



Dynamics 365 Trends Top Plugin - Manual

Ref. Document: Trends Top Plugin Manual

Author: Koen Van Damme

Date: 6/02/2017

Contents

1. INTRODUCTION	3
2. INSTALLATION	4
2.1. PREREQUISITES	4
2.2. DOWNLOAD	4
2.3. INSTALLATION IN DYNAMICS 365	5
3. CONFIGURATION	8
3.1. PLUGIN CONFIGURATION	8
3.2. SECURITY	9
3.2.1. <i>Assign the “Trends Top integration access” security role to the users</i>	<i>10</i>
3.2.2. <i>Modify existing security roles</i>	<i>12</i>
4. USING THE TRENDS TOP PLUGIN	15
4.1. QUERY TRENDS TOP FOR COMPANY DATA	15
4.2. IMPORTING DATA	19
4.3. REFRESH DATA	21
4.4. WORK WITH TRENDS TOP DATA IN DYNAMICS 365	21
5. IMPORTED DATA	23
5.1. ACCOUNT	23
5.2. CONTACT	24
5.3. TRENDS TOP COMPANY FIGURES	25
6. DOCUMENT VERSIONING	26

1. INTRODUCTION

The Trends Top Plugin allows you to view Trends Top company data from your Dynamics 365 environment. The data can also be imported back into your CRM data, allowing you to view and query the data in Dynamics 365.

2. INSTALLATION

2.1. Prerequisites



Before downloading and installing the plugin make sure to do the following:

- Be sure to have a Trends Top login for the CRM users who need to use the plugin.
- Contact [Trends Top](http://trendstop.be) in order to get an API key. The API key is required to complete the setup.
- Make sure you have the privileges to import managed solutions into Dynamics 365.

2.2. Download

The Trends Top plugin for Dynamics 365 can be downloaded from the following location:



<http://trendstop.be/dynamics-crm-download>

Here you can enter your login information or request a new Trends Top Plug-in.

Trends Top Plugin for Microsoft Dynamics CRM Online

Use this plugin in order to easily inject Trends Top company data into your CRM. You will be able to view and merge data.

How does it work:

- You search the company when using CRM Online.
- The plugin will automatically return Trends Top Company Information.
- Check and merge the data needed.
- You will be charged through the credit mechanism: a set of company information + one contact = one credit.

Quick [demo](#) of this smart integration (dutch).

What do you have to do:

- Be sure to have a Trends Top login for CRM users for which you want to install the plugin.
- Contact [Trends Top](http://trendstop.be) in order to get an API key, needed to set up the integration.
- Read the [technical information](#).
- Download the package using the button below.
- Please do [report](#) technical issues.
- Support is provided by Net-it and charged to client, since customized CRM can involve additional development.

Tip: use the Trends Top Alert Service to stay updated by mail in case of important changes in companies for which you have merged data, since these changes are not yet pushed through this plugin. A Trends Top XL login will allow you to monitor up to 3,500 companies.

Ik heb reeds een Trends Top login.

Ik heb nog geen Trends Top login.

Company

Given name

Name

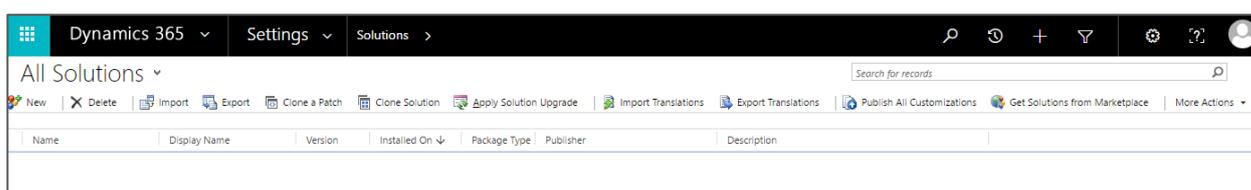
Email

[Download](#)

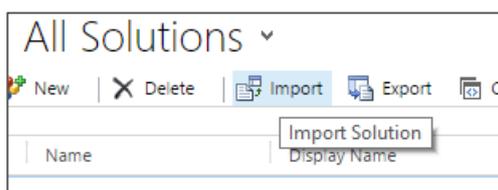
After clicking the download button, a download window will appear to download a .zip file. Save this zip file to your disk.

2.3. Installation in Dynamics 365

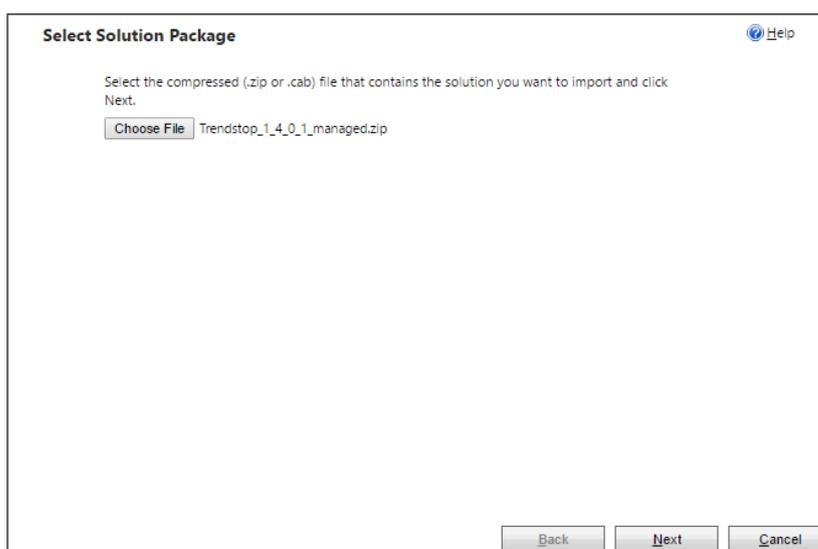
1. Open your Dynamics 365 environment in your browser.
2. Go to **Settings** → **Solutions**.



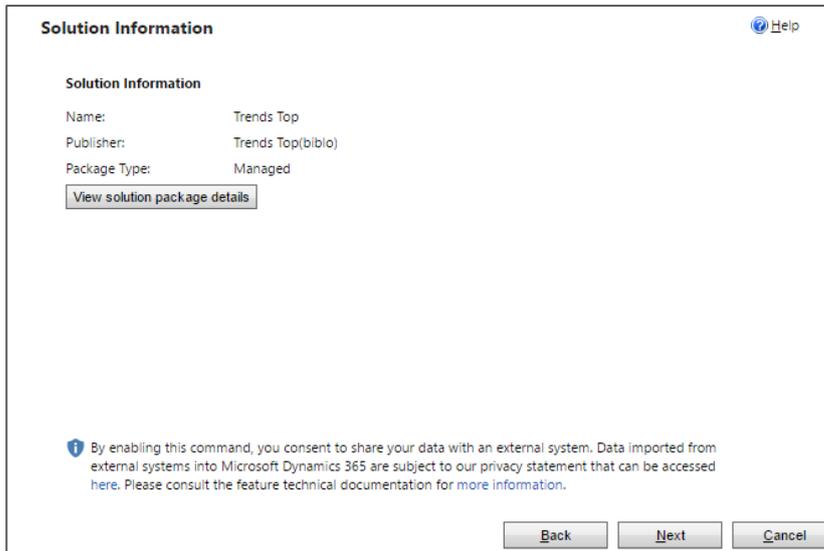
3. In the solutions list menu choose **Import**.



