



Illinois IT Solutions, LLC

Product: Approve, Test and Enable User Mailbox Automation

Contents

1	Product Details:	2
2	USE CASE SCENARIOS:	2
2.1	Test Case 1:	2
2.2	Test Case 2.	2
3	USEFULNESS:	2
	• AUTO EMAIL APPROVAL	2
	• EASY TO INSTALL	2
4	Requirements:.....	3
5	Installation:	3
6	LICENSING:	9
6.1	Registration:.....	9
7	MAINTENANCE:	11
8	CONTACT:	11



Welcome to Illinois IT Solutions.
Thank you for allowing us to be at your service.

1 Product Details:

Name: D365 CRM User Mailbox Approval, Test and Enable.

This is a managed solution for your D365 CRM. The solution comprises of Web resources such as HTML pages and Scripts. It also has a plugin dll that gets called on Create or Update events within D365 CRM. The entities monitored for Update and Create events are SystemUser and Mailbox.

2 USE CASE SCENARIOS:

2.1 Test Case 1:

Plugin fires when a new user is added to D365 CRM. If the user is missing any security roles the plugin will assign Sales Person role and complete the tasks of Approving the user email and then Test and Enable the mailbox.

2.2 Test Case 2.

When a user's email approval is revoked due to email address changes or any other reason that triggers Approval to change then the plugin will fire and check security roles. If minimum required permissions are missing it will Assign Sales Person role and execute the next steps of Approving and Testing and Enabling the mailbox.

3 USEFULNESS:

- **AUTO EMAIL APPROVAL**

Simple and easy logic to auto approve user emails within D365 CRM

REDUCE GLOBAL ADMIN'S UI TIME

Global Admins no longer need to spend time in CRM UI to Approve user email addresses.

- **EASY TO INSTALL**

As easy as it can be. Simply import a Managed solution as a Global Admin into D365 CRM. Complete the registration under the Configuration Page within the solution and your Trial will start. After the trial expires contact billing@ilitsol.com to renew.

4 Requirements:

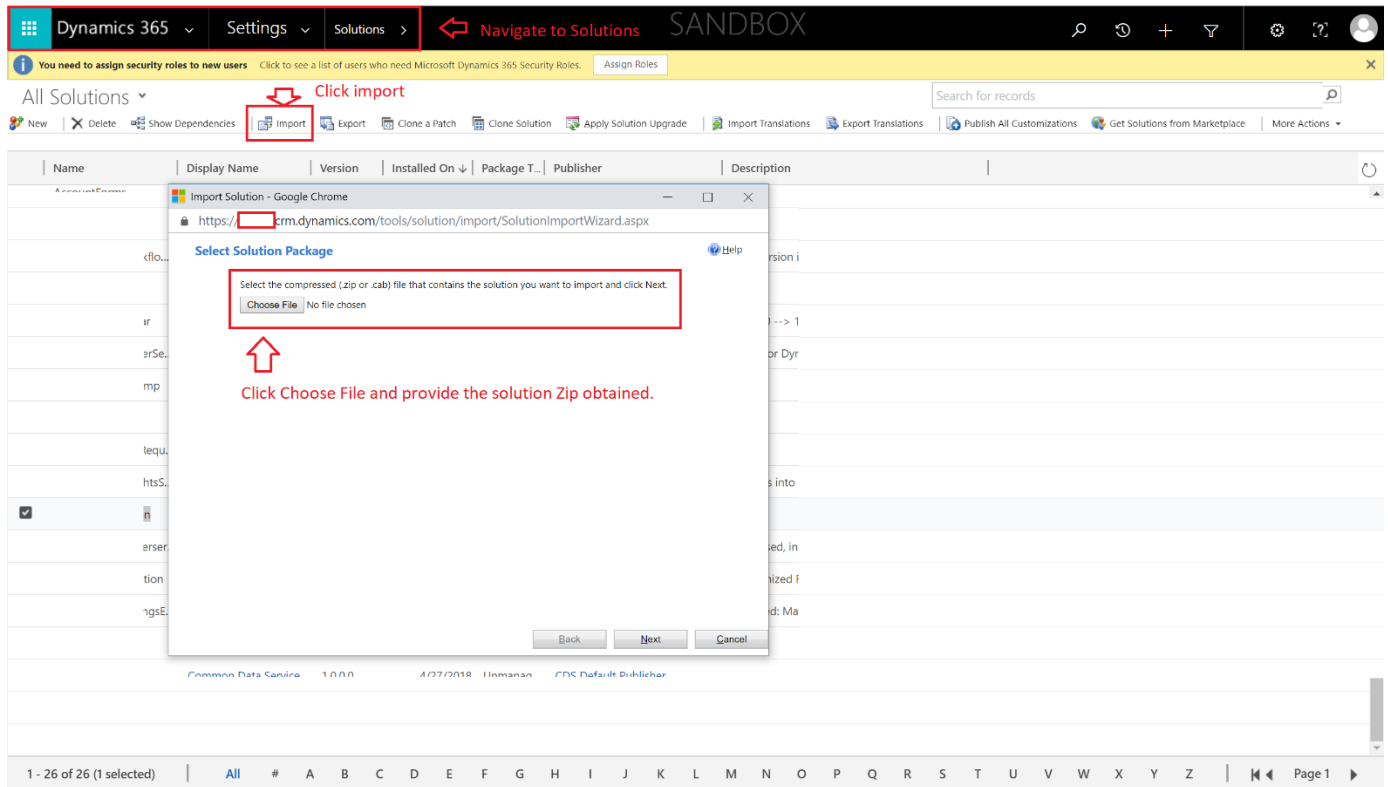
4.1 The solution must be imported and owned by Global Admin who has a CRM System Administrator Account.

