

SideKick 365 CRM

Admin Guide



Version 1.0.3

8/29/2018

Created and Built in California by SkyLite Systems

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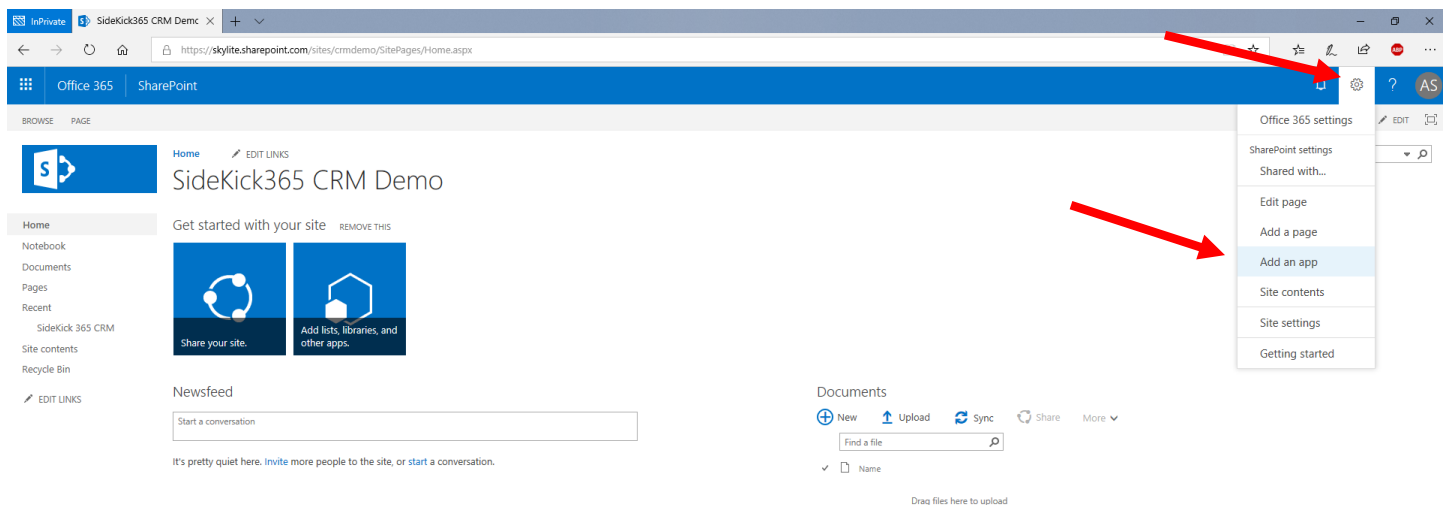
Setup for SideKick 365 CRM, Technical Architecture, & Guidance

SideKick 365 CRM is a powerful, full featured CRM solution that runs on top of 2016 in Office 365 or on your in-house SharePoint servers. This guide will guide you through the steps necessary to set up SideKick 365 CRM in Office 365. You can also watch a video on how to perform many of the steps outlined within this guide by watching videos at <https://skylitesystems.com/sidekick-365-crm-videos>

A Little Background – Some Definitions - The Host Web and App Web

SideKick 365 CRM is a SharePoint hosted app. SharePoint hosted apps are built with SharePoint lists and document libraries and all the data is stored within a SharePoint content database. SideKick 365 CRM also has a mobile interface in PowerApps, a Content Template in Power BI, Add-ins for Office and Outlook, and Flows in Microsoft Flow. Before we dive into setting up SideKick 365 CRM, let's spend a few minutes looking at how SharePoint hosted apps work

SideKick 365 CRM is installed using the “add an app” option under the little gear menu within a team site in SharePoint. You can install SideKick 365 CRM at the root team site in a new site collection, or within any team site anywhere in a SharePoint site collection – the choice is up to you.

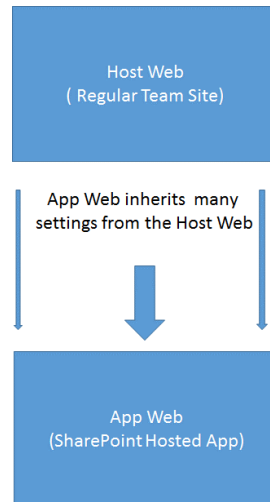


Before digging deeper, we need to define some terminology. This site where you install the app using the “add an app” menu option is called the Host Web. As an example, the host web would be the SharePoint teamsite in the screenshot shown right above this paragraph.

When a SharePoint hosted app is installed using the “add an app” option from the menu under the little gear, the app creates its own special SharePoint site “under” the Host Web. That special SharePoint Site is called an App Web. The app web is similar to a regular team site but it is tightly controlled by the host web above it (remember a host web is regular team site). A lot of settings in the host web are inherited in the app web.

Things like SharePoint security groups, content types, default language and regional settings are all inherited by the app web. You can define new content types and security groups within the host web at any time, and the app web will inherit them so they can be used – cool!

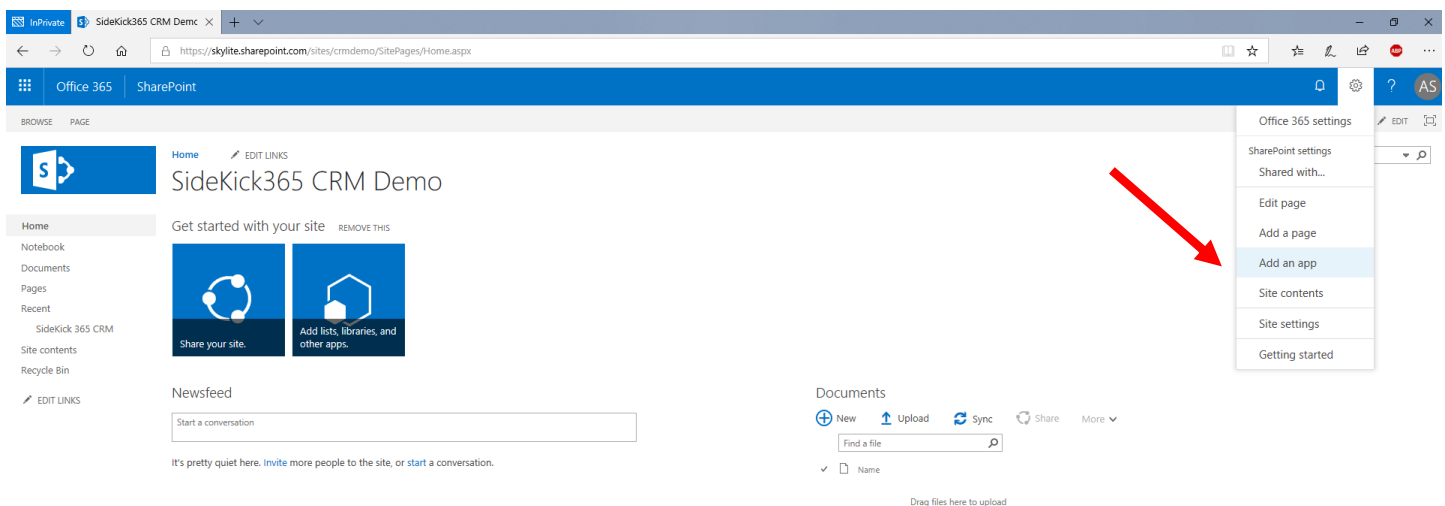
IMPORTANT - Each Host web can have many app webs, but an app web cannot have another app web under it or another host web above it. This means you cannot install another app within the app web that you create when you install SideKick 365 CRM today ☹ – maybe this will change in the future (we keep asking Microsoft so maybe we will get this capability one day)



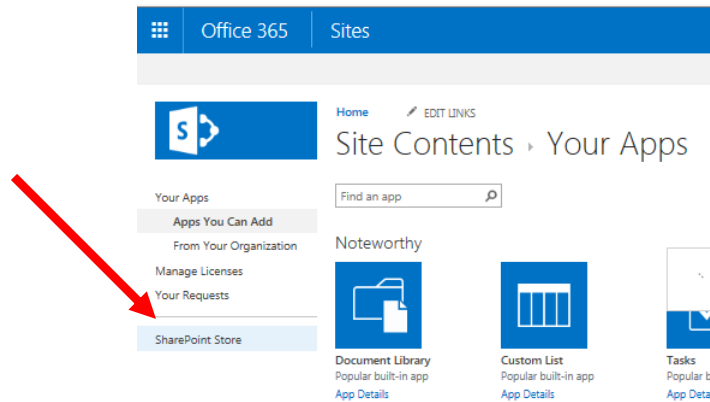
Installing SideKick 365 CRM

Now that we have some terminology explained, let’s get back to setting up SideKick 365 CRM.

To make the purchase or download a trial, of SideKick365 xRM you must first decide where you want to install it. You can either create a new Site Collection from the SharePoint admin console in Office 365, or create a new team site within an existing site collection. In either case, you will start from a team site and navigate to the little gear in the ribbon and select the option to “add an app” as shown below.

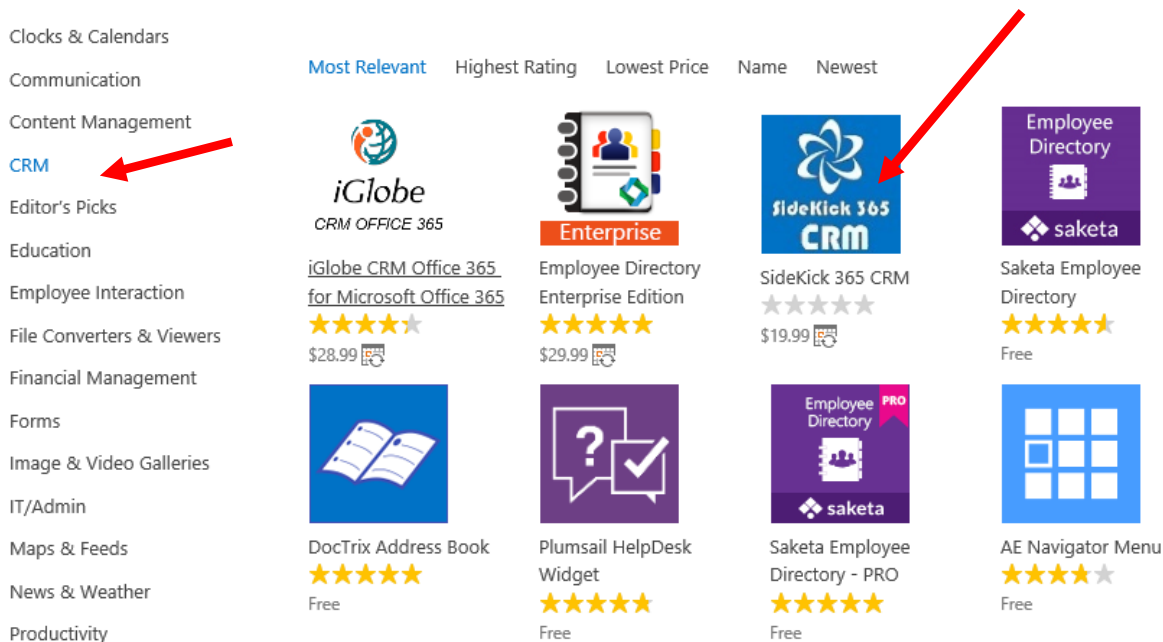


Then navigate to the option “SharePoint Store”



Next Navigate to the “CRM” category in the store as shown below

You will see that SideKick 365 CRM is a monthly subscription. Select the corresponding SideKick 365 CRM icon and then click on the Trial or Buy button.



