

Installing the WalkMe for Microsoft Dynamics Package

Deploying WalkMe Directly with a Package

You can use the WalkMe for Dynamics package to get WalkMe to your users, even if you don't plan on using the WalkMe extension. In order to complete the installation, you must have access to a Dynamics Administrator account and the Dynamics Package. Once complete, your published WalkMe content will immediately be accessible and WalkMe will begin collecting data.

Install the Package

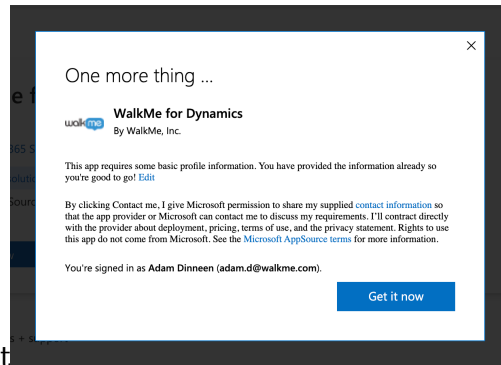
Install from Microsoft AppSource

Note

- These steps must be performed by a Dynamics System Administrator
- The package must be installed in every Dynamics environment you need WalkMe in
- You do not need to install the package if you are planning on using the WalkMe extension
- Make sure you send your customer their WalkMe system GUID, as it is required during package configuration

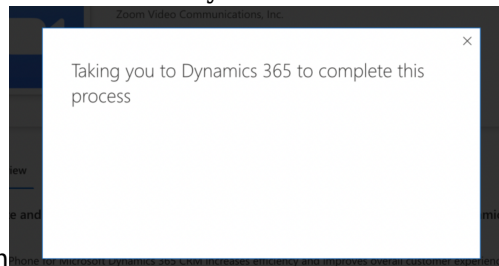
1. Go to the [WalkMe AppSource page](#) and click **Get it now**





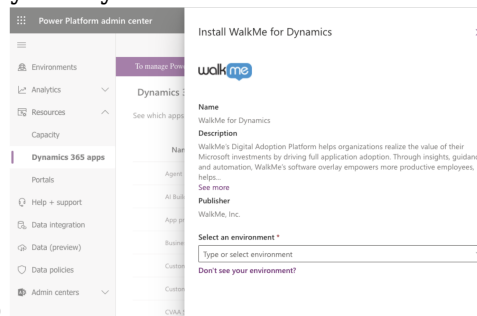
2. Accept the consent

3. You will be taken to the Dynamics 365 Power Platform Admin Center to complete the



installation

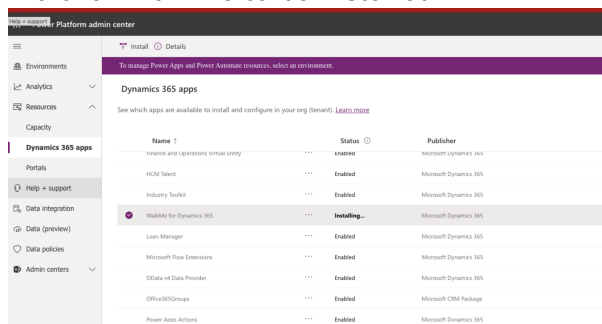
- **Note:** You may need to sign in to your Dynamics admin account first.



4. Choose which environment to install to

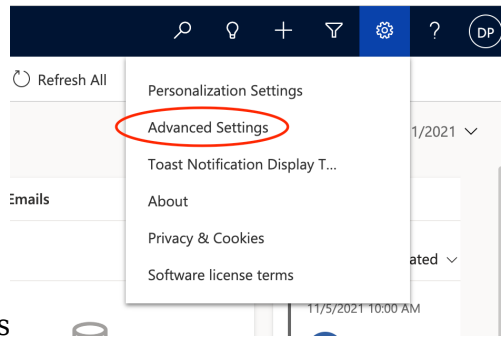
- **Tip:** Usually Production or Sandbox

5. Wait for WalkMe to be installed

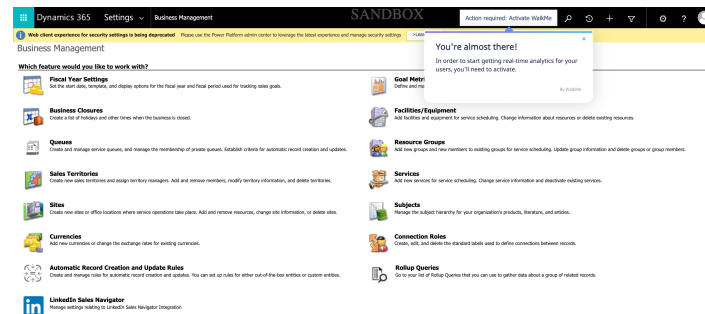


6.

