Dynamics 365 Trends Top Plugin - Manual

Contents

Net IT NV ● Gentse Steenweg 281 ● B-9620 ZOTTEGEM
T: +32 9 361 82 33 ● F: +32 9 361 82 35 ● ondernemingsnummer: BE0466.765.186
info@net-it.be ● www.net-it.be

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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 in order to get an API key. The API key is required to complete te 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 tot 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 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.

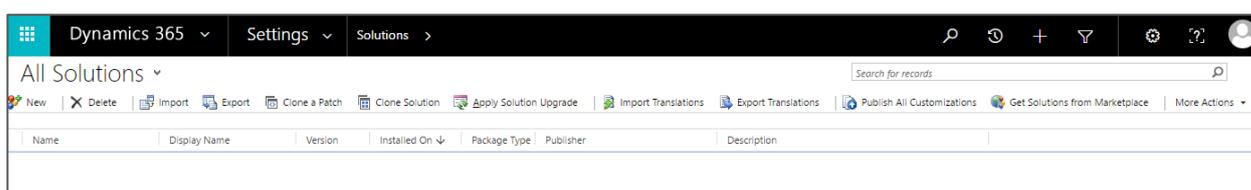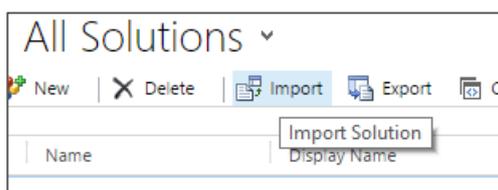| Company | | • |
Given name		•
Name		•
Email		•

> Download

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

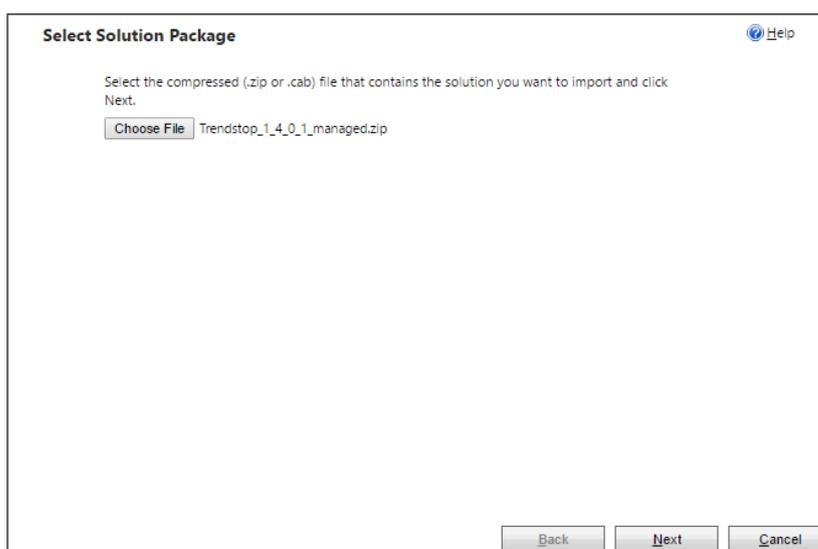## 2.3.   Installation in Dynamics 365

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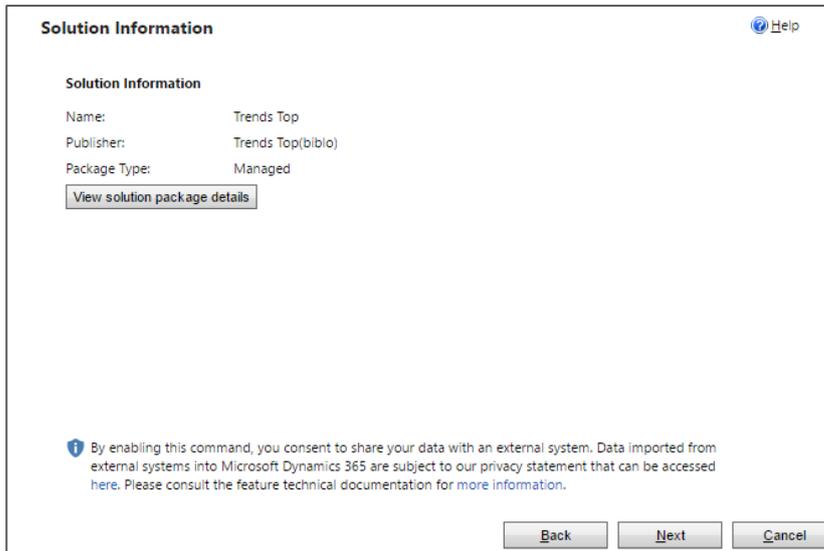
2. Go to **Settings** → **Solutions**.

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**.

7. Make sure the checkbox '**Enable any SDK message processing steps included in the solution**' is **checked**. Choose **Import**.
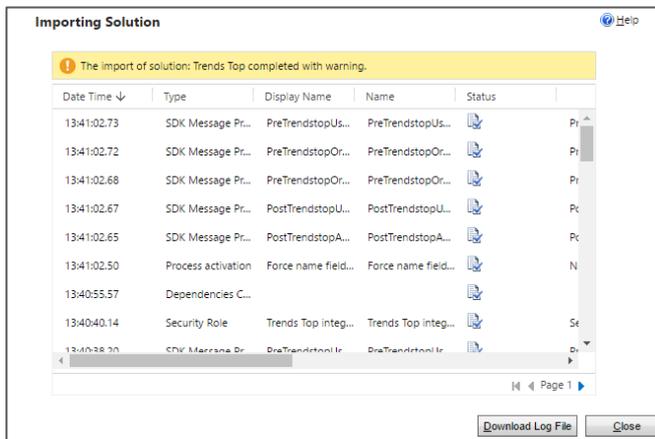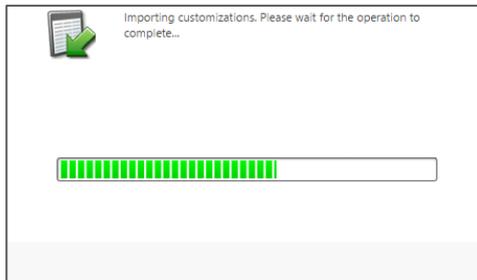
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8. You may need to wait a few moments while the solution import completes. If it is successful, you can view the results and choose Close.