4.2 The plugin must run under the Global Admin who is also a CRM System Administrator in the Organization.

5 Installation:

5.1 Navigate to Solutions page in D365 CRM. (D365 CRM => Settings => Solutions)

5.2 Import Solution by Clicking on import and selecting the Solution Provided.



The screenshot shows the Microsoft Dynamics 365 interface. At the top, the navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. A red arrow points to the 'Solutions' menu item with the text 'Navigate to Solutions'. Below the navigation bar, a yellow banner displays a message: 'You need to assign security roles to new users'. The main content area is titled 'All Solutions' and features a 'Click import' button, which is highlighted with a red box and a red arrow. Below this, a table lists various solutions with columns for Name, Display Name, Version, Installed On, Package T., Publisher, and Description. A modal window titled 'Import Solution - Google Chrome' is open, showing the 'Select Solution Package' step. The modal contains the instruction: 'Select the compressed (zip or .cab) file that contains the solution you want to import and click Next.' Below this instruction is a 'Choose File' button, which is also highlighted with a red box and a red arrow. A red arrow points from the 'Choose File' button to the text: 'Click Choose File and provide the solution Zip obtained.' The modal also includes 'Back', 'Next', and 'Cancel' buttons at the bottom.



5.3 Once the file is you will see the following screen. Click next to proceed.

Select Solution Package

 Help

Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

ApproveTestandEnableMailbox_1_0_0_0_managed.zip

5.4 During the import process you will see a confirmation of the solution before you can import. Verify the correct information is displayed and proceed with the import.


Solution Information

 [Help](#)

Solution Information

Name: ApproveTestandEnableMailbox
Publisher: Illinois IT Solutions(illinoisitsolutions)
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](#)



