SideKick 365 CRM

Admin Guide

Version 1.0.3

8/29/2018

Created and Built in California by SkyLite Systems

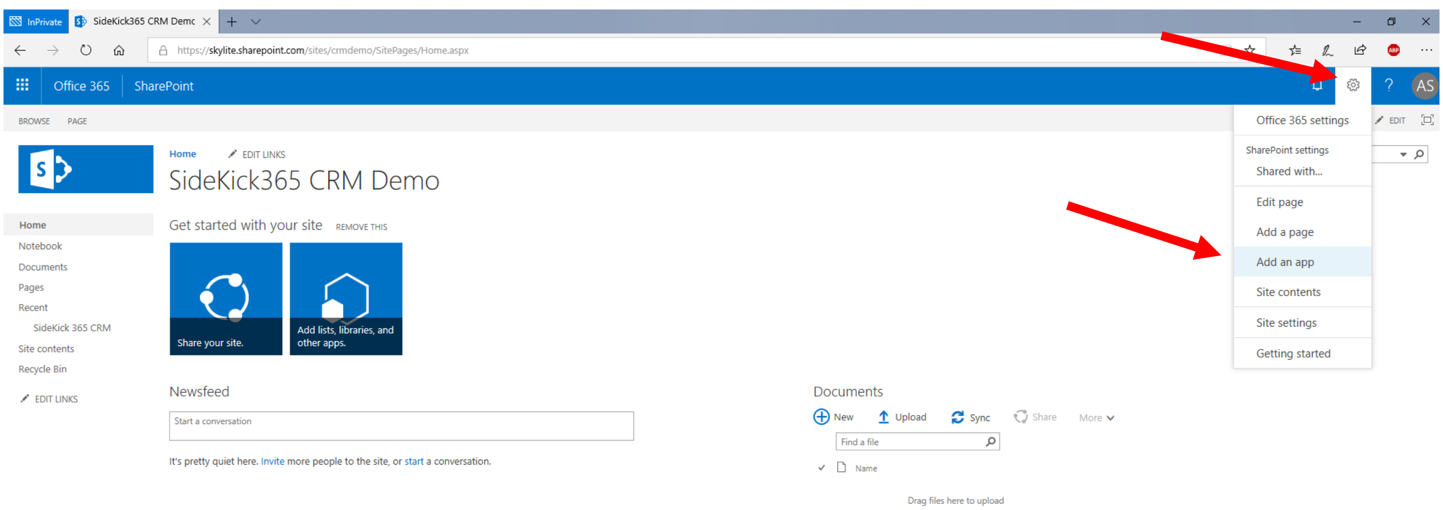
Setup for SideKick 365 CRM, Technical Architecture, & Guidance

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.

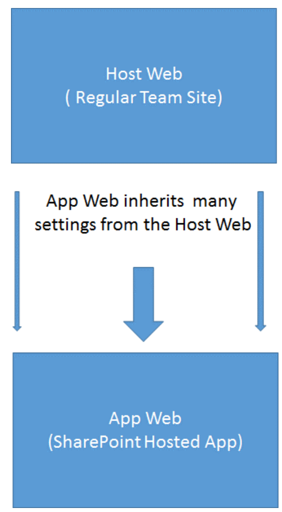


Before digging deeper, we need to define some terminology. This site where you install the app using the “add an app” menu option is called the Host Web. As an example, the host web would be the SharePoint teamsite in the screenshot shown right above this paragraph.

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!

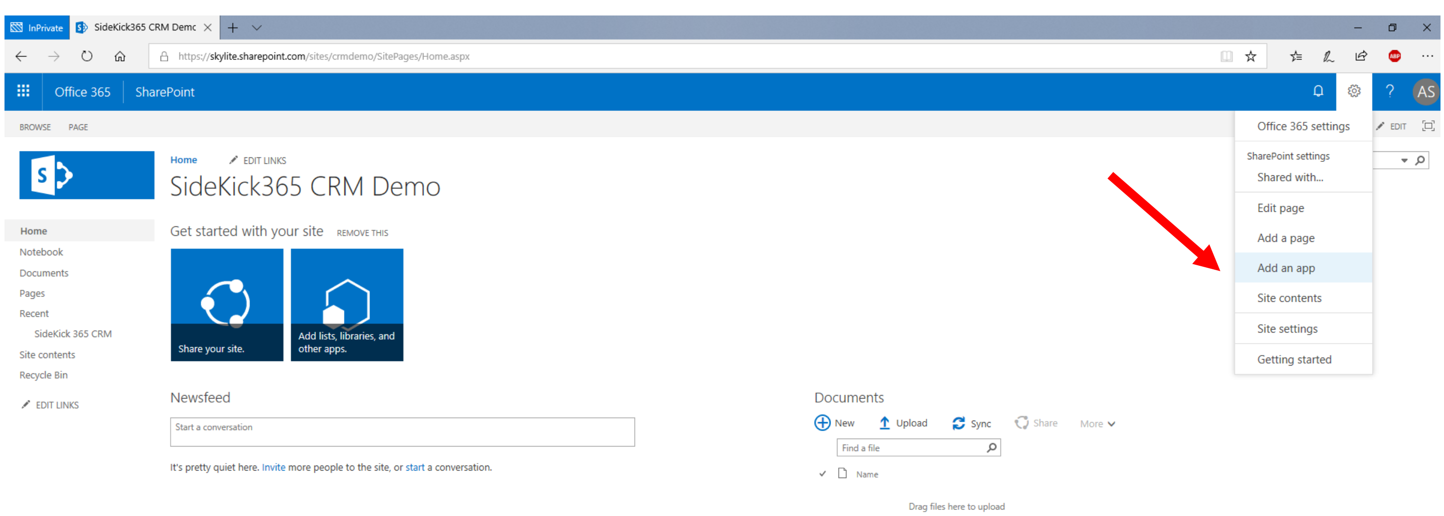
IMPORTANT - Each Host web can have many app webs, but an app web cannot have another app web under it or another host web above it. This means you cannot install another app within the app web that you create when you install SideKick 365 CRM today ☹ – maybe this will change in the future (we keep asking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



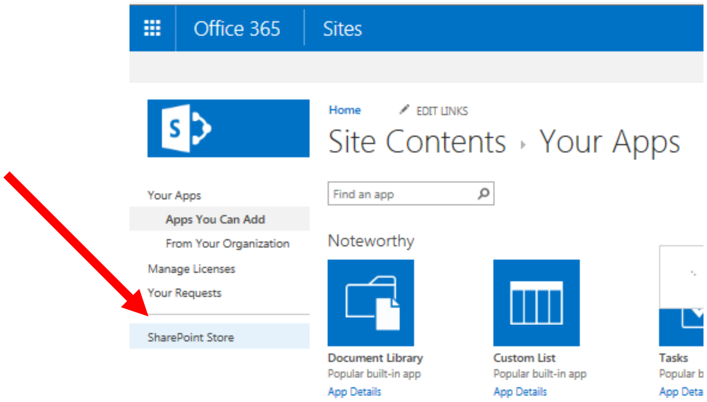
Installing SideKick 365 CRM

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.

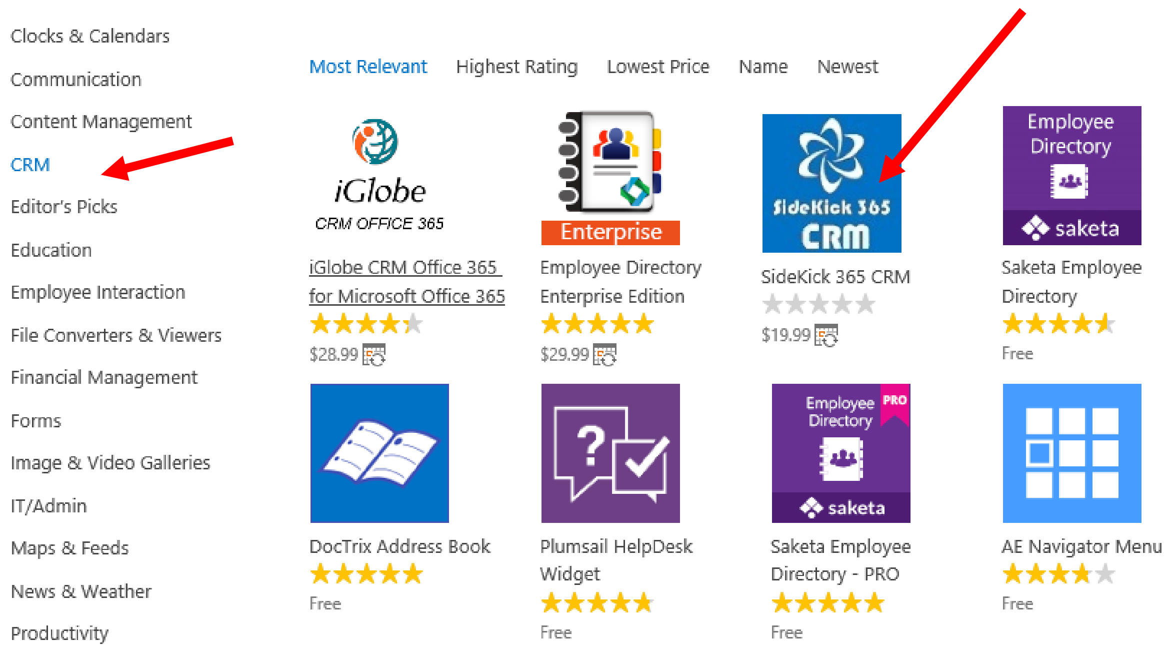


Then navigate to the option “SharePoint Store”



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 trail 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.

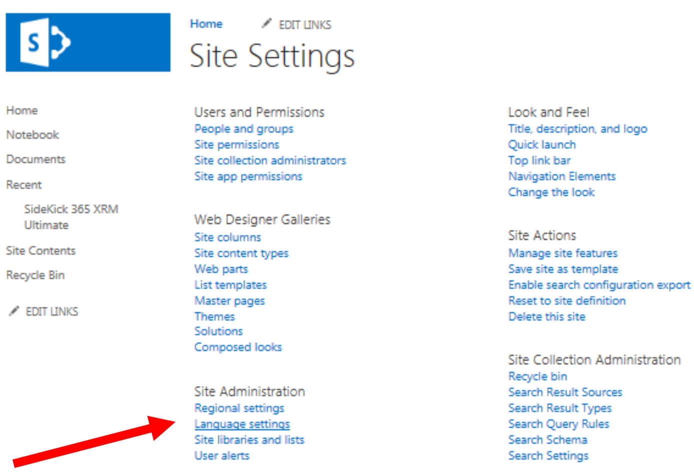
Setting the Localized Language Setting

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.

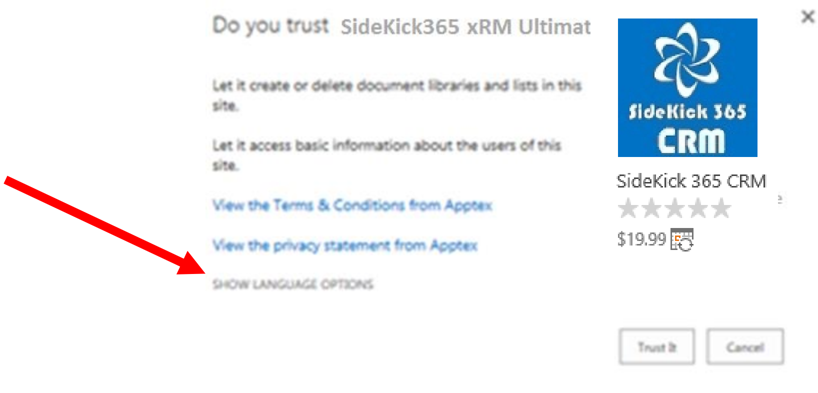
Option 1 – Using the language of the Host Web of SideKick 365 CRM

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 <u>AND</u> 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.

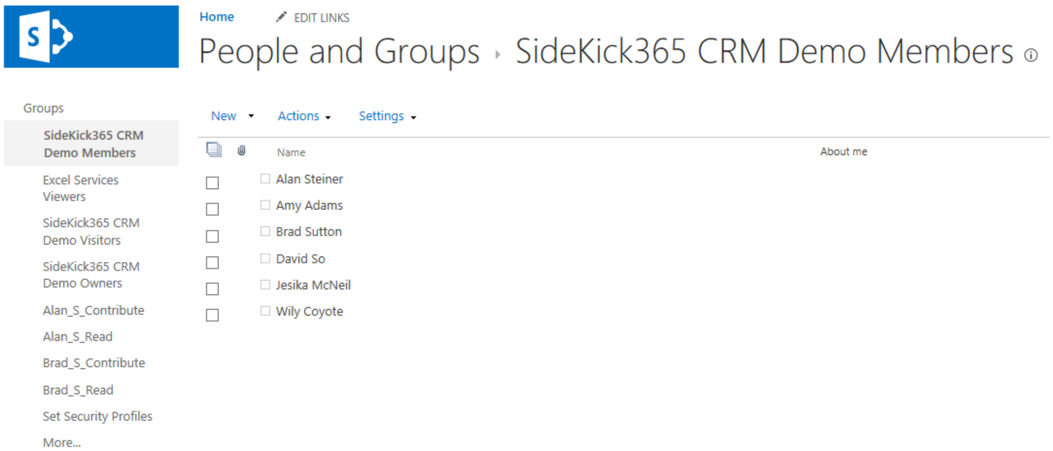
<u>Adding Users to the Members Group</u>

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



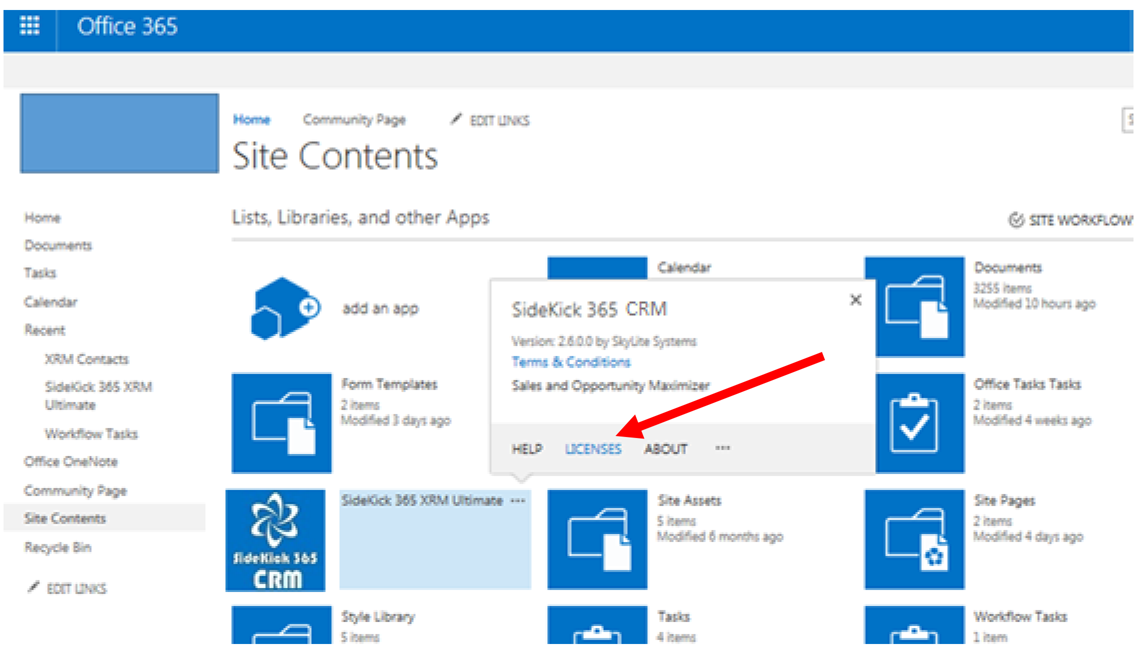
Assigning Licenses

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.