Converting A Trial to a Purchase – Important – Please Read

If you start with a trial and then decide to purchase SideKick 365 CRM, then follow the steps below:

- 1 - Go to the host site that holds the Trial of SideKick 365 CRM and select Site Contents under the gear menu
- 2 - Look for the SideKick 365 CRM logo and then click on the 3 dots next to the icon.
- 3 – Select the menu called License
- 4 – Select the proper number of licenses and then hit the Buy button

You MUST convert the trial to a purchase as described above if you want to keep your data. If you install a fresh copy of SideKick 365 CRM from the store, then you will have to delete that fresh install and recover the license for your trial if you want to use that data. Email us at Info@SkyLiteSystems if you have questions or need assistance.

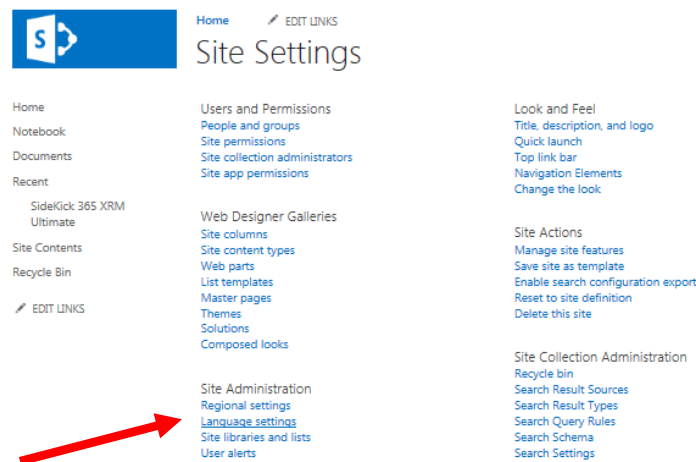
Setting the Localized Language Setting

SideKick 365 CRM supports many different languages and you have two ways to set the language used within the app.

VERY IMPORTANT – Once you set the language it cannot be changed and it will show the same language to ALL users for that instance of SideKick 365 CRM.

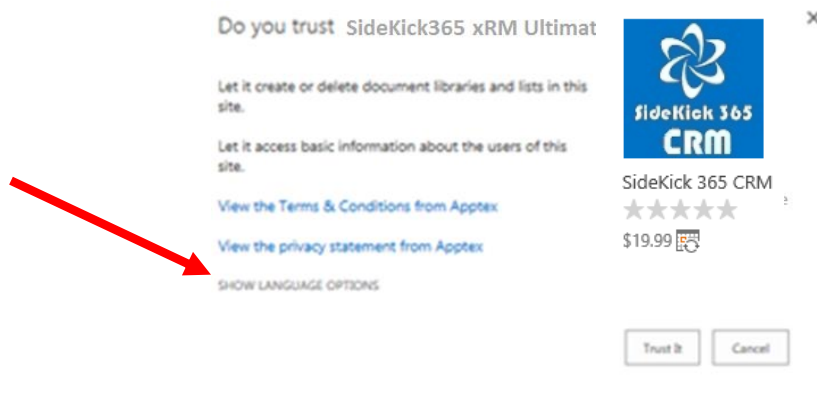
Option 1 – Using the language of the Host Web of SideKick 365 CRM

SideKick 365 CRM will use the local language settings of the Host Web (team site) where it is installed by default. You just set the local language settings within the Site Settings and SideKick365 will pick up those settings when it is installed as the default. You can set the local language settings in the host team site under the site settings as shown below.



Option 2 – Setting the Language During Installation

Sometimes, you will want the language used within SideKick 365 CRM to be different than what is used in the host web (team site). This is easy to do. When you select the option to install SideKick 365 CRM, you will see an option to select the language as well...



Just select that link and choose any language shown and that language will be used within SideKick 365 CRM.

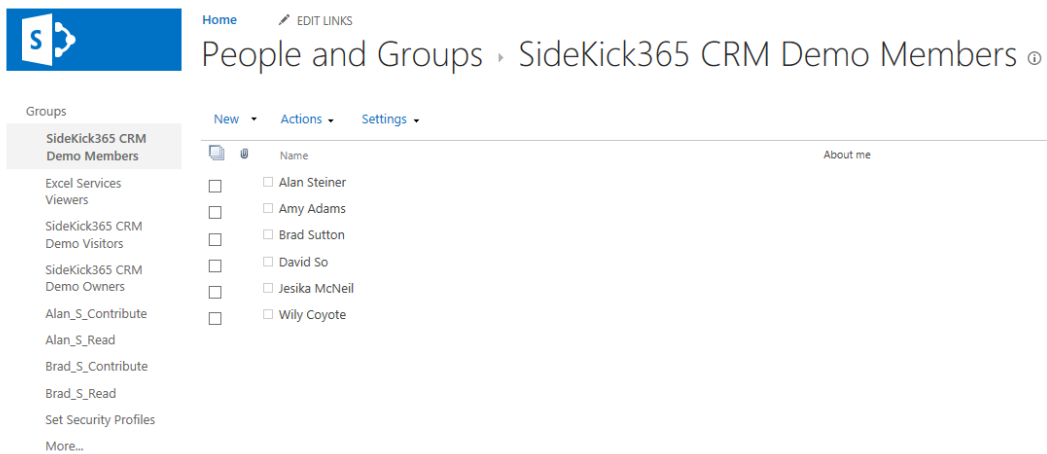
Adding Users and Licenses

SideKick 365 CRM is a SharePoint hosted app, so users need assigned permissions to access to the site that holds the app (the host site) AND an assigned license for SideKick 365 CRM. After you install SideKick 365 CRM, you'll need to assign permissions to the SharePoint users in the host site and also assign SideKick 365 CRM licenses to each person that needs to use the app so they can use the app. A user needs to be assigned permissions to the host web AND the app or they can't access the SideKick 365 CRM. OK, let get everything set up. Keep reading

Once the app has been installed start allowing access by adding users to the members group in the host site by following the instructions below.

Adding Users to the Members Group

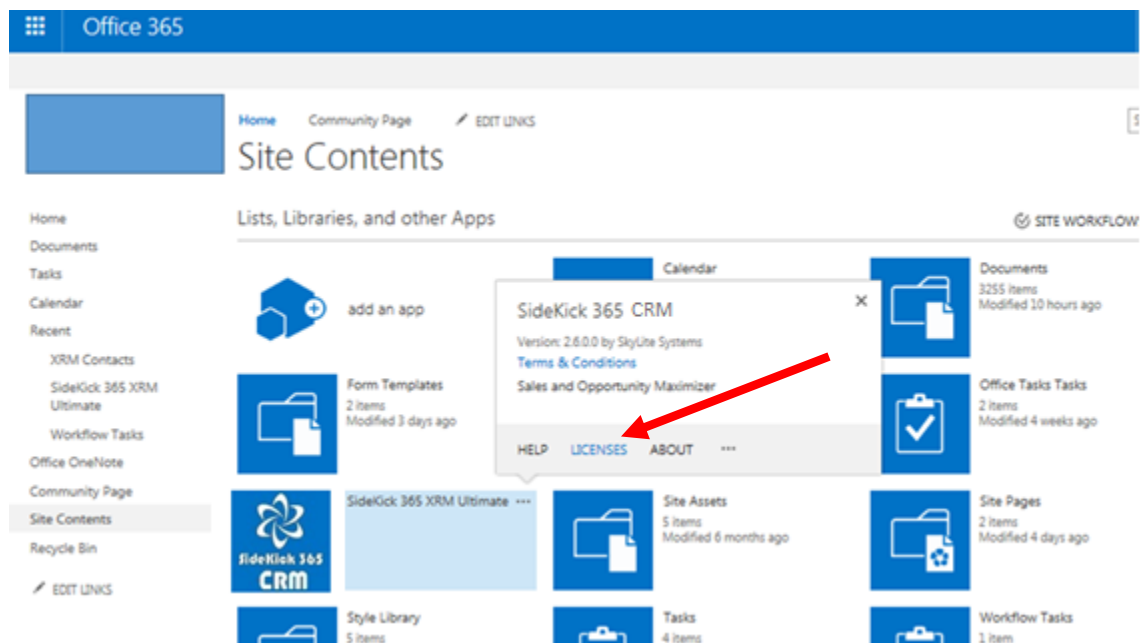
- 1 – Navigate to the little gear in the top right and select Site Settings in the host site (the site that holds SideKick 365 CRM)
- 2 – Select Users and Groups
- 3 – Open the “Members” group of the site as shown below
- 4 – Add all users that need to access SideKick 365 CRM should be added to the Members group as shown below



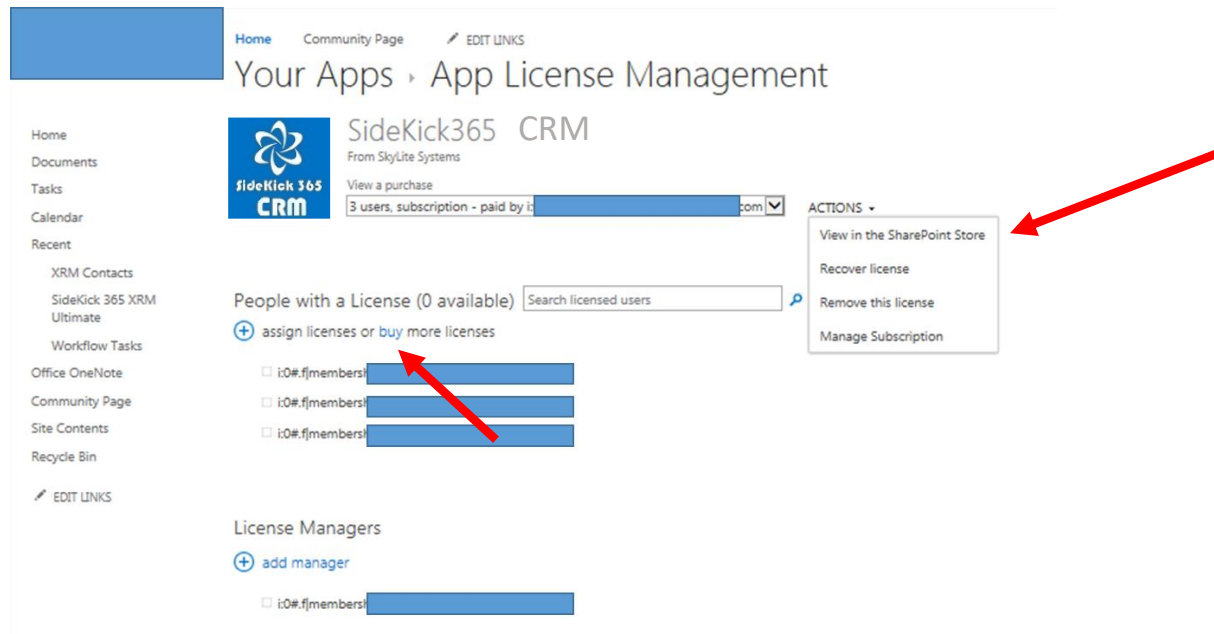
Assigning Licenses

Once users have been added to the host site member group then you need to assign a license to each user that will access SideKick 365 CRM. Follow the steps below to learn how to do this.