4. In the **Import Solution** dialog, **Select Solution Package** step, use the file upload control to **select the downloaded zip file**.



5. Choose **Next**
6. The following step shows some information about the Trends Top solution. Choose **Next**.



Solution Information Help

Solution Information

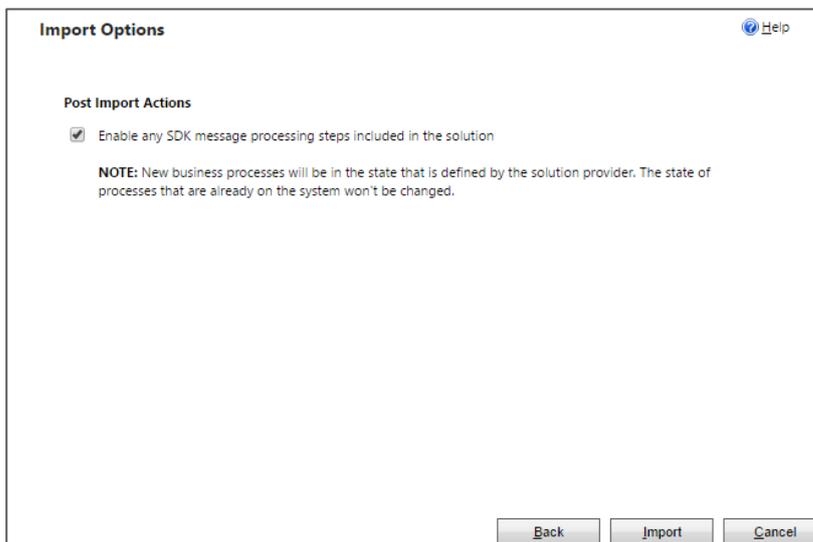
Name: Trends Top
Publisher: Trends Top(biblio)
Package Type: Managed

[View solution package details](#)

By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for more information.

Back Next Cancel

7. Make sure the checkbox 'Enable any SDK message processing steps included in the solution' is checked. Choose **Import**.



Import Options Help

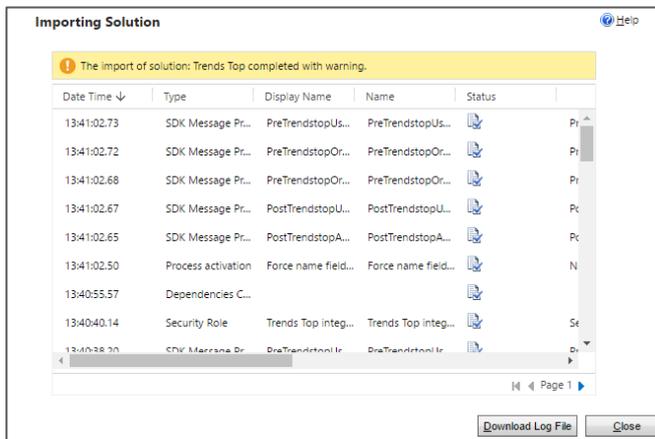
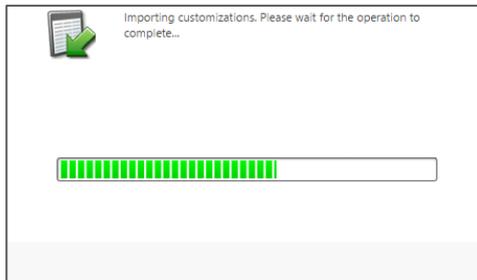
Post Import Actions

Enable any SDK message processing steps included in the solution

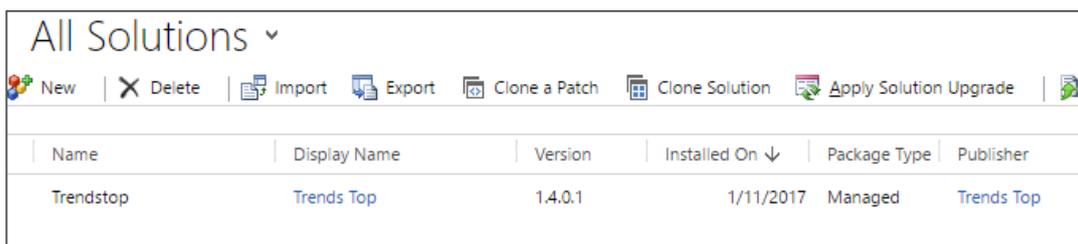
NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

Back Import Cancel

- You may need to wait a few moments while the solution import completes. If it is successful, you can view the results and choose Close.



- The Trends Top plugin is now imported in Dynamics 365. You should see the trendstop plugin in the solution list.

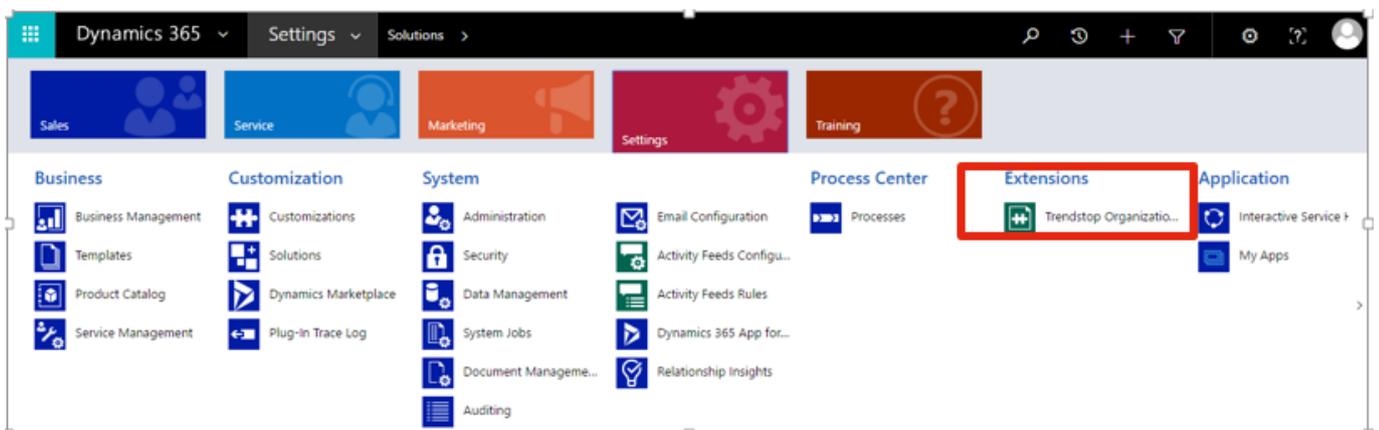


- Refresh the Dynamics 365 page in your browser. (Shortcut: F5)