Once installed go to **Settings > Advanced**



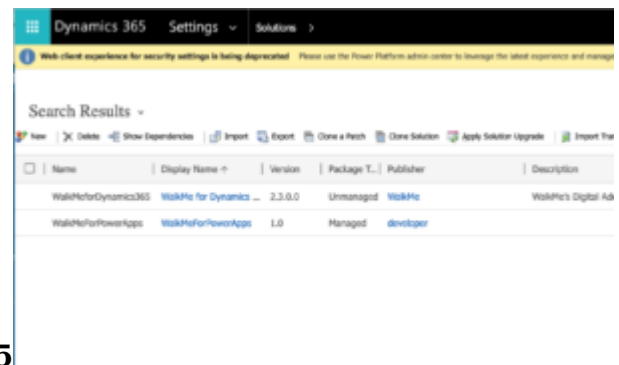
Settings inside Dynamics



7. You will be prompted to activate

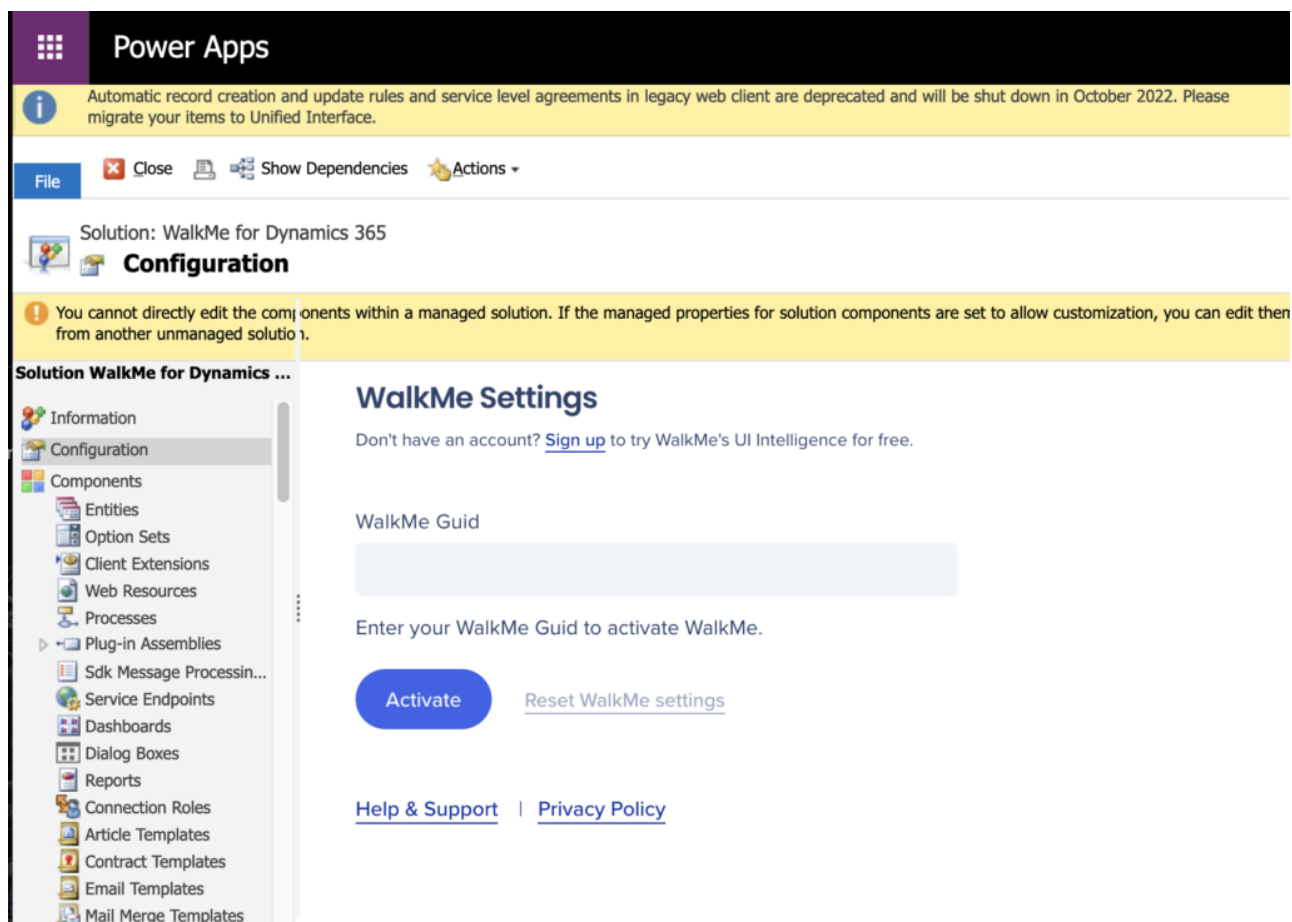
- To activate manually:

1. Click **Settings > Solutions**



2. Click on **WalkMe for Dynamics 365**

8. Enter your WalkMe Guid to activate



Power Apps

Automatic record creation and update rules and service level agreements in legacy web client are deprecated and will be shut down in October 2022. Please migrate your items to Unified Interface.

File Close Show Dependencies Actions

Solution: WalkMe for Dynamics 365

Configuration

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 from another unmanaged solution.

Solution WalkMe for Dynamics ...

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processin...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates

WalkMe Settings

Don't have an account? [Sign up](#) to try WalkMe's UI Intelligence for free.

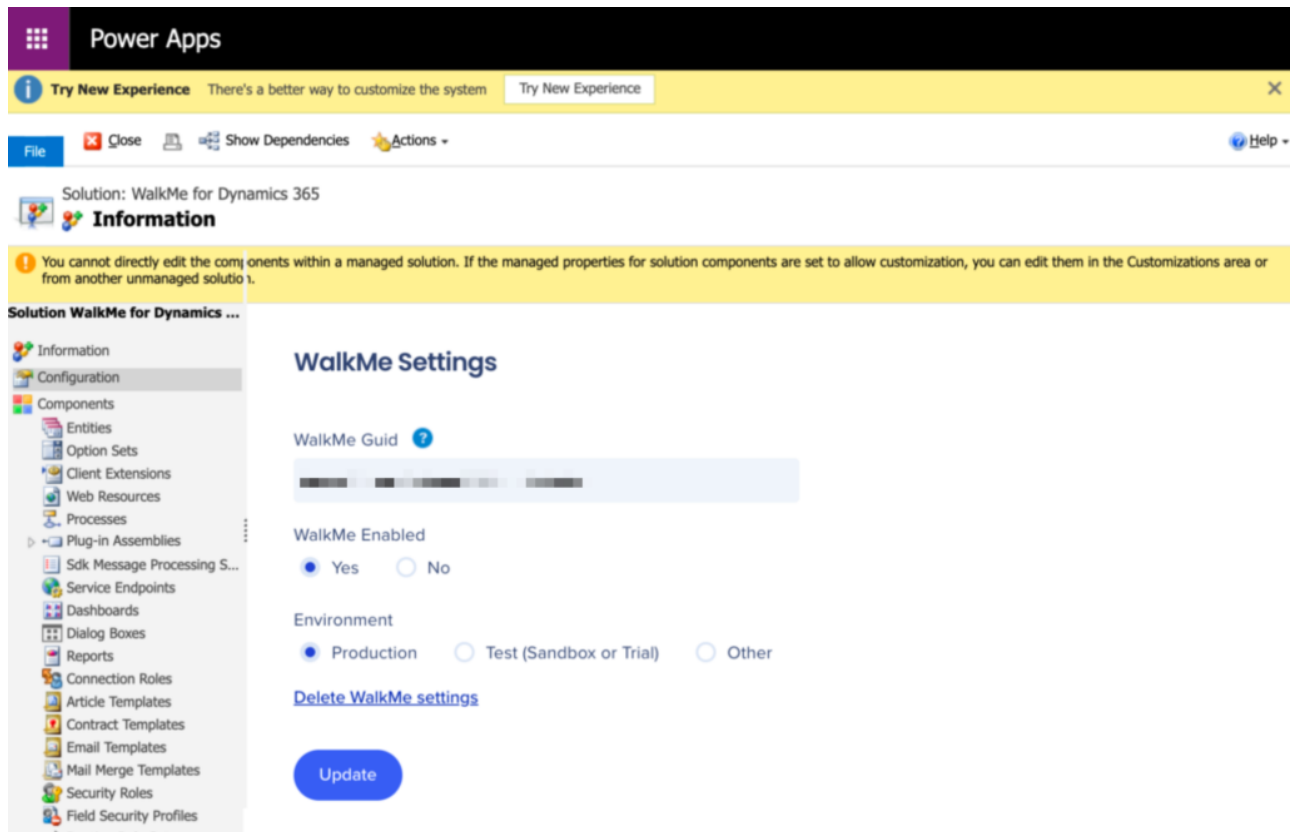
WalkMe Guid

Enter your WalkMe Guid to activate WalkMe.