- 1 – Navigate to the host site and select the little gear
- 2 - Select the Site Contents option
- 3 – Find the SideKick365 xRM CRM Icon and Select Licenses

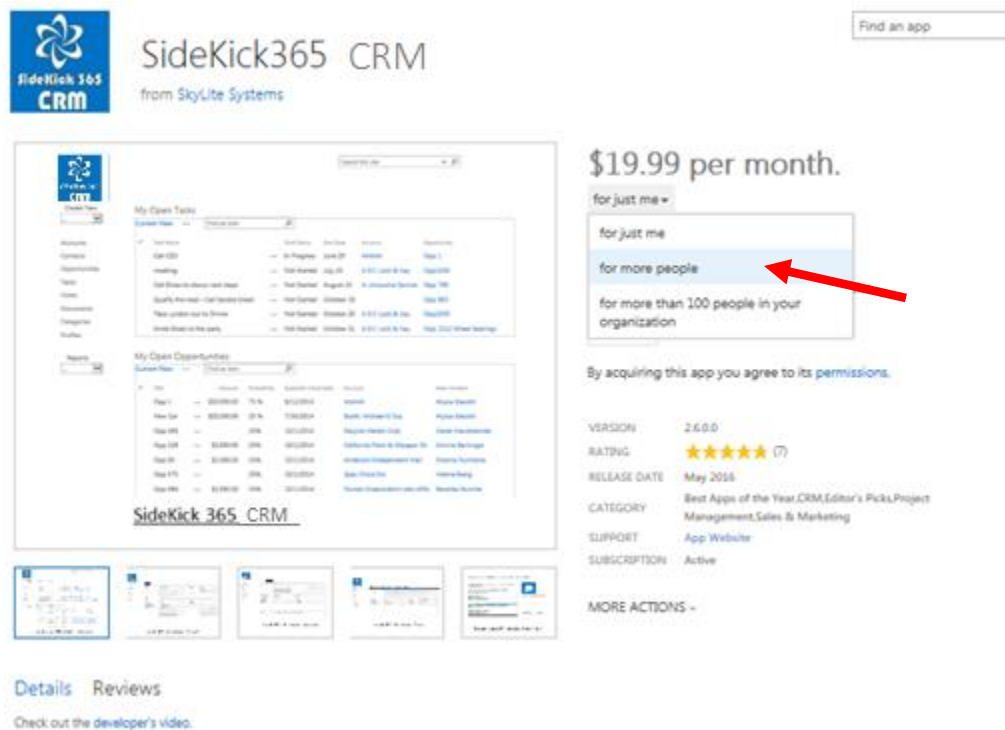


4 – Add, delete, and change licenses and users in the license management screen



You can manage users in this screen and navigate to important functionality by selecting the Actions menu.

- You can buy more licenses by selecting the “buy” link or “View in the SharePoint Store”
- Then select the Buy button and make sure to pick the quantity you want to add



Setting values in Dropdowns in SideKick 365 CRM

SideKick 365 CRM presents the user with choice lists for many fields to ensure data entry consistency and accurate reporting. The values in the dropdown choices are either a SharePoint choice field or a SharePoint look up to another list within the app. While many Choice lists come with pre-loaded values, not all have entries. This section will help you set up any choice lists necessary and explain how you can modify as needed.

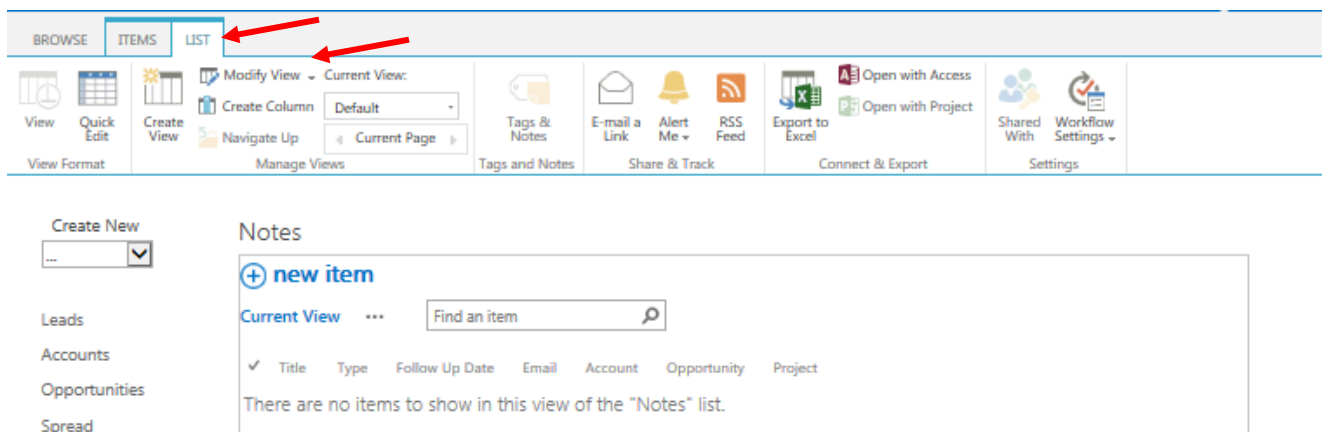
Setting up Dropdown values for the Categories in Notes

A Note can have a category assigned to the Note to help you get a better understanding of the type of Note you associate with an Account, Opportunity, or Project. Examples of the Note type category you may want to set up include:

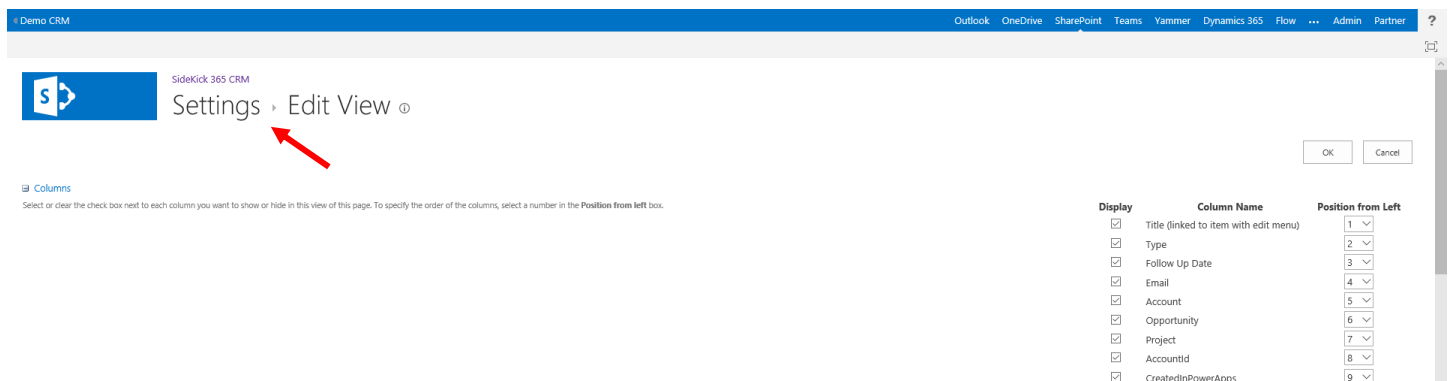
- Background
- To Do
- Idea
- Reminder

Follow the steps below to set up the options in the dropdown used to define the type of note.

- 1 – Select the Notes Module so you can see a list of all Notes
- 2 – Select any line with a single click so the List and Items tabs are activated
- 3 – Select the List Tab



- 4 – Select the Modify View button
- 5 – Select “Settings” when you see the modify View screen as shown below.



6 – This activates the List settings screen as shown below. Now scroll down and find the Type field and click once on the word “Type”.

SideKick 365 CRM
Notes > Settings

List Information

Name: Notes
Web Address: https://skylite-b572914ae0b783.sharepoint.com/sites/democrm/SideKick365CRM/Lists/Notes/AllItems.aspx
Description: Notes

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Delete this list
- Save list as template
- Permissions for this list
- Information Rights Management
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

Communications

- RSS settings

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Notes	Multiple lines of text	
Account	Lookup	
Accountid	Number	
Opportunity	Lookup	
Opportunityid	Number	
Link	Hyperlink or Picture	
Project	Lookup	
Projectid	Number	
Parent	Single line of text	
Type	Choice	
Follow Up Required	Yes/No	
Follow Up Date	Date and Time	
Email	Single line of text	

7 – This opens up the column setting. Now enter in the values that you want to appear in the Notes dropdown and hit OK.

SideKick 365 CRM Ultimate
Settings > Edit Column

Name and Type

Type a name for this column.

Column name: Type

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☒ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, %, €)
- ☐ Date and Time

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Enforce unique values:

☐ Yes ☒ No

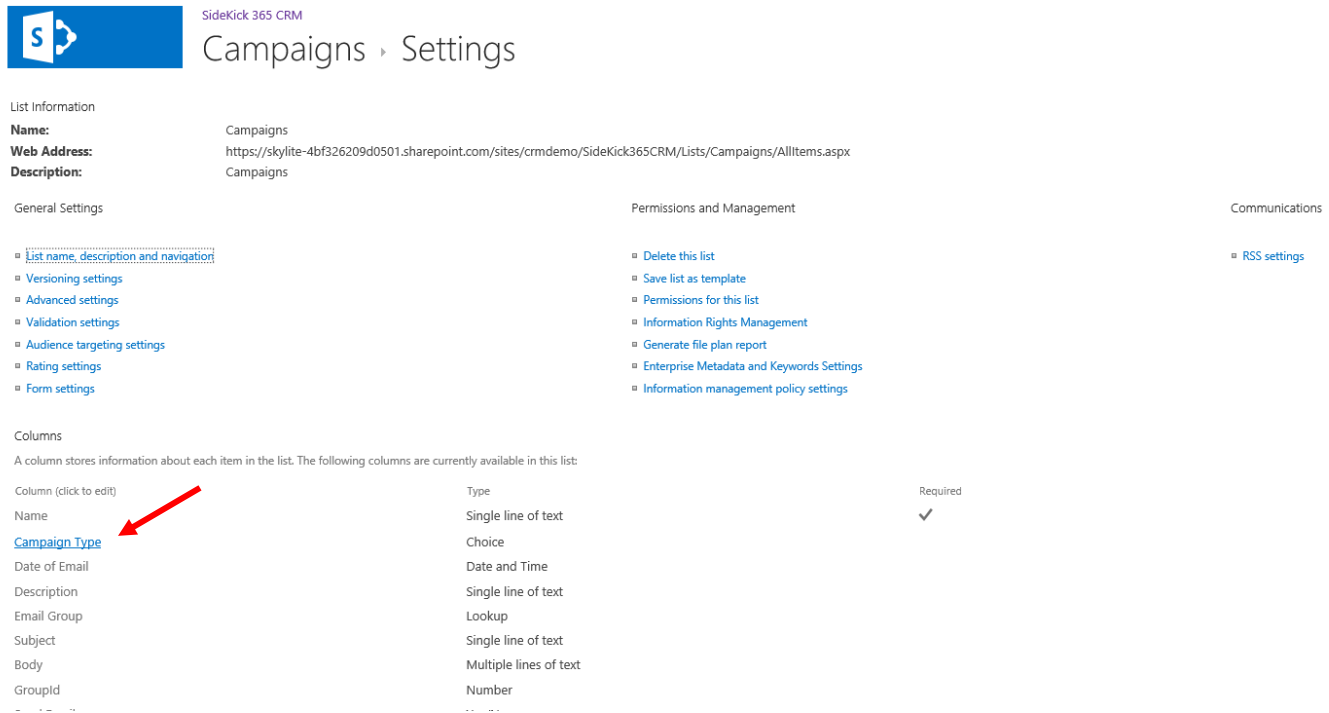
Type each choice on a separate line:

Phone Call
Email
Background
To Do

Display choices using:

☒ Drop-Down Menu
☐ Radio Buttons

NOTE – You will need to set up Type in the Campaign Module using steps 1-7 if you want to track campaigns by the type of campaign. For example Email, Direct Call, Mailer etc...