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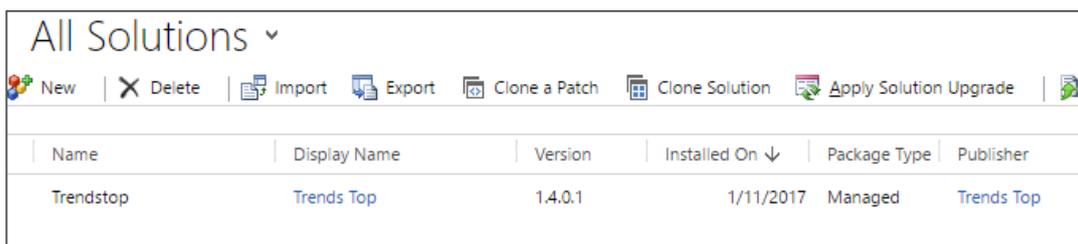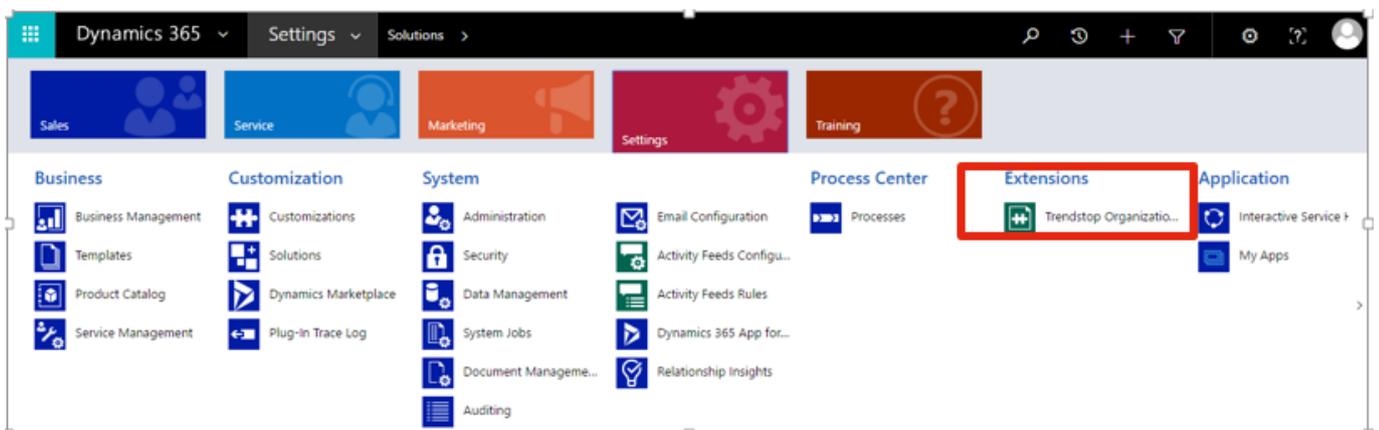

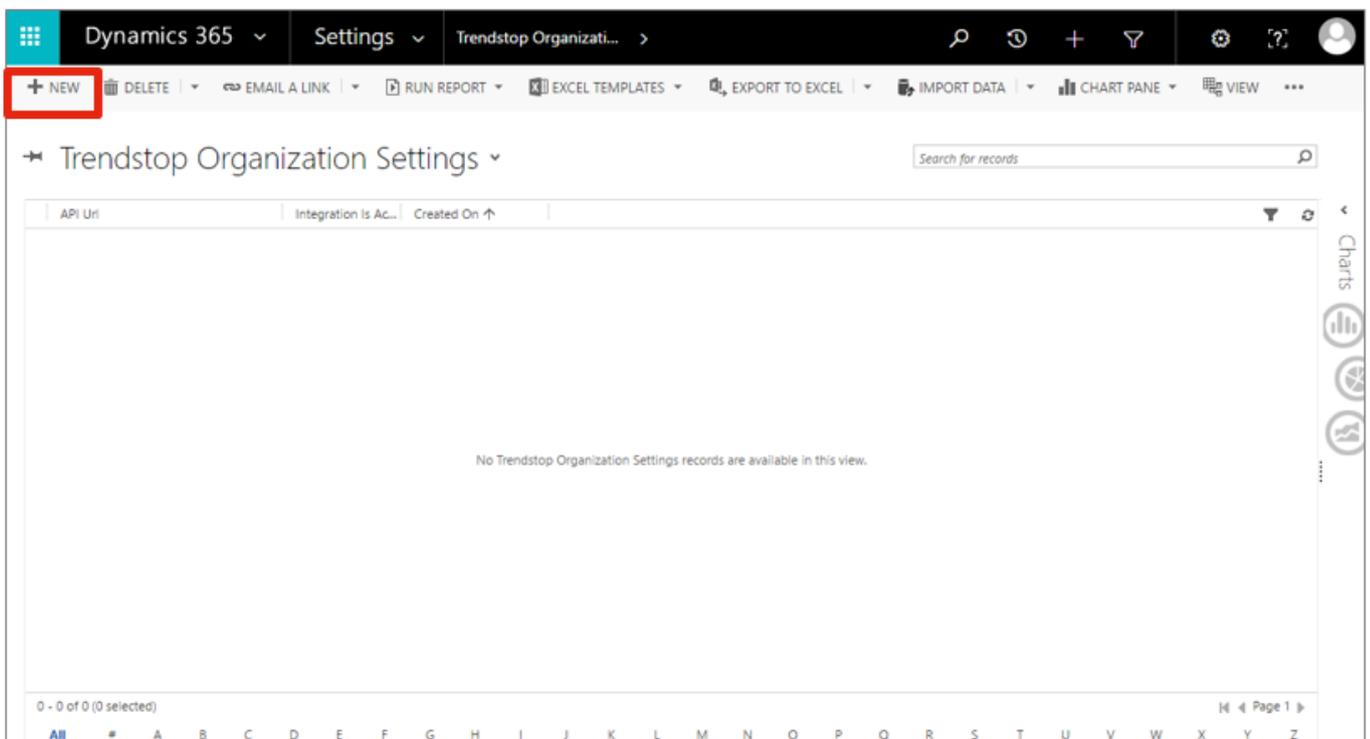10. Refresh the Dynamics 365 page in your browser. (Shortcut: F5)