[Activate](#) [Reset WalkMe settings](#)

[Help & Support](#) | [Privacy Policy](#)

9. Once activated, you can adjust your configuration as needed



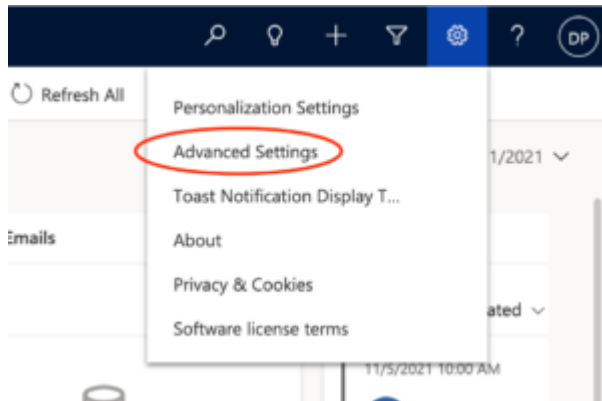
You're done! Now any published items will appear to your users.

Install from Solution zip file

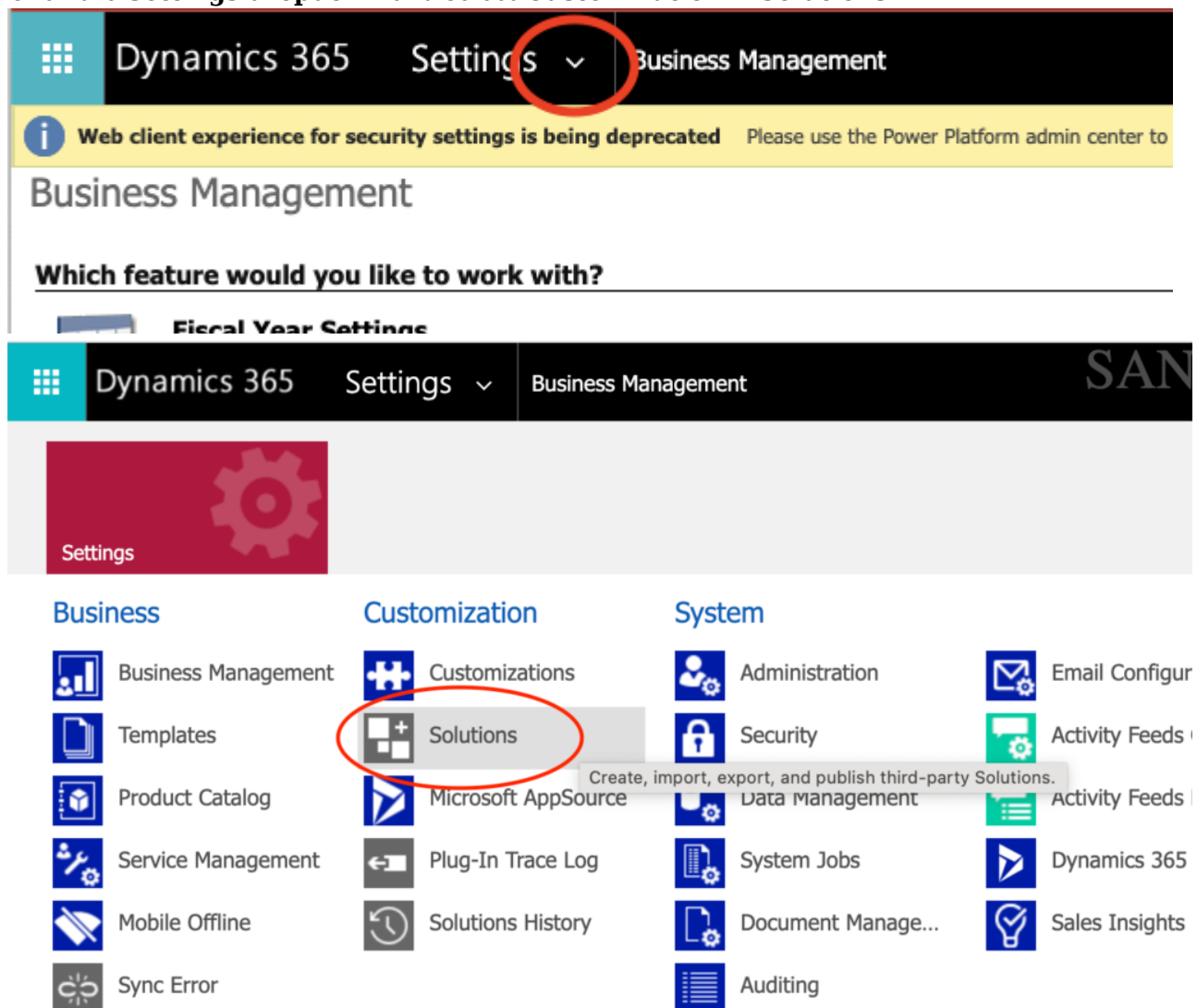
Note

- These steps must be performed by a Dynamics System Administrator
- The package must be installed in every Dynamics environment you need WalkMe in
- You do not need to install the package if you are planning on using the WalkMe extension
- Make sure you send your customer their WalkMe system GUID, as it is required during package configuration

1. Download the latest version of the package ZIP file
 - [Download Link](#)
2. Go to **Settings > Advanced Settings** inside Dynamics



3. Click the **Settings dropdown** and select **Customization > Solutions**



4. From the toolbar, select **Import**

Dynamics 365 Settings Solutions

All Solutions

New Delete Show Dependencies **Import** Export Clone a Patch

More Actions

Name	Display Name	Version	Installed On
msdynce_CoreService...	Core Service Scheduling	9.0.21091...	10/3/2021
msdynce_CoreService...	Core Service Scheduling...	9.0.21091...	10/3/2021
msdynce_CSS_Helper	Core Service Scheduling...	9.0.21091...	10/3/2021
ResourceSchedulingC...	Resource Scheduling ...	1.1.7.211...	10/3/2021
MicrosoftDynamicsSch...	Universal Resource Sc...	3.12.52.4	10/3/2021

- **Note:** If you see that an older version of the WalkMe package is installed, make sure to delete it before moving on to the next step.

5. Browse and select the WalkMe package you downloaded, then click **Next**

Import Solution

wmdyn-packages-uat.crm4.dynamics.com/tools/solution/import/SolutionImportWizard.aspx

