
<tr>
<th>Dynamics CRM and 365 Versions</th>
<th>Insights 4.x</th>
<th>Insights 3.4</th>
<th>Insight 3.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamics 365 Plan 1 and 2</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Dynamics 365 for Sales</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Dynamics 365 for Customer Service</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Dynamics 365 for Field Service</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Dynamics for Project Service Automation</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM Online Enterprise and Professional 2016</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM On-premises 2016</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM Online 2015 Update 1</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM Online 2015 Update</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM On-premises 2015</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM Online 2013</td>
<td>✗</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM On-premises 2013</td>
<td>✗</td>
<td>✗</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM Online 2011</td>
<td>✗</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM On-premises 2011</td>
<td>✗</td>
<td>✗</td>
<td>✔️</td>
</tr>
</tbody>
</table>

Note: If you are using Microsoft Dynamics CRM version prior to 7.0, which is CRM 2015 version, you should not upgrade or attempt to install Insights, powered by InsideView solution package.
Supported Version of Microsoft Dynamics CRM via Outlook Client
This table shows the supported Microsoft Dynamics CRM versions via Outlook 2016 and 2013 clients for Insights, powered by InsideView:

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Version</th>
<th>Outlook Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Dynamics CRM</td>
<td>2016</td>
<td>Microsoft Office 2016</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM</td>
<td>2015 Update 1</td>
<td>Microsoft Office 2016, 2015, and 2013</td>
</tr>
<tr>
<td>Microsoft Dynamics CRM</td>
<td>2015 Update</td>
<td>Microsoft Office 2013</td>
</tr>
</tbody>
</table>

System and Software Requirements
The following table show Insights, powered by InsideView 4.2 system and software requirements for each supported version of Dynamics 365 or CRM Online environment:

Caution: Internet Explorer 8 or Internet Explorer 9 browsers are not supported in Dynamics 365 or CRM Online environment. We recommend you to use Internet Explorer version 10 or newer.
<table>
<thead>
<tr>
<th>Operating System</th>
<th>Supported Browsers</th>
<th>Insights 4.2</th>
<th>Supported Microsoft Office Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10</td>
<td>Microsoft Edge, Internet Explorer 11, Mozilla Firefox (latest publicly released version), Google Chrome (latest publicly released version)</td>
<td>Supported</td>
<td>Microsoft Office 2016, Microsoft Office 2013</td>
</tr>
<tr>
<td>Windows 8.1</td>
<td>Internet Explorer 11, Mozilla Firefox (latest publicly released version), Google Chrome (latest publicly released version)</td>
<td>Supported</td>
<td>Microsoft Office 2016, Microsoft Office 2013</td>
</tr>
<tr>
<td>Windows 8</td>
<td>Internet Explorer 10, Mozilla Firefox (latest publicly released version), Google Chrome (latest publicly released version)</td>
<td>Supported</td>
<td>Microsoft Office 2016, Microsoft Office 2013</td>
</tr>
<tr>
<td>Windows 7</td>
<td>Internet Explorer 10, Mozilla Firefox (latest publicly released version), Google Chrome (latest publicly released version)</td>
<td>Supported</td>
<td>Microsoft Office 2016, Microsoft Office 2013</td>
</tr>
<tr>
<td>Windows Vista / XP</td>
<td>Not Supported</td>
<td>Not Supported</td>
<td>Not Supported</td>
</tr>
<tr>
<td>MAC OS X 10.8 or Higher</td>
<td>Apple Safari, Mozilla Firefox (latest publicly released version)</td>
<td>Supported</td>
<td></td>
</tr>
</tbody>
</table>
Microsoft Dynamics CRM Online - 2015 Update 1

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Supported Browsers</th>
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<th>Supported Microsoft Office Versions</th>
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<td>Microsoft Office 2016</td>
</tr>
<tr>
<td>Windows 8.1</td>
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<td>Supported</td>
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<td>Windows 8</td>
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<td>Supported</td>
<td>Microsoft Office 2016&lt;br&gt;Microsoft Office 2013&lt;br&gt;Microsoft Office 2010</td>
</tr>
</tbody>
</table>
## Windows Vista / XP
- Not Supported
- Not Supported