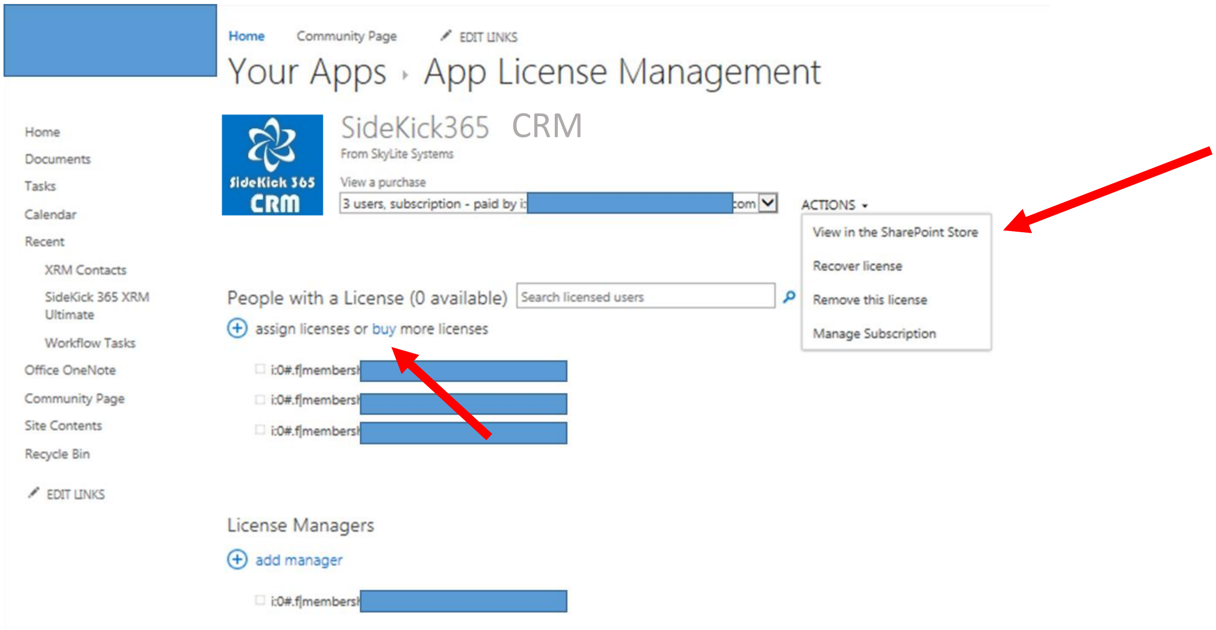
1 – Navigate to the host site and select the little gear

2 - Select the Site Contents option

3 – Find the SideKick365 xRM CRM Icon and Select Licenses

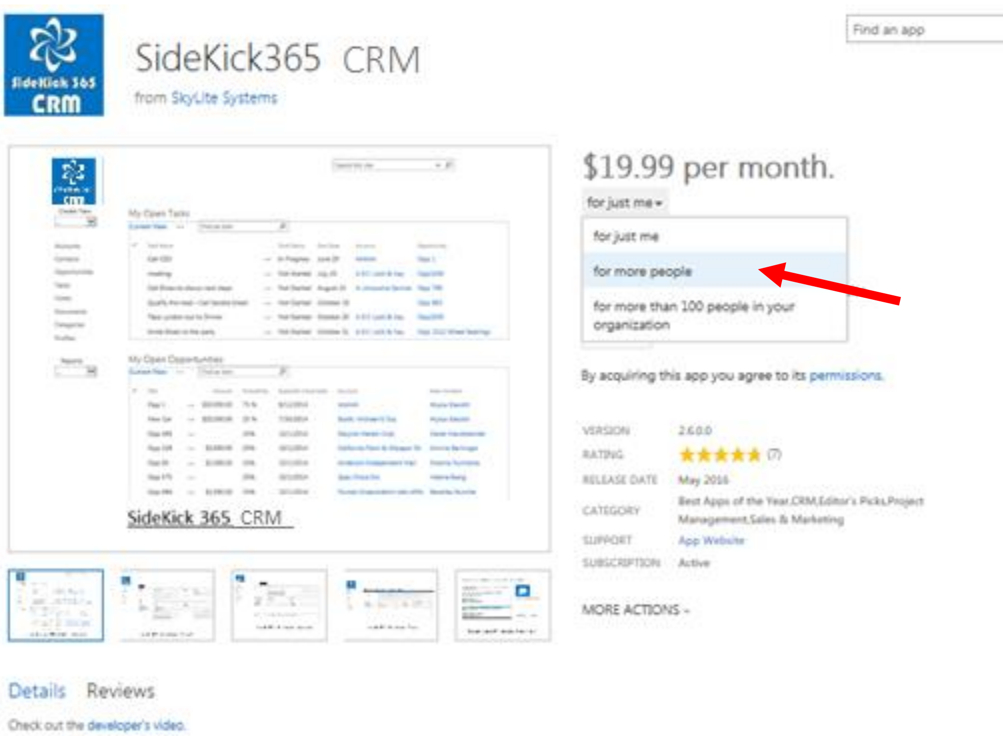


4 – Add, delete, and change licenses and users in the license management screen



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:

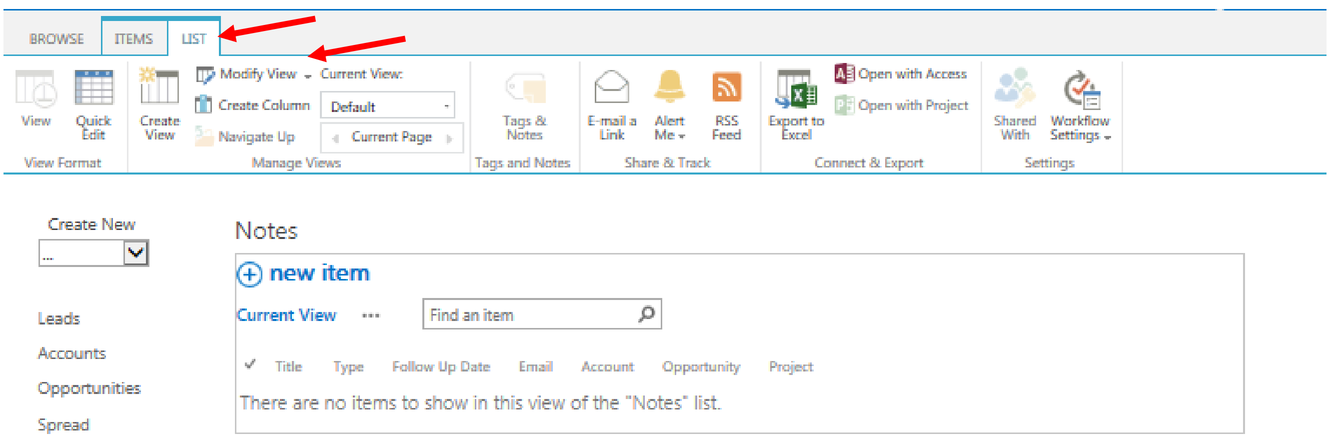
- Background
- To Do
- Idea
- Reminder

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 al Notes

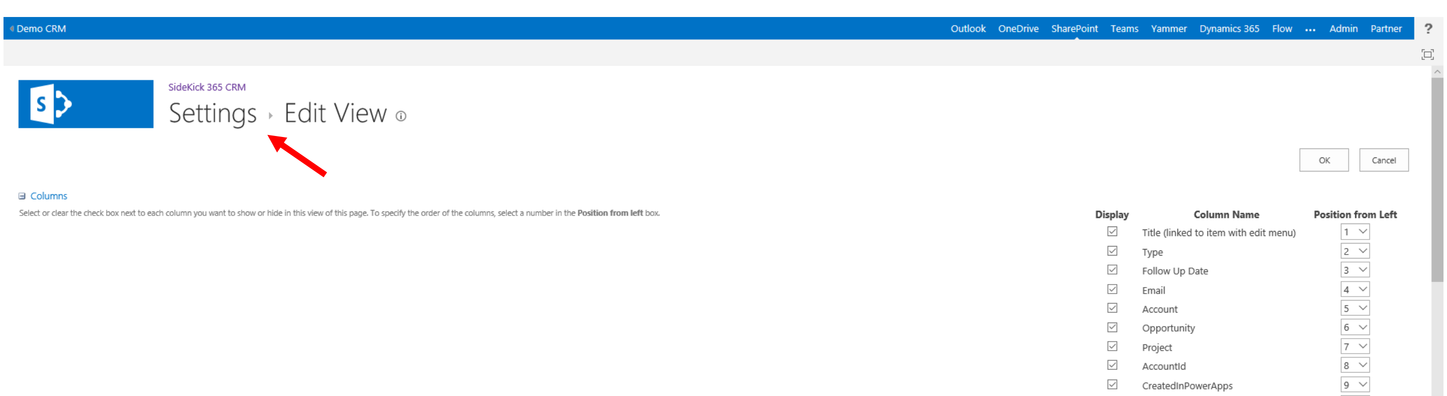
2 – Select any line with a single click so the List and Items tabs are activated

3 – Select the List Tab

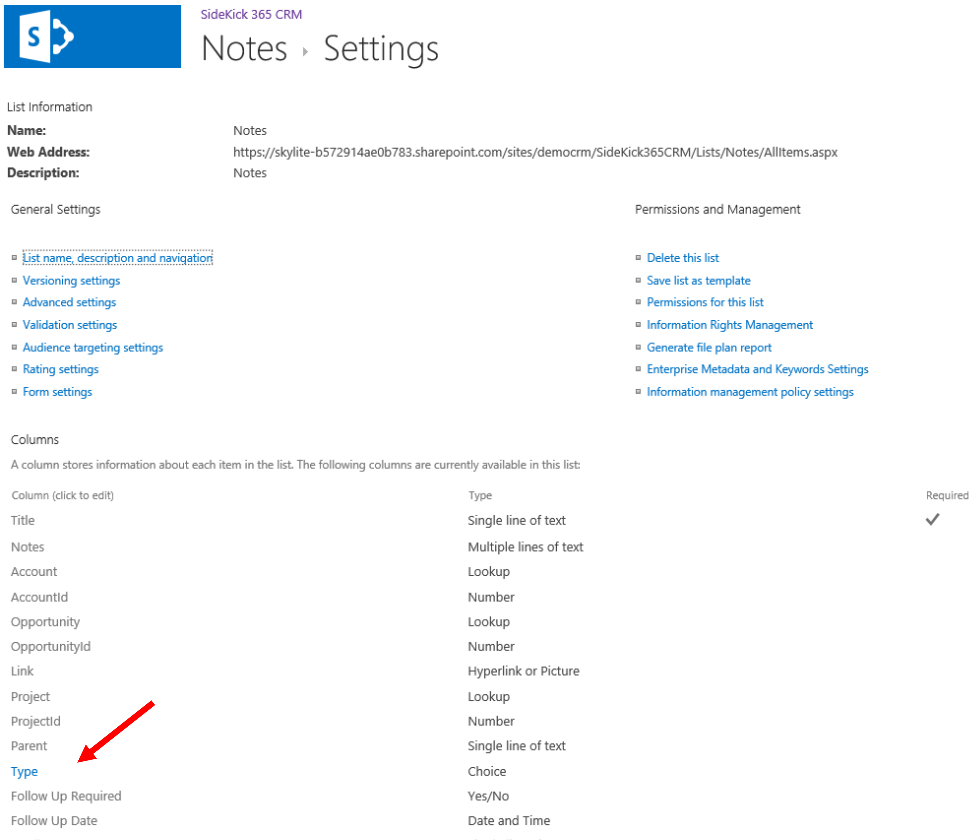


4 – Select the Modify View button

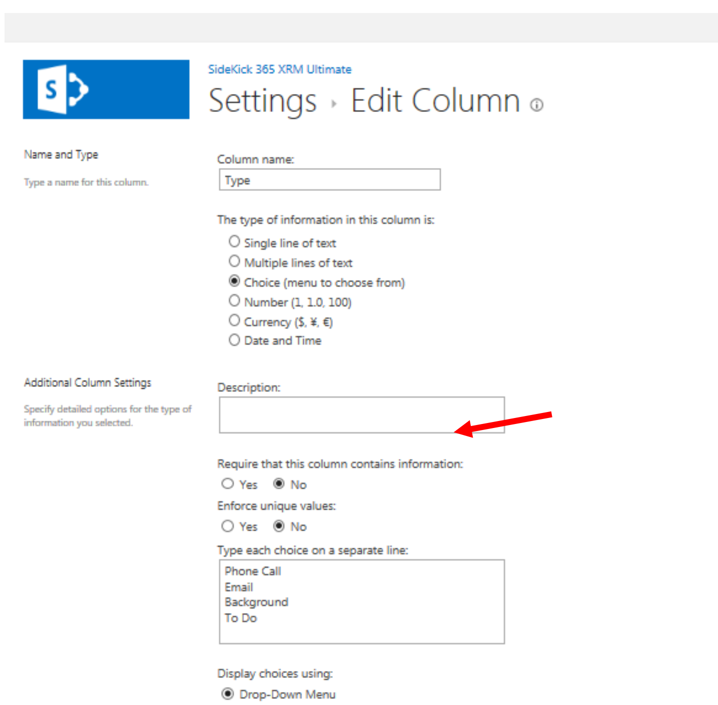
5 – Select "Settings" when you see the modify View screen as shown below.