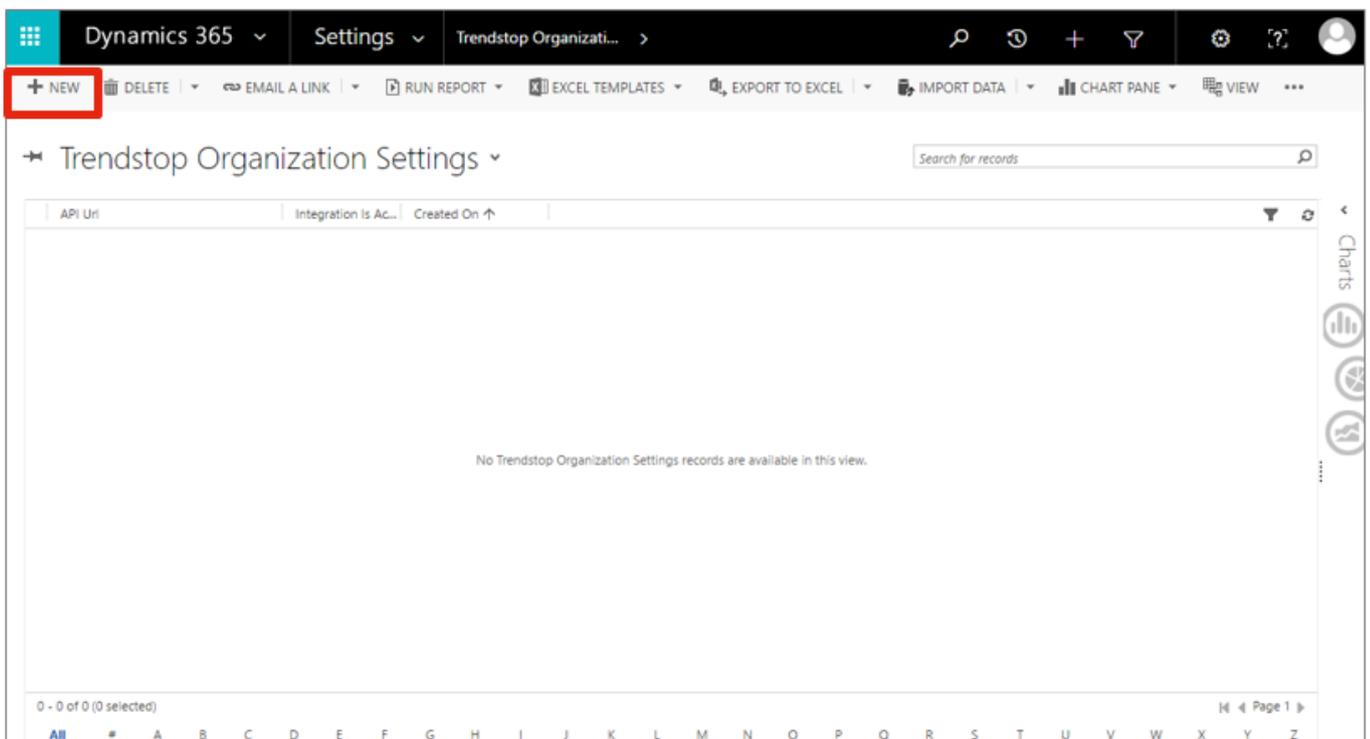
3. CONFIGURATION

3.1. Plugin configuration

After downloading and installing the Trends Top plugin for Dynamics 365, some configuration is required. Open **Dynamics 365** and go to **Settings** → **Trendstop Organization Settings**.

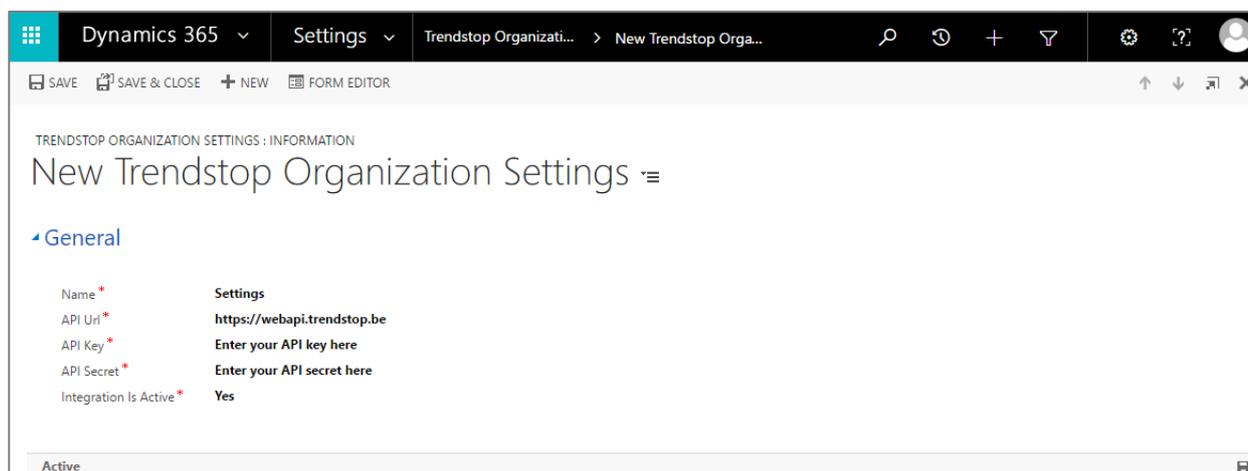


1. Create a new record by pressing the 'NEW' button in the toolbar.



2. Fill in the required fields like below and **save** the setting.

API Url	Enter: https://webapi.trendstop.be
API Key	Enter the API Key you received from Trends Top.
API Secret	Enter the API Secret you received from Trends Top.
Integration Is Active	Make sure this field is set to 'Yes' .



Dynamics 365 Settings Trendstop Organizati... > New Trendstop Orga...

SAVE SAVE & CLOSE + NEW FORM EDITOR

TRENDSTOP ORGANIZATION SETTINGS : INFORMATION

New Trendstop Organization Settings

General

Name * Settings

API Uri * **https://webapi.trendstop.be**

API Key * **Enter your API key here**

API Secret * **Enter your API secret here**

Integration Is Active * **Yes**

Active

3.2. Security

In order to use the Trends Top integration, CRM Users must have access to the custom entities that belong to the Trends Top solution. System administrators by default will have access to these entities. Other users (and teams) should be granted these privileges explicitly for the integration to work.

There are 2 ways to provide access to the users:

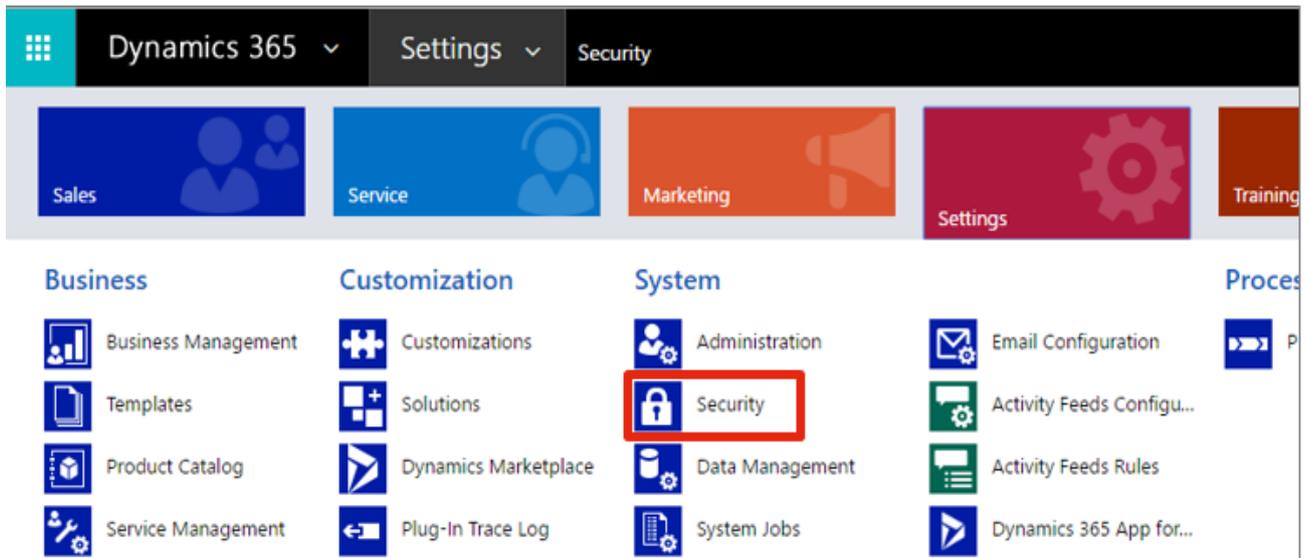
- *The solution includes a security role that provides these privileges. This security role can be assigned to the users.*
- or**
- *Modify existing security roles with the required privileges for the Trends Top Entities.*

The preferred way is the first option: assigning the provided security role to the users.