The screenshot shows the 'Campaigns > Settings' page in SideKick 365 CRM. The page is divided into three main sections: List Information, General Settings, and Permissions and Management. The List Information section shows the Name, Web Address, and Description. The General Settings section includes a list of settings such as List name, description and navigation, Versioning settings, Advanced settings, Validation settings, Audience targeting settings, Rating settings, and Form settings. The Permissions and Management section includes a list of permissions such as Delete this list, Save list as template, Permissions for this list, Information Rights Management, Generate file plan report, Enterprise Metadata and Keywords Settings, and Information management policy settings. The Communications section includes RSS settings. The Columns section shows a list of columns available for the list, including Name, Date of Email, Description, Email Group, Subject, Body, and GroupId. A red arrow points to the 'Campaign Type' column in the Columns section.

SideKick 365 CRM
Campaigns > Settings

List Information
Name: Campaigns
Web Address: https://skylite-4bf326209d0501.sharepoint.com/sites/crmdemo/SideKick365CRM/Lists/Campaigns/AllItems.aspx
Description: Campaigns

General Settings
List name, description and navigation
Versioning settings
Advanced settings
Validation settings
Audience targeting settings
Rating settings
Form settings

Permissions and Management
Delete this list
Save list as template
Permissions for this list
Information Rights Management
Generate file plan report
Enterprise Metadata and Keywords Settings
Information management policy settings

Communications
RSS settings

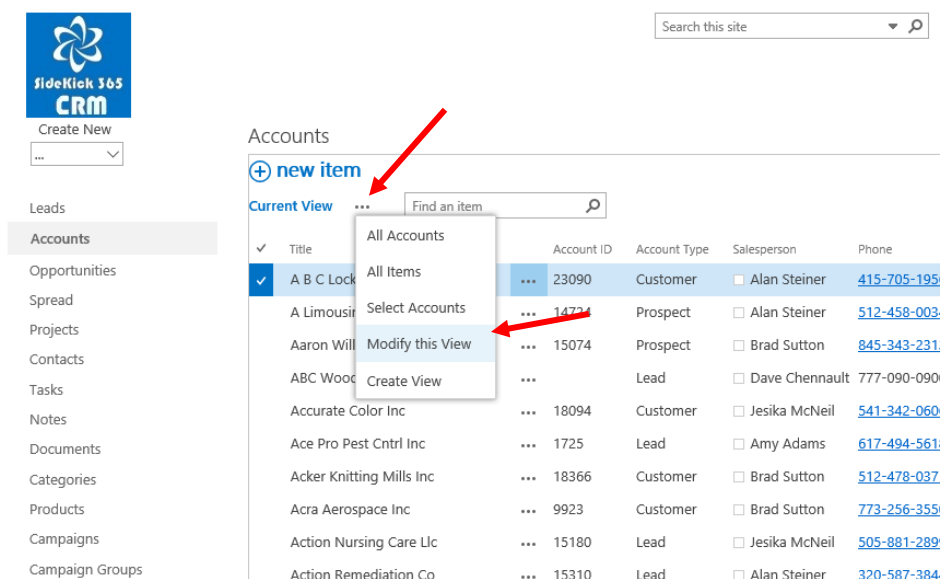
Columns
A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Name	Single line of text	✓
Campaign Type	Choice	
Date of Email	Date and Time	
Description	Single line of text	
Email Group	Lookup	
Subject	Single line of text	
Body	Multiple lines of text	
GroupId	Number	

Modify An Existing Choice List

Modifying a choice list with entries already entered follows the same steps. Let's modify the Account Types choices in the Accounts Module to see how to modify an existing set of choices.

1 – Select the Accounts Module and this time hit the 3 dots next to current view and then select Modify View as shown below



The screenshot shows the 'Accounts' module in SideKick 365 CRM. The left sidebar shows the navigation menu with 'Accounts' selected. The main area displays a table of accounts. A red arrow points to the 'new item' button. Another red arrow points to the 'Modify this View' option in the dropdown menu that appears when the three dots next to the 'Current View' are clicked. The table has columns for Title, Account ID, Account Type, Salesperson, and Phone.

SideKick 365 CRM
Create New
...

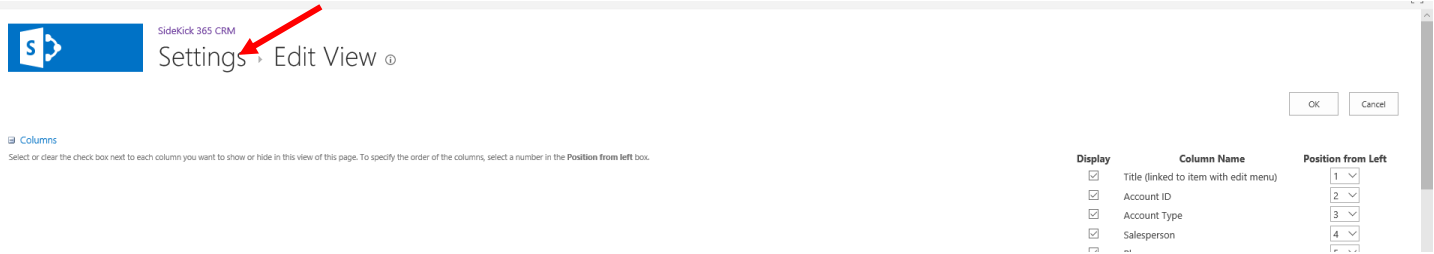
Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups

Accounts
new item
Current View ... Find an item

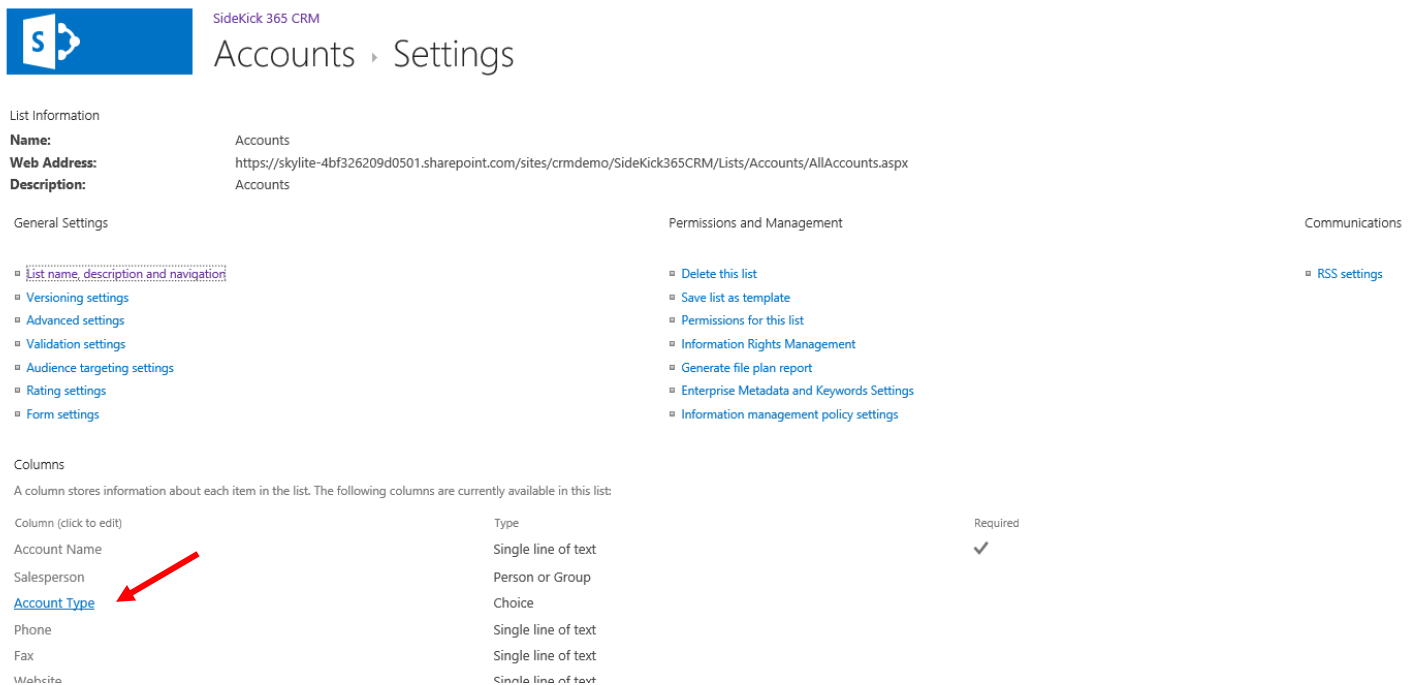
Account ID Account Type Salesperson Phone

✓	A B C Lock	23090	Customer	Alan Steiner	415-705-195
✓	A Limousine	14724	Prospect	Alan Steiner	512-458-003
	Aaron Will	15074	Prospect	Brad Sutton	845-343-231
	ABC Wood	...	Lead	Dave Chennault	777-090-090
	Accurate Color Inc	18094	Customer	Jesika McNeil	541-342-060
	Ace Pro Pest Cntrl Inc	1725	Lead	Amy Adams	617-494-561
	Acker Knitting Mills Inc	18366	Customer	Brad Sutton	512-478-037
	Acra Aerospace Inc	9923	Customer	Brad Sutton	773-256-355
	Action Nursing Care Llc	15180	Lead	Jesika McNeil	505-881-289
	Action Remediation Co	15310	Lead	Alan Steiner	320-587-384

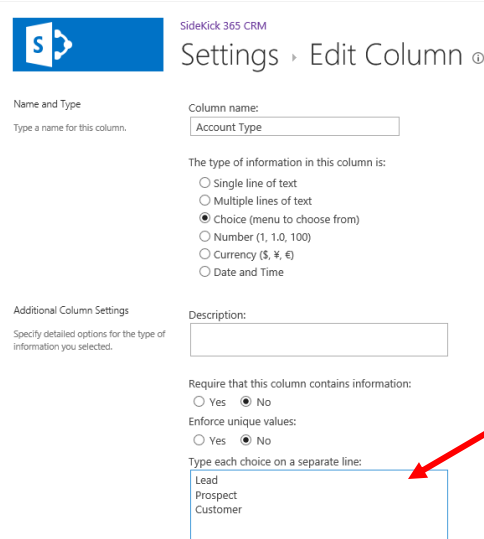
2 – Select the word “Settings” as shown below



3 – Now scroll down the List of field and select the “Account Type” field



4 – Select the Account Type field and change the choices as needed and hit OK.



Choice List Fields - Fields You Will Need to Set Up Or Should be Reviewed

SideKick 365 CRM “ships” with most choice list dropdowns pre-populated, but a few are completely empty because we thought it more important to let you set up the choices you need rather than ship the wrong choices with the product. A list of choice list fields that you should populate as part of the setup of SideKick 365 CRM follows:

- Account

All Choice fields populated with choices, but look at Territory and make sure it fits your needs

- Opportunity

Category – This field is shipped with no values. Please add choices as appropriate as described within this section of the installation guide

**Status – Status is a special field. It come pre populated with the 8 different sales stages. If you want to change these, go ahead and do that, but make sure that the entries in the Sales Stage list matches the names in this choice list. They Sales Stage list values are used in the Power BI reports so ensure the name used in the sales Stage within the Choice List in Opportunity matches the name (Title field) in the Sales Stage List.

- Task

All Choice fields populated with choices, but look at Task Status and make sure it fits your needs.

- Note

No changes needed.

- Projects

All Choice fields populated with choices, but look at Project Status and make sure it fits your needs.

- Documents

All Choice fields populated with choices

**Category – The Category is a lookup from the Category List. We did this so that end users could maintain the types of Document Categories. Make sure to enter the types of documents you want to track in the Category Module. The entries in Category will appear in the dropdown when you add a new document (file).

- Campaign

Type – The Type of campaign is shipped with no entries. Please add choices as appropriate as described within this section of the installation guide.