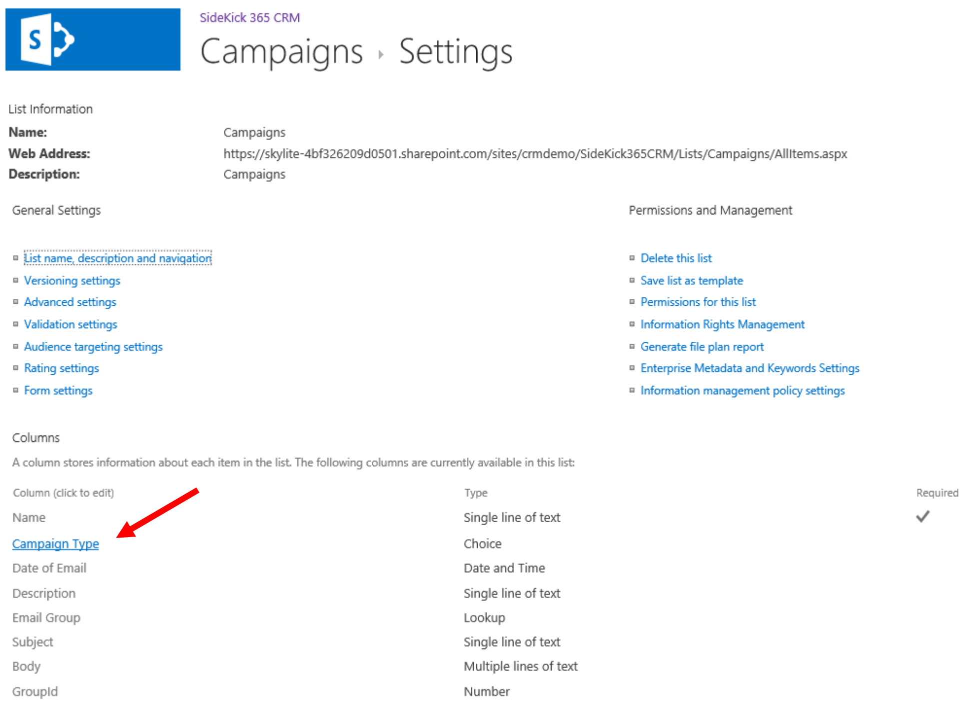
6 – This activates the List settings screen as shown below. Now scroll down and find the Type field and click once on the word “Type”.



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



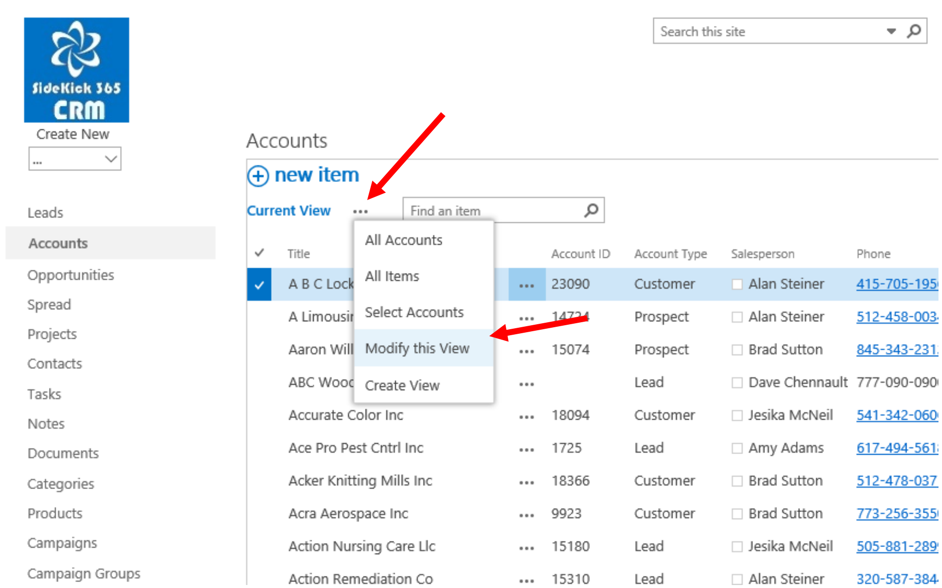
NOTE – You will need to set up Type in the Campaign Module using steps 1-7 if you want to track campaigns by the type of campaign. For example Email, Direct Call, Mailer etc...



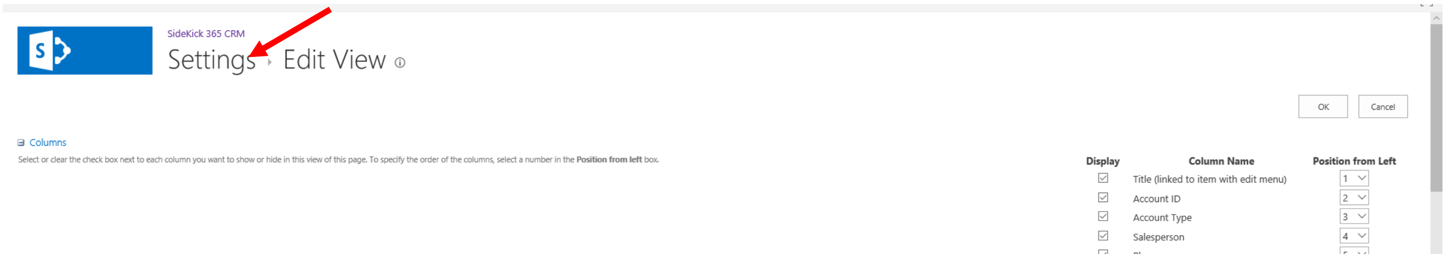
Modify An Existing Choice List

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.

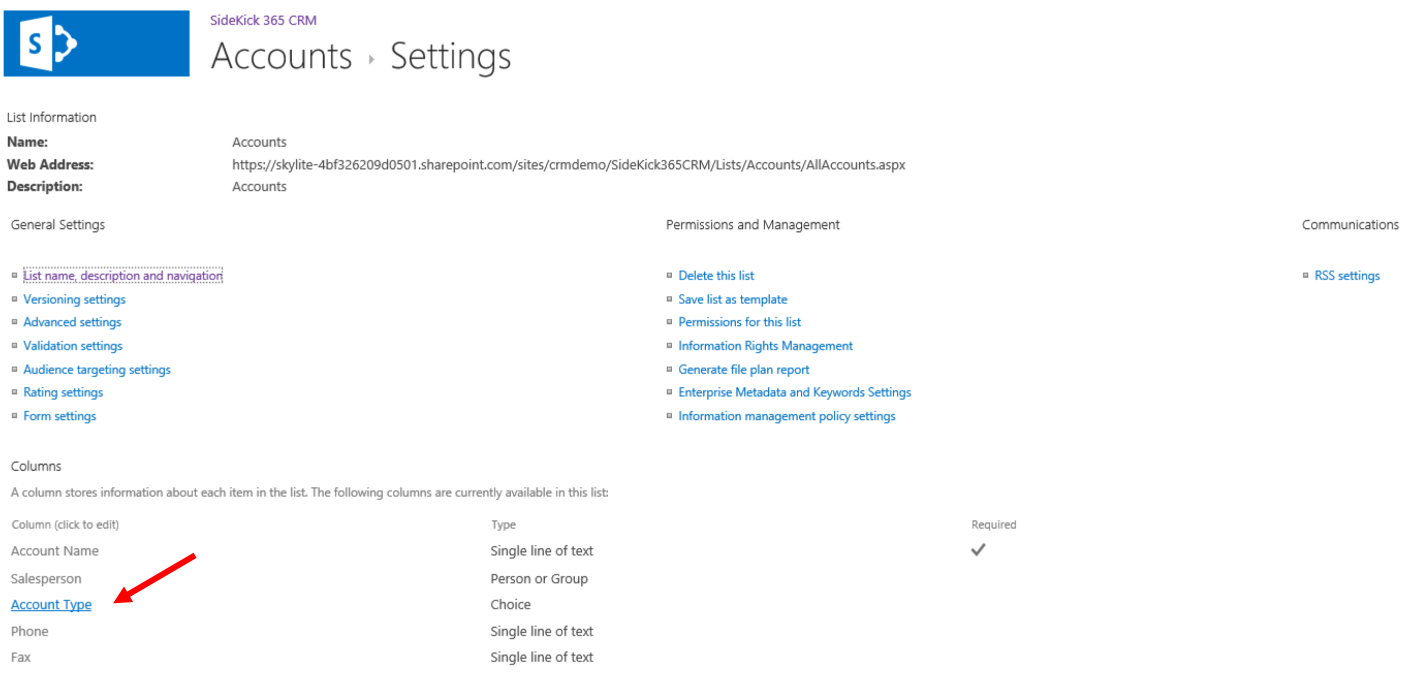
1 – Select the Accounts Module and this time hit the 3 dots next to current view and then select Modify View as shown below



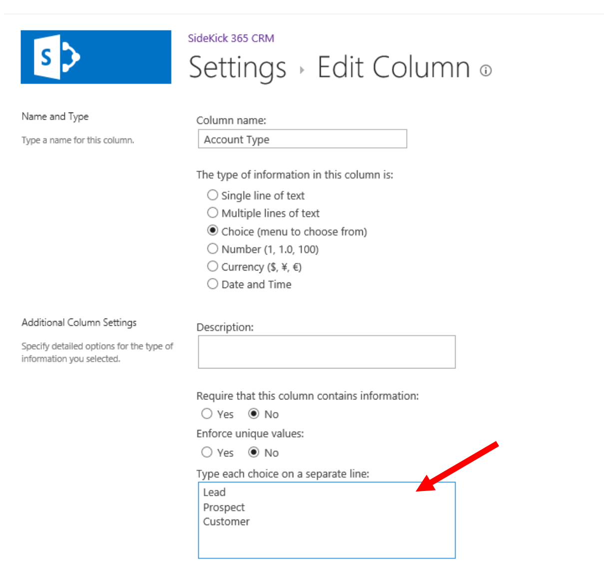
2 – Select the word “Settings” as shown below



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

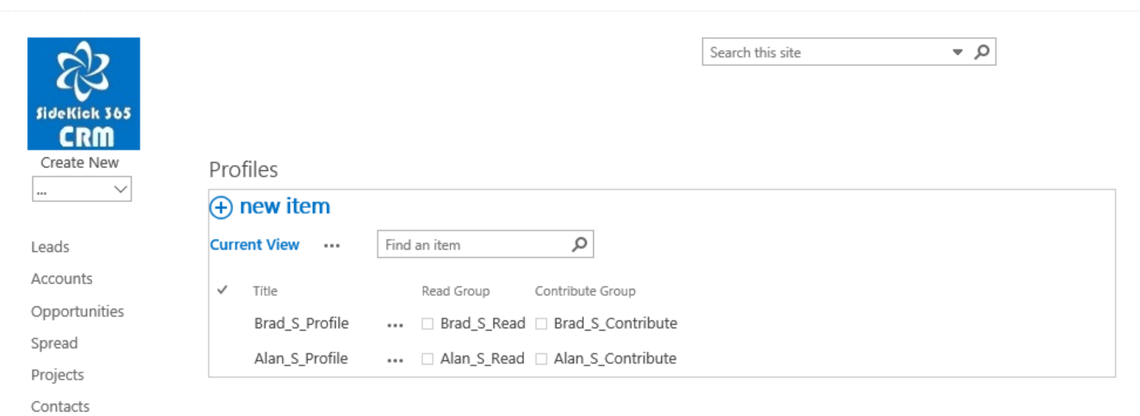
When we started developing SideKick 365 CRM in 2010 (seems like a long time ago in a galaxy far, far away....), we quickly realized that powerful security features limiting “who” could see “what” was a necessity. One of our first customers was using Salesforce and wanted to replace it with SideKick 365 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!

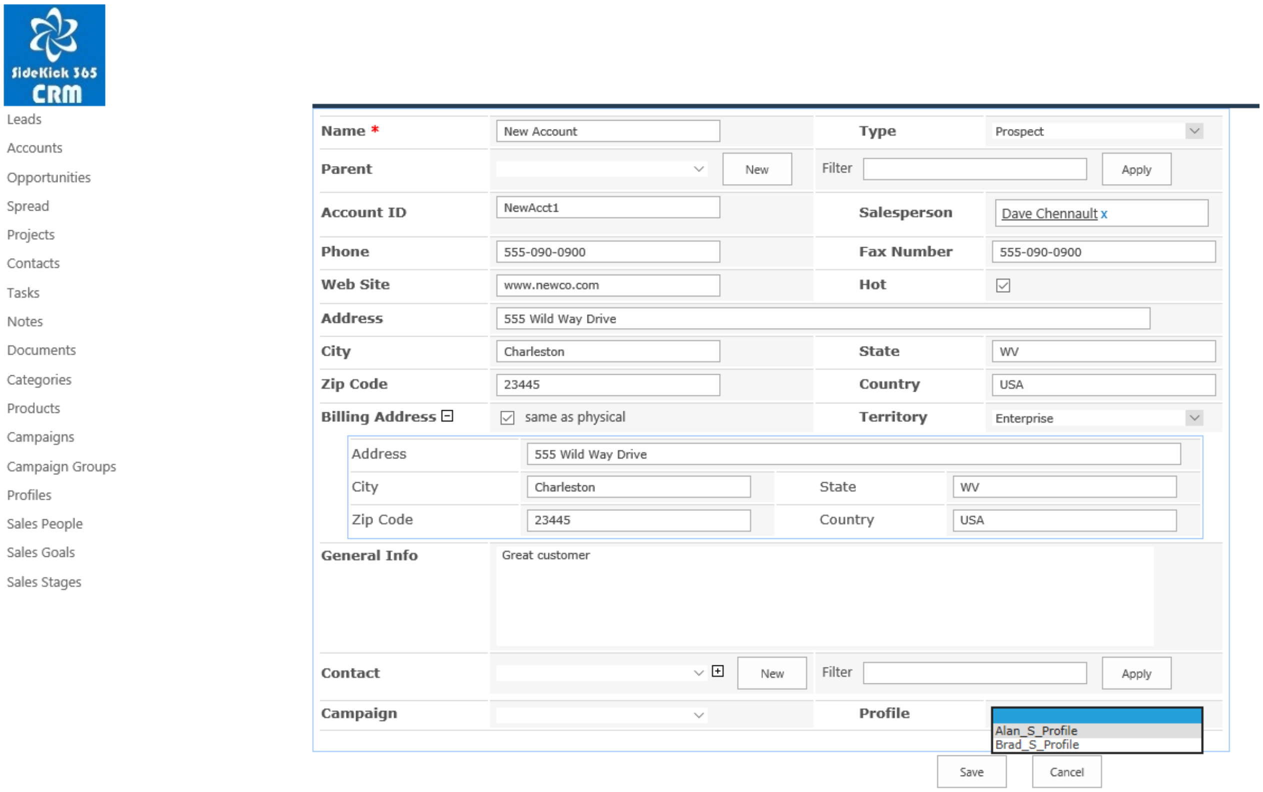
We faced a big challenge – how could we limit who could access segments of the data and do it in an efficient way? Hmmm….. this was a big challenge, but once again SharePoint came to the rescue. As you will learn, we built an ingenious way for SideKick 365 CRM to efficiently leverage the Permissions 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

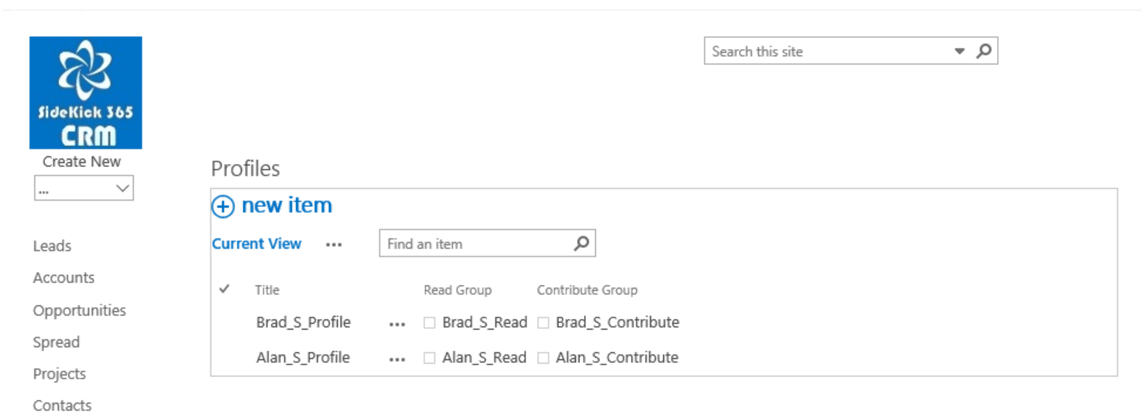
Security starts with setting up a security profile in SideKick 365 CRM. Security profiles can only be created by users that have been granted “full control” permissions in the SharePoint site where SideKick 365 CRM was installed. Normally, the administrator of that site will create a SharePoint group 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.