5.5 Select the Check box to enable SDK Steps within the solution post import.

Import Options



Post Import Actions

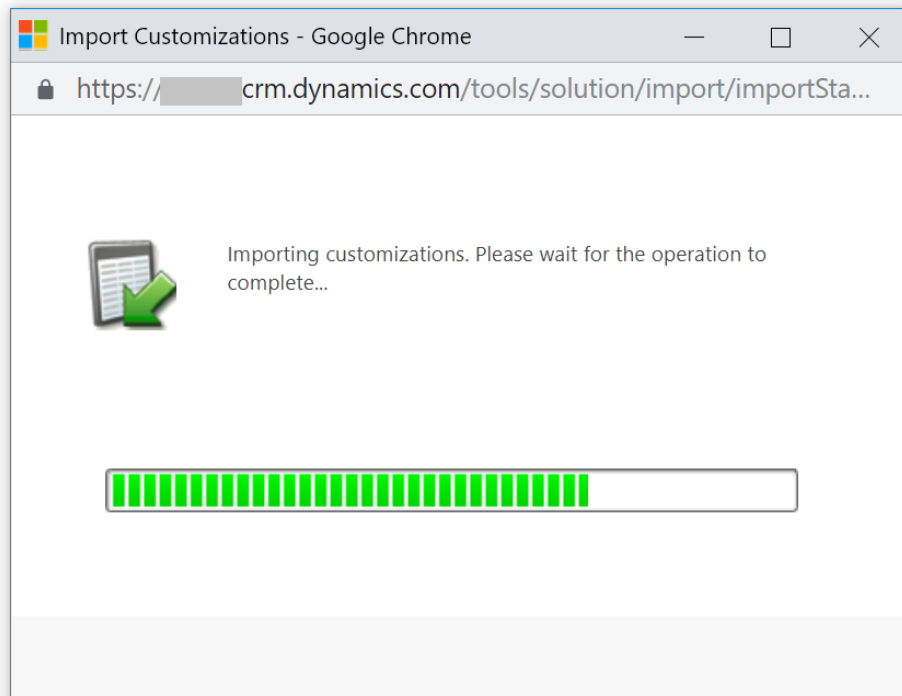
- Enable any SDK message processing steps included in the solution

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.

5.6 import progress will appear as follows:

Importing Solution

 Help



Time for import was [redacted] seconds


Back







Cancel

5.7 Import successful: upon successful import Close the dialog.
Note: Since this is a managed solution it is auto published during import.

Importing Solution