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.**
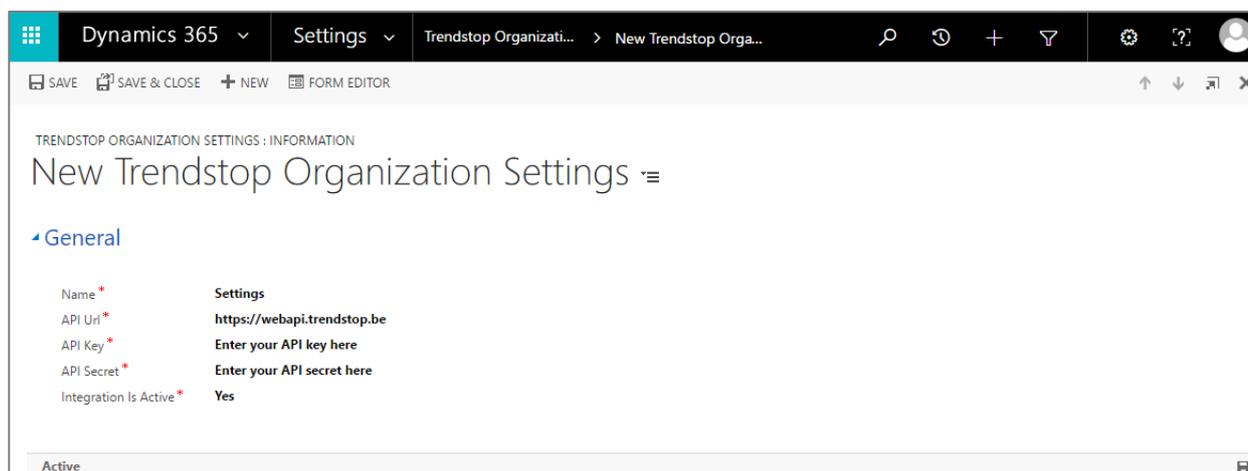

1. Create a new record by pressing the '**NEW**' button in the toolbar.

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**'.

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.

Net IT NV ● Gentse Steenweg 281 ● B-9620 ZOTTEGEM
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3.2.1. Assign the "Trends Top integration access" security role to the users