- Sale People

**Territory – While this field is populated with default choice values, make sure the values in this dropdown match the entries in the Opportunities Territory choices so report sin PowerBI will filter properly.

- Campaign

No changes needed

Setting Up Security Groups

SideKick 365 CRM supports powerful security profiles so you can set up permissions that allow users to only access subsets of data. Security profiles can be set up for regions, districts, product lines, and/or inside/outside teams and any other grouping you may need. You can even use security profile to support multiple companies within a single instance of SideKick 365 CRM. This remainder of this section will explain how security profiles work and guide you through set up and configuration of security profiles within the app.

Security Profiles – A Little Background

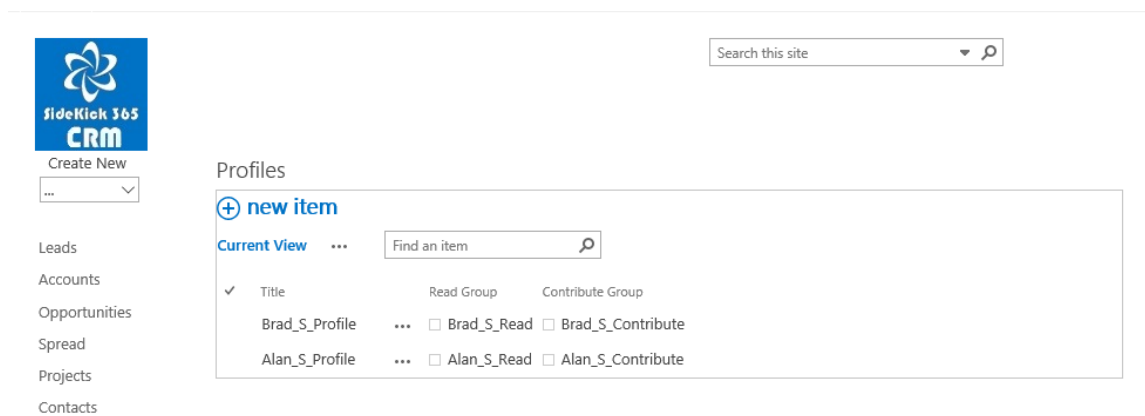
When we started developing SideKick 365 CRM in 2010 (seems like a long time ago in a galaxy far, far away....), we quickly realized that powerful security features limiting “who” could see “what” was a necessity. One of our first customers was using Salesforce and wanted to replace it with SideKick 365 CRM. They had a national sales team of 800 sales people with a complex hierarchy of regions, districts, sales teams, and executives. They needed a way to ensure that users only viewed and accessed information they were supposed to see. They wanted to ensure their sales teams remained focused on the subset of customers and projects they were actively working. Imagine the mess if their national team of 800 sales people could see everything in every region!

We faced a big challenge – how could we limit who could access segments of the data and do it in an efficient way? Hmmm..... this was a big challenge, but once again SharePoint came to the rescue. As you will learn, we built an ingenious way for SideKick 365 CRM to efficiently leverage the Permissions and Workflow capabilities already built into SharePoint to enable granular security profiles. Best of all, it is simple to set up and does not slow down the app in any way 😊. Let’s take a closer look

Security Profile

Security starts with setting up a security profile in SideKick 365 CRM. Security profiles can only be created by users that have been granted “full control” permissions in the SharePoint site where SideKick 365 CRM was installed. Normally, the administrator of that site will create a SharePoint group to manage the users allowed to create and set permissions on an item. If you want others to set permissions, then create a group with Full Control Permissions and add users to that group.

Users with full control permissions can select the option to create a New Profile or edit an existing Profile in the module shown below. All users can view and edit the security profiles available within the Account, Contact, and Opportunities but only users with Full Control Permission can edit or add new permissions. Users with contribute Security Profiles.





Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles
Sales People
Sales Goals
Sales Stages

Name *	New Account	Type	Prospect
Parent	<input type="text"/> New	Filter	<input type="text"/> Apply
Account ID	NewAcct1	Salesperson	Dave Chennault x
Phone	555-090-0900	Fax Number	555-090-0900
Web Site	www.newco.com	Hot	<input checked="" type="checkbox"/>
Address	555 Wild Way Drive		
City	Charleston	State	WV
Zip Code	23445	Country	USA
Billing Address <input type="checkbox"/>	<input checked="" type="checkbox"/> same as physical	Territory	Enterprise
<div>Address: 555 Wild Way Drive City: Charleston State: WV Zip Code: 23445 Country: USA</div>			
General Info	Great customer		
Contact	<input type="text"/> New	Filter	<input type="text"/> Apply
Campaign	<input type="text"/>	Profile	Alan_S_Profile Brad_S_Profile
		Save	Cancel

If you take a close look at the profile, you will see there is a Read Group and an Edit group associated with each profile. These are SharePoint groups that are created by the SideKick 365 CRM administrator. Each group contains the users of SideKick 365 CRM that can either read or edit the item that has the assigned security profile.



Create New
...

Leads
Accounts
Opportunities
Spread
Projects
Contacts

Search this site

Profiles

+ new item

Current View

Find an item

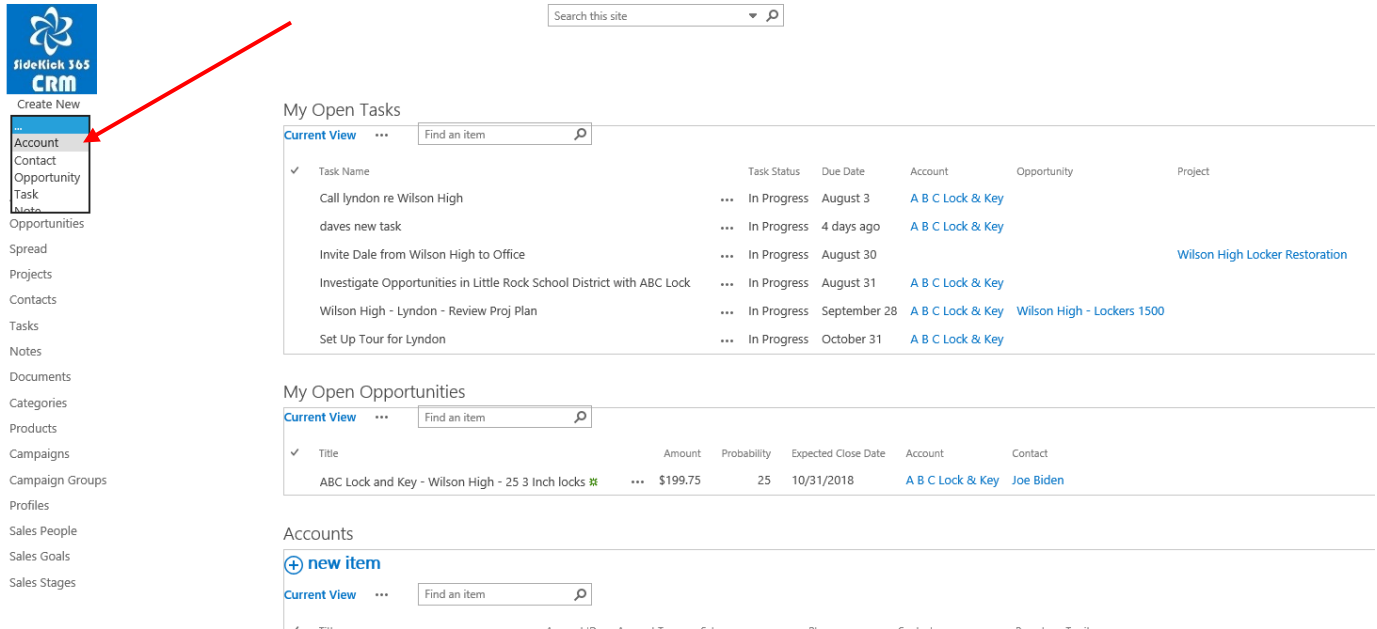
✓ Title	Read Group	Contribute Group
Brad_S_Profile	... <input type="checkbox"/> Brad_S_Read	<input type="checkbox"/> Brad_S_Contribute
Alan_S_Profile	... <input type="checkbox"/> Alan_S_Read	<input type="checkbox"/> Alan_S_Contribute

Using a Security Profile

Security profiles are a great way to limit the amount of information presented to a user and also keep them focused on their work. Security profiles also limit what is returned in search results. It is easy to use Security profiles to limit “who” can see “what” - let’s get started

Tip – A Security profile can be assigned or changed as needed. You can also edit the members of the Read and Edit SharePoint groups associated with a profile to control the access users have to items that have the security profile applied to an item.

1 - Create a new Account by selecting “Account” under the Create New dropdown in the quick launch as shown below



The screenshot shows the CRM interface. On the left, the 'Create New' dropdown menu is open, with 'Account' selected. A red arrow points to this selection. The main content area displays three sections: 'My Open Tasks', 'My Open Opportunities', and 'Accounts'.

My Open Tasks

Task Name	Task Status	Due Date	Account	Opportunity	Project
Call lyndon re Wilson High	In Progress	August 3	A B C Lock & Key		
daves new task	In Progress	4 days ago	A B C Lock & Key		
Invite Dale from Wilson High to Office	In Progress	August 30			Wilson High Locker Restoration
Investigate Opportunities in Little Rock School District with ABC Lock	In Progress	August 31	A B C Lock & Key		
Wilson High - Lyndon - Review Proj Plan	In Progress	September 28	A B C Lock & Key	Wilson High - Lockers 1500	
Set Up Tour for Lyndon	In Progress	October 31	A B C Lock & Key		

My Open Opportunities

Title	Amount	Probability	Expected Close Date	Account	Contact
ABC Lock and Key - Wilson High - 25 3 Inch locks	\$199.75	25	10/31/2018	A B C Lock & Key	Joe Biden

Accounts

+ new item

Account Name	Account Type	Account Status	Account Address	Account Phone	Account Email	Account Website
--------------	--------------	----------------	-----------------	---------------	---------------	-----------------

Selecting the Create New “Account” dropdown option will activate the new account screen as shown below. For this section, we want to focus on the field called “Profile”. Selecting the “Profile” dropdown within the new account will show all the security profiles managed within the Profiles module as shown below.



Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles
Sales People
Sales Goals
Sales Stages

Name * New Account **Type** Lead

Parent [dropdown] New **Filter** [input] **Apply**

Account ID [input] **Salesperson** Dave Chennault x

Phone [input] **Fax Number** [input]

Web Site [input] **Hot** ☐

Address [input]

City [input] **State** [input]

Zip Code [input] **Country** [input]

Billing Address ☐ same as physical **Territory** [dropdown]

General Info

Address [input]

City [input] **State** [input]

Zip Code [input] **Country** [input]

Contact [dropdown] New **Filter** [input] **Apply**

Campaign [dropdown] **Profile** [dropdown]

Alan_S_Profile
Brad_S_Profile

Save Cancel

Once a profile is selected and the Account is saved, then only the users in the Read and Edit groups associated with that security profile will be able to either view or edit that account. All of the related Documents, Tasks, Opportunities, and Notes also share the same security profile.