 Help

 The import of solution: ApproveTestandEnableMailbox completed with warning.

Date Time ↓	Type	Display Name	Name	Status	D
19:08:06.45	Plugin Assem...	ILITSUserand...	ILITSUserand...		
19:08:06.35	Web Resourc...	IllinoisITSoluti...	ilits_/image/Il...		
19:08:06.32	Web Resourc...	JQuery.js	ilits_/scripts/J...		
19:08:06.30	Web Resourc...	RegistrationF...	ilits_/CSS/Reg...		
19:08:06.29	Web Resourc...	RegistrationF...	ilits_/scripts/S...		
19:08:05.42	Solution	ApproveTesta...			We

◀ ▶ Page 1 ▶

[Download Log File](#)

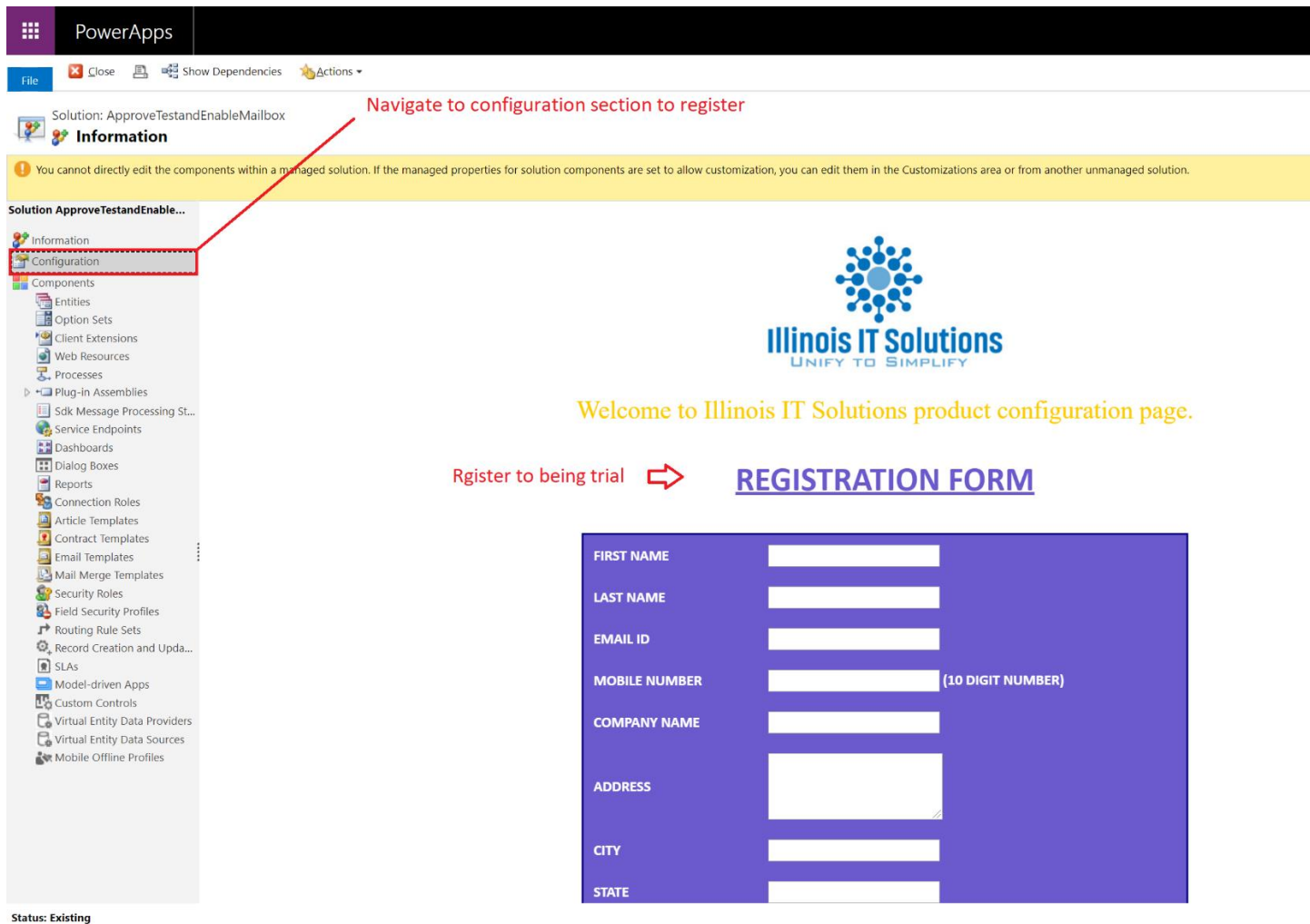
[Close](#)