The approach described in this topics grants users access to use the Trends Top plugin in Dynamics 365 by assigning the out of the box security role to the users.
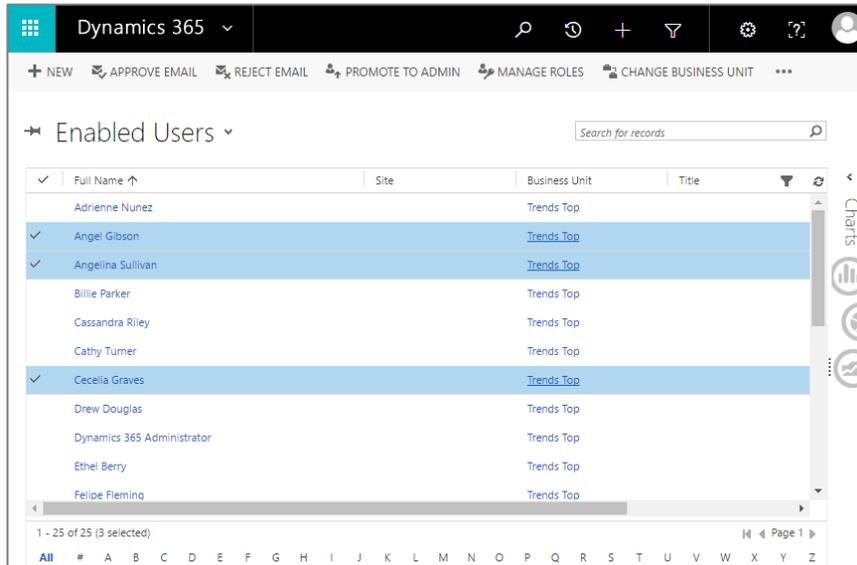
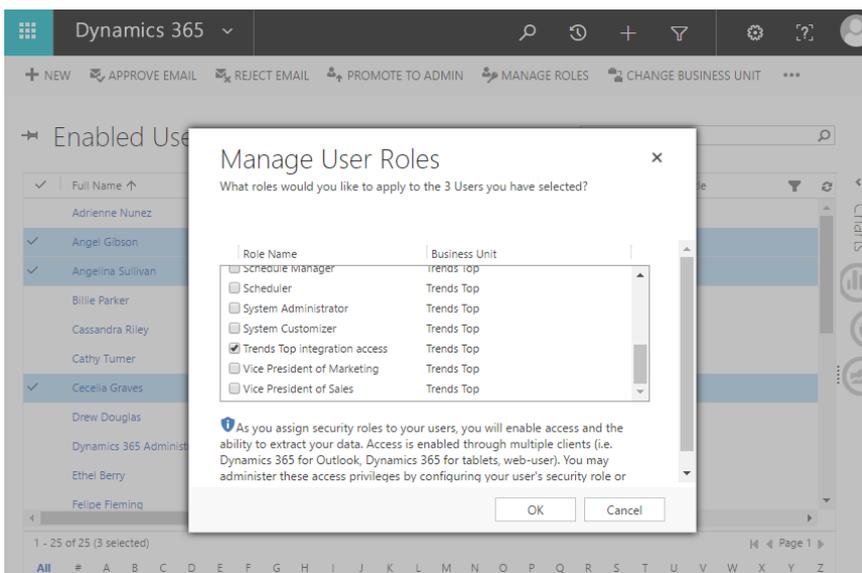1. In Dynamics 365 go to **Settings → Security**.
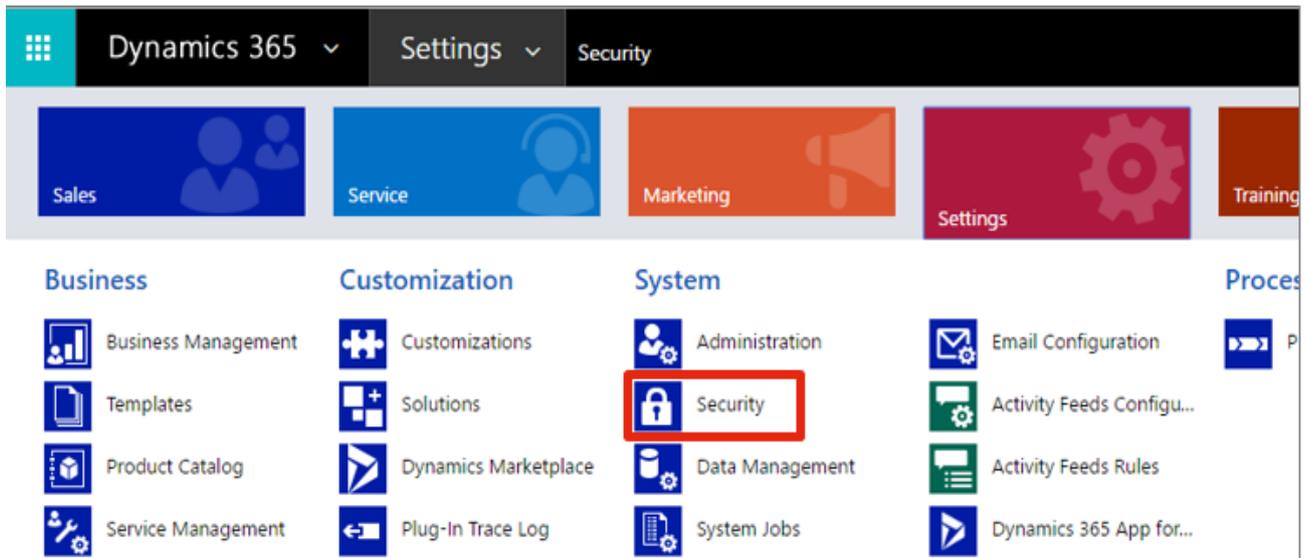
2. Choose **Users**.
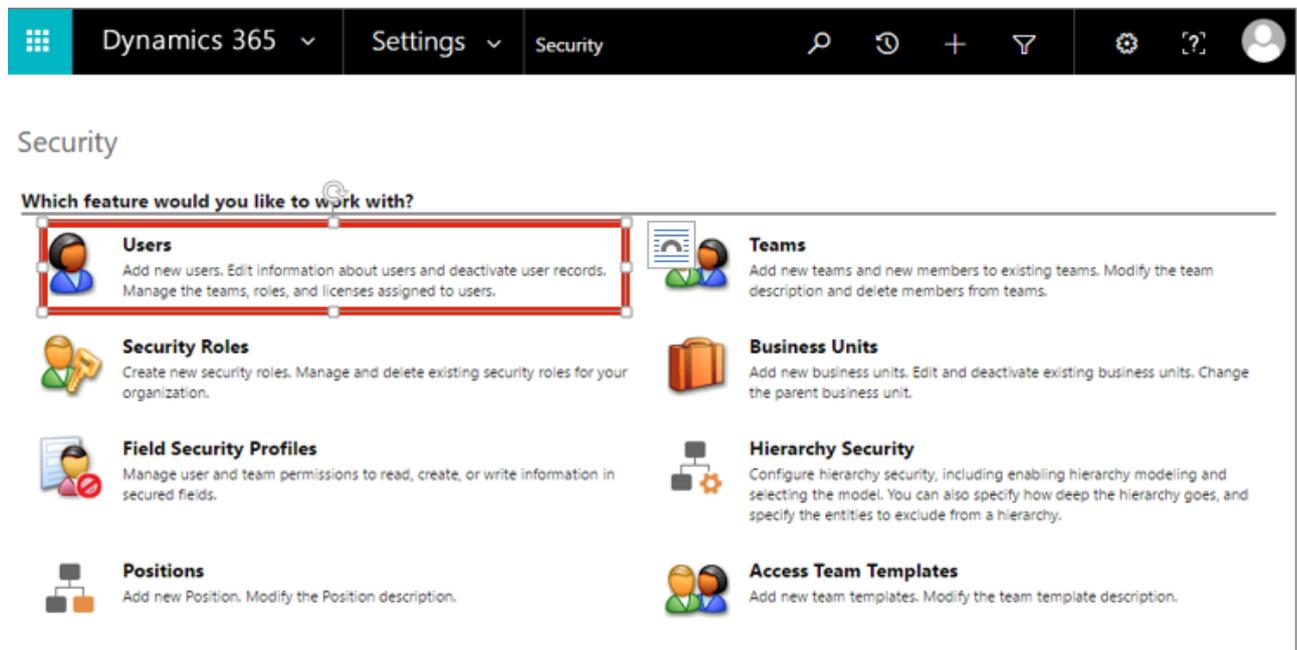
3. **Select** the **users** who need to use the Trends Top plugin.