Select Solution Package

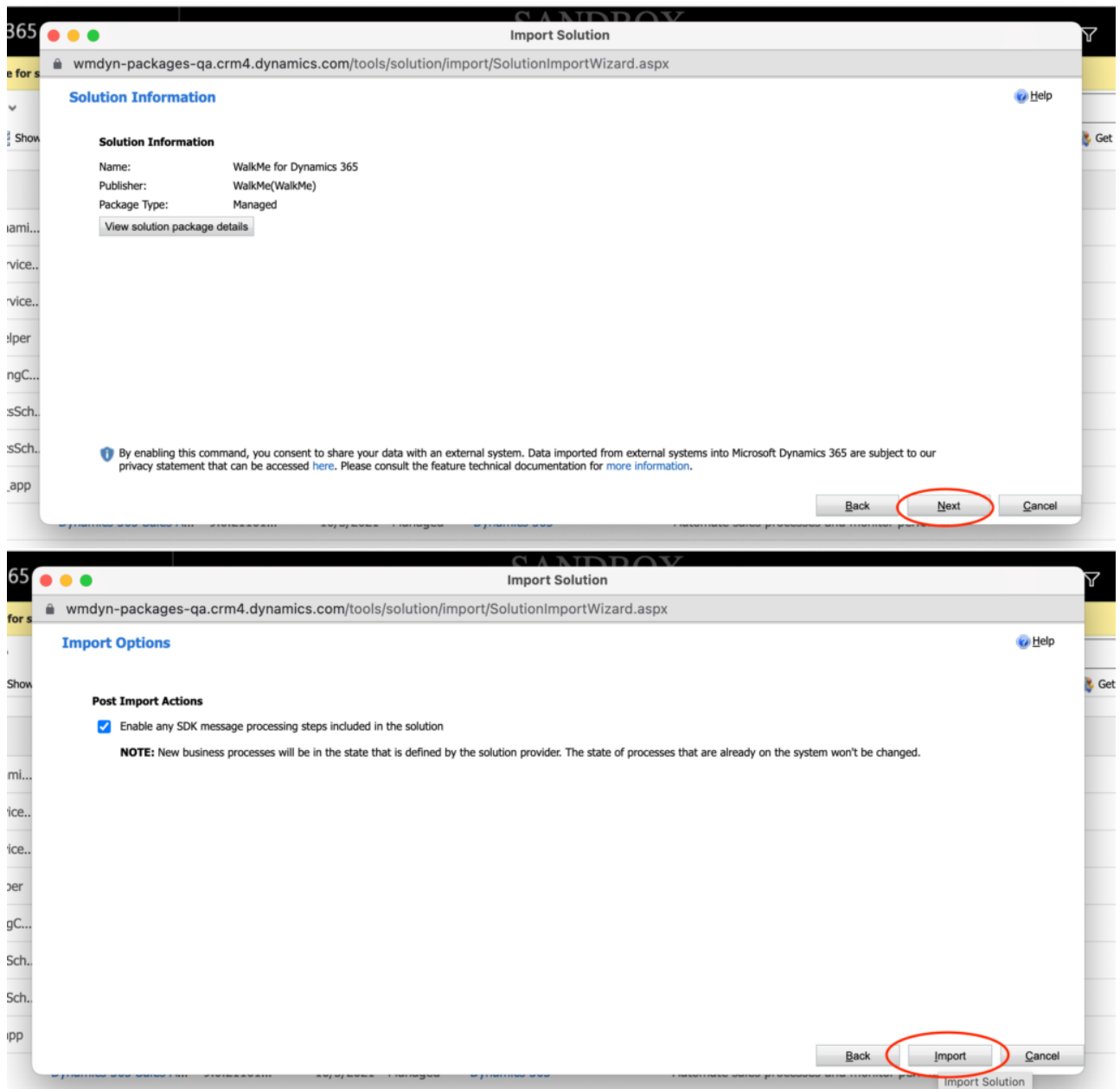
Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

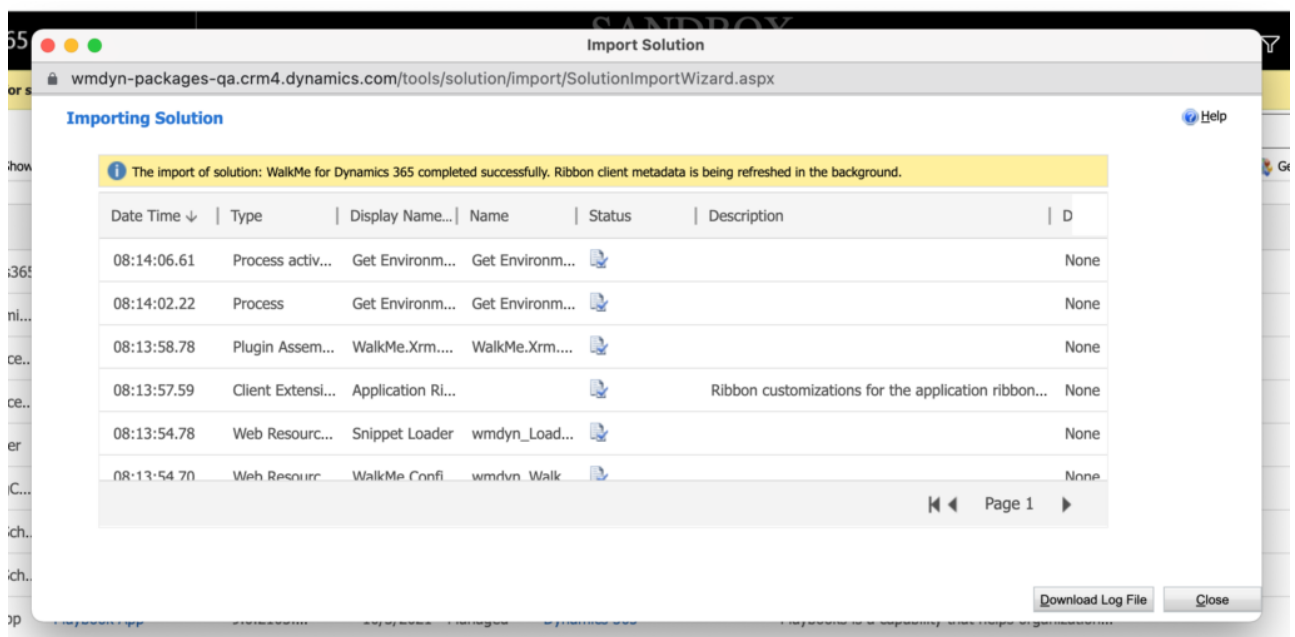
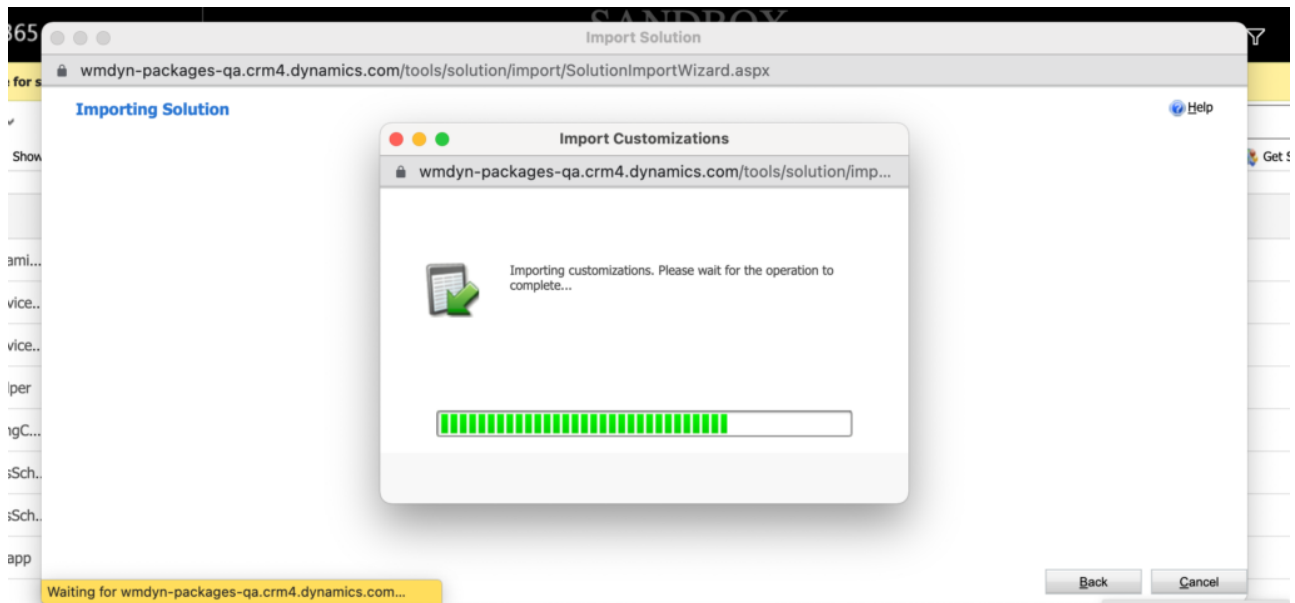
Choose file WalkMeforDynamics365_Managed.zip