## MAC OS X 10.8 or Higher
- Apple Safari
- Mozilla Firefox (latest publicly released version)
- Google Chrome (latest publicly released version)
- Supported

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### Microsoft Dynamics CRM Online - 2015 Update

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Supported Browsers</th>
<th>Insights 4.2</th>
<th>Supported Microsoft Office Versions</th>
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<tbody>
<tr>
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<td>Google Chrome (latest publicly released version)</td>
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<tr>
<td>Windows 8.1</td>
<td>Internet Explorer 11</td>
<td>Supported</td>
<td>Microsoft Office 2013 Microsoft Office 2010 Microsoft Office 2007</td>
</tr>
<tr>
<td></td>
<td>Mozilla Firefox (latest publicly released version)</td>
<td></td>
<td></td>
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<td>Google Chrome (latest publicly released version)</td>
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<td>Mozilla Firefox (latest publicly released version)</td>
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<tr>
<td></td>
<td>Google Chrome (latest publicly released version)</td>
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</tr>
<tr>
<td>Windows 7</td>
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<td>Microsoft Office 2013 Microsoft Office 2010 Microsoft Office 2007</td>
</tr>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Google Chrome (latest publicly released version)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating System</td>
<td>Supported Browsers</td>
<td>Insights 4.2</td>
<td>Supported Microsoft Office Versions</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>----------------------------------------------</td>
</tr>
</tbody>
</table>
| Windows Vista            | Internet Explorer 8 / 9 / 10 / 11  
Mozilla Firefox (latest publicly released version)  
Google Chrome (latest publicly released version) | Supported    | Microsoft Office 2013  
Microsoft Office 2010  
Microsoft Office 2007 |
| Windows XP               | Not Supported                                                                      | Not Supported|                                               |
| MAC OS X 10.8 or Higher  | Apple Safari  
Mozilla Firefox (latest publicly released version)  
Google Chrome (latest publicly released version) | Supported    |                                               |

**Required User Credentials**

To install Insights, powered by InsideView, you will need to be set up as a global administrator in Office 365, and as a system administrator in Dynamics CRM Online.

**Important Notes:**

1. If your organization restricts network access by third party applications, please ask your IT administrator to add the following IP address ranges to allow updates from Insights, powered by InsideView application:
   - 52.4.63.192 to 52.4.63.223
   - 64.56.203.0 to 64.56.203.255

2. Insights, powered by InsideView mashup may not load and CRM 13 error is displayed if you do not add the following websites to your trusted sites list in your browser settings: addition
   - about: blank
   - *insideview.com
   - *.dynamics.com
   - login.windows.net
   - login.microsoftonline.com
In Internet Explorer web browser, you must add all of the above websites into your Trusted Sites only when Protected Mode is ON in the Internet Zone. By default it is ON.

To add the website, open the Internet Explorer and go to Settings > Internet Options > Security > Trusted Sites and click Sites.
Chapter 3: Installing Insights, powered by InsideView

Select and install the latest version of Insights, powered by InsideView installation package. Here’s how:

Installing Insights, powered by InsideView via AppSource Marketplace

Insights, powered by InsideView is now available via Microsoft’s AppSource Marketplace and can be installed directly from the marketplace.


2. Enter the product name as Insights, powered by InsideView in the Search field and click the Search button.
3. In the Search Results page, select the Insights, powered by InsideView application and click the **GET IT NOW** button.
4. Enter your login credentials and click **Sign in** to open Microsoft AppSource.
5. Click **Continue** to open the **Terms of Use** page.

6. On the **Terms of Use** page, select the **Agree to Microsoft’s Legal Terms and Privacy Statement** and **Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365** check boxes.

7. Click **Agree**.

8. Verify the status for the Insights, powered by InsideView solution is now **Installation pending**, which indicates the installation has started.
9. Once the installation is complete, verify the status for the Insights, powered by InsideView solution changes to **Installed**, indicating that installation was successful.