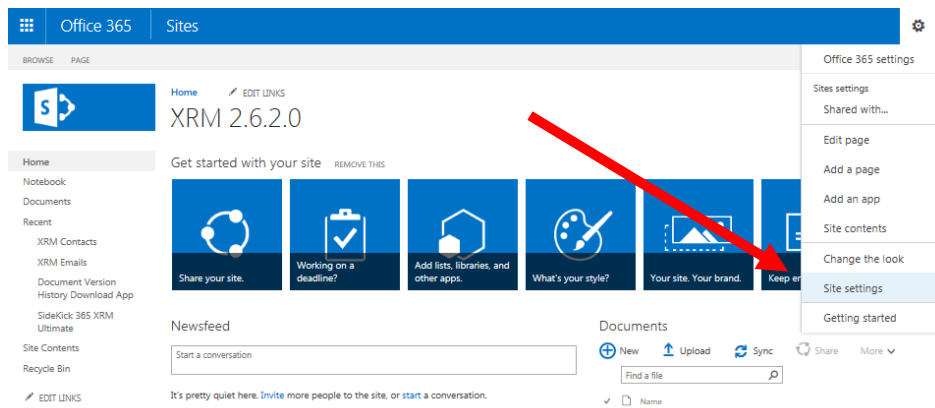
Overview

SharePoint has a rich permission management capability that can be applied to Sites, Lists, Libraries, and items. You can manually set the permission on a list, item or site to limit who can read, edit, delete, or create items or access entire sites. The trick is how can this process be automated so that users do not have to think about setting the security of each item. We realized that workflow could very useful to automate how permissions could be automatically set based upon predefined settings stored within SideKick 365 CRM. After a lot of trial and error, we “cracked the code” and developed a powerful way to easily set permissions on items using native capabilities built into SharePoint. The remainder of this section will show you the steps needs to set up security profiles and how you can limit who can see or edit what within SideKick 365 CRM.

Getting Started – Setting up SharePoint Groups and Permissions in the Host Site

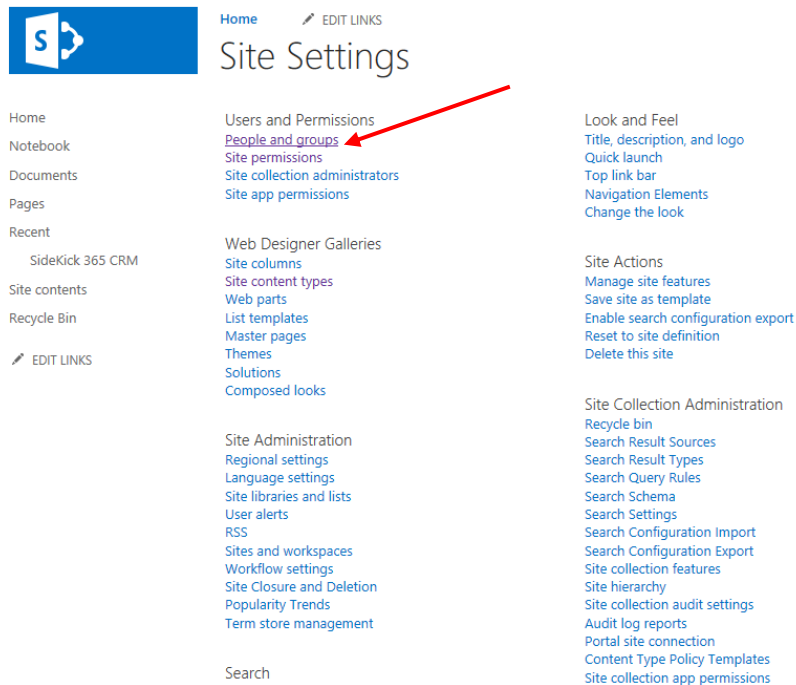
To use security profiles you need to start by setting up SharePoint groups in the site that holds SideKick 365 CRM. Let’s get started – please follow the steps below:

Step 1 – Open the site that holds SideKick 365 CRM and select the little gear > Site Settings

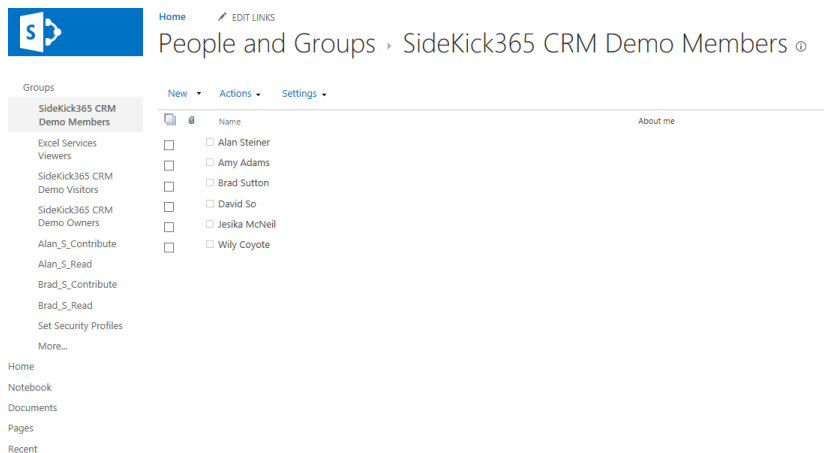


Step 2 – Add users that will use the App into the Members Group

Select the Option – People and Groups under Users and Permissions in the Site Settings



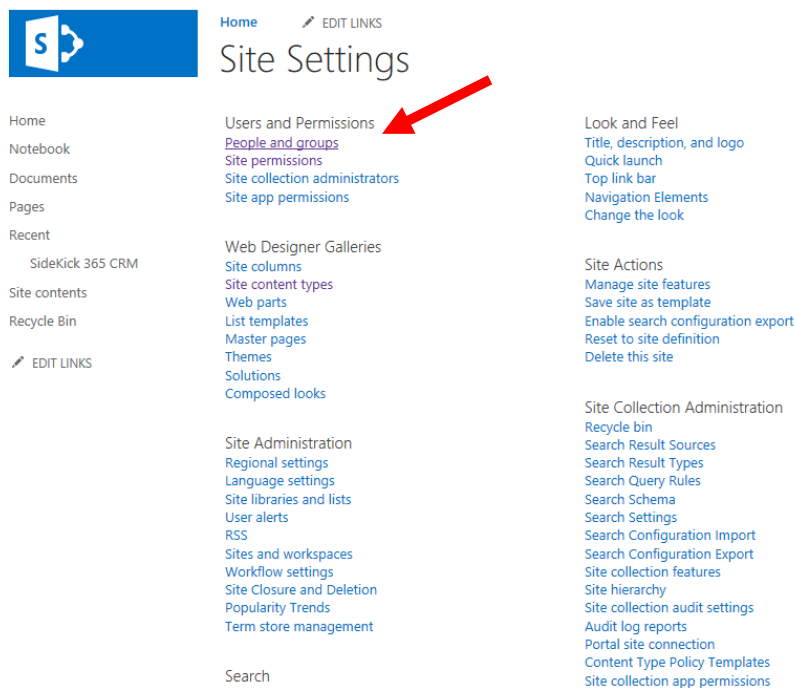
Select The Members Group as shown below and add any users that will access SideKick 365 CRM



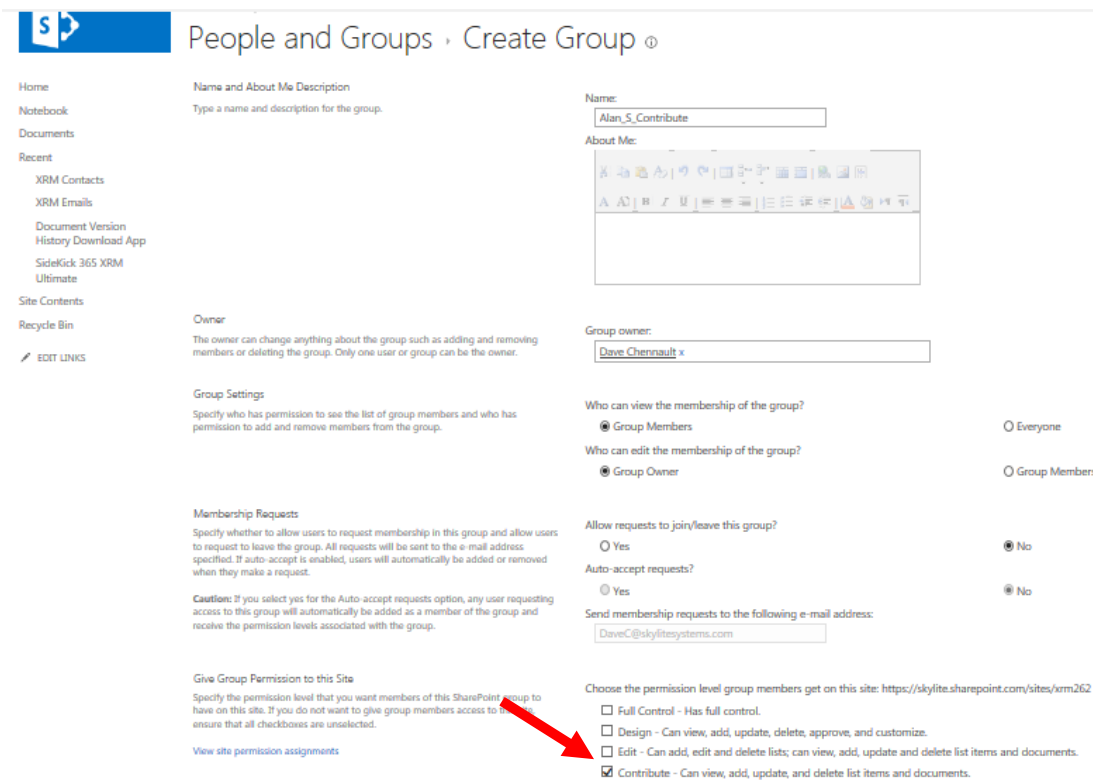
STEP 3 – Setting Up Security Groups in the Host Site

Now we'll finish up by setting up two groups – a Contribute Group and a Read-only group FOR EACH SECURITY PROFILE THAT WE WANT TO SET UP IN SIDKICK 365 CRM

A - Navigate to the site that holds SideKick 365 CRM, select Site settings> People and Groups as shown below



B – Create a group with Contribute permissions within the Host site that holds SideKick 365 CRM for any user that will be creating, deleting and editing records in SideKick 365 CRM using the Security Profile we are setting up – In this case the AlanS_Security Profile as shown below.



C – Now create a group with Read permissions within the Host site that holds SideKick 365 CRM for users that can read but not edit/delete/create items in this security profile - In this case the AlanS_Security Profile as shown below.

D – Now add users to each group in the host site that will need access to records assigned with these permission levels within SideKick 365 CRM as shown below

Office 365 | SharePoint

Home EDIT LINKS

People and Groups › Alan_S_Contribute

Groups

- SideKick365 CRM Demo Members
- Excel Services Viewers
- SideKick365 CRM Demo Visitors
- SideKick365 CRM Demo Owners
- Alan_S_Contribute**
- Alan_S_Read
- Brad_S_Contribute
- Brad_S_Read
- Set Security Profiles
- More...

Home

New Actions Settings

	Name	About me
<input type="checkbox"/>	Alan Steiner	
<input type="checkbox"/>	Amy Adams	
<input type="checkbox"/>	Dave Chennault	

and

Start | Mueller's 'speaking indictm' | New tab | skylite-f4ea6aa595891f.shar | SideK

← → ↺ 🏠 https://skylite.sharepoint.com/sites/crmdemo/_layouts/15/people.aspx?MembershipGroupId=19

Office 365 | SharePoint

Home EDIT LINKS

People and Groups › Alan_S_Read

Groups

- SideKick365 CRM Demo Members
- Excel Services Viewers
- SideKick365 CRM Demo Visitors
- SideKick365 CRM Demo Owners
- Alan_S_Contribute
- Alan_S_Read**
- Brad_S_Contribute
- Brad_S_Read
- Set Security Profiles
- More...

Home

New Actions Settings

	Name	About me
<input type="checkbox"/>	Dave Chennault	
<input type="checkbox"/>	David So	
<input type="checkbox"/>	Wily Coyote	

Notebook

Step 4 – Creating a Security Profile in SideKick 365 CRM using the groups created in the host site.