Back Next Cancel

Power Apps Checker 1.2.0.122 10/3/2021 Managed Dynamics 365 Power Apps Checker promotes higher-quality m...

6. Follow the prompts to import the solution





- **Note:** After the import is complete, the installation is still processing some background tasks, because of that, it may take up to 10 minutes before you see any content appear.

7. From the Solutions page, click on **WalkMe for Dynamics 365**

Dynamics 365 Settings Solutions

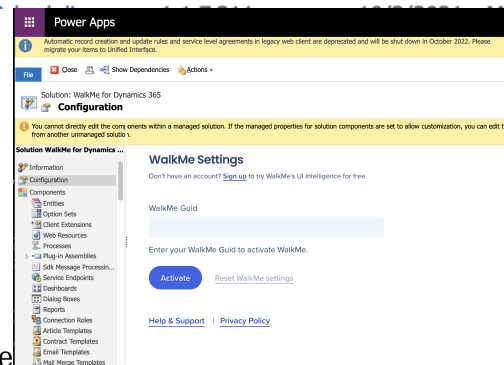
Web client experience for security settings is being deprecated Please use the Power Platform admin center to leverage the latest

All Solutions

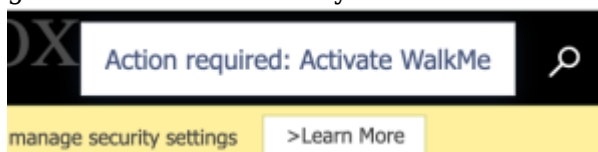
New Delete Show Dependencies Import Export Clone a Patch Clone Solution Apply Solution

More Actions

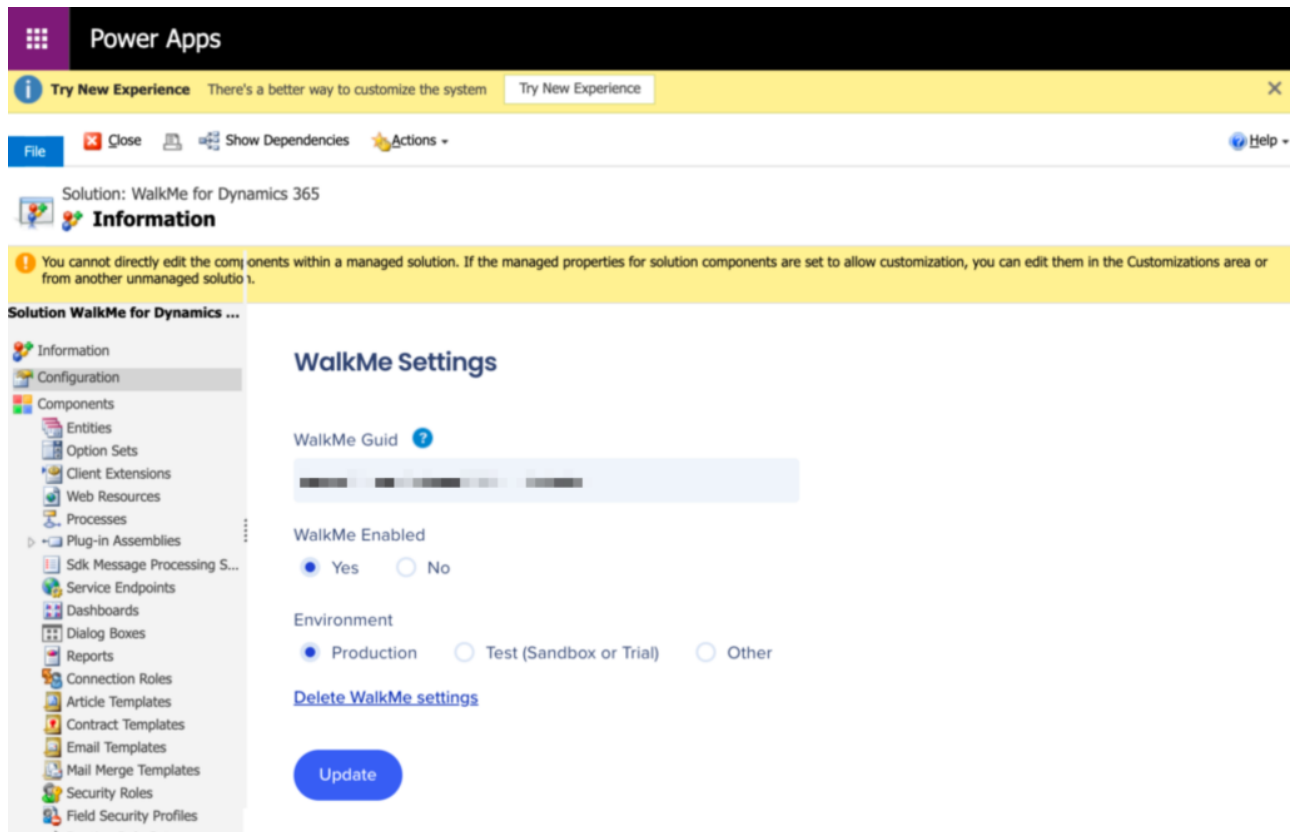
<input type="checkbox"/>	Name	Display Name	Version	Installed On	Package T...	Publisher
<input type="checkbox"/>	WalkMeforDynamics365	WalkMe for Dynamics	2.0.0.3	11/8/2021	Managed	WalkMe
	msdynce_CoreService...	WalkMe for Dynamics 365 Core Service Scheduling	9.0.21091...	10/3/2021	Managed	Dynamics 365
	msdynce_CoreService...	Core Service Scheduling	9.0.21091...	10/3/2021	Managed	Dynamics 365
	msdynce_CSS_Helper	Core Service Scheduling	9.0.21091...	10/3/2021	Managed	MicrosoftCorporat



8. Enter your WalkMe Guid to activate
 - **Note:** Prior to activation, a default WalkMe snippet will be installed to help the Admin get started. This will only be shown to the Admin.