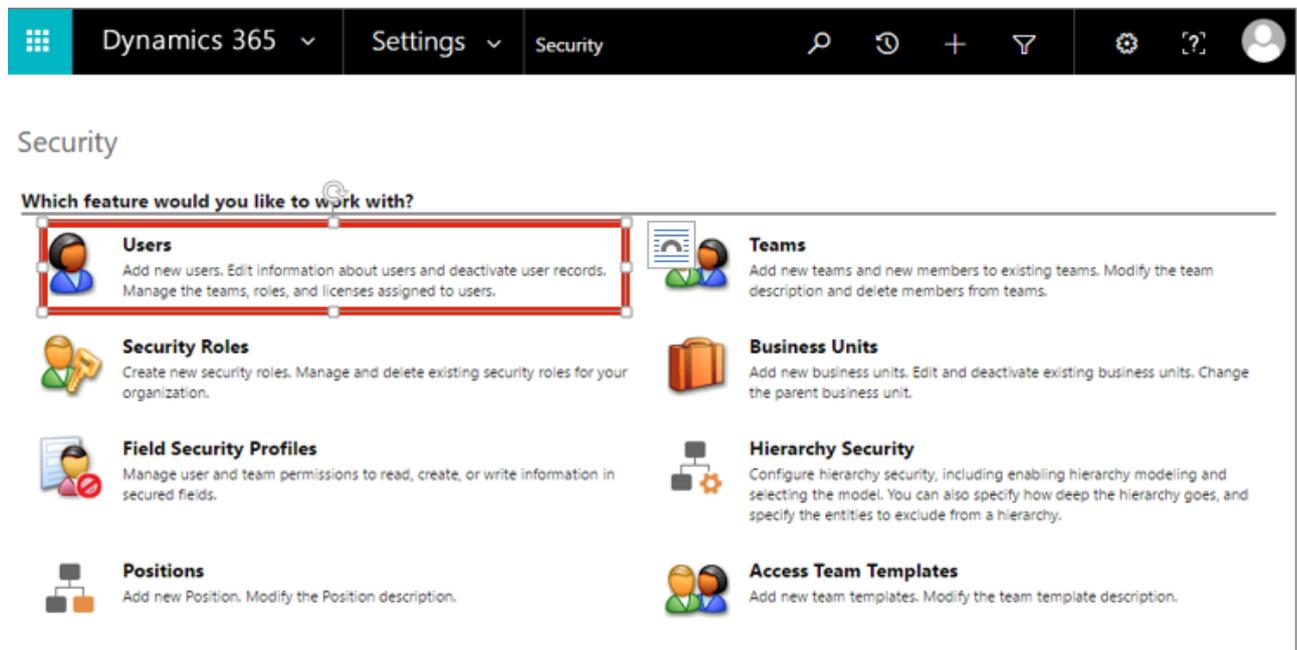
3.2.1. Assign the “Trends Top integration access” security role to the users

The approach described in this topic grants users access to use the Trends Top plugin in Dynamics 365 by assigning the out of the box security role to the users.

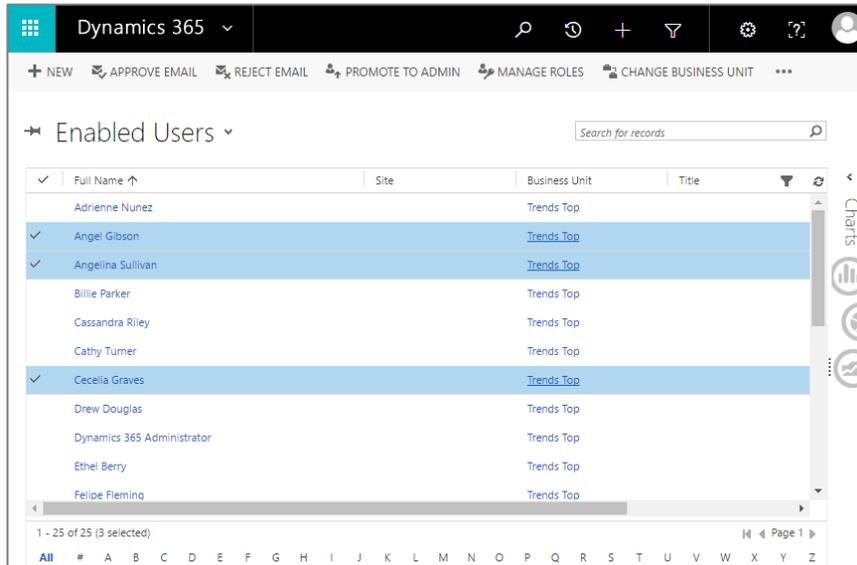
1. In Dynamics 365 go to **Settings** → **Security**.



2. Choose **Users**.



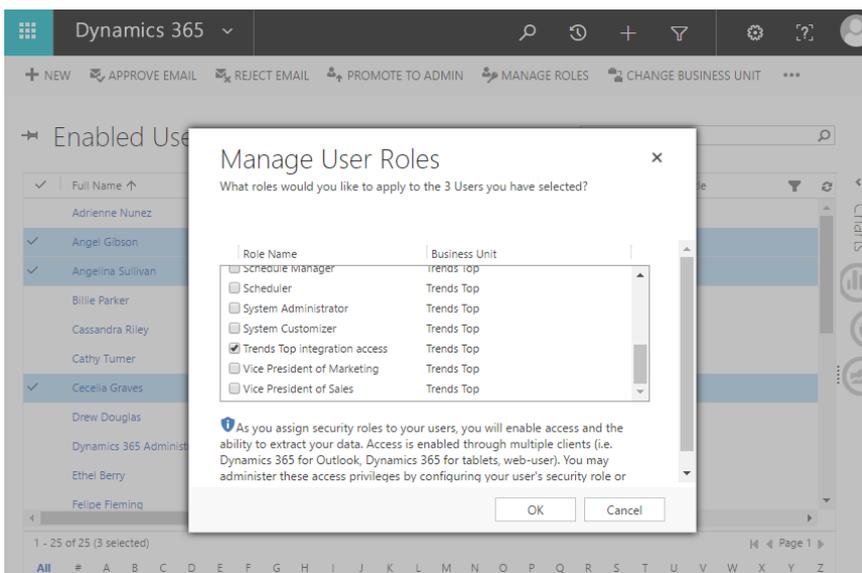
3. Select the users who need to use the Trends Top plugin.