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.

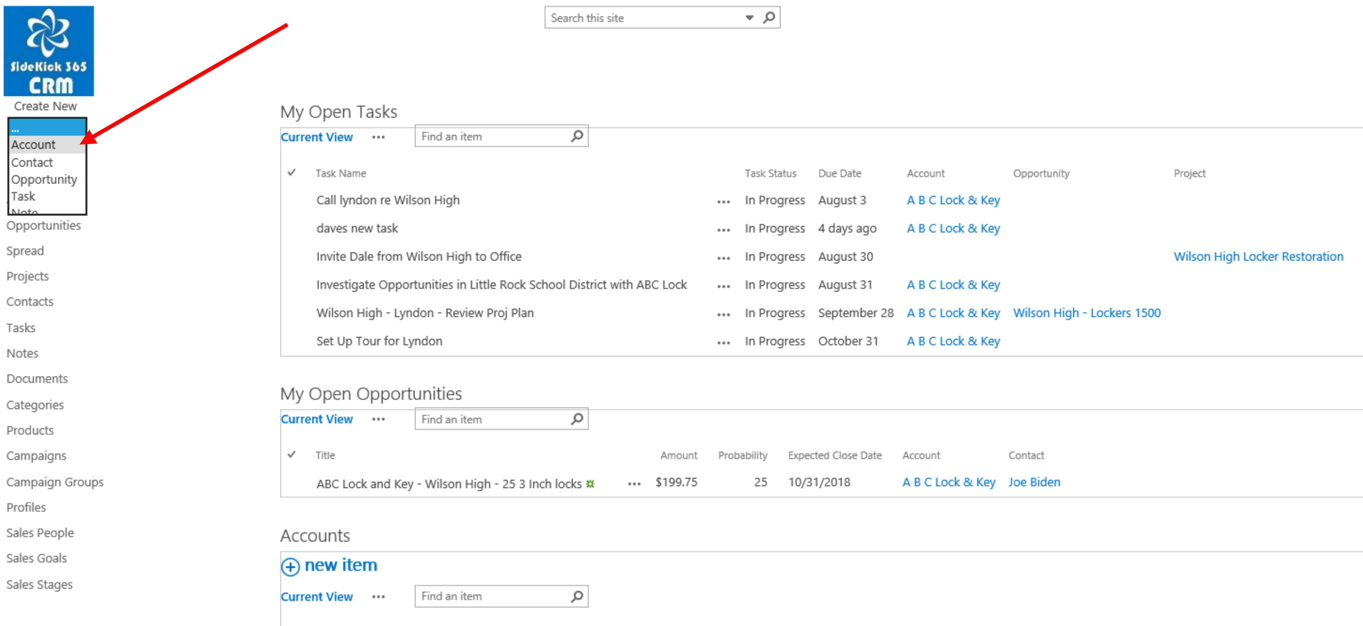


Using a Security Profile

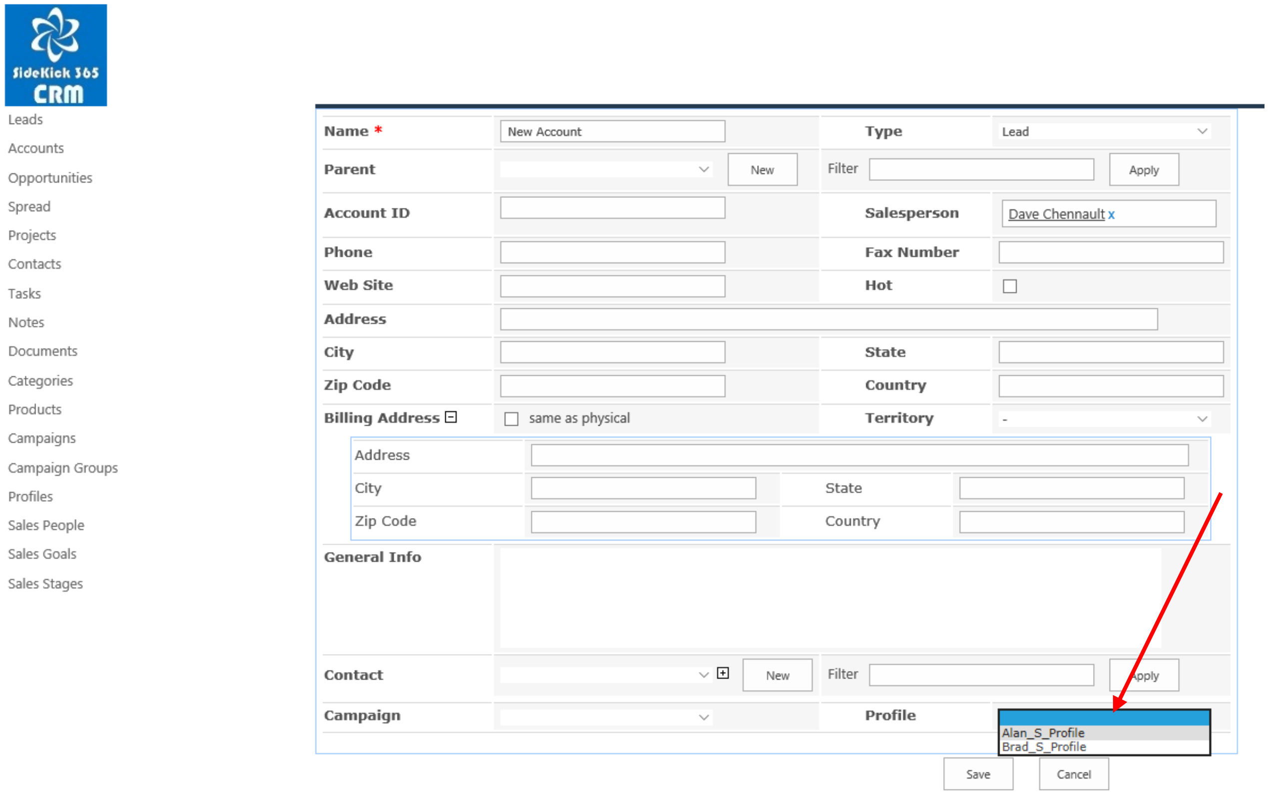
Security profiles are a great way to limit the amount of information presented to a user and also keep them focused on their work. Security profiles also limit what is returned in search results. It is easy to use Security profiles to limit “who” can see “what” - let’s get started

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



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.



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.

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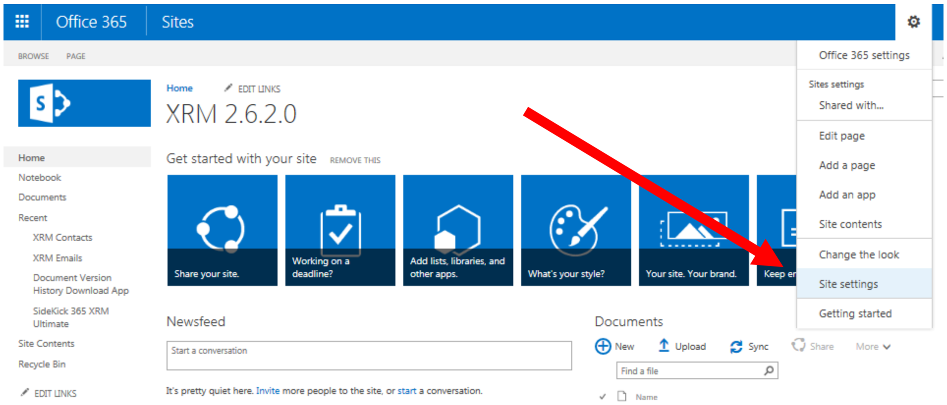
Overview

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:

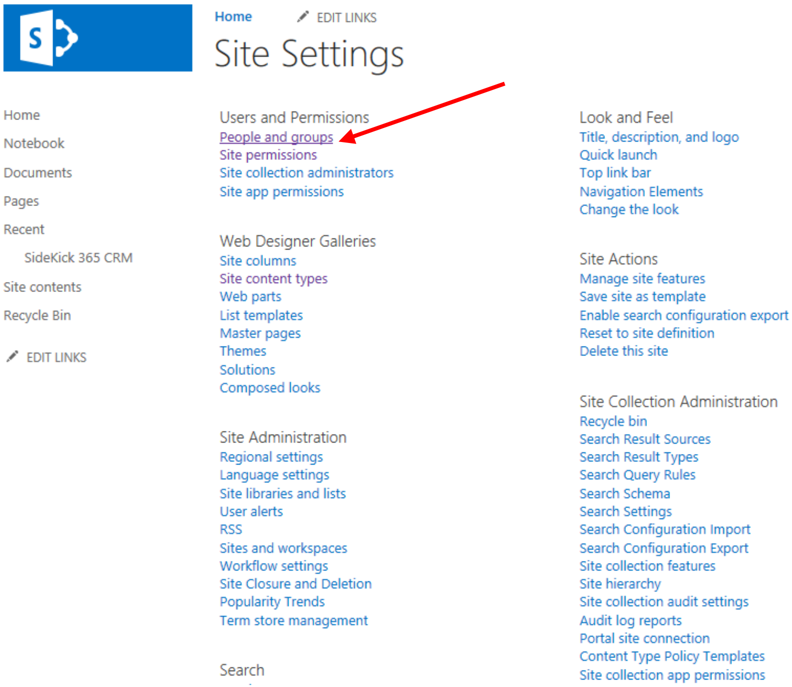
Step 1 – Open the site that holds SideKick 365 CRM and select the little gear > Site Settings



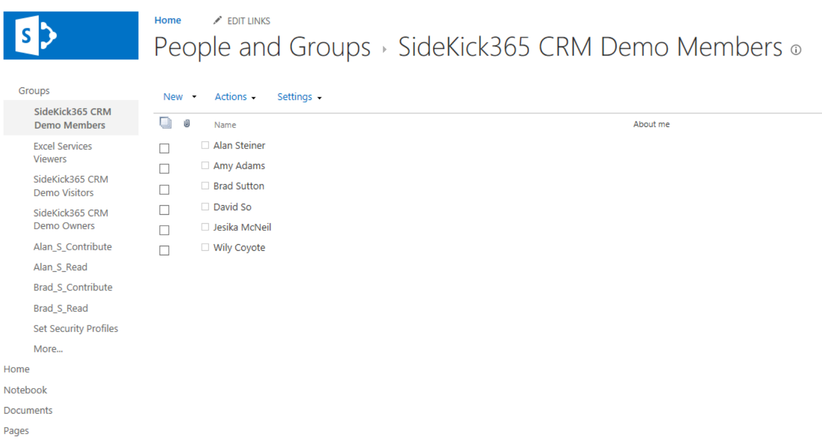
Office 365
Sites
BROWSE
PAGE
Home
EDIT LINKS
XRM 2.6.2.0
Get started with your site
REMOVE THIS
Share your site.
Working on a deadline?
Add lists, libraries, and other apps.
What's your style?
Your site. Your brand.
Home
Notebook
Documents
Recent
XRM Contacts
XRM Emails
Document Version History Download App
SideKick 365 XRM Ultimate
Site Contents
Recycle Bin
EDIT LINKS
Newsfeed
Start a conversation
It's pretty quiet here. Invite more people to the site, or start a conversation.
Documents
New
Upload
Sync
Share
More
Find a file
Name
Office 365 settings
Sites settings
Shared with...
Edit page
Add a page
Add an app
Site contents
Change the look
Site settings
Getting started

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



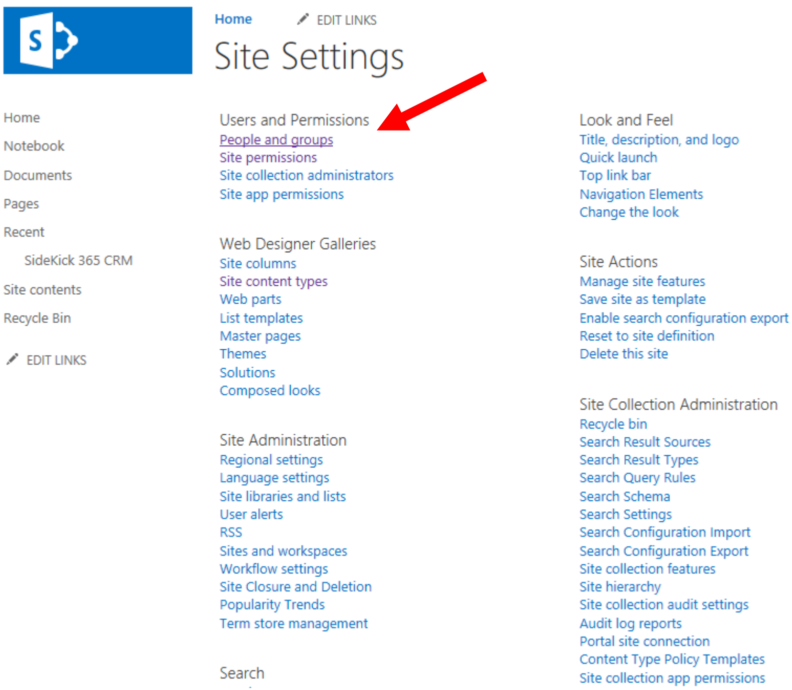
Select The Members Group as shown below and add any users that will access SideKick 365 CRM