9. Once activated, you can adjust your configuration as needed



You're done! Now any published items will appear to your users.

Install older (1.x) package versions via Solution ZIP file (including On Premise)

Step 1) Download an installation package

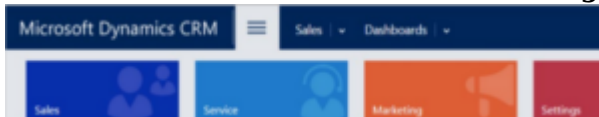
Choose from among the following per your version of Microsoft Dynamics:

Dynamics CRM Version	Link to Download Package
On Premise	WalkMe Dynamics Package 1.1.1 On Premise
9 regular UI + Unified User Interface	WalkMe Dynamics Package 1.1
8.1	WalkMe Dynamics Package 1.0.5+
8.0	WalkMe Dynamics Package 1.0.5

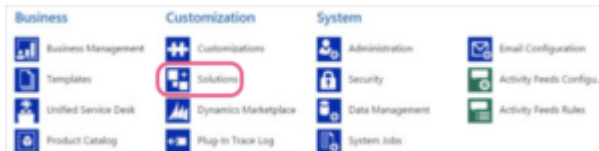
7.1	WalkMe Dynamics Package 1.0.3
6.1	WalkMe Dynamics Package 1.0.1

Step 2) Import the package to Microsoft Dynamics

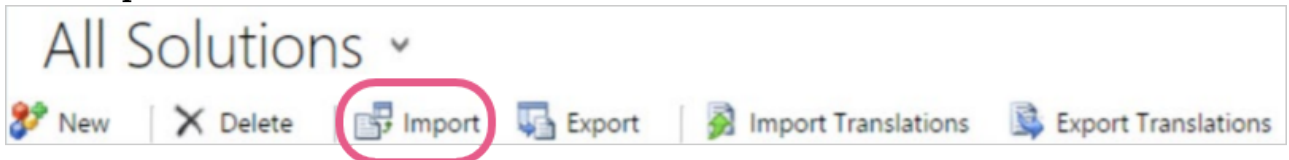
1. Log into Microsoft Dynamics with your admin credentials
2. Click the menu icon and hover over **Settings**



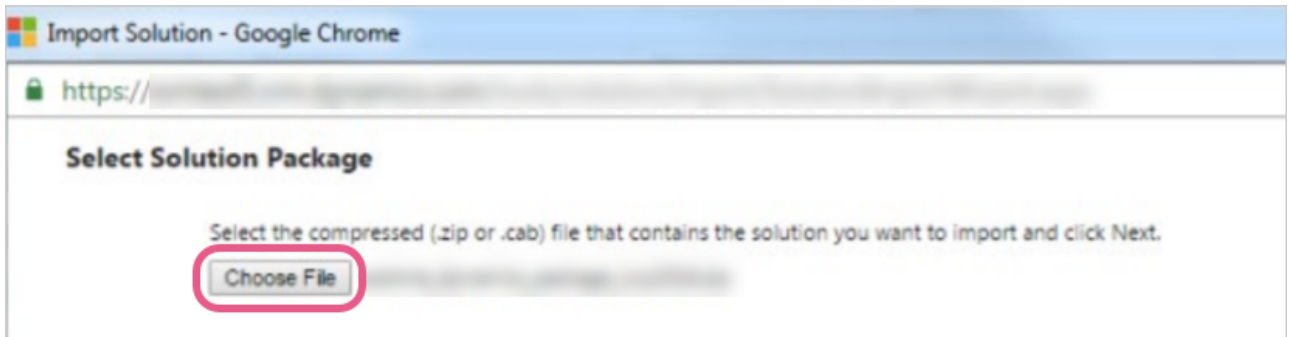
3. Under Customization, click **Solutions**



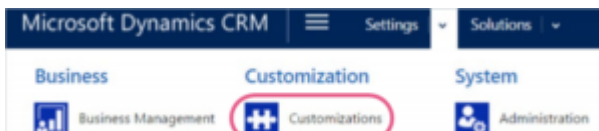
4. Click **Import**



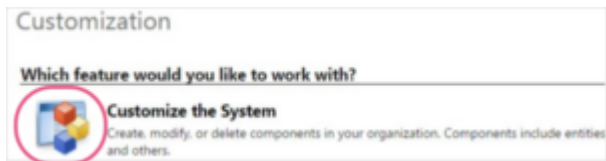
5. Click **Choose File**



6. Find the WalkMe Package file on your computer
7. Select the file and click **Import**
8. Once the import is complete, click **Close**
9. Click **Settings**
10. Click **Customizations**

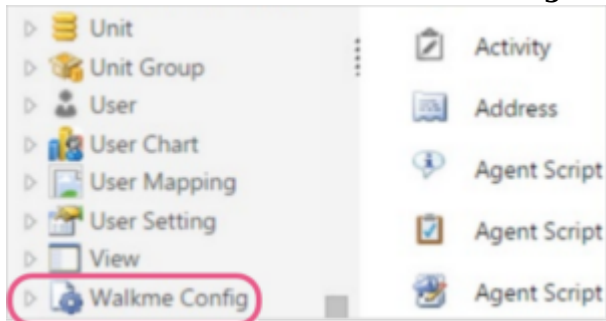


11. Click **Customize the System**

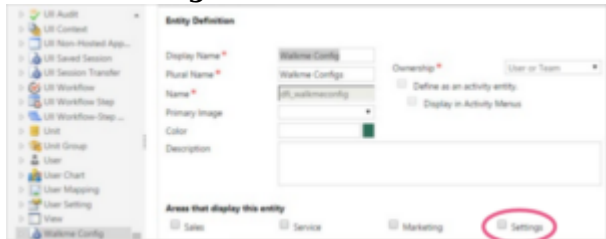


12. Expand Entities

13. In the left sidebar, click **WalkMe Config**



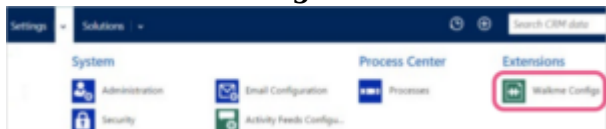
14. Check **Settings**



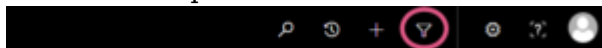
15. Click **Save and Publish**

Step 3) Set up the WalkMe package

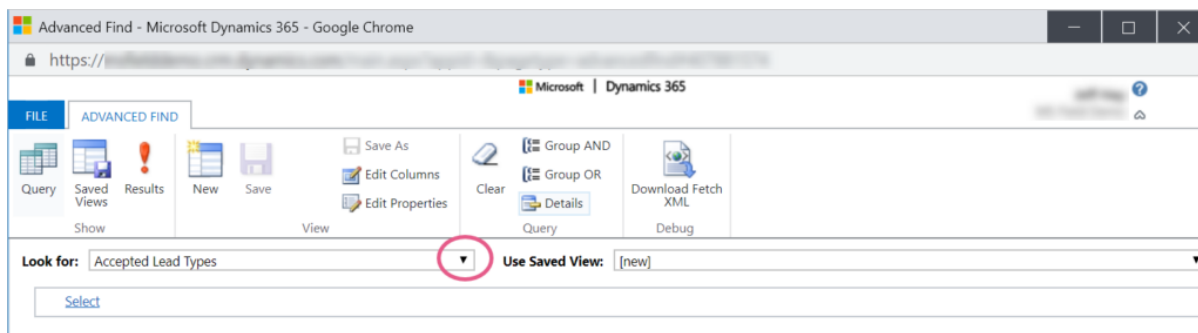
1. Refresh Microsoft Dynamics
2. Close the popup and refresh Microsoft Dynamics again
3. Click **Settings**
4. Click **WalkMe Configs**