4. Choose 'Manage Roles' in the toolbar.



5. Check the 'Trends Top integration access' security role in the list.

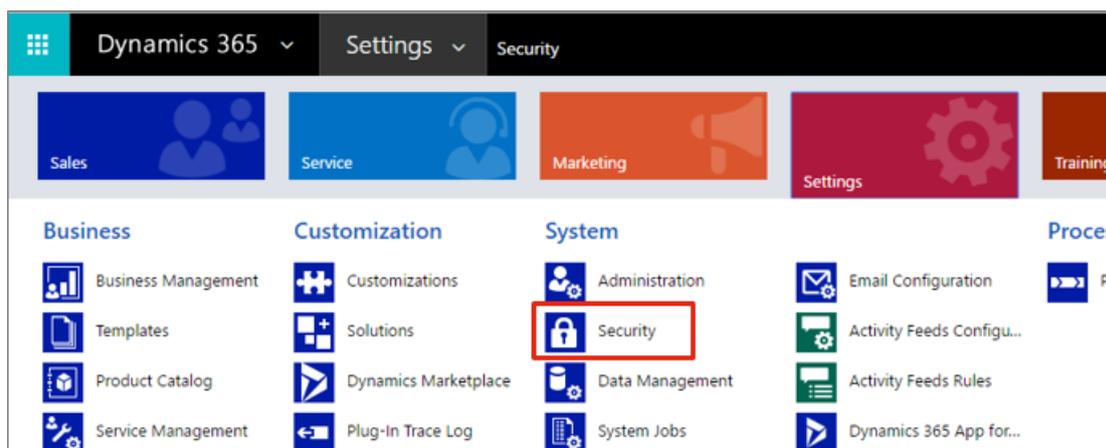


6. Choose OK.

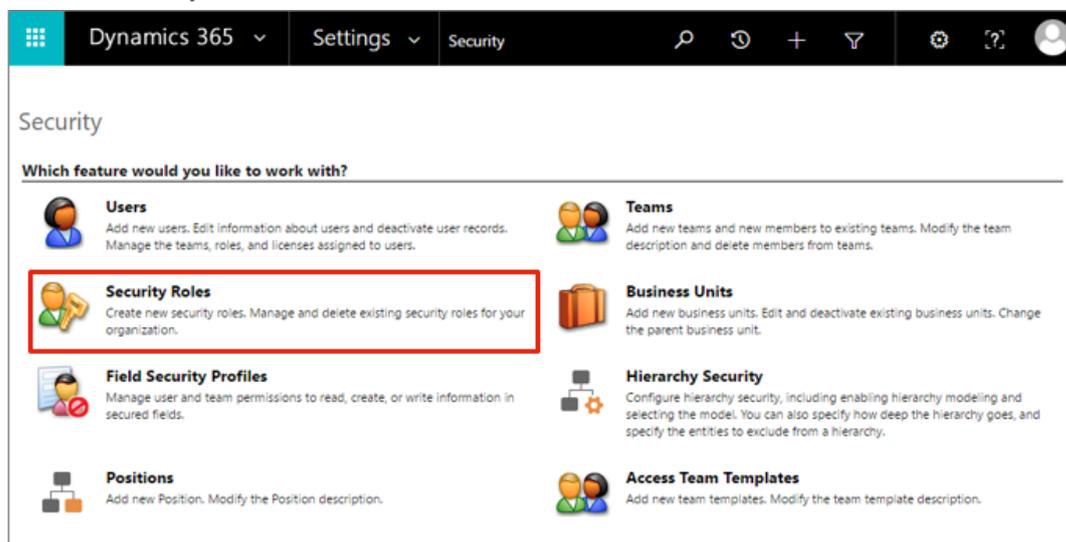
3.2.2. Modify existing security roles

When you do not wish to use the “Trends Top integration access” security role, you can grant the required privileges by modifying existing security roles. Alternatively, you can create a brand new security role with the required privileges.

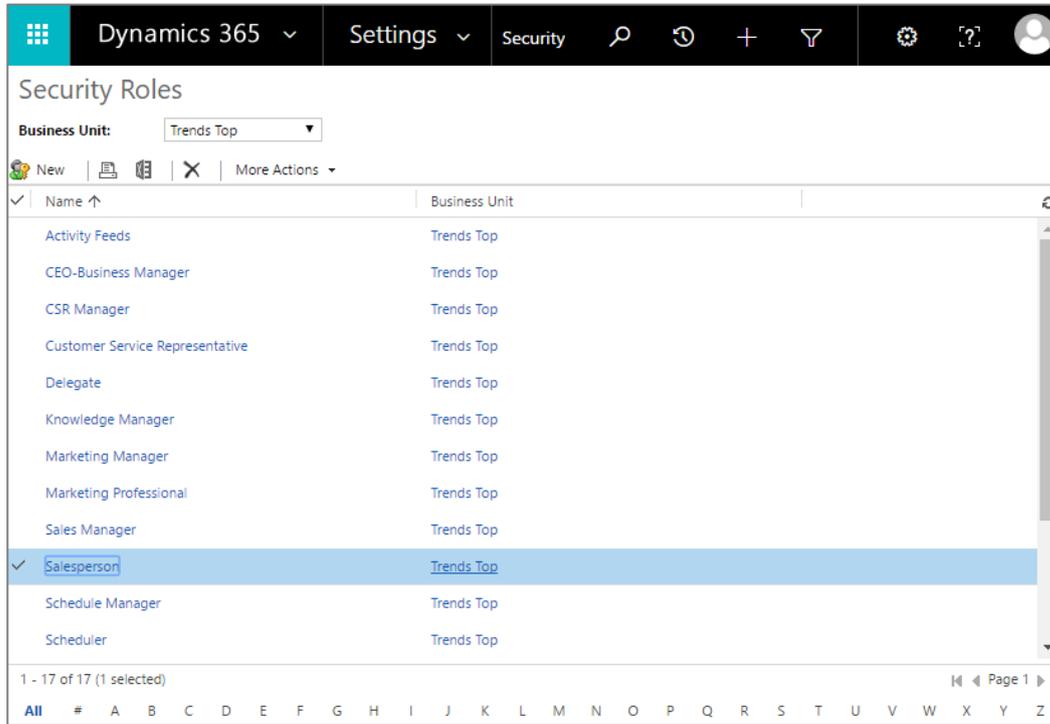
1. In Dynamics 365 go to **Settings** → **Security**.