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.
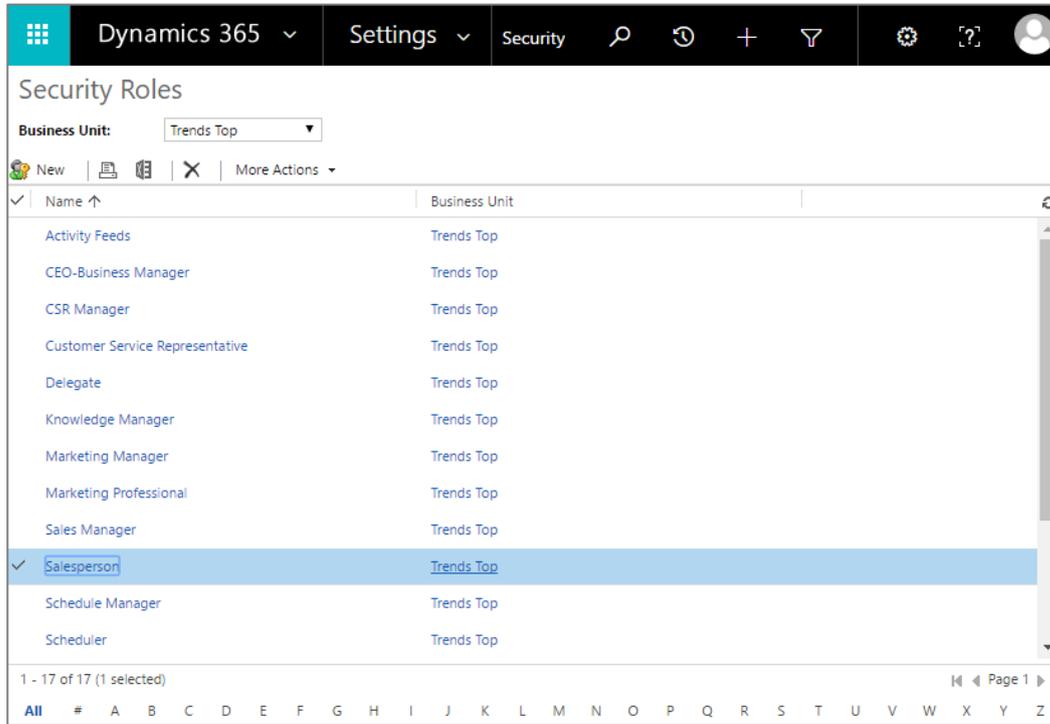
1. In Dynamics 365 go to **Settings → Security**.
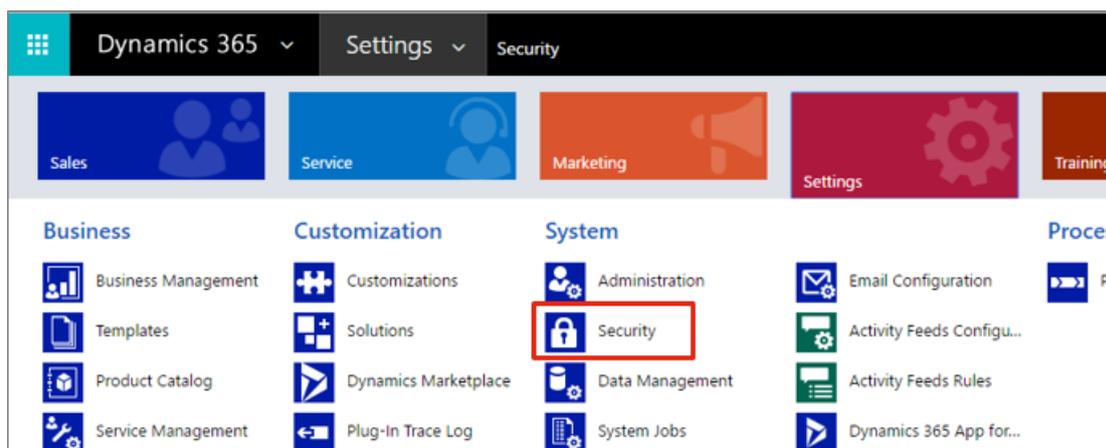
2. Choose **Security Roles**.
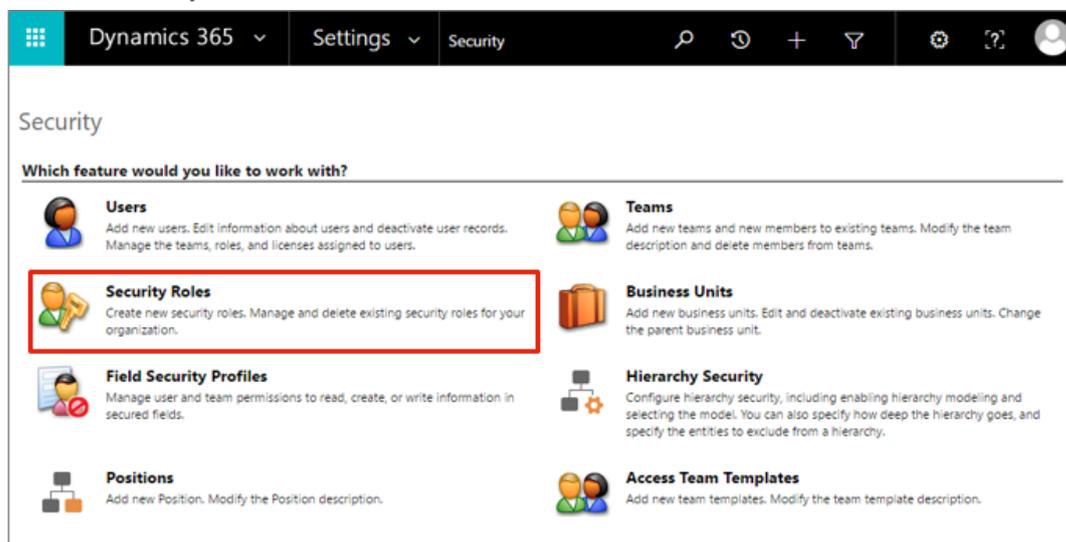
3. **Open** the **security role** you wish to modify.