6 LICENSING:

6.1 Registration:

NOTE: To start your trial first install/import the solution into your D365 CRM organization. After installing the solution file, you need to register your profile online (to begin trial).

6.1.a Open the imported solution and navigate to Configuration as displayed below:



PowerApps

File Close Show Dependencies Actions

Solution: ApproveTestandEnableMailbox

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ApproveTestandEnable...

Information

Configuration

Components

- Entities
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
- Sdk Message Processing St...
- Service Endpoints
- Dashboards
- Dialog Boxes
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles
- Routing Rule Sets
- Record Creation and Upda...
- SLAs
- Model-driven Apps
- Custom Controls
- Virtual Entity Data Providers
- Virtual Entity Data Sources
- Mobile Offline Profiles

Illinois IT Solutions
UNIFY TO SIMPLIFY

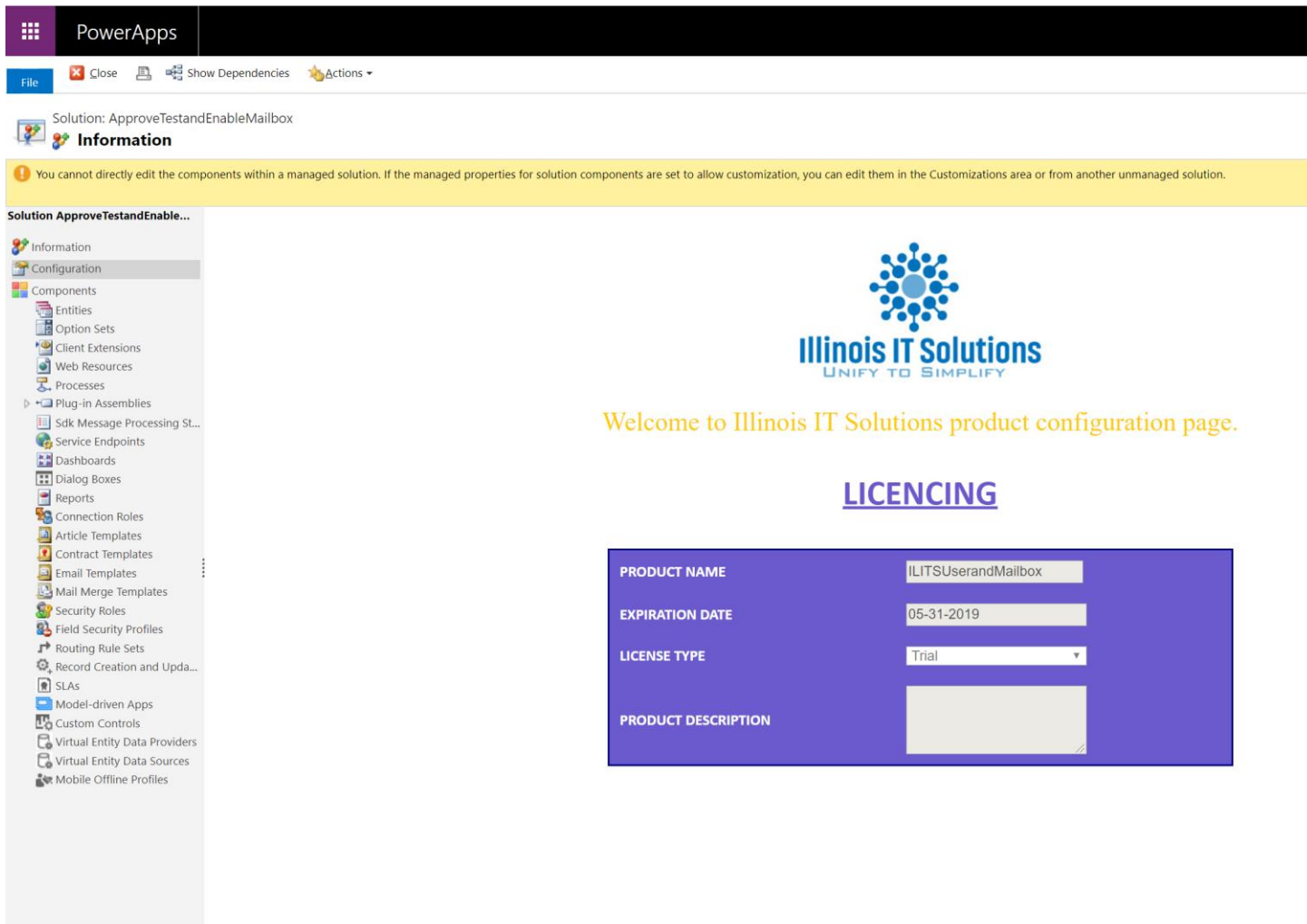
Welcome to Illinois IT Solutions product configuration page.

Register to being trial → **REGISTRATION FORM**

FIRST NAME	<input type="text"/>
LAST NAME	<input type="text"/>
EMAIL ID	<input type="text"/>
MOBILE NUMBER	<input type="text"/> (10 DIGIT NUMBER)
COMPANY NAME	<input type="text"/>
ADDRESS	<input type="text"/>
CITY	<input type="text"/>
STATE	<input type="text"/>

Status: Existing

6.1.b. Once registered you will notice the Trial has begun and your plugin will start firing based on the above events. There is no extra configuration needed within the Solution. To renew your license please contact techsupport@ilitsol.com



PowerApps

File Close Show Dependencies Actions

Solution: ApproveTestandEnableMailbox

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution ApproveTestandEnable...

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Model-driven Apps
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources
 - Mobile Offline Profiles

Illinois IT Solutions
UNIFY TO SIMPLIFY

Welcome to Illinois IT Solutions product configuration page.

LICENCING

PRODUCT NAME	ILITSUserandMailbox
EXPIRATION DATE	05-31-2019
LICENSE TYPE	Trial
PRODUCT DESCRIPTION	



7 MAINTENANCE:

We like to keep our code up to date and whenever D365 CRM code changes we ensure our products are up to date and in line with changes Microsoft pushes. If we notice changes are required to our code we will update the solution and communicate with you to plan release of newer version of the solution.

We assure you quality. If you find a BUG within our solution we will fix it for free. Any new feature addition will be considered case by case and will be worked on a Time and Material basis. Contact TechSupport@ilitsol.com

8 CONTACT:

The Team
Illinois IT Support
<https://ilitsol.com>
Unify to Simplify
TechSupport@ilitsol.com