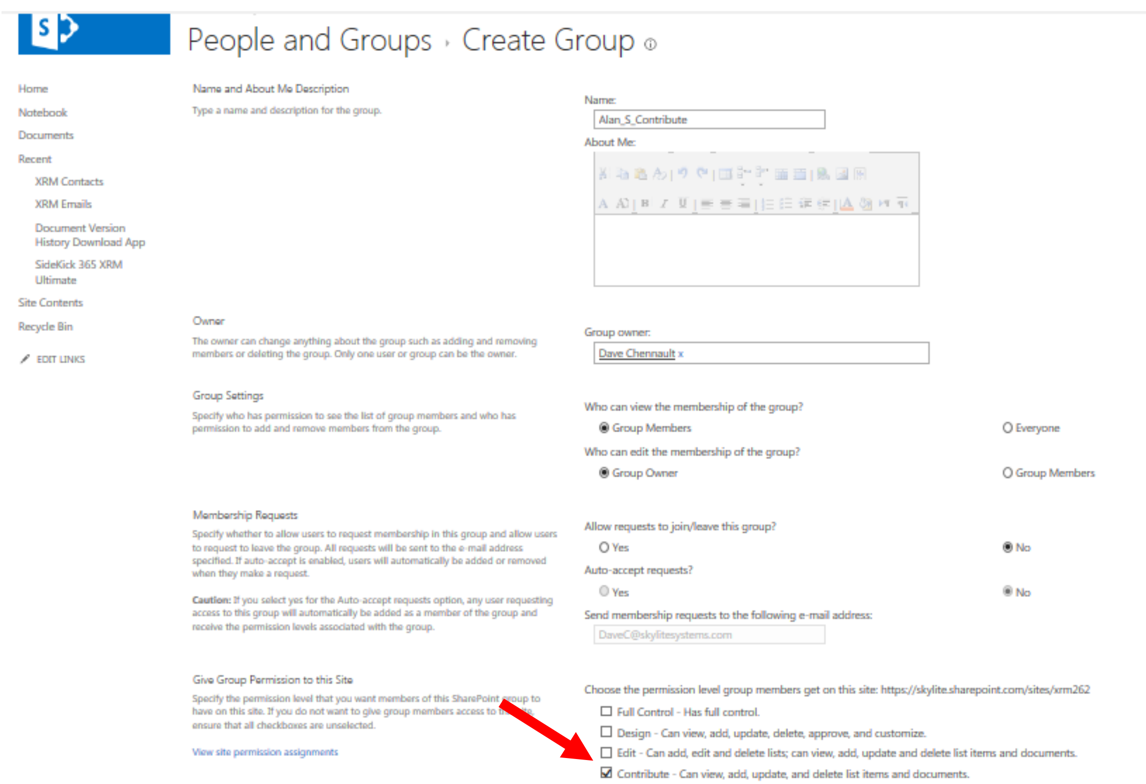
STEP 3 – Setting Up Security Groups in the Host Site

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

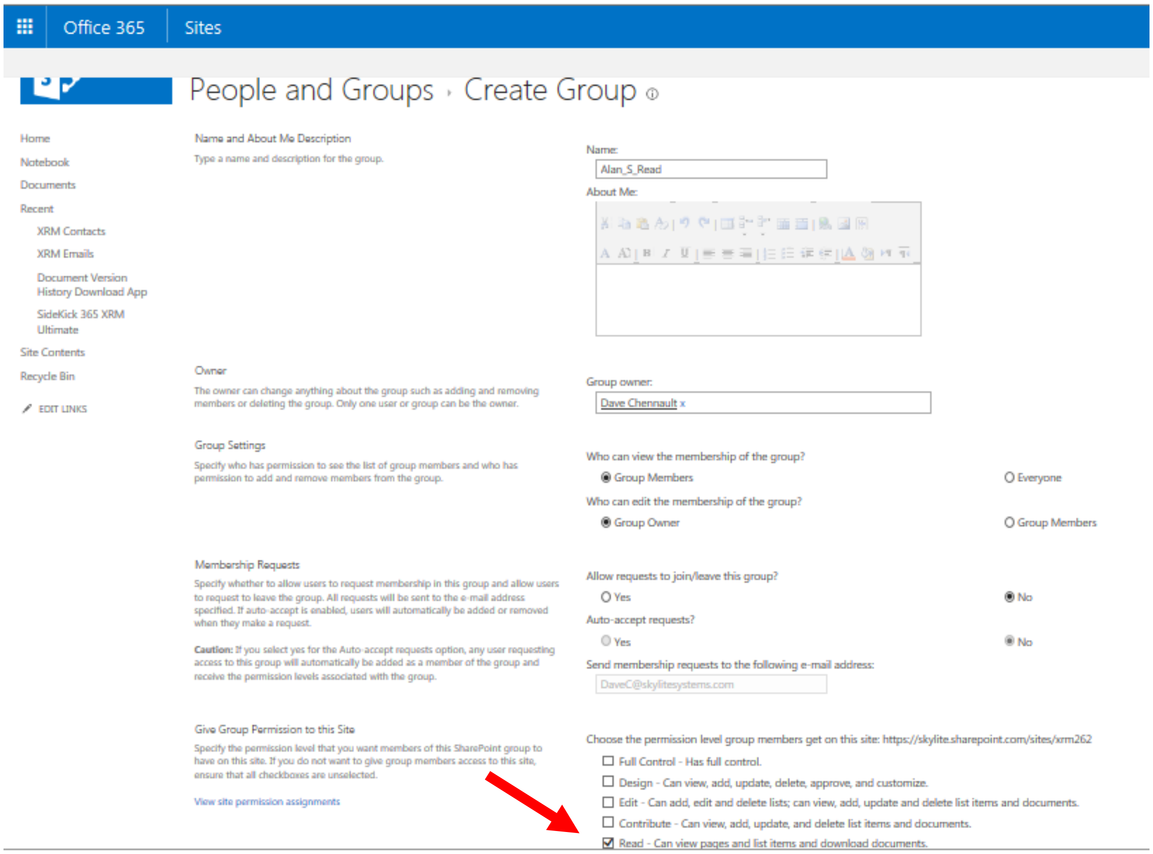
A - Navigate to the site that holds SideKick 365 CRM, select Site settings> People and Groups as shown below



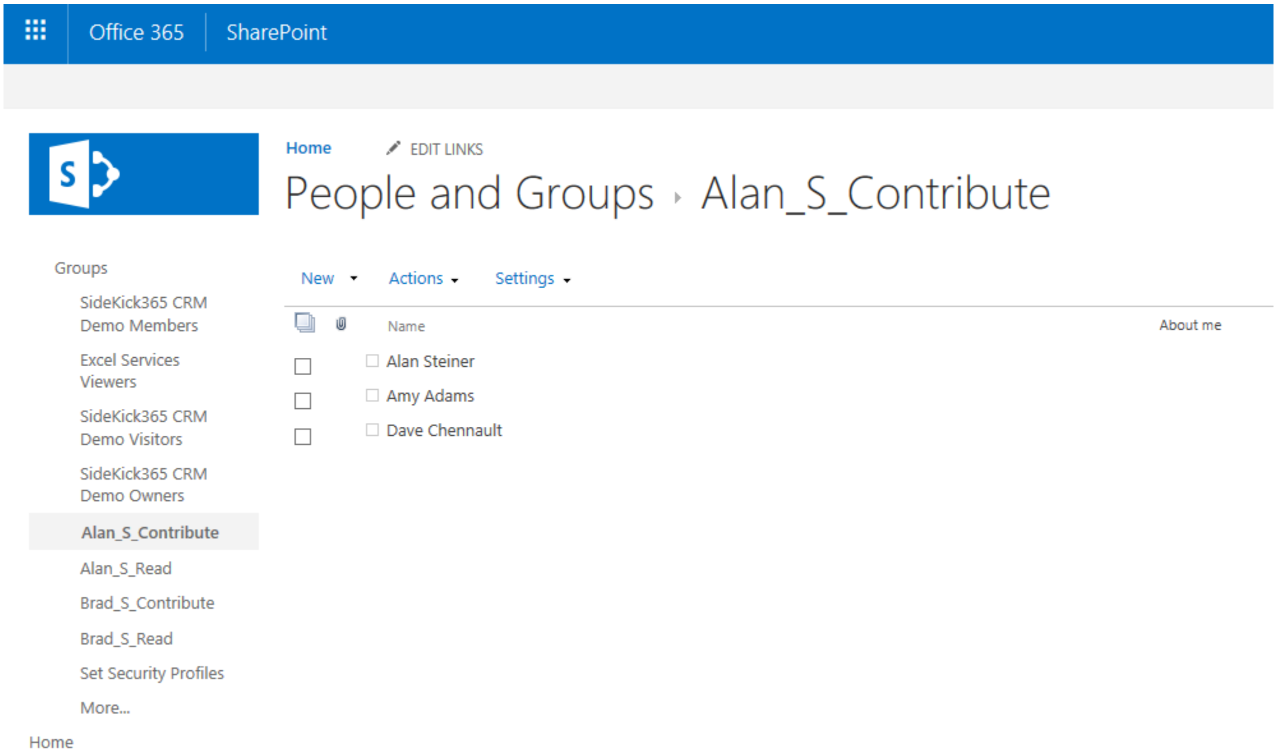
B – Create a group with Contribute permissions within the Host site that holds SideKick 365 CRM for any user that will creating, deleting and editing records in SideKick 365 CRM using the Security Profile we are setting up – In this case the AlanS_Security Profile as shown below.



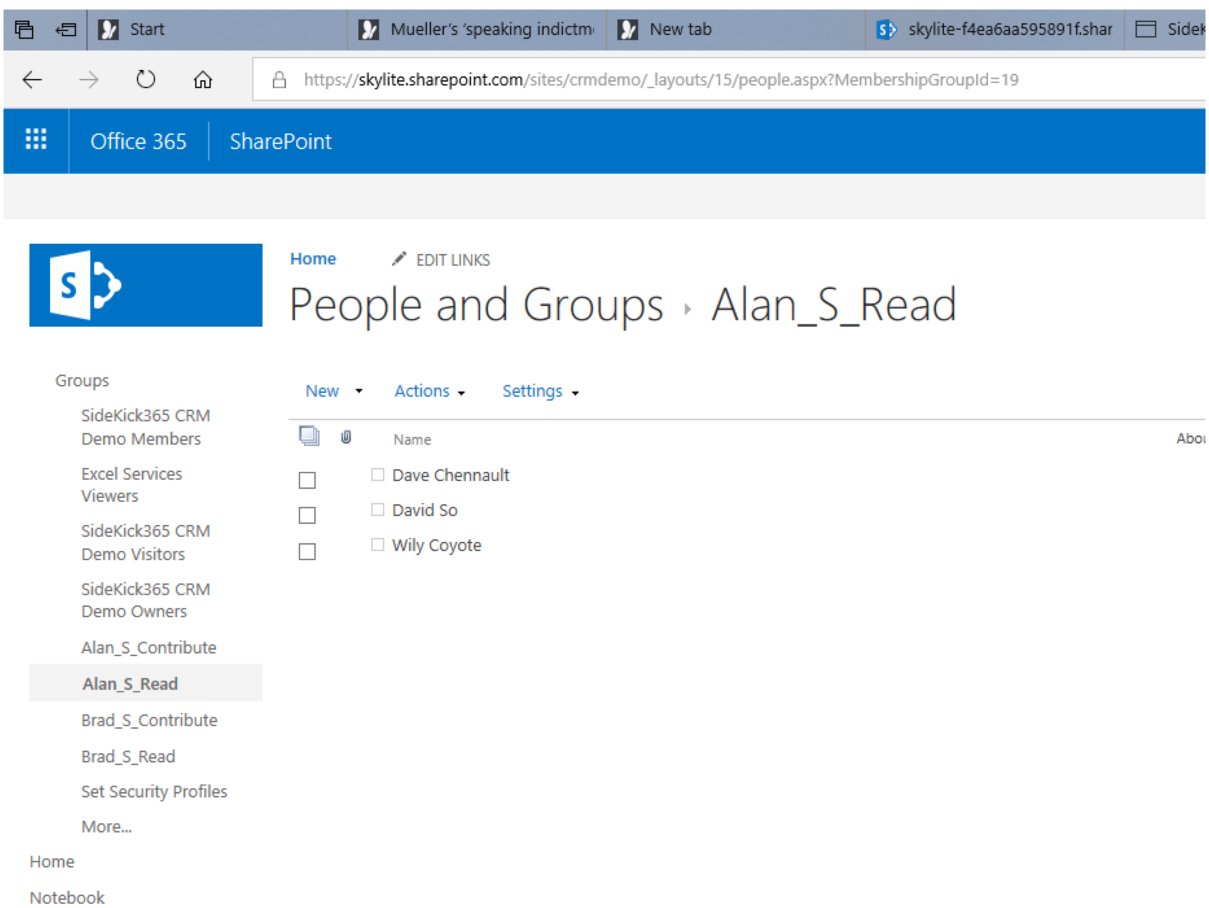
C – Now create a group with Read permissions within the Host site that holds SideKick 365 CRM for users that can read but not edit/delete/create items in this security profile - In this case the AlanS_Security Profile as shown below.