10. Make Insights, powered by InsideView available to everyone in your organization. For more information, refer to the next section, **Making Insights, powered by InsideView Available through the Dynamics CRM Online Web Client**.

Installing Insights, powered by InsideView in Microsoft Dynamics CRM On-Premises
You can install Insights Enterprise 4.2 in Microsoft Dynamics CRM 2015 version and above. In order to install Insights Enterprise 4.2 in older versions of Microsoft Dynamics CRM, such as 2011 and 2013, it is recommended to upgrade your CRM to a newer version.

**Before you begin your installation**, please refer to the Admin Notes and ensure that pop-up blockers are turned off in your web browser.

2. Click the **Download Now** link as illustrated above.

3. Log into your Microsoft Dynamics CRM as an Administrator with the “**System Customizer**” role.

4. Navigate to **Settings > Solutions** or **Settings > Customizations > Solutions**.

5. Click the **Import Solution** icon or link and select the downloaded zip file from your local computer.
6. Follow the instructions in the Installation prompts to complete your installation.

Making Insights, powered by InsideView Available through the Dynamics CRM Online Web Client
Anyone who is set up as an Office 365 global administrator can make Insights, powered by InsideView available to all users in the organization. We recommend administrators should grant access via this option which provides the most seamless and managed experience.

Instructions for CRM Administrators
Be sure you are signed in as an administrator, then follow these steps:


2. On the Insights, powered by InsideView screen, click Continue to enable OAuth for all users in an organization.
3. When prompted, sign in with your administrator credentials and click **Accept**.

4. The user access request starts automatically, and you will know it is finished when you see the **Insights Organizational Settings** page in the CRM window.

**Note:** Only administrators will see this page.
5. Insights, powered by InsideView is now available to all users in the organization.

**Insights User Role (New Security Role)**

An **Insights User** security role is assigned to all users as part of the Insights, powered by InsideView installation process.

The **ISV Extensions** privilege is assigned to all users to enable them to view and use the Navigation buttons in the **Insights Summary** panel, which is the standard customization provided by Insights solution for Account, Contact, Lead, and Opportunity entity. If this privilege is not assigned, then users will not be able to navigate from Summary to Detailed panel. For more information, read the **Getting to Insights, powered by InsideView** section in the Insights User Guide.
By default, the Business Process Flows privileges are assigned to Insights User role when you install Insights solution in Dynamics 365.

It is recommended to disable the Business Process Flows privileges for Insights User role in Dynamics 365 instance.
Chapter 4: Upgrading from an Older Insights, powered by InsideView Version to Insights 4.2

Customers who are using an older version of Insights, powered by InsideView can upgrade to latest Insights 4.2 package Microsoft’s AppSource Marketplace. Here’s how:

1. Sign in to [https://portal.office.com](https://portal.office.com) with your Office 365 global administrator credentials.

2. Once the user logs in to the CRM, when you open an account, a contact, a lead an opportunity, or discovery center form the following alert with the **Update** link appears asking you to upgrade to latest Insights package.

3. The following upgrade message is also visible in the **Summary** panel when you open an account, contact, lead or opportunity object. Click **Update** to upgrade to latest Insights solution package.
4. You can also go to the Microsoft’s [AppSource Marketplace](https://appsource.microsoft.com) web page appears search for the latest Insights, powered by InsideView package.

5. On the AppSource page, select the Insights, powered by InsideView 4.2 package and then click **GET IT NOW**.
6. When prompted, enter your user credentials and click **Sign In**.

![Sign into Microsoft AppSource](image)

7. On the Insights page, click **Continue** to open the Terms of Use page.

![One more thing ...](image)

8. On the **Terms of Use** page, select the **Agree to Microsoft’s Legal Terms and Privacy Statement** and **Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365** check boxes and click **Agree**.
9. Once the installation is complete. The following message appears.