A – Open up SideKick 365 CRM and select the Profiles Module

B – Add the Read and Contribute Groups from the host site and select Save



Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups

Title *	<input type="text" value="Alan_S_Profile"/>
Read Group *	Alan_S_Read
Contribute Group *	Alan_S_Contribute

Step 5 – Using the Security Profile

Finally – you are all set up and ready to start using the profiles. Go ahead and create a record and select and Security Profile that is available as shown below



Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles
Sales People
Sales Goals
Sales Stages

Name *	<input type="text"/>	Type	Lead
Parent	<input type="text"/> New	Filter	<input type="text"/> Apply
Account ID	<input type="text"/>	Salesperson	Dave Chennault x
Phone	<input type="text"/>	Fax Number	<input type="text"/>
Web Site	<input type="text"/>	Hot	<input type="checkbox"/>
Address	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
Zip Code	<input type="text"/>	Country	<input type="text"/>
Billing Address <input type="checkbox"/>	<input type="checkbox"/> same as physical	Territory	-
<div>Address <input type="text"/></div> <div>City <input type="text"/> State <input type="text"/></div> <div>Zip Code <input type="text"/> Country <input type="text"/></div>			
General Info			
Contact	<input type="text"/> New	Filter	<input type="text"/> Apply
Campaign	<input type="text"/>	Profile	Alan_S_Profile Brad_S_Profile
		Save	Cancel

The security setting that were set up in the Contribute and Read groups that you created in the host site and associated with this security profile will automatically be assigned to the record. Any “child” item like documents or tasks will automatically have these security setting applied – NICE ☺.

Maintaining Security Profiles

Here are some pointers

- 1 – Make sure to manage the members of each group (Contribute or Read) in the host site. The security will automatically be assigned based upon the permission profile you assigned – NICE!
- 2 – You can include groups from Office 365 (Azure AD) but NOT SharePoint groups because SharePoint groups cannot contain other SharePoint groups. You could easily create a group of executives that could be added to all Read groups that you create in the security profiles. That way, you only need to maintain membership in the Executive group within Azure AD or regular AD if you are on-prem.

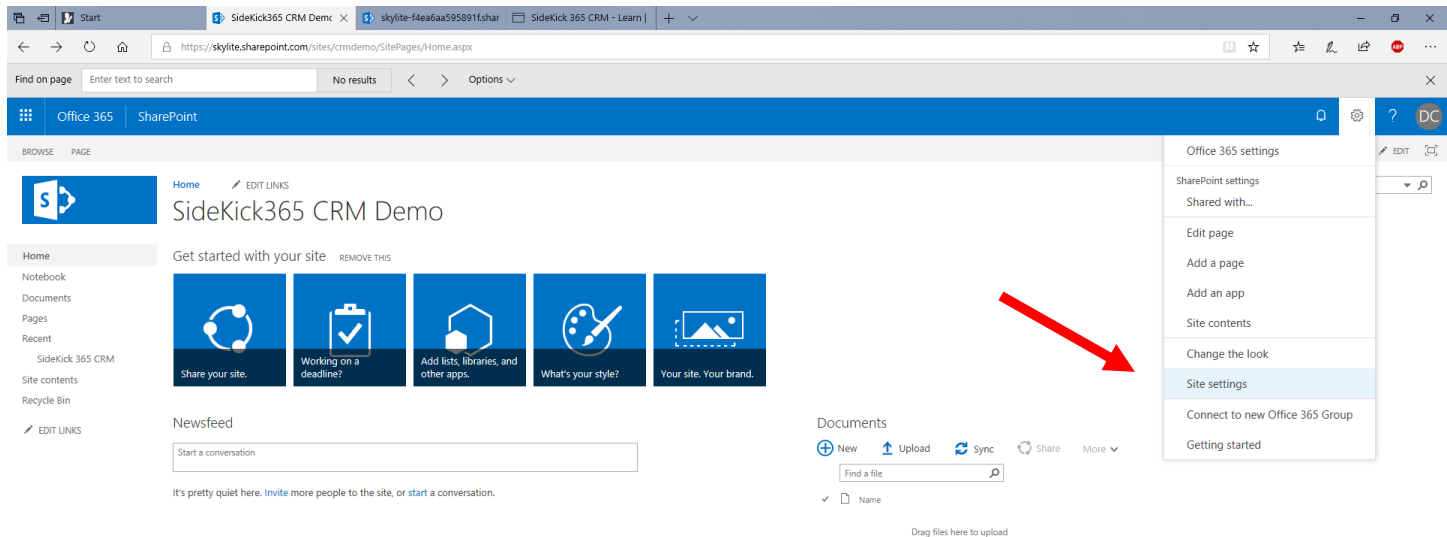
Setting up Templates Using Content Types

Content Types are a part of SharePoint that will let you set up templates like Excel spreadsheets or forms in Word or OneNote. This section will explain how you can create templates that can be used in any document library within SideKick 365 CRM. (NOTE – YOU CANT DO THIS LOGGED IN AS [THE TEST USER](#) – WE JUST WANT TO SHOW YOU THE STEPS)

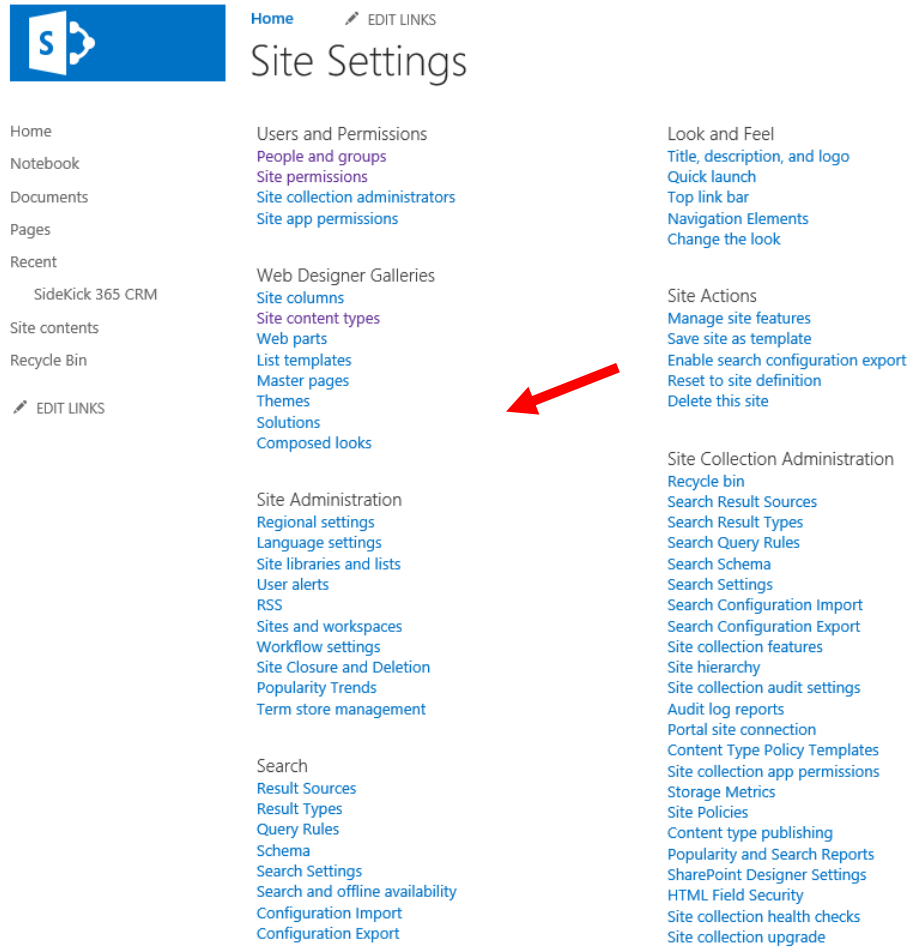
Creating a Template from an Excel Spreadsheet

Let's start by creating a template from an Excel Spreadsheet and adding it to SideKick 365 CRM.

- Go into the hostweb (the site that holds SideKick 365 CRM) and go to the site settings by selecting Create Site Actions -> Site Settings



Then select -> Site Content Types under Galleries.



- Use the Parent Content Type **Document** from **Document Content Types** Group.
- Name the content Type something like "Excel Inspection".



Home EDIT LINKS

Site Content Types ▸ New Site Content Type ⓘ

Home
Notebook
Documents
Pages
Recent
SideKick 365 CRM
Site contents
Recycle Bin
EDIT LINKS

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:
Excel Inspection

Description:

Parent Content Type:

Select parent content type from:
Document Content Types

Parent Content Type:
Document

Description:
Create a new document.

Group

Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:

☐ Existing group:
Custom Content Types

☒ New group:
Inspection

- Once you hit OK in the screen above, go to the Advanced Settings of the newly created content type, add a new Excel file.



Home EDIT LINKS

Site Content Types ▸ Site Content Type

Home
Notebook
Documents
Pages
Recent
SideKick 365 CRM
Site contents
Recycle Bin
EDIT LINKS

Site Content Type Information

Name: Excel Inspection

Description:

Parent: Document

Group: Inspection

Settings

- Name, description, and group
- Advanced settings
- Workflow settings
- Delete this site content type
- Information management policy settings
- Document Information Panel settings

Columns

Name	Type
Name	File
Title	Single line of text

- Add from existing site columns
- Add from new site column
- Column order

Home EDIT LINKS

Site Content Type ▸ Advanced Settings ⓘ

Home
Notebook
Documents
Pages
Recent
 SideKick 365 CRM
Site contents
Recycle Bin

EDIT LINKS

Document Template
Specify the document template for this content type.

☐ Enter the URL of an existing document template:

☒ Upload a new document template:

Read Only
Choose whether the content type is modifiable. This setting can be changed later from this page by anyone with permissions to edit this type.

☐ Yes
☒ No

Update Sites and Lists
Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to the child site and list content types will be lost.

☒ Yes
☐ No

Should this content type be read only?
☐ Yes
☒ No

Update all content types inheriting from this type?
☒ Yes
☐ No

Good job! Now you have the template loaded as a Content Type in the Host web, now we need to add it to the document library in SideKick 365 CRM. Let's get started...

- Open SideKick 365 CRM
- Select the Documents Module by picking Documents in the lefthand menu
- Now select any folder in the document list by selecting the checkmark column **with a single click to activate the library tab** and then select "Modify View"

SideKick365 CRM Demo

BROWSE FILES LIBRARY

View Quick Edit Create View Modify View Current View: Default 1 - 30

Tags & Notes E-mail a Link Alert Me RSS Feed Sync Connect to Office Open with Explorer Export to Excel Open with Explorer Shared With Workflow Settings

Create New

Leads Accounts Opportunities Spread Projects Contacts Tasks Notes Documents Categories Products Campaigns Campaign Groups Profiles Sales People Sales Goals Sales Stages

Documents

Current View Find a file

Name	Modified	Modified By	Category
A B C Lock Key_Account38	July 30	Sergiy Nesterenko	
A Limousine Service_Account301	July 30	Sergiy Nesterenko	
AAAA1111_Account512	Monday at 11:14 AM	Sergiy Nesterenko	
Aaron William Esq_Account112	July 30	Sergiy Nesterenko	
ABC Wood Supplies_Account502	August 1	Dave Chennault	
Accurate Color Inc_Account257	July 30	Sergiy Nesterenko	
Ace Pro Pest Cntrl Inc_Account378	July 30	Sergiy Nesterenko	
Acker Knitting Mills Inc_Account68	July 30	Sergiy Nesterenko	
Acra Aerospace Inc_Account475	July 30	Sergiy Nesterenko	
Action Nursing Care Llc_Account444	July 30	Sergiy Nesterenko	
Action Remediation Co_Account250	July 30	Sergiy Nesterenko	
Advanced Electromagnetics Inc_Account144	July 30	Sergiy Nesterenko	
Air Academy Federal Credit Un_Account58	July 30	Sergiy Nesterenko	
Airlifter_Account402	July 30	Sergiy Nesterenko	
Albers Technologies Corp_Account15	July 30	Sergiy Nesterenko	
Alexander Christine T Esq_Account496	July 30	Sergiy Nesterenko	
All N All Shop_Account499	July 30	Sergiy Nesterenko	
Allegro Copy and Print_Account330	July 30	Sergiy Nesterenko	
Allen Industrial Supply_Account100	July 30	Sergiy Nesterenko	

- Now select the word Settings to get into the Document Library Settings

SideKick365 CRM Demo Outlook OneDrive SharePoint Teams Yammer Dynamics 365 Flow ... Admin Partner ?