2. Choose **Security Roles**.



3. Open the security role you wish to modify.



4. Extend the security role's privileges with the highlighted privileges.

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Field			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Hierarchy Rule			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Import Job			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Option Set			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Assembly			<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Trace Log			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Type			<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Process			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process Configuration			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process Session			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Publisher			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relationship			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sdk Message			<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step			<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Image			<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Secure Configuration			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Filter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post Rule Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profile Album	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trendstop Api Command	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trendstop Company Figures	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trendstop Organization Settings	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trendstop User Api Access	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wall View	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

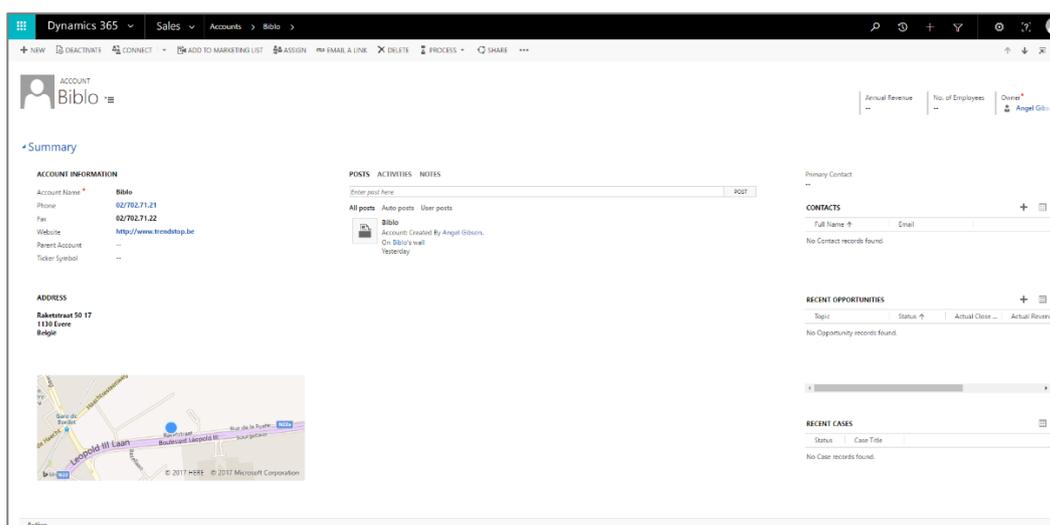
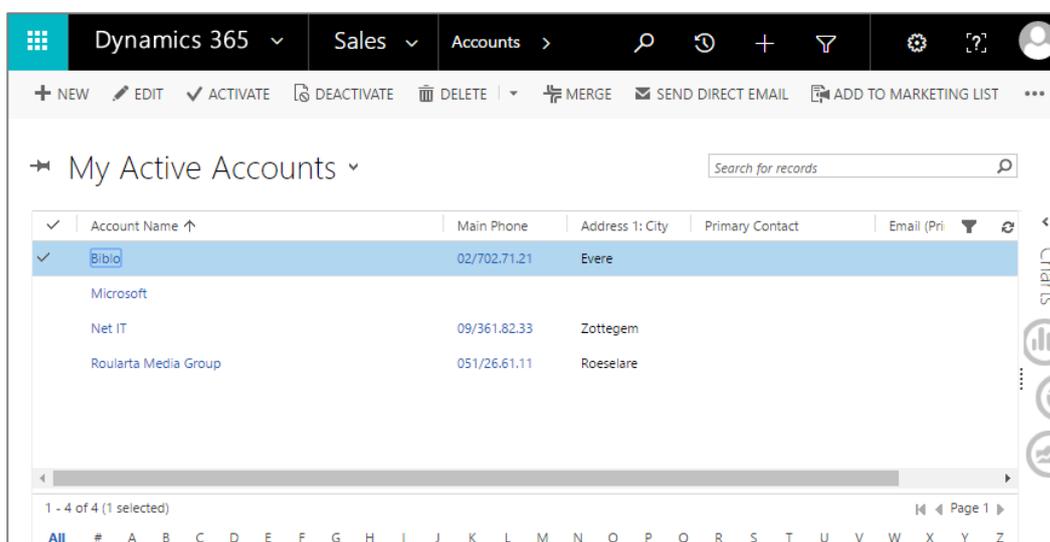
5. **Save** the security role.

4. USING THE TRENDS TOP PLUGIN

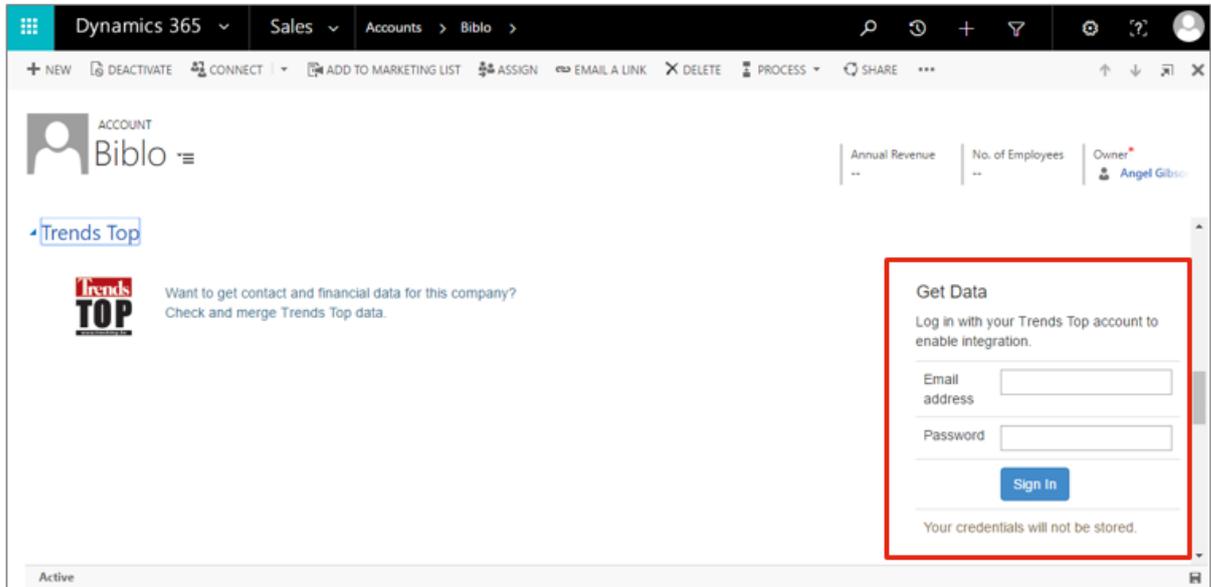
Using the Trends Top plugin in Dynamics 365, can be easily done from the Account entity. From an account you can query Trends Top to import the Trends Top data for this account. Importing data costs credits, which are available when you have the right subscription.

4.1. Query Trends Top for company data

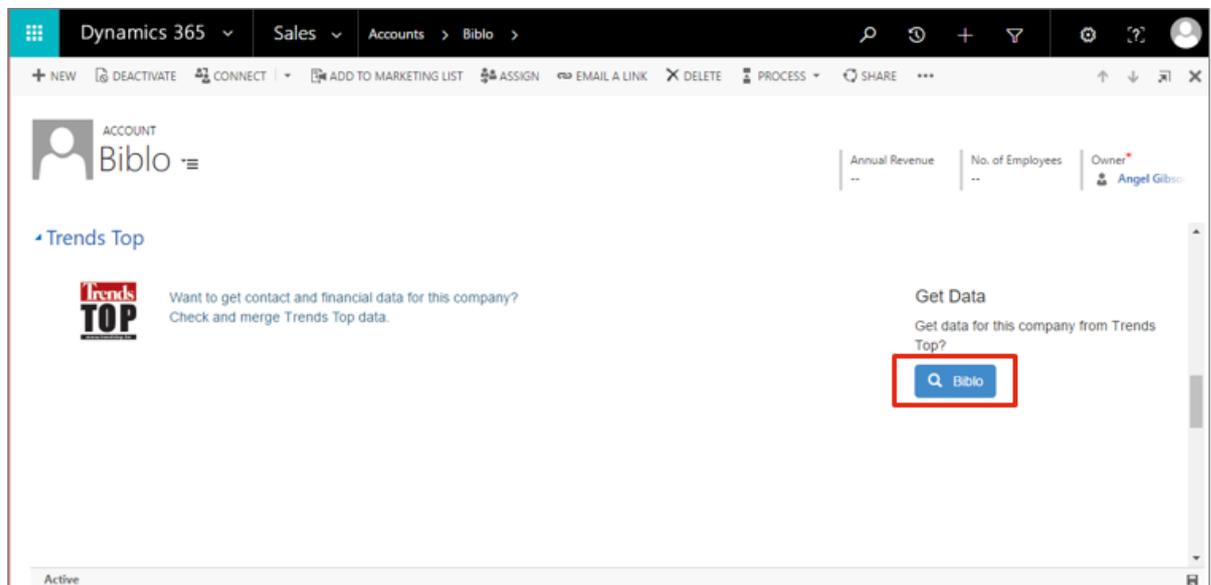
1. Open an account in Dynamics 365.



