

InsideView Lead Enrich
Setup Guide
for
Microsoft Dynamics CRM
(Applies to Microsoft Dynamics CRM 2011 and 2013)



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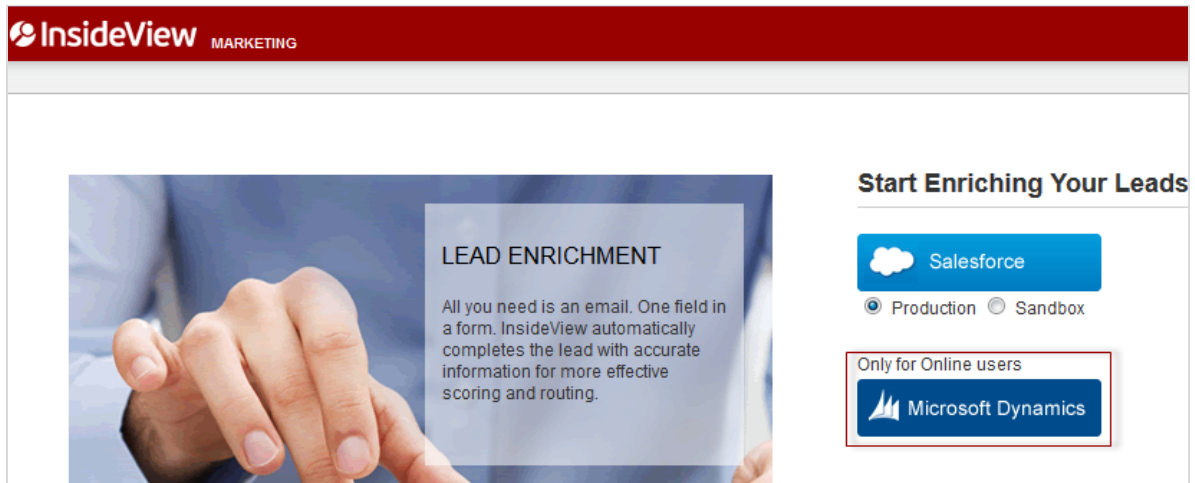
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Installing *InsideView for Marketing*

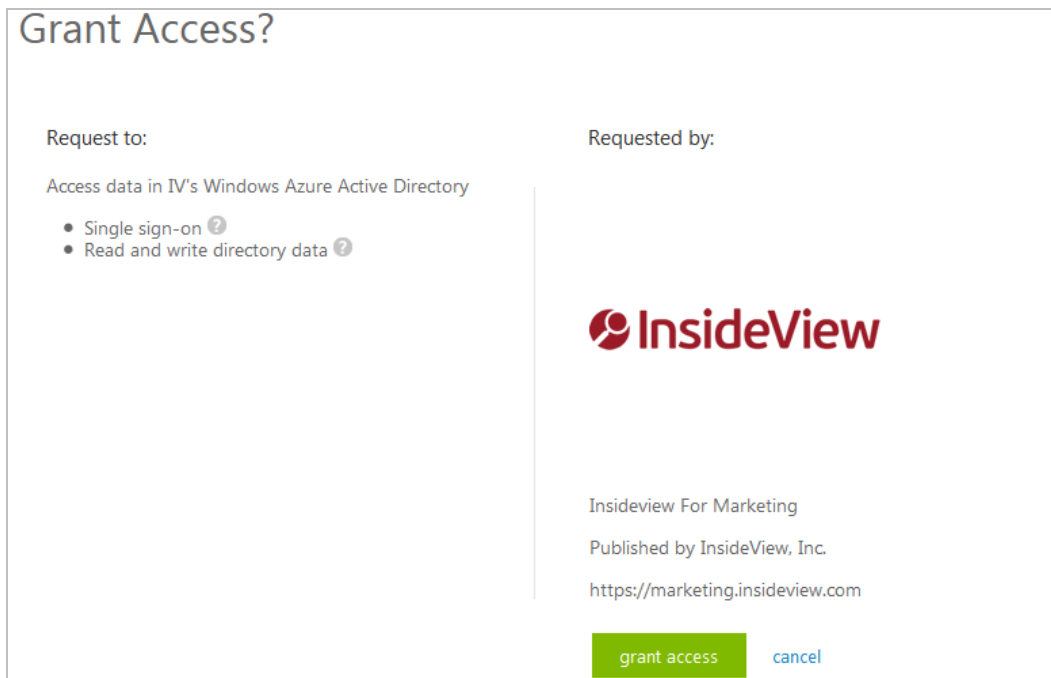
Follow the steps below to install *InsideView for Marketing* solution package in Microsoft Dynamics CRM:

Step 1: Sign up for *InsideView for Marketing*


1. Go to the *InsideView for Marketing* sign-up webpage: <http://marketing.insideview.com/marketing>.
2. Click **Microsoft Dynamics**. The Windows Azure sign in page opens.



3. Sign in to Windows Azure with your organizational account.



4. Click **Grant access**. A webpage appears confirming that you have successfully signed up for *InsideView for Marketing*.

Products Why InsideView Customer Success Partners

InsideView for Marketing - Microsoft Dynamics CRM Online

Thanks for signing up with your Microsoft Account!

To continue with setting up InsideView for Marketing, please download our solutions package and follow the steps in the

[Click Here](#) for the InsideView for Marketing setup guide for Microsoft Dynamics CRM Online.

[Click Here](#) to download the solutions package

If you have any questions or feedback please write to us at sales.leadenrich@insideview.com.

Step 2: Download the *InsideView for Marketing* solution package

You can download the *InsideView for Marketing* solution package here:

https://marketing.insideview.com/marketing/dynamics/InsideviewForMarketing_1_0_managed.zip

The *InsideView for Marketing* solution package is a compressed (.zip) file that includes the following components:

- Web Resources (Folder)
- Plugin Assemblies (Folder)
- Solutions.xml file
- Customizations.xml file
- [Content_Types].xml file

Step 3: Import the *InsideView for Marketing* solution

Important

All unmanaged solutions must be backed up before importing InsideView for Marketing into CRM.

To import InsideView for Marketing solution package into CRM, follow these steps:

1. Make sure you're signed into Microsoft Dynamics CRM using your administrator credentials.

2. On the nav 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 `InsideViewForMarketing_1_0_managed.zip` file, click **Browse**.

- OR -

In the text box next to the **Browse** button, type the complete path to `InsideViewForMarketing_1_0_managed.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 4: Create a service user

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.

To allow InsideView for Marketing to enrich the leads in your CRM, you need to create a service user account in the 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 user for InsideView for Marketing:

1. On the nav bar, click **Microsoft Dynamics CRM**. Then select **Settings**.
2. Under **Settings**, click **Solutions**.
3. On the InsideView for Marketing 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 user is created.

Once this step is completed, InsideView for Marketing creates the following in CRM:

- A non-interactive user account named `InsideViewForMarketing Delegate`.
- A new security role called `InsideViewForMarketing 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.

Getting Help

If you have any questions or feedback please contact sales.leadenrich@insideview.com.