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



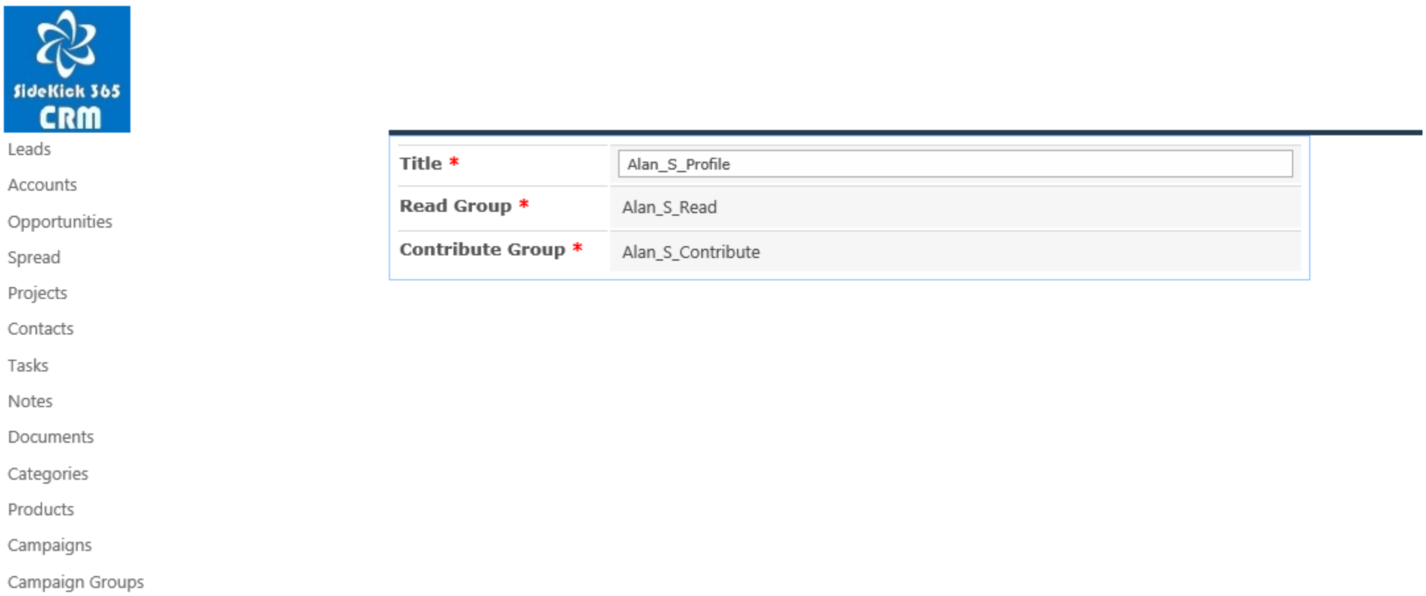
and



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

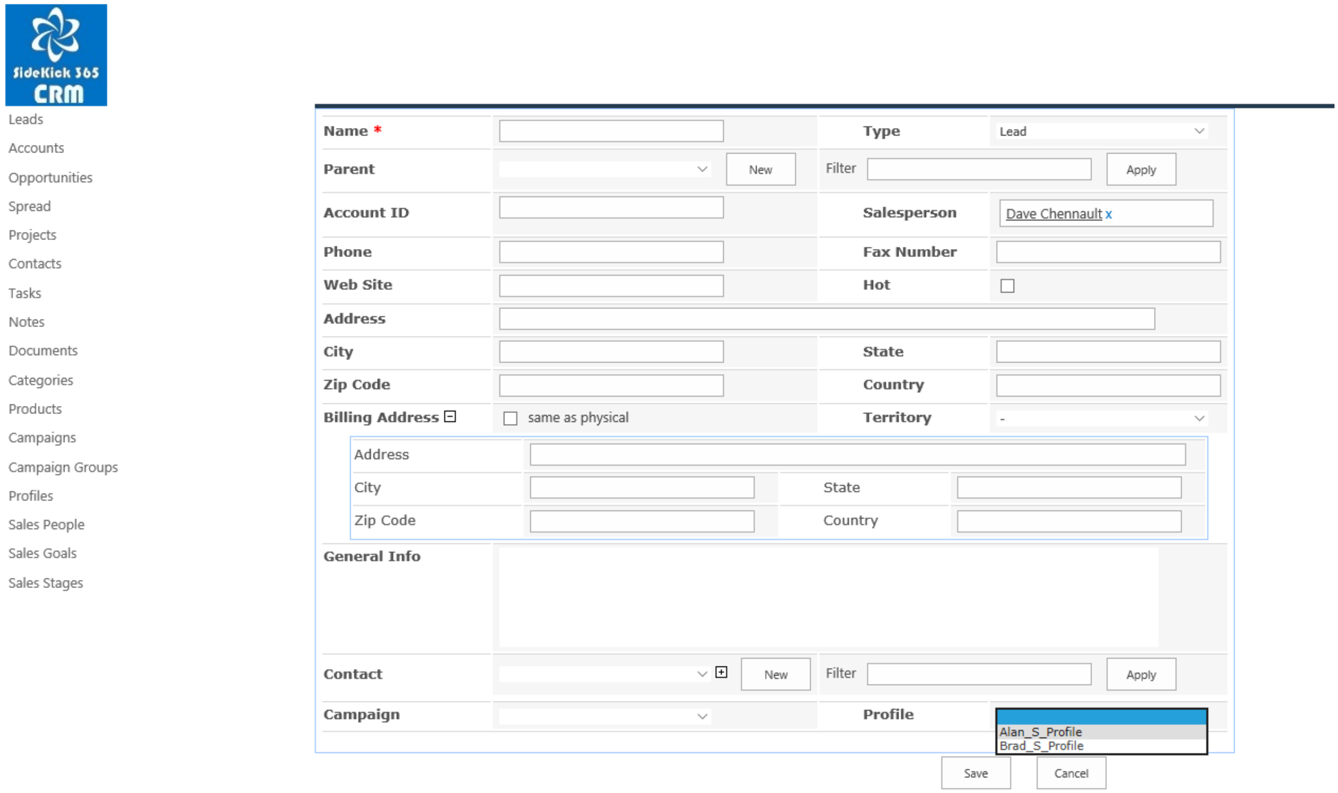
A – Open up SideKick 365 CRM and select the Profiles Module

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



<u>Step 5 – Using the Security Profile</u>

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



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 al 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.

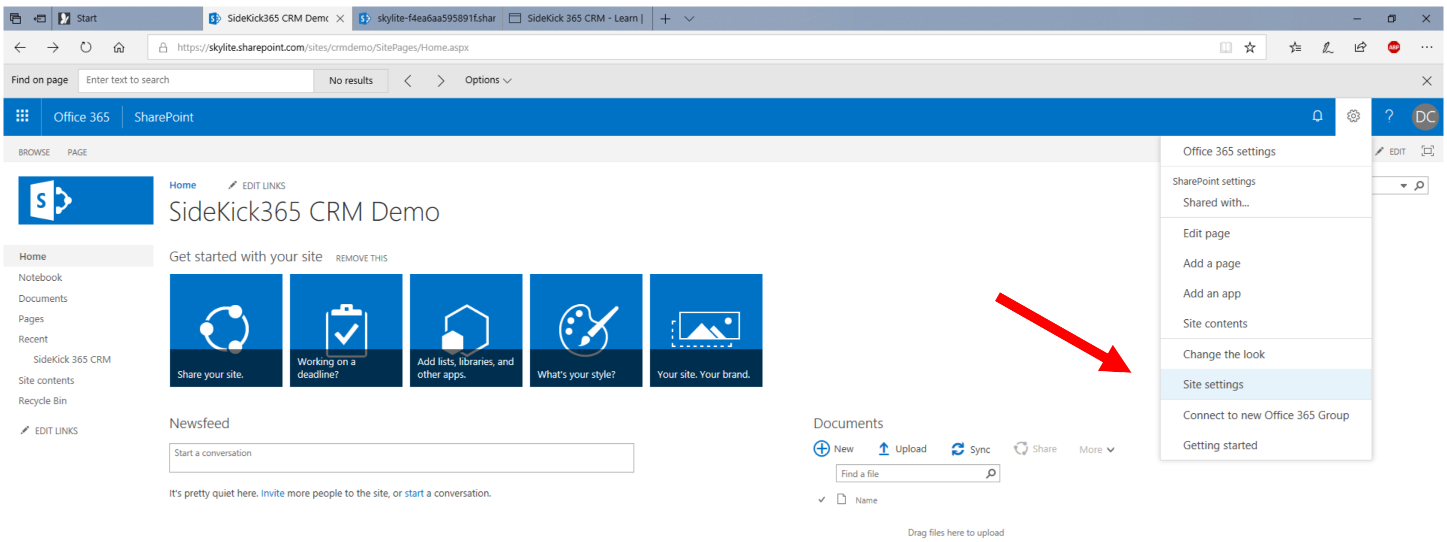
Setting up Templates Using Content Types

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)

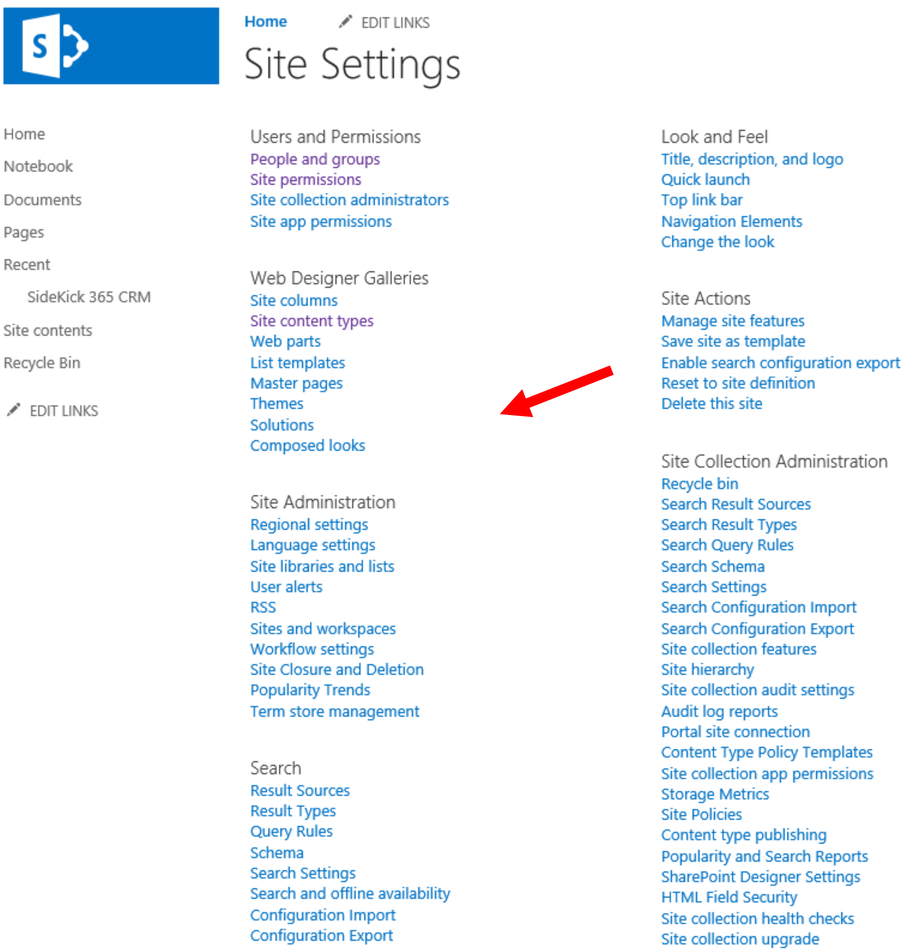
Creating a Template from an Excel Spreadsheet

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

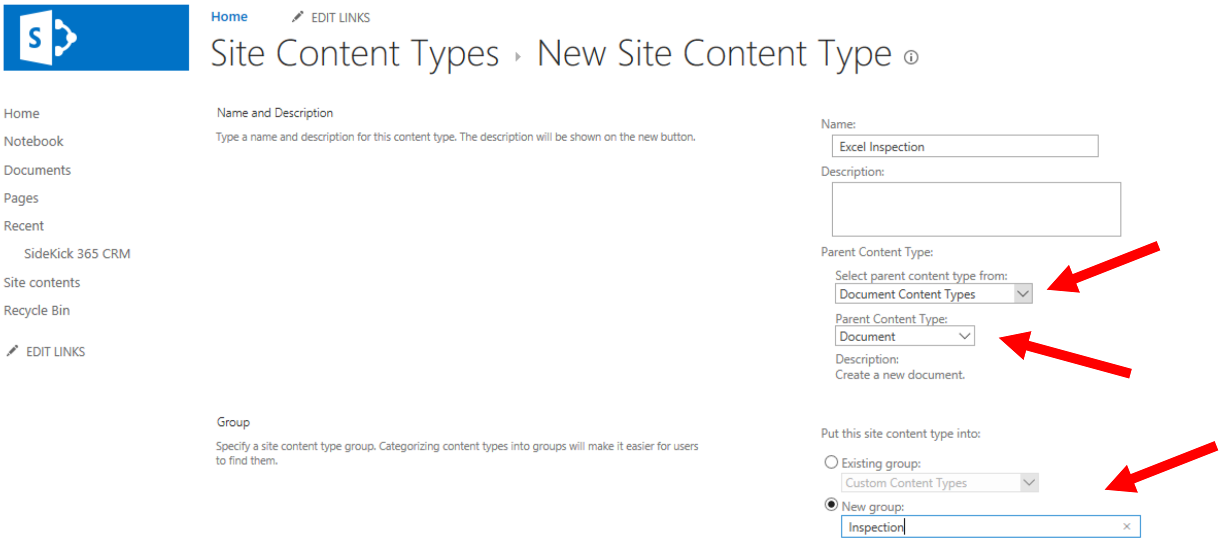
- Go into the hostweb (the site that holds SideKick 365 CRM) and go to the site settings by selecting Create Site Actions -> Site Settings



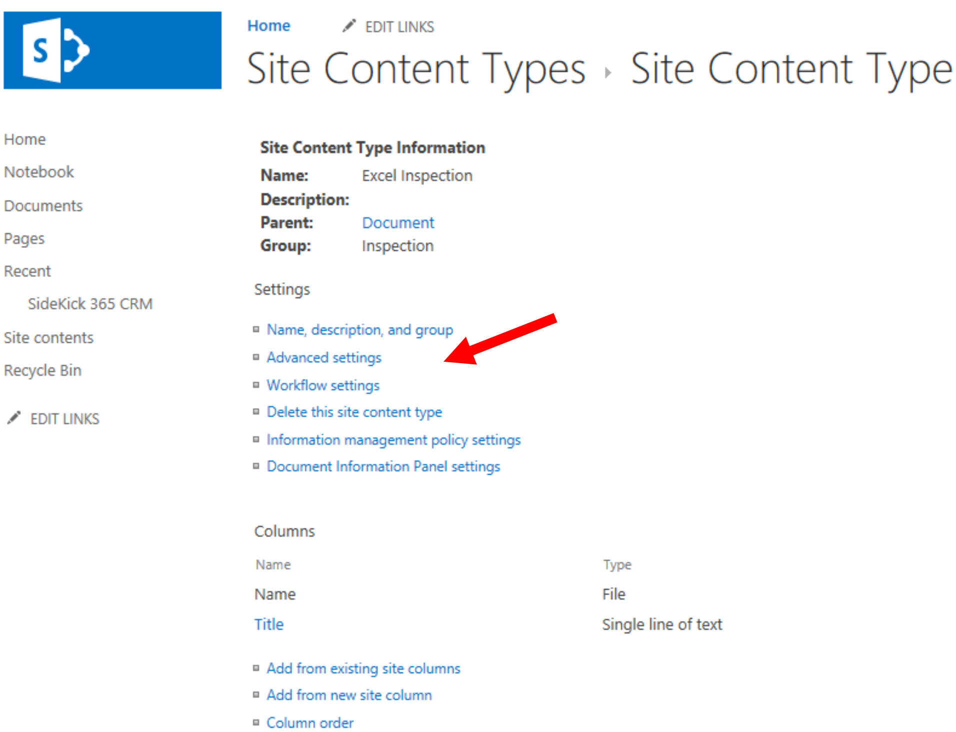
Then select -> Site Content Types under Galleries.