SideKick 365 CRM Settings Edit View

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	Category	5
<input type="checkbox"/>	Account	6
<input type="checkbox"/>	Accountid	7
<input type="checkbox"/>	AccountName	8
<input type="checkbox"/>	App Created By	9
<input type="checkbox"/>	App Modified By	10
<input type="checkbox"/>	Check In Comment	11
<input type="checkbox"/>	Checked Out To	12
<input type="checkbox"/>	Comment count	13
<input type="checkbox"/>	Compliance Asset Id	14
<input type="checkbox"/>	Contact	15
<input type="checkbox"/>	Contactid	16
<input type="checkbox"/>	ContactName	17
<input type="checkbox"/>	Content Type	18

OK Cancel

- Next, select Advanced Settings.

SideKick 365 CRM Documents Settings

List Information

Name: Documents

Web Address: <https://skylite-4bf326209d0501.sharepoint.com/sites/crmdemo/SideKick365CRM/Lists/Documents/Forms/AllDocuments.aspx>

Description: Documents

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings**
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- Information Rights Management
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

Communications

- RSS settings

Content Types

This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:

Content Type	Visible on New Button	Default Content Type
Upload File	✓	✓

- Add from existing site content types
- Change new button order and default content type

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document.

Column (click to edit)	Type	Used in

- Here, set **Allow Management of Content Types** to **Yes** and click OK. This takes you back to the Document Library Settings page



Settings » Advanced Settings

Content Types

Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?

☒ Yes ☐ No

Document Template

Type the address of a template to use as the basis for all new files created in this document library. When multiple content types are enabled, this setting is managed on a per content type basis. [Learn how to set up a template for a library.](#)

Template URL:

Opening Documents in the Browser

Specify whether browser-enabled documents should be opened in the client or browser by default when a user clicks on them. If the client application is unavailable, the document will always be opened in the browser.

Default open behavior for browser-enabled documents:

☐ Open in the client application
☐ Open in the browser
☒ Use the server default (Open in the browser)

Custom Send To Destination

Type the name and URL for a custom Send To destination that you want to appear as an option for this list. It is recommended that you choose a short name for the destination.

Destination name: (For example, Team Library)

URL:

Folders

Specify whether the "New Folder" command is available. Changing this setting does not affect existing folders.

Make "New Folder" command available?

☒ Yes ☐ No

- Now scroll down to the Content Types section and select "Add From Existing Site Content Types"



SideKick 365 CRM

Documents ▸ Settings

List Information

Name: Documents
Web Address: <https://skylite-4bf326209d0501.sharepoint.com/sites/crmdemo/SideKick365CRM/Lists/Documents/Forms/AllDocuments.aspx>
Description: Documents

General Settings

- ▣ [List name, description and navigation](#)
- ▣ [Versioning settings](#)
- ▣ [Advanced settings](#)
- ▣ [Validation settings](#)
- ▣ [Column default value settings](#)
- ▣ [Audience targeting settings](#)
- ▣ [Rating settings](#)
- ▣ [Form settings](#)

Permissions and Management

- ▣ [Delete this document library](#)
- ▣ [Save document library as template](#)
- ▣ [Permissions for this document library](#)
- ▣ [Manage files which have no checked in version](#)
- ▣ [Information Rights Management](#)
- ▣ [Generate file plan report](#)
- ▣ [Enterprise Metadata and Keywords Settings](#)
- ▣ [Information management policy settings](#)

Content Types

This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types

Content Type	Visible on New Button	Default
Upload File	✓	✓

- ▣ [Add from existing site content types](#)
- ▣ [Change new button order and default content type](#)

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are not

Column (click to edit)	Type	Used in

- Next, Add the Newly created Content Type “Inspection” to the Library and hit “OK”.



SideKick 365 CRM

Settings ▸ Add Content Types ⓘ

Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from:

Available Site Content Types:

- Allow any content type *
- Audio
- Basic Page
- Document
- Document Set
- Dublin Core Columns
- Excel Inspection
- Form
- Image

Content types to add:


Add >

< Remove

Description:
Allows users to upload documents of any content type to a library. Unknown documents will be treated as their original content type in client applications.

Group: Special Content Types

Now when you go into any document tab within SideKick 365 CRM and select the New button, you should be able to see the new template Excel Inspection in the New Document dropdown.



Create New

...

Leads

Accounts

Opportunities

Spread

Projects

Contacts

Tasks

Notes

Documents

Categories

Products

Compliance

Search this site

Account

Documents

Contacts

Projects

Account Name

Salesperson

+

New

Current View

Account ID

23090

Account Type

Customer

✓

10 Hours Consulting_Opportunity632

ABC Lock and Key - Wilson High - 25 3 Inch locks_Opportunity654

DOD Program

Wilson High - Lockers 1500_Opportunity627

1134_RE Scanner

1150_Link to Mark Twain record

...

August 11

Monday at 1:14 PM

Monday at 2:50 PM

July 31

July 31

August 15

...

Alan Steiner

Dave Chennault

Alan Steiner

Dave Chennault

Dave Chennault

Alan Steiner

Category

[Email](#)

[Email](#)

Create a new file

Upload File

Excel Inspection

New folder

Selecting the template creates the new Excel form from the template. Just hit save and it automatically saves into this document list associated with the Account, Opportunity, Project, or Contact – NICE!

COPYRIGHT 2018 SKYLITE SYSTEMS - PAGE 33

Excel Online | SideKick 365 CRM | A B C Lock Key_Account38 | Book

FILE HOME INSERT DATA REVIEW VIEW Tell me what you want to do EDIT IN EXCEL

Undo Paste Copy Format Painter Clipboard Font Alignment Number Conditional Formatting Tables Insert

Home Inspection Checklist

By Vertex42.com

Vertex42 LLC 2014 ©

Address: _____ Date: _____

Note: This checklist is for personal use only. It should not be used in place of an official home inspection. This list may not be comprehensive. Contact a qualified ASHI certified home inspector for an official inspection.

M - missing, S - scratched, D - damaged, B - broken, R - repair/replace, W - Water Damage, L - Leaking

← Beyond checking Good, OK or Bad, use these letters to be more specific about what you found.

Exterior	Good	OK	Bad
Back Doors			
Deck, porch, patio			
Doorbell			
Driveway			
Front Doors			
Garage Doors			
Garbage receptacle			
House number			
Mailbox			
Outdoor lights			
Paint and trim			
Parking			
Recycling receptacle			
Sidewalks			
Siding (brick/stone/cement)			
Traffic noise			
Windows			
Are things loose, cracked, damaged, rotted, bug infested?			
Notes:			

Roof	Good	OK	Bad
Chimney			
Gutters and downspouts			
Soffits and fascia			
When was it last replaced? Are there encroaching trees?			
Notes:			

← Highlighted in gray, each section also includes additional things to be on the lookout for.

Garage	Good	OK	Bad
Ceiling			
Doors			
Floors			
Lights			
Storage			
Walls			
Windows			
Is the garage door opener operating properly?			
Notes:			

← Each section also has a place for notes. It's highly recommended that if you check "OK" or "Bad" for any item

Adding More Templates

If you want to add more templates, like the Excel Spreadsheet entitled "Home Inspection" shown above, then follow the same steps. Add the file you want to use as a template in the host web (the site that holds SideKick 365 CRM) then add the new template (Content Type) to the Document Library in SideKick 365 CRM.

Digging Deeper

If you want to learn more about Content Types, then visit the url below for additional information.

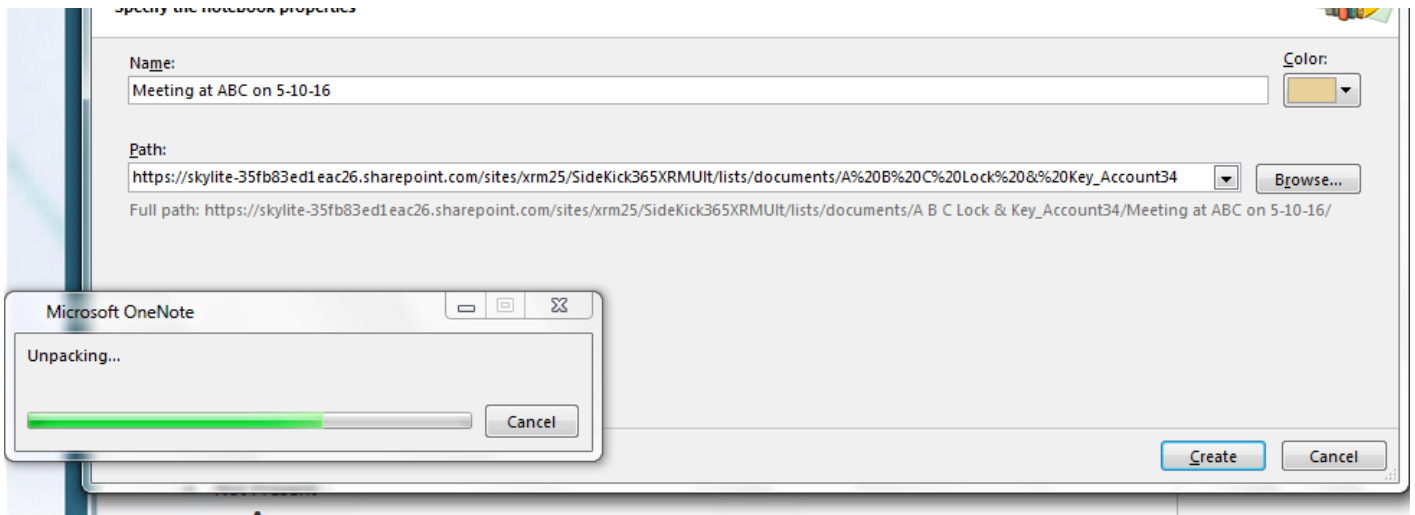
<http://www.sharepoint.inf4web.com/1313/sharepoint-2013-how-to-add-additional-document-types-to-a-document-library/>

Tricks and Considerations

One Note Considerations

The trick to make OneNote a template using this technique is to export the OneNote Template as a OneNote Package so it can be uploaded to the new content type definition

OneNote Pathnames are limited to approximately 150 characters. You will see that the full path within SideKick 365 CRM can get quite long, so keep your account, project and opportunity names short if you want to use OneNote templates.



Data Import Considerations

SideKick 365 CRM includes a utility to import data. Certain characters are not allowed in SharePoint File or folder names. To see a complete list, look here

<https://support.microsoft.com/en-us/kb/2933738#bookmark-fixitformealways>

Microsoft has created a tool that will replace these characters in the name of files that you want to upload. You can find a link to it in the it article referenced above..... Look for “Easy Fix”.