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

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| Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Missing Entities | Business Process Flows | Custom Entities |

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Trendstop Api Command	●	●	●	●	●	●		
Trendstop Company Figures	●	●	●	●	●	●		
Trendstop Organization Settings	○	●	○	○	○	○		
Trendstop User Api Access	◐	◐	◐	◐	◐	◐	○	○
Wall View	○	○	○	○	○	○		

5. **Save** the security role.

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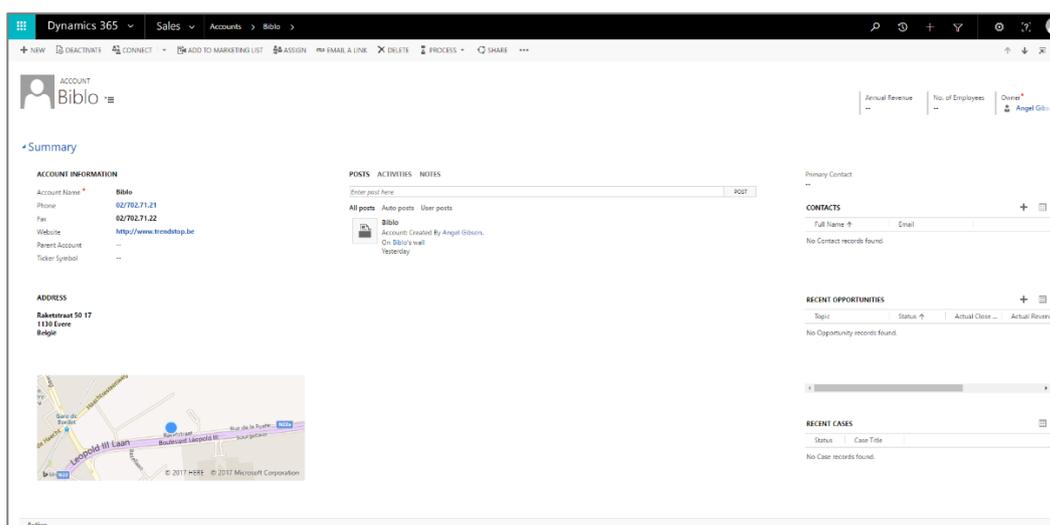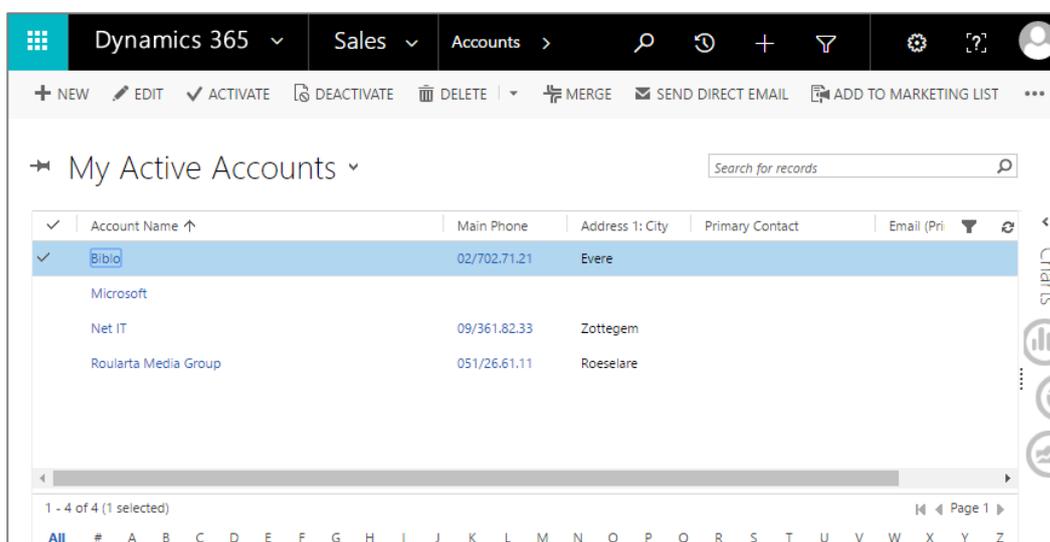
4. USING THE TRENDS TOP PLUGIN

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.