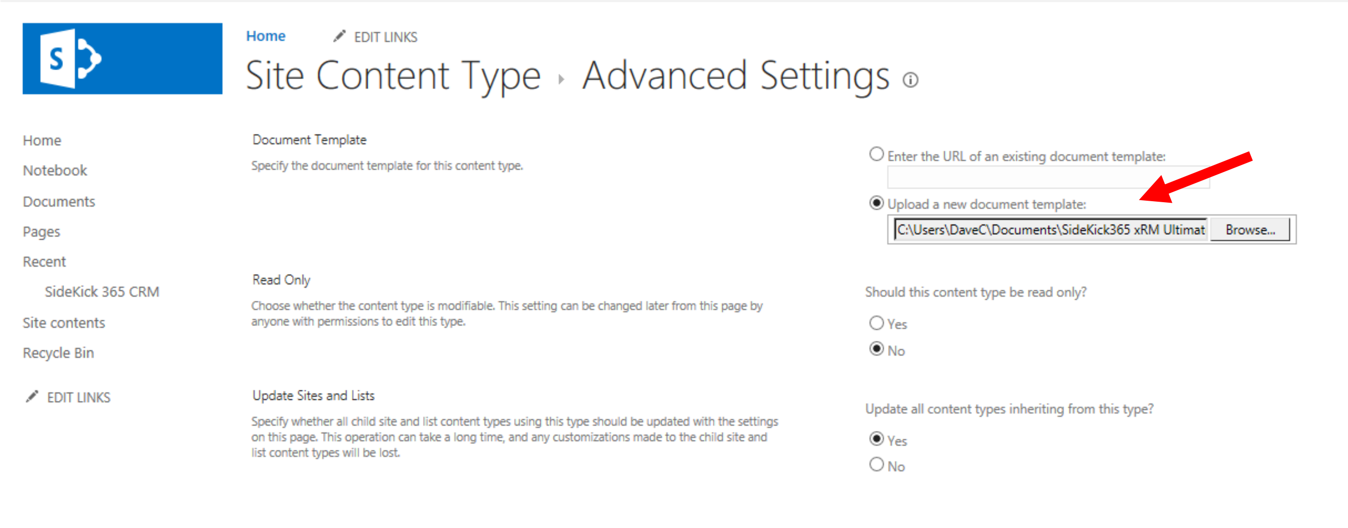


- Use the Parent Content Type **Document** from **Document Content Types** Group.
- Name the content Type something like "Excel Inspection".



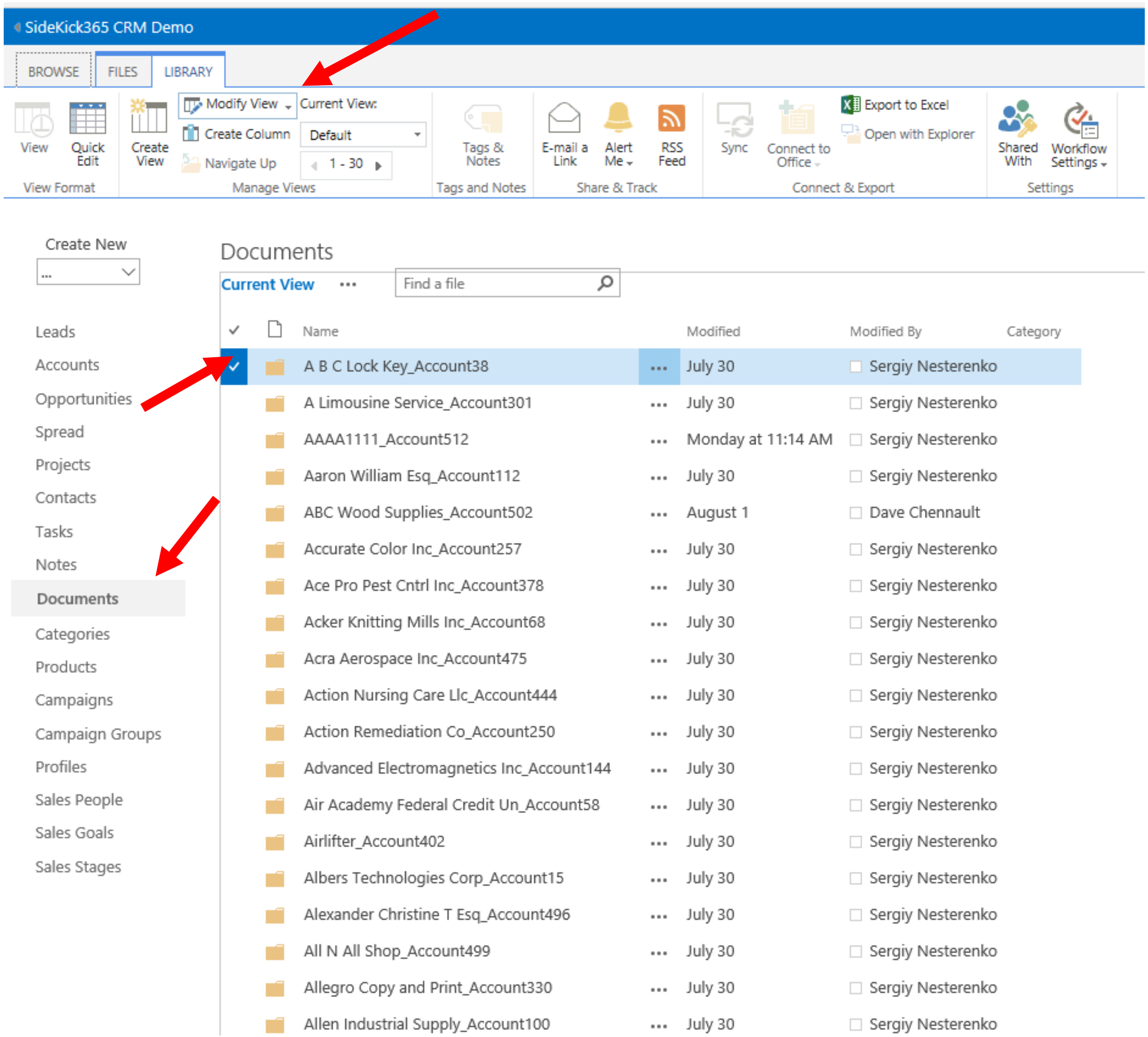
- Once you hit OK in the screen above, go to the Advanced Settings of the newly created content type, add a new Excel file.



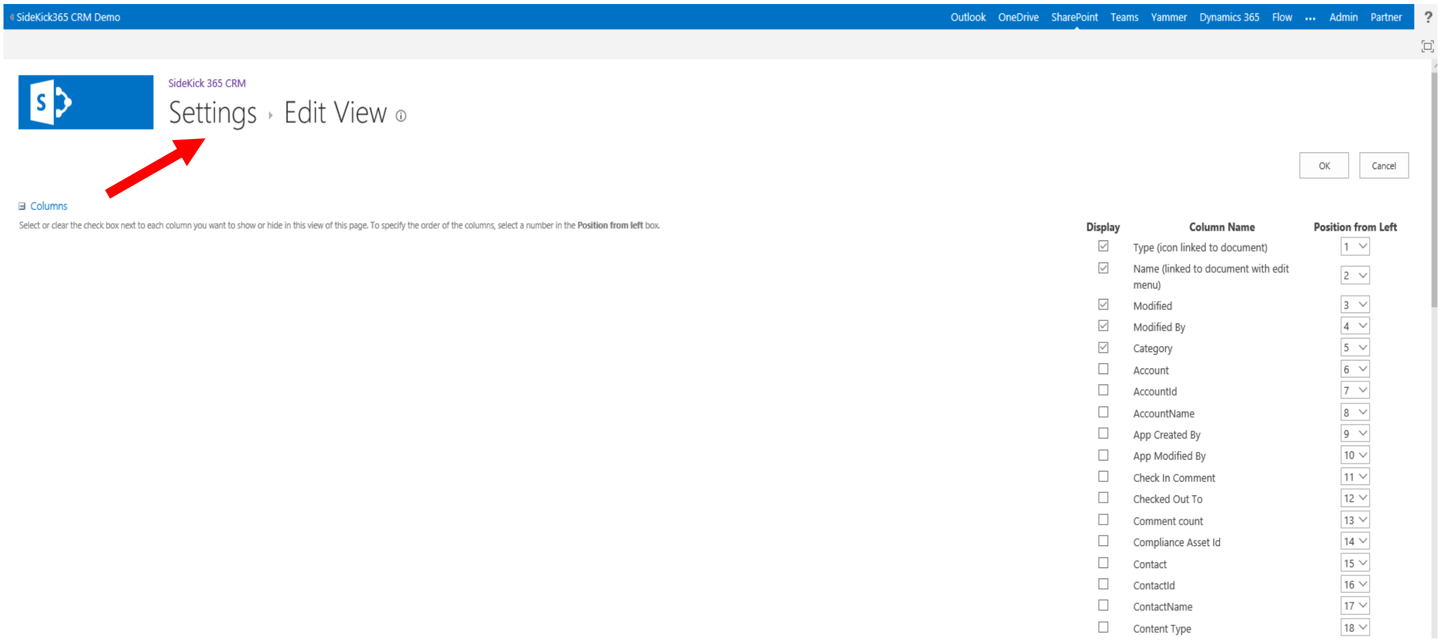


Good job! Now you have the template loaded as a Content Type in the Host web, now we need to add it to the document library in SideKick 365 CRM. Let's get started…

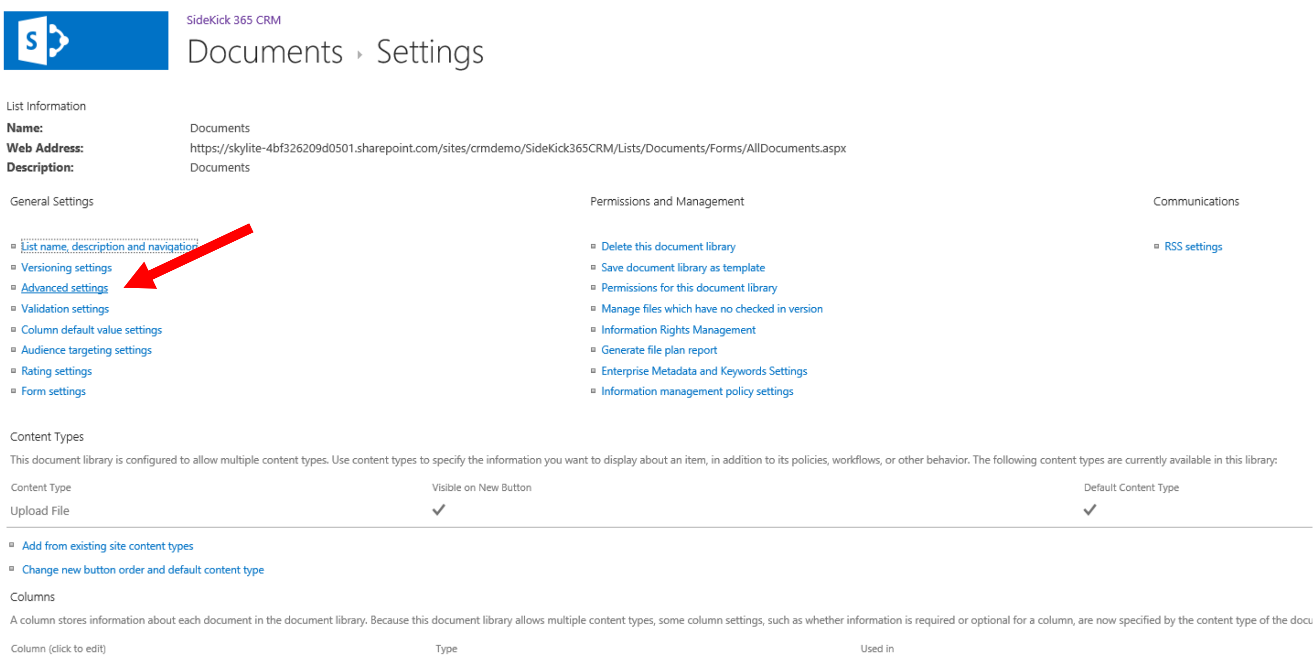
- Open SideKick 365 CRM
- Select the Documents Module by picking Documents in the lefthand menu
- Now select any folder in the document list by selecting the checkmark column **with a single click to activate the library tab** and then select "Modify View"



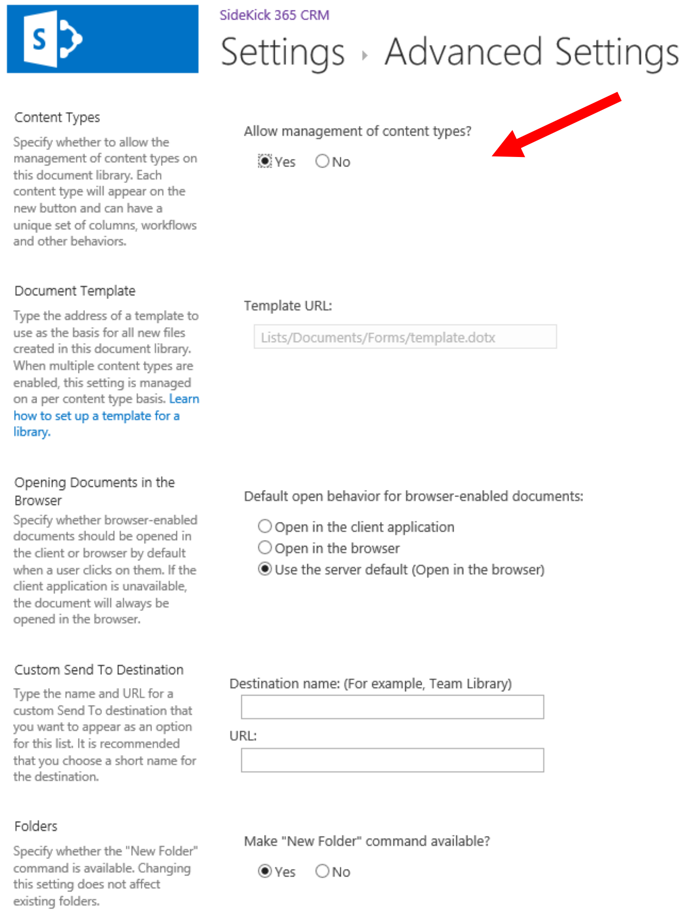
- Now select the word Settings to get into the Document Library Settings