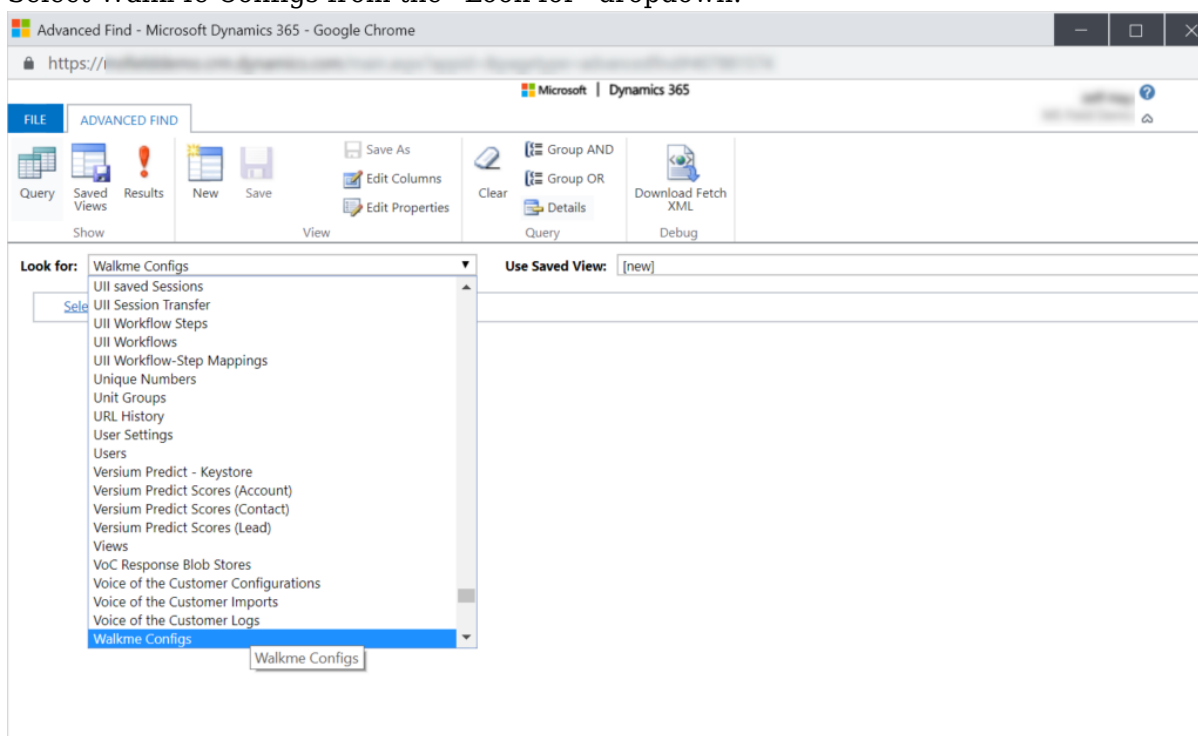
- **Important:** If the *WalkMe Configs* button does not appear, click the Advanced Funnel icon on the top bar:



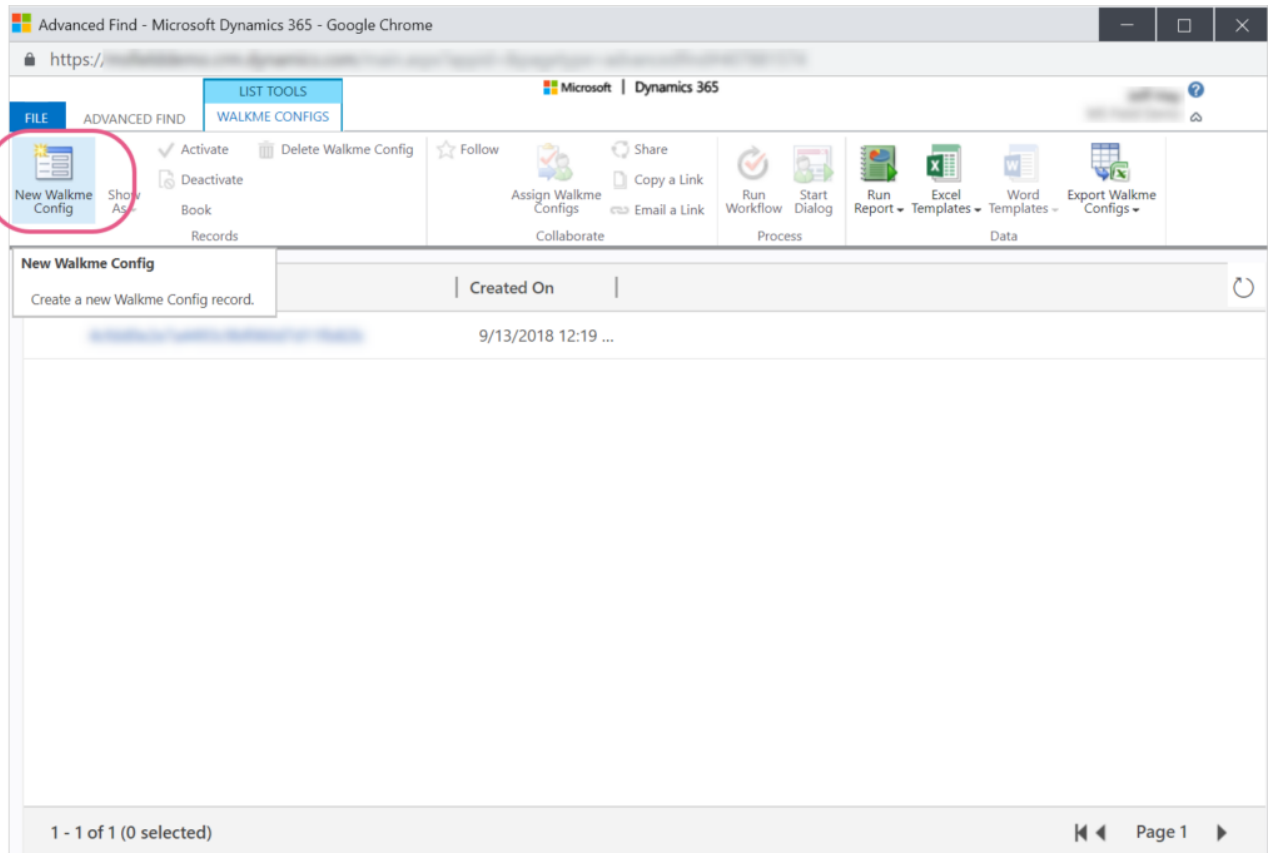
- Click on the dropdown arrow to the right of "Look for:"