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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.
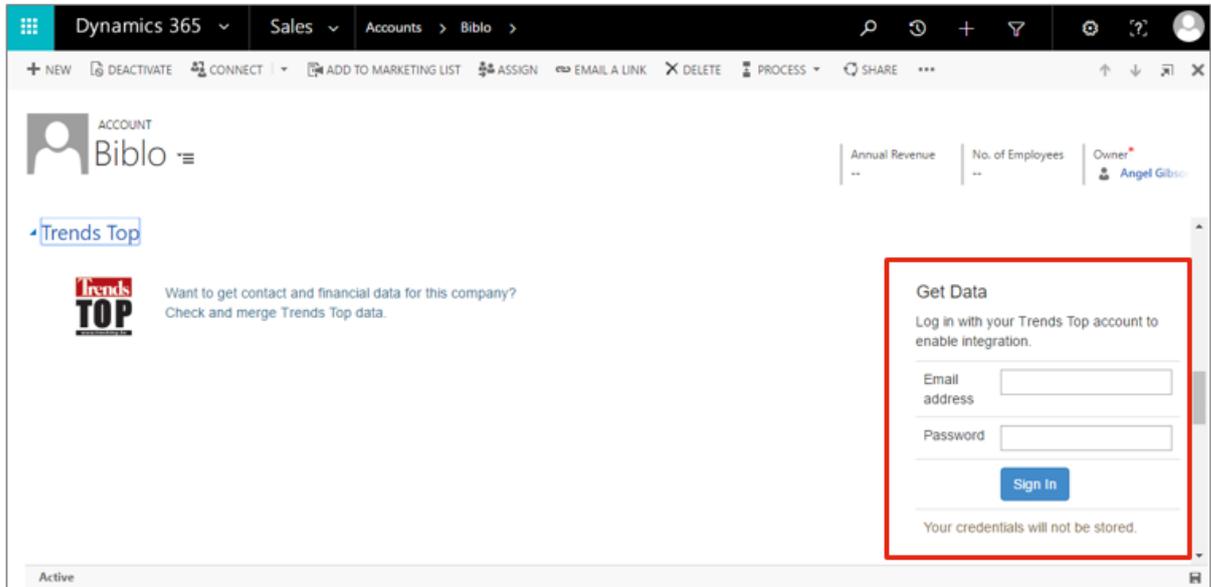