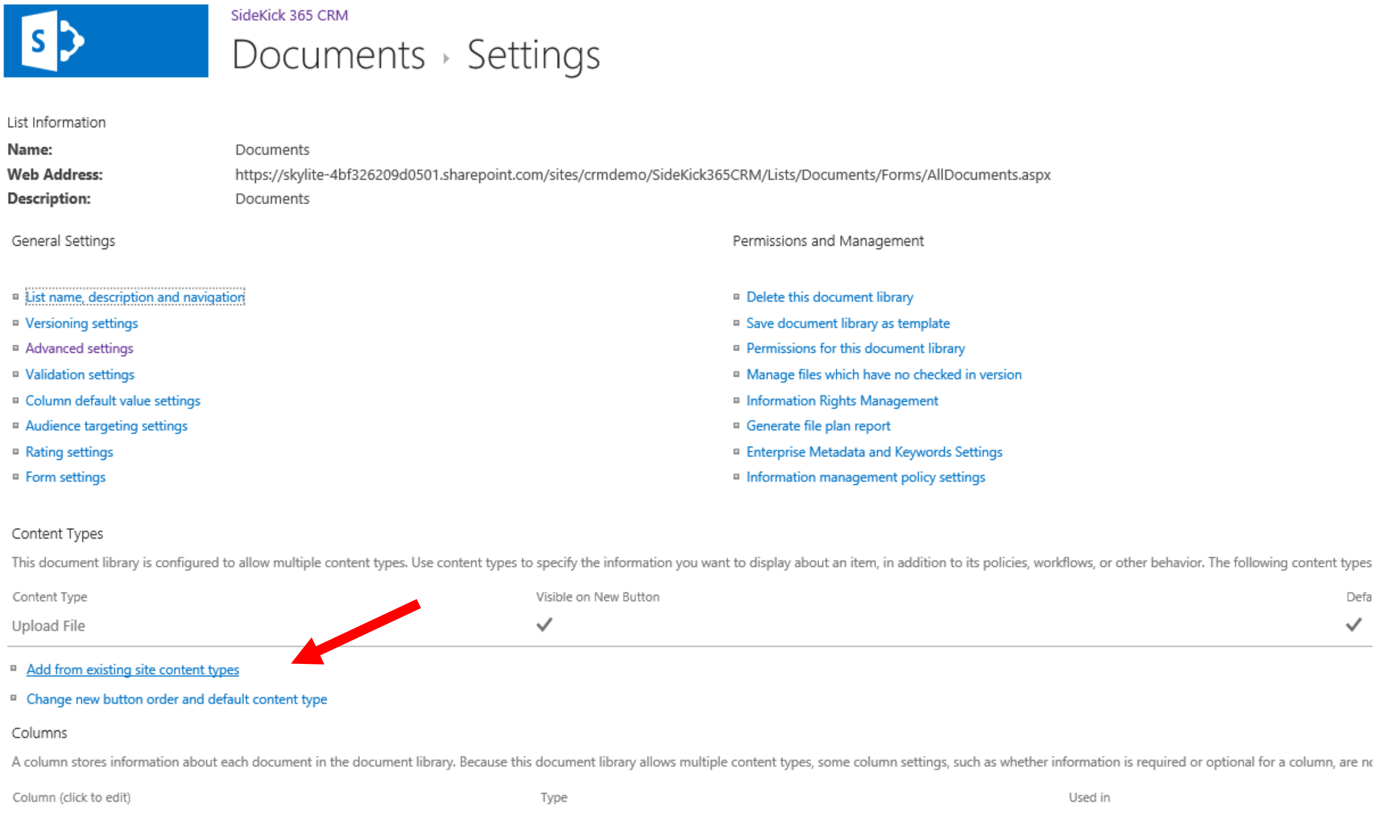
- Next, select Advanced Settings.



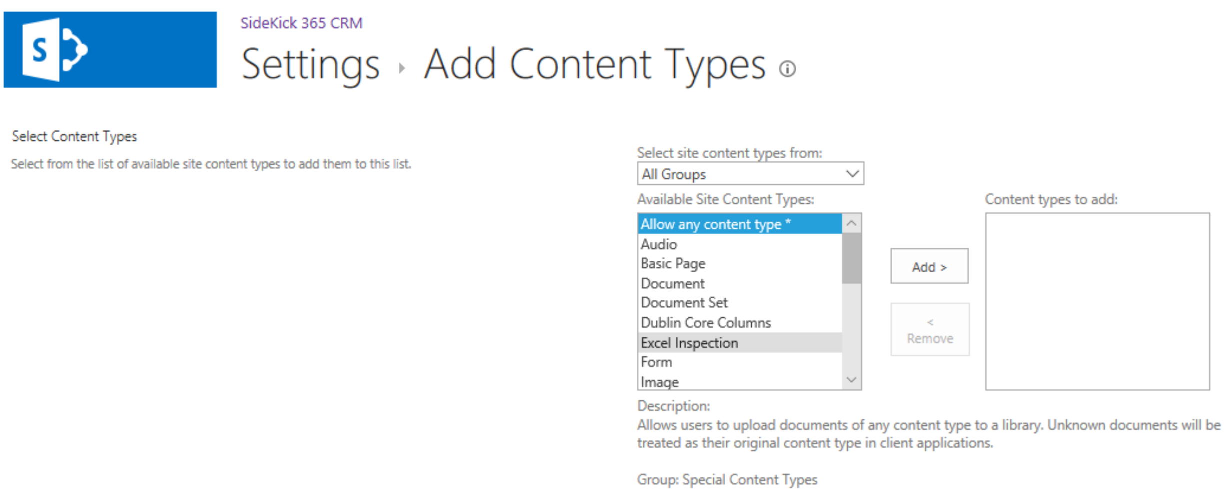
- Here, set **Allow Management of Content Types** to **Yes** and click OK. This takes you back to the Document Library Settings page



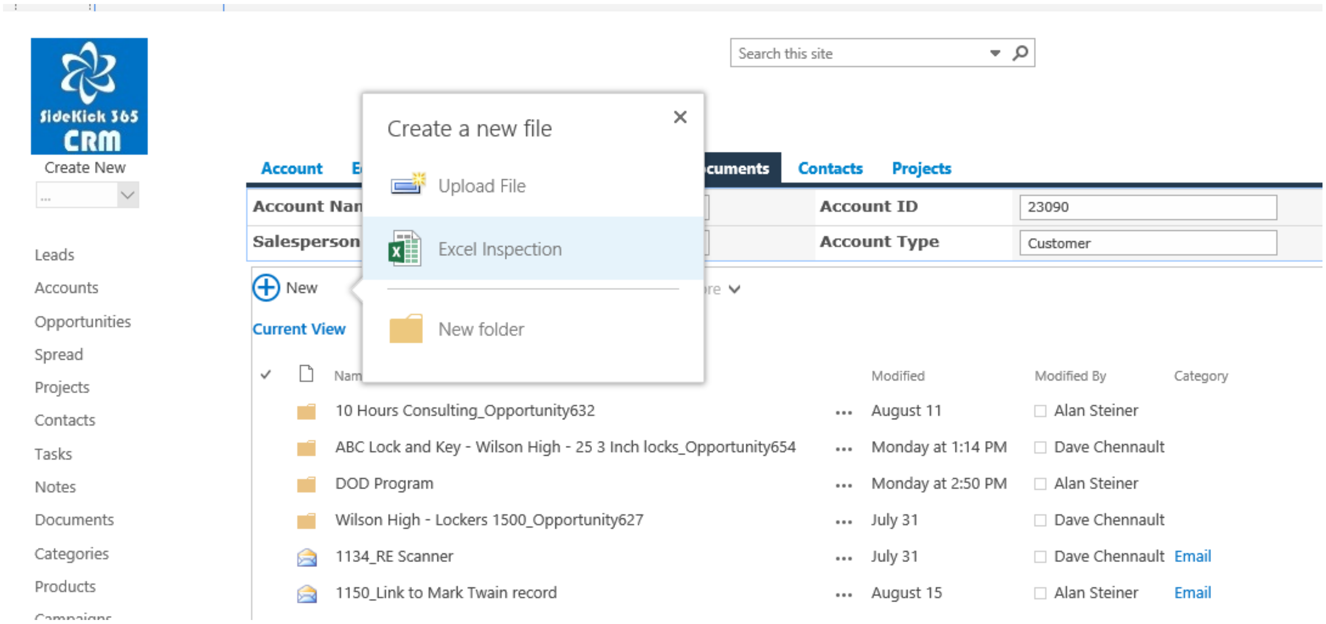
- Now scroll down to the Content Types section and select “Add From Existing Site Content Types”



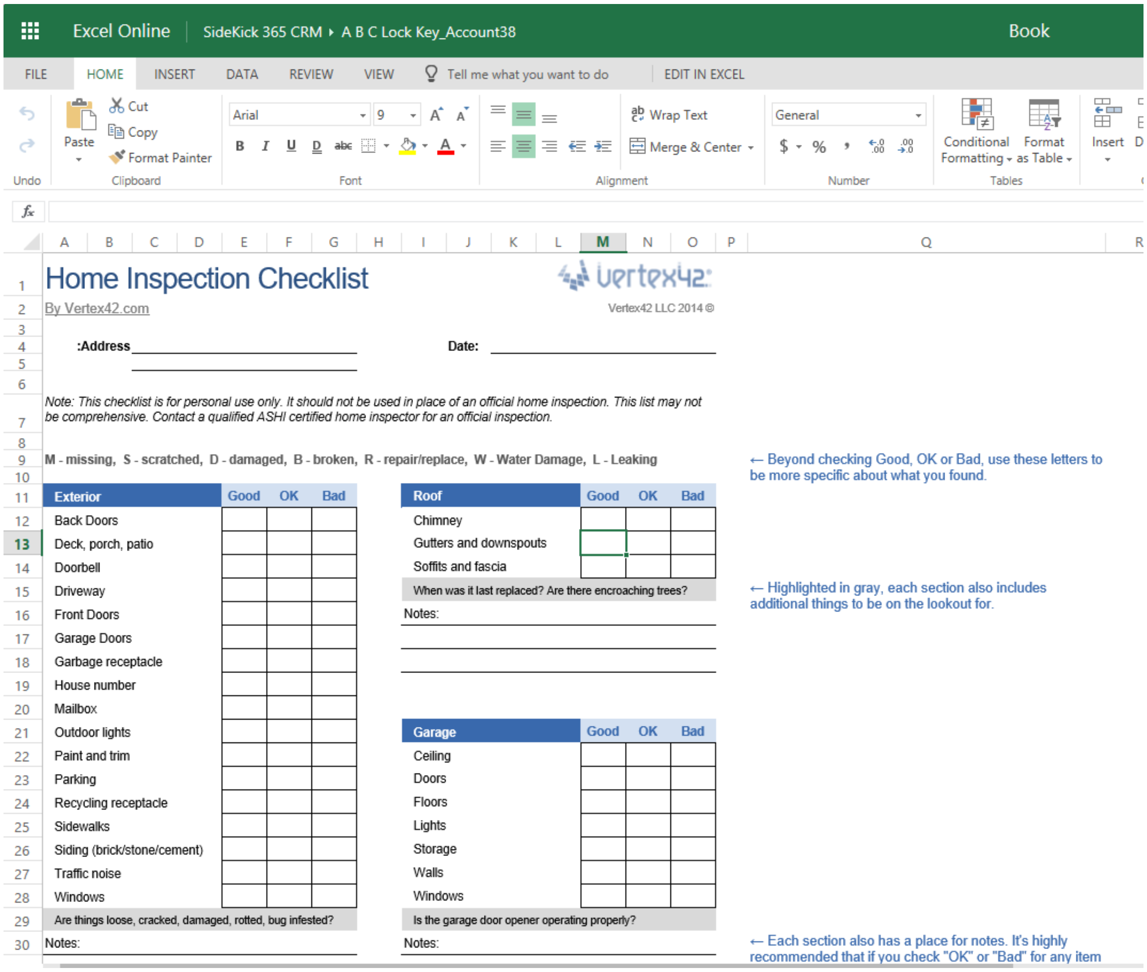
- Next, Add the Newly created Content Type “Inspection” to the Library and hit “OK”.



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.



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



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.

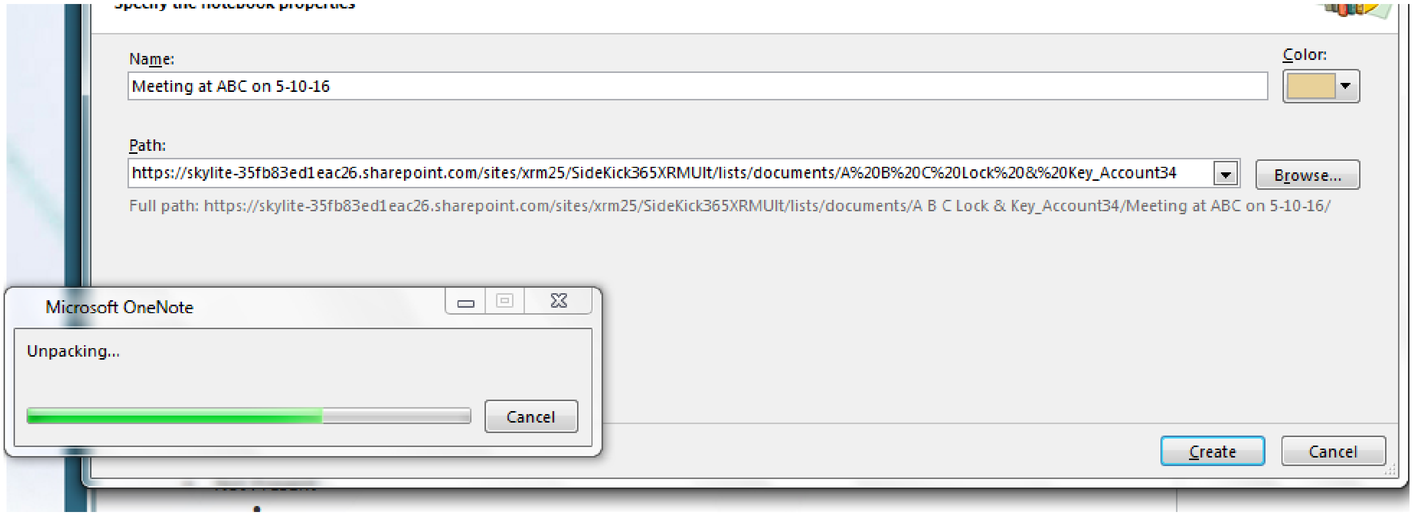
http://www.sharepoint.inf4web.com/1313/sharepoint-2013-how-to-add-additional-document-types-to-a-document-library/

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".