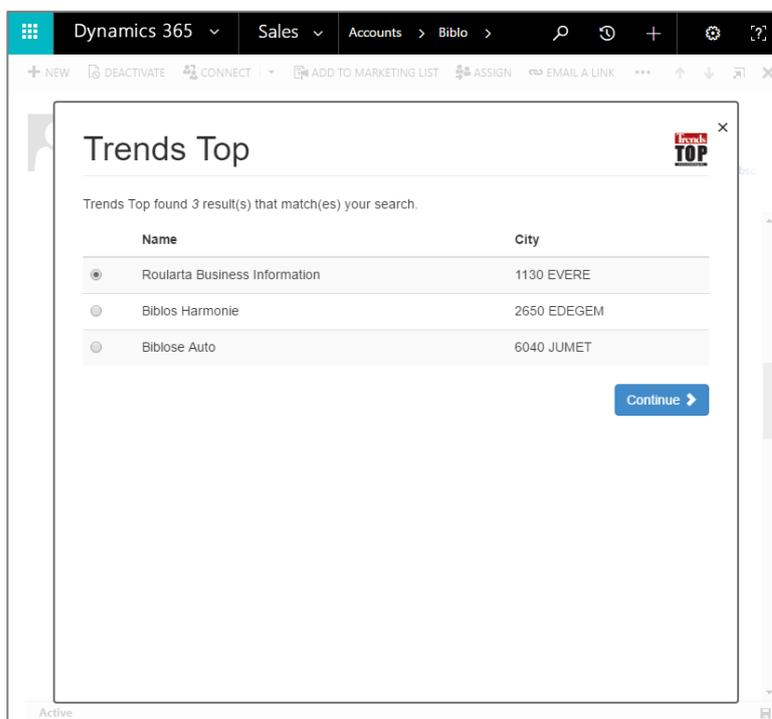
2. Navigate to the Trends Top tab on the account form. When a login screen is displayed, please login using your Trends Top credentials. Note that your credentials will not be stored.



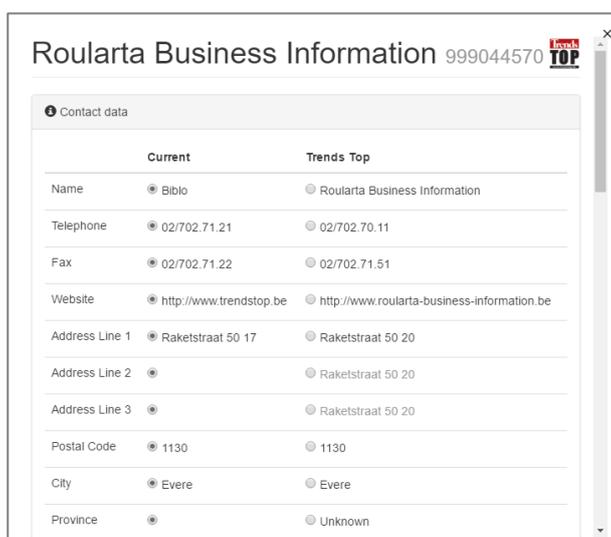
3. Click on the button containing the account's name.



4. The plugin will search for matching companies on Trends Top. The results are displayed. Select a company and choose Continue.



5. The following company details will be displayed:
 - a. Company data: you current data in Dynamics 365 is shown in the 'Current' column. Data from Trends Top is displayed in the 'Trends Top' column. All available information is shown as separate rows. You can import Trends Top data by selecting the radio button in the 'Trends Top' column. This will be explained in section 4.2



- b. Financial data: shows which key figures and ratings are available in Dynamics 365 ('Current' column) and which are available on Trends Top ('Trends Top' column).

€ Fincancial data		
	Current	Trends Top
Key-figures		2015
Rating	n/a	n/a

Key figures include turnover, gross margin, profit/loss, added value, investments, employees.

- c. Contacts: shows a list of contacts that are known on Trends Top. The name and function of the contact is displayed. When a personal e-mail address is available, an envelope icon is shown next to the contact's name. If you wish to import data from Trends Top, check the checkbox in front of the contact's name.

👤 Contacts [15]	
<input type="checkbox"/>	Hendrik De Nolf ✉ Chairman/board
<input type="checkbox"/>	Xavier Bouckaert ✉ CEO
<input type="checkbox"/>	Burt Riské ✉ General manager
<input type="checkbox"/>	Silvio Senkinz ✉ Sales manager
<input type="checkbox"/>	Michel Wyckaert ✉ Sales manager

- d. Additional Trends Top data: additional information (company number, legal form, sector, nacebel, establishment date, rankings) are not displayed, but will be imported if you choose to import data.

📄 Additional Trends Top data
This data is always imported and updated with the latest information. It includes company number, legal form, sector, nacebel, establishment date, rankings and link to Trends Top.

- e. View the company on trendstop.be: on the bottom of the window a link is provided to view the company on the Trends Top website.

[View this company on Trendstop.be](#)

4.2. Importing data

The Trends Top plugin for Dynamics 365 allows you to enrich your Dynamics 365 data with Trends Top information.

1. Query Trends Top for company data. (follow the steps described in: 4.1)
2. Check the radio buttons and checkboxes for the data you wish to import.
Note: financial data, if available, and additional data will always be imported when importing data from Trends Top.

Roularta Business Information 999044570

Contact data		
	Current	Trends Top
Name	<input type="radio"/> Biblo	<input checked="" type="radio"/> Roularta Business Information
Telephone	<input type="radio"/> 02/702.71.21	<input checked="" type="radio"/> 02/702.70.11
Fax	<input type="radio"/> 02/702.71.22	<input checked="" type="radio"/> 02/702.71.51
Website	<input type="radio"/> http://www.trendstop.be	<input checked="" type="radio"/> http://www.roularta-business-information.be
Address Line 1	<input type="radio"/> Raketstraat 50 17	<input checked="" type="radio"/> Raketstraat 50 20
Address Line 2	<input checked="" type="radio"/>	<input type="radio"/> Raketstraat 50 20
Address Line 3	<input checked="" type="radio"/>	<input type="radio"/> Raketstraat 50 20
Postal Code	<input type="radio"/> 1130	<input checked="" type="radio"/> 1130
City	<input type="radio"/> Evere	<input checked="" type="radio"/> Evere
Province	<input checked="" type="radio"/>	<input type="radio"/> Unknown
Country	<input type="radio"/> België	<input checked="" type="radio"/> België

Financial data		
	Current	Trends Top
Key-figures		2015
Rating	n/a	n/a

Key figures include turnover, gross margin, profit/loss, added value, investments, employees.