3. Click on the button containing the account's name.
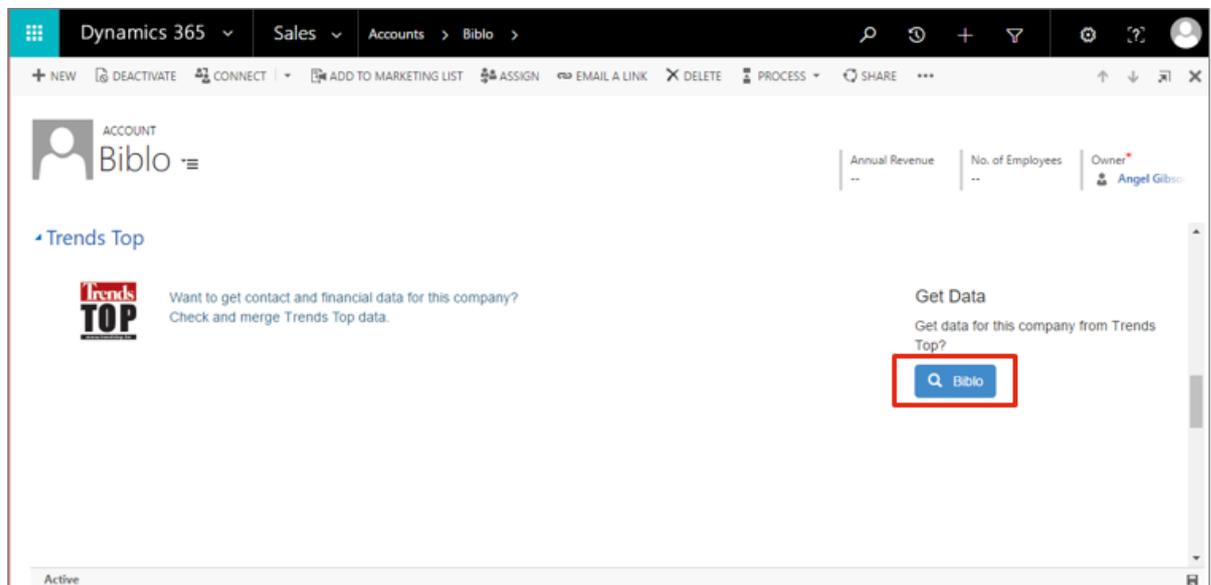
4. The plugin will search for matching companies on Trends Top. The results are displayed. Select a company and choose Continue.
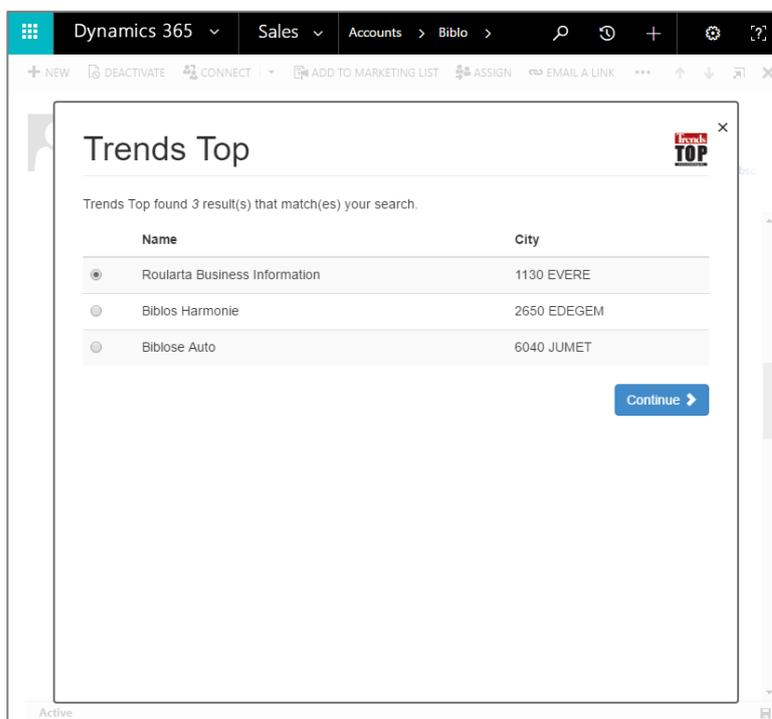
5. The following company details will be displayed:
    a. Company data: you current data in Dynamics 365 is shown in the 'Current' column. Data from Trends Top is displayed in the 'Trends Top' column. All available information is shown as separate rows. You can import Trends Top data by selecting the radio button in the 'Trends Top' column. This will be explained in section 4.2
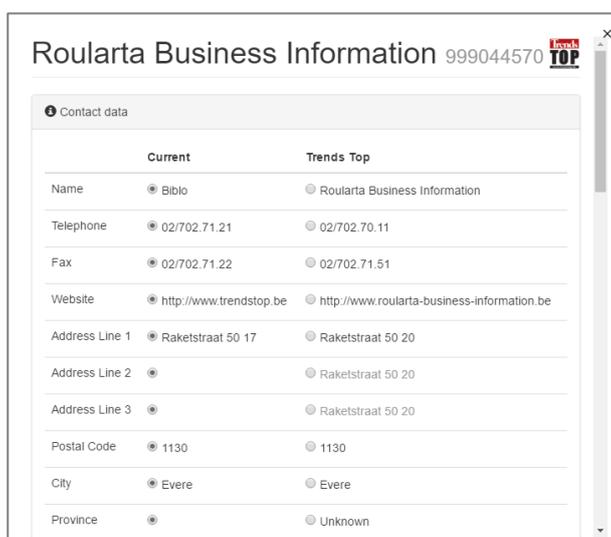
b. Financial data: shows which key figures and ratings are available in Dynamics 365 ('Current' column) and which are available on Trends Top ('Trends Top' column).

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.

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.

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.

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.

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.

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.

Net IT NV ● Gentse Steenweg 281 ● B-9620 ZOTTEGEM
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4. 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.
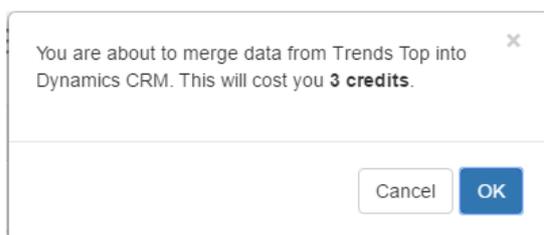
5. When the import completes, your Dynamics 365 data will be updated, and the Trends Top tab will display general data, key figures and the rating. (If available)

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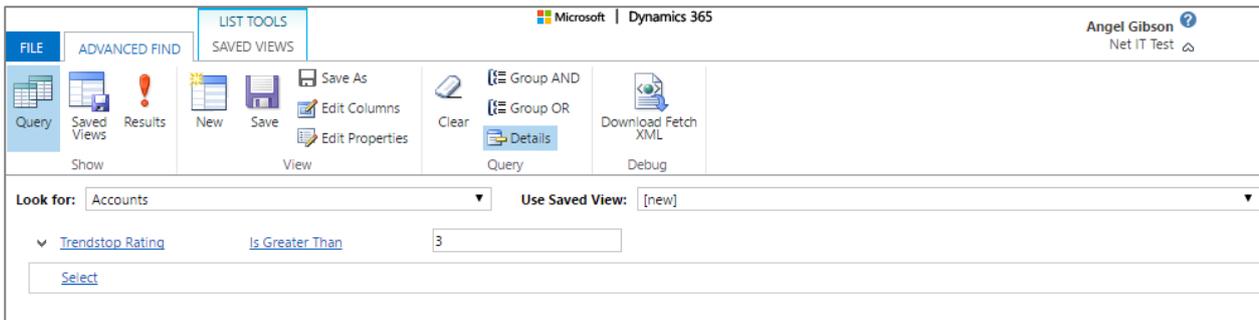
To view what data is available for querying and displaying in Dynamics 365 view, see section 5. Imported Data.

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