Chapter 5: Managing Organizational Settings
Insights allows administrators to manage organizational settings such as Insight-to-CRM field mappings and social media feeds. These settings affect all users in the organization.

Configure Field Mapping
Map Insights data fields with CRM fields to retrieve data that is relevant for your business and enable your CRM users to update their CRM records with one click.

Follow these steps to configure field mappings for your organization:

1. Sign in to Microsoft Dynamics CRM Online.

2. Go to CRM > Settings > Insights > Org Settings.

3. On the Insights Organizational Settings page, click the Field Mapping tab.
4. Map Insights field to CRM's field in the Accounts, Contacts, and Leads areas as needed for your business.

**Note:** CRM fields that are mapped against fields in Insights should use same datatypes. For example, the ‘Revenue’ field, which uses 'Currency' datatype in Insights can be mapped to fields that have 'Currency' as the datatype in your CRM.

5. Click **Save**.
Review and Update Social Media Feeds Settings

With Insights you can enable or disable social media feeds for your entire organization to track the latest news and events on sites such as Twitter, Facebook and company blogs.

Follow these steps to review and update social media settings:

1. Sign in to Microsoft Dynamics CRM Online.

2. Go to CRM > Settings > Insights > Org Settings.

3. On the Insights Organizational Settings page, click the Social tab.

4. By default, all check boxes are selected, which lets users see Facebook and Twitter news feeds, as well as company blogs.

5. If you do not want users in your organization to see social media feeds, clear the Facebook or Twitter check boxes (or both). The blog setting cannot be cleared.

6. Click Save.
Configure Insights Web Resource in Dynamics CRM Online and 365 Custom Forms

Customize your Microsoft Dynamics 365 or CRM Online custom form to view and launch Insights Summary panel directly when you open an account, contact, lead or opportunity.

Follow the instructions in this section, based on your system administrator’s decision under these scenarios:

- By default, Insights solution provides the web resource customization for the standard form. If you wish to move the Insights web resource to different location within the form, you don’t need do anything.
- You must not have two Insights web resources within the Standard or Custom form to avoid the errors due to multiple versions.
- If you are moving Insights web resource to a different standard form, you must follow the instructions in this section to configure that form to display the Insights Summary panel.
- If you are using custom forms to work in your CRM instance, complete the instructions in this section.

Here’s how:

1. To edit the form to which you want to add Insights connector, navigate to Settings -> Customization -> Customize the System -> Entities -> Account -> Form and select the form. Refer to the image below for example.
2. In the “Three Columns” tab, click the Insert tab in the ribbon and select the “One Column” tab.
3. Under the tab, select the Section and click the “Web Resource” button in the ribbon.
4. The Add Web Resource window pops up.
5. In the **Web Resource** field, type “iv” and click the **Search** button to select the IV Web Resource from the CRM. You should see something like “iv_/webpages/summary_mashup.htm”. Select that entry in the search result.

6. Enter “Insights” in the **Name** and **Label** fields. The name and label values are case-sensitive enter them as shown in the screen.

7. Select the **Visible by default** and **Pass record object-type code and unique identifier as parameters** check boxes in the same window as illustrated below:

![Web Resource Properties](image)

*Note: Selecting the **Pass record object-type code and unique identifier as parameters** check box is mandatory. If this option is not selected, no Insights content will be displayed in the CRM panel.*
8. Provide **Custom Parameter** as “solutionVersion=4.2&crm_version=v140”

   **Note**: Make sure there is no extra space or any special characters such as new line in the **Custom Parameter** field after you have entered the above value.

9. In the same window, click the **Formatting** tab on top.
10. Enter “Number of rows” as 20, and select the **Automatically expand to use available space** check box under Row Layout.
11. Select the **As necessary** option from the **Scrolling** drop-down menu as illustrated below:

   ![Web Resource Properties](image)

12. Once this customization is done, click **Save** to save the customization.
13. To create the Insights Navigation Link page, double-click on the **Common** tile to make it editable. In the Custom Form page, select **Insights** in the left pane and click the **Navigation Link** icon.
14. On the Navigation Link dialog box, enter the following navigation properties:

- **Name** as Insights.
- **Icon** as iv_/images/insights_32px.png
- Search and select the **Web Resource URL** as iv_/webpages/detail_mashup.htm.
• Click OK.