Contacts [15]

- Hendrik De Nolf** ✕
Chairman/board
- Xavier Bouckaert** ✕
CEO
- Burt Riské** ✕
General manager
- Silvio Senkinz** ✕
Sales manager
- Michel Wyckaert** ✕
Sales manager
- Katrien De Nolf** ✕
Personnel, HRM
- Jean-Louis Danthine** ✕
EDP
- Tom Goos** ✕
EDP
- Tommy Browaey** ✕
Marketing
- Danielle Joris** ✕
Manufacturing
- Ann Marcelle** ✕
Customer serv.
- Bart Van Cauter** ✕
Training
- Ann Heyman** ✕
Project manag.
- Pascal Flisch** ✕
Product devel.
- Tommy Browaey** ✕
Product devel.

Additional Trends Top data

This data is always imported and updated with the latest information. It includes company number, legal form, sector, nacebel, establishment date, rankings and link to Trends Top.

Cost for this merge: 3 credit(s).

You have 245 credit(s) remaining.

[View this company on Trendstop.be](#)

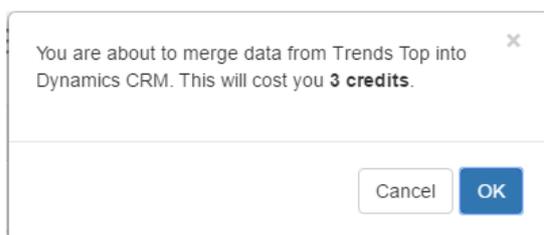
Merge Data

Note: The label 'Already in your CRM' may be shown when the contact has already been imported before by the plugin. You still may choose to refresh the information during the import, by checking the checkbox next to the contact's name.

- Katrien De Nolf** ✕
Personnel, HRM
Already in your CRM

3. Importing data costs credits. The cost for the import and your currently remaining credits are displayed at the bottom of the page. Choose Merge Data to import the data.

- The plugin will prompt you to start the import, informing you this will cost a certain amount of credits. Choose OK to continue with the import, or Cancel to cancel the import.



- When the import completes, your Dynamics 365 data will be updated, and the Trends Top tab will display general data, key figures and the rating. (If available)



ACCOUNT Roularta Business Information

Annual Revenue: -- No. of Employees: -- Owner: Angel Gil...

Summary

ACCOUNT INFORMATION

Account Name: Roularta Business Information
Phone: 02/702.78.11
Fax: 02/702.71.51
Website: <http://www.roularta-business-information.be>
Parent Account: --
Ticker Symbol: --

ADDRESS

Kalmstraat 50 20
1130 Evere
Belgie

POSTS ACTIVITIES NOTES

Enter post here POST

All posts Auto posts User posts

CONTACTS

Full Name	Email
Burt Riske	burt@riske@roularta.be
Hendrik De Noof	h.denoof@roularta.be
Xavier Bouckaert	xavier.bouckaert@roulart...

RECENT OPPORTUNITIES

Topic	Status	Actual Close	Actual Reven

Trends Top

General data

Company Number: BE 0999.044.570
Legal Form: Database, data treatment (d/t)
Sector: View this company on Trendstop.be
Nacebel: info.rti@roularta.be
Est Date: --
Trends Top UniRankings: --
E-mail address: 0 in overall ranking
Added Value: 0 in overall ranking
Ranking by Turnover: 0 in sector ranking

Key-figures

Financial Year: 2015
Closing Date: 0
Duration (months): n/a
Balance Type: n/a
Turnover: n/a
Gross margin: n/a
Profitless: n/a
Added value: n/a
Investments: n/a
Staff (FTE): n/a

Rating - Overall health indicator

Weak Below average Normal Above average Strong

Get Data

Get data for this company from Trends Top?

Q Roularta Business Information

Last update: in an hour

4.3. Refresh data

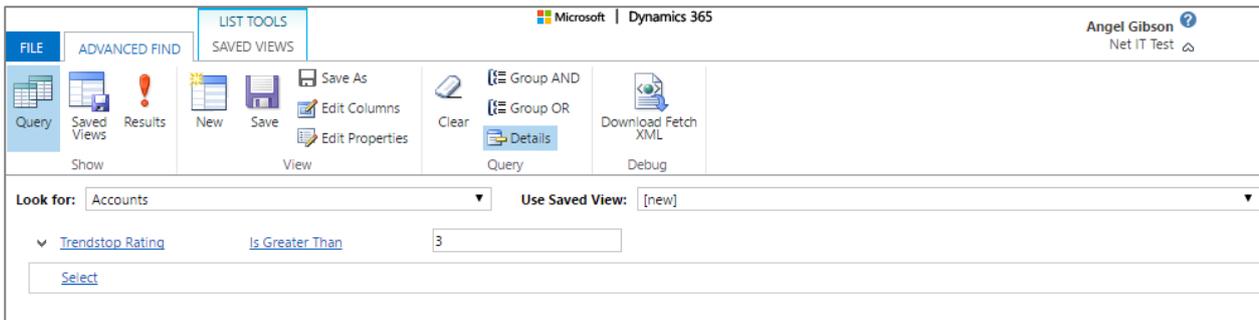
To refresh your Dynamics 365 details about a company, follow the same process as described in the section 4.2 Importing data.

4.4. Work with Trends Top data in Dynamics 365

When you have enriched your company records in Dynamics 365 with Trends Top information, you can use the information to create queries, marketing lists, ... based on Trends Top information.

For example you can:

- Query companies with a certain rating.
- Query companies with a certain turnover for a given year.



To view what data is available for querying and displaying in Dynamics 365 view, see section 5. Imported Data.

5. IMPORTED DATA

When importing data, the Trends Top plugin for Dynamics 365 saves data in the following entities en fields.

5.1. Account

The following account fields are updated, depending on your selection. Note that 'Trendstop' fields are always imported when importing data.

Account Name
Main Phone
Fax
Website
Address 1: Line 1
Address 1: Line 2
Address 1: Line 3
Address 1: Zip/Postal Code
Address 1: City
Address 1: State/Province
Address 1: Country/Region
TrendstopCompanyEmailAddress
Trendstop Company Number
Trendstop Detail Url
Trendstop Est Date
Trendstop Vat
Trendstop Legal Form
TrendstopLegalFormCode

Trendstop Nacebel Code
Trendstop Nacebel Description
Trendstop Rating
Trendstop Sector Code
Trendstop Sector Description
Trendstop Sector Ranking Added Value
Trendstop Sector Ranking Turnover
Trendstop Top Ranking Added Value
Trendstop Top Ranking Turnover
Trendstop Import Date
Trendstop Update Date

5.2. Contact

The following contact fields are updated in Dynamics 365 when importing a contact.

First Name
Last Name
Job Title
E-mail
Gender
Company Name
Trendstop Language Code
Trendstop Import Date

5.3. Trendstop Company Figures

The company's figures are stored in the entity 'Trendstop Company Figures'. The following fields are populated.

Account
Name
Balance Type
Closing Date
Duration Months
Financial Year
R012 (= € Turnover)
R015 (= € Gross Margin)
R034 (= € Profit/Loss)
R070 (= € Added Value)
R071 (= € Investments)
RA25 (= Staff (FTE))

6. DOCUMENT VERSIONING

Version	Date	Author
1	6/02/2017	Koen Van Damme