15. Select the Insights tab and click the Form Properties icon to bring up the Form Properties page.

16. To modify the form properties, in the Form Properties page, select the Parameter tab and enter the following information:
   • Click the + Add icon.
   • Enter the Name as iv_onLoadAction.
   • Enter the Type as SafeString.
17. Click **Save**, then click **Publish** to publish your customization changes.

**Note**: Repeat steps 1-17 for *Contact*, *Opportunity*, and *Lead* Microsoft Dynamic CRM entities.

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**Add Insights Dashboard Widget in the Microsoft Dynamics CRM Dashboard**

Customize your Microsoft Dynamics 365 or CRM Online dashboard to view and launch Insights Watchlist Activity Stream function directly from the dashboard. Use the Insights Dashboard widget to view the latest news for the companies and people you are tracking right from the Dynamics CRM home screen for business opportunities.

**Note**: The Insights Dashboard widget can be configured and accessed only your Microsoft Dynamics CRM administrator. Here’s how:
1. Go to the **Settings > Customizations**.

![Dynamics 365 customizations](image)

2. In the Customization page, click the **Customize the System** link.

![Customize the System dialog](image)

3. In the **Solution Editor** dialog, double-click the **Dashboard** link.

![Solution Editor dashboard](image)

4. Scroll down and select the **Web Resource** in which you want to configure the Insights application. For example, scroll down and double-click on the **Sales Activity Dashboard**.
or **Any** other dashboard web resource an administrator selects to place Insights widget. This action opens the **Dashboard** editor for Sales Activity.

5. In the Dashboard Editor, add the **Web Resource: Insights Dashboard** widget.

6. Double-click the **Web Resource: Insights Dashboard** widget to open the Web Resource Properties window and enter the following details:
   - For the Web Resource, type “iv” and click the **Search** button to select the **Insights Dashboard** from the CRM. You should see something like “iv_/webpages/insights_dashboard.htm”. Select this entry in the search result.
- Enter “WebResource_insightdashboard” in the Name and “Insights Dashboard” in the Label fields.
- Select the Visible by default check box.
- Click OK.

7. In the Dashboard Editor, click Save to save all changes.
8. Select the Publish All Customizations tab and then select the Sales Activity Dashboard check box or any web resource that you have customized and click Publish.
Click **Close** and return to Microsoft Dynamics CRM’s dashboard you will see your Watchlist activity stream in the home page.

**Chapter 6: Managing User Settings**

Insights users can manage some of their own settings for accounts, contacts, and leads in CRM. The User Settings page provides options to change and manage Company Insights agents, Watchlists settings, email notifications, and connections.

For more information on user settings, see Chapter 10: User Preferences in the *Insights, powered by InsideView for Dynamics CRM Online User Guide*.

**Chapter 7: Troubleshooting**

The User Guide will answer many of your questions. If you need more help with Insights, powered by InsideView for Dynamics CRM Online, you or your CRM Administrator can contact the Microsoft CRM Support Team: [http://go.microsoft.com/fwlink/p/?LinkId=620732](http://go.microsoft.com/fwlink/p/?LinkId=620732).

**Chapter 8: Uninstalling Insights, powered by InsideView**

You can uninstall the Insights, powered by InsideView package from the Solutions dashboard. Here’s how:

1. Log in to your CRM with your global administrator credentials.
2. Go to Dynamics 365 > Settings > Solutions.

3. On the Solutions page, select the **Insights, powered by InsideView** version that you have installed and click the **Delete** button.

4. On the Uninstallation Solution page, click **OK** to uninstall Insights package.
5. Once the Insights solution is uninstalled, the package is removed from the Solutions page.

When you uninstall Insights, powered by InsideView 4.2, the **Insights User** role is automatically removed from CRM.