- Select WalkMe Configs from the “Look for” dropdown:

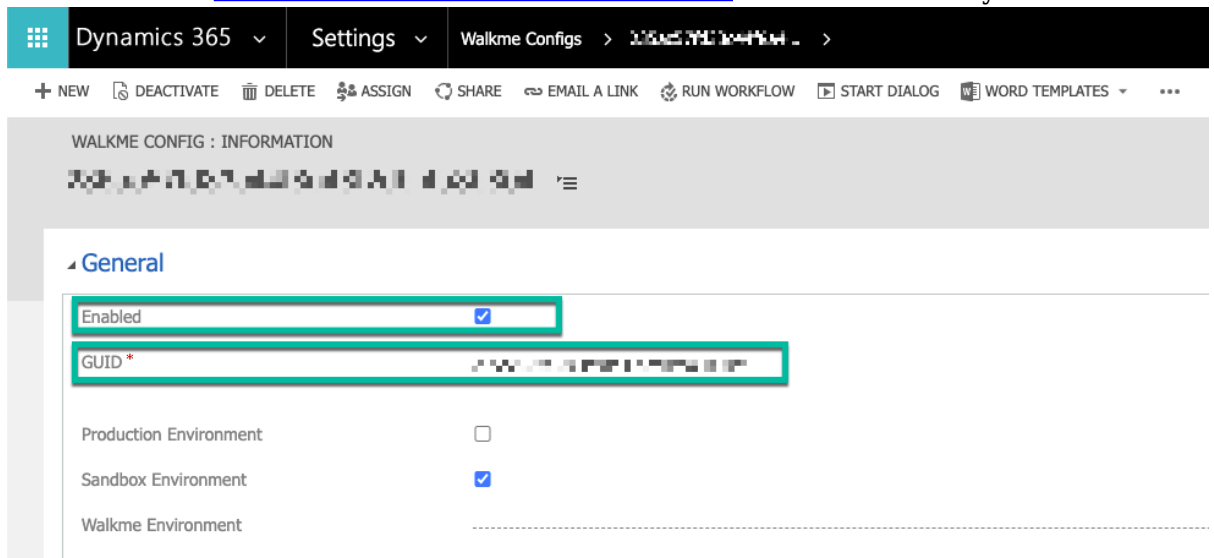


5. Click New WalkMe Config



6. Check the “**Enabled**” box and enter your WalkMe GUID

- See our article [How To Retrieve Your Account’s GUID](#) to learn to obtain your GUID

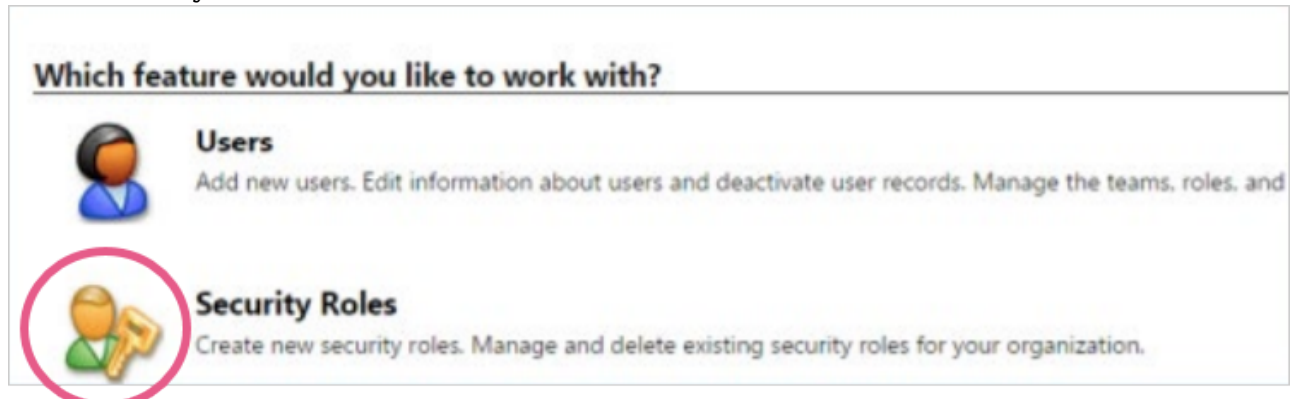


- Select **Production Environment** if using the WalkMe Production environment
- Select **Sandbox Environment** if using the WalkMe Test environment
- If you need to use any other WalkMe environment, enter the alternative WalkMe environment name into the WalkMe Environment text area
 - For example, “customEnv”

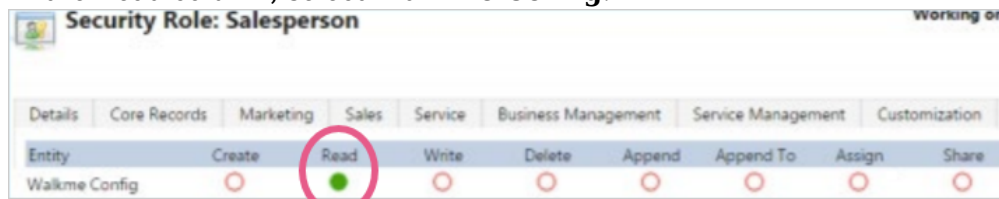
7. Click Save.

Step 4) Configure WalkMe to appear for all roles

1. Hover over Microsoft Dynamics CRM and click **Settings**
2. Click **Settings**
3. Click **Security**
4. Click **Security Roles**



5. Select a role that you wish WalkMe to use
6. Click the Custom Entities tab and switch on the “Enable” checkbox
7. In the Read column, select **WalkMe Config**.



8. Repeat this process for all desired roles

You're done! Now any published items will appear to your users.

Update the Package

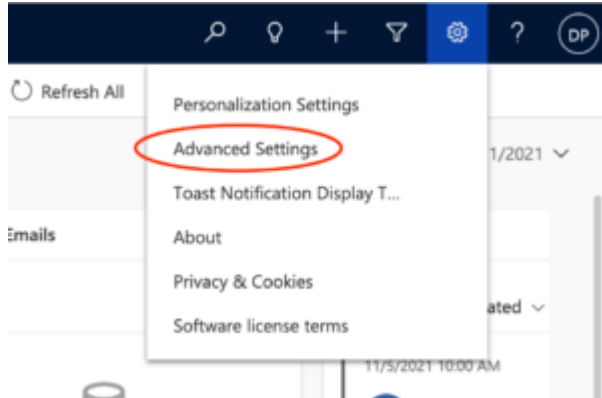
Upgrade from 1.x to 2.x

First install and configure the new package following the steps on this page. Ensure WalkMe is working as expected on the new version before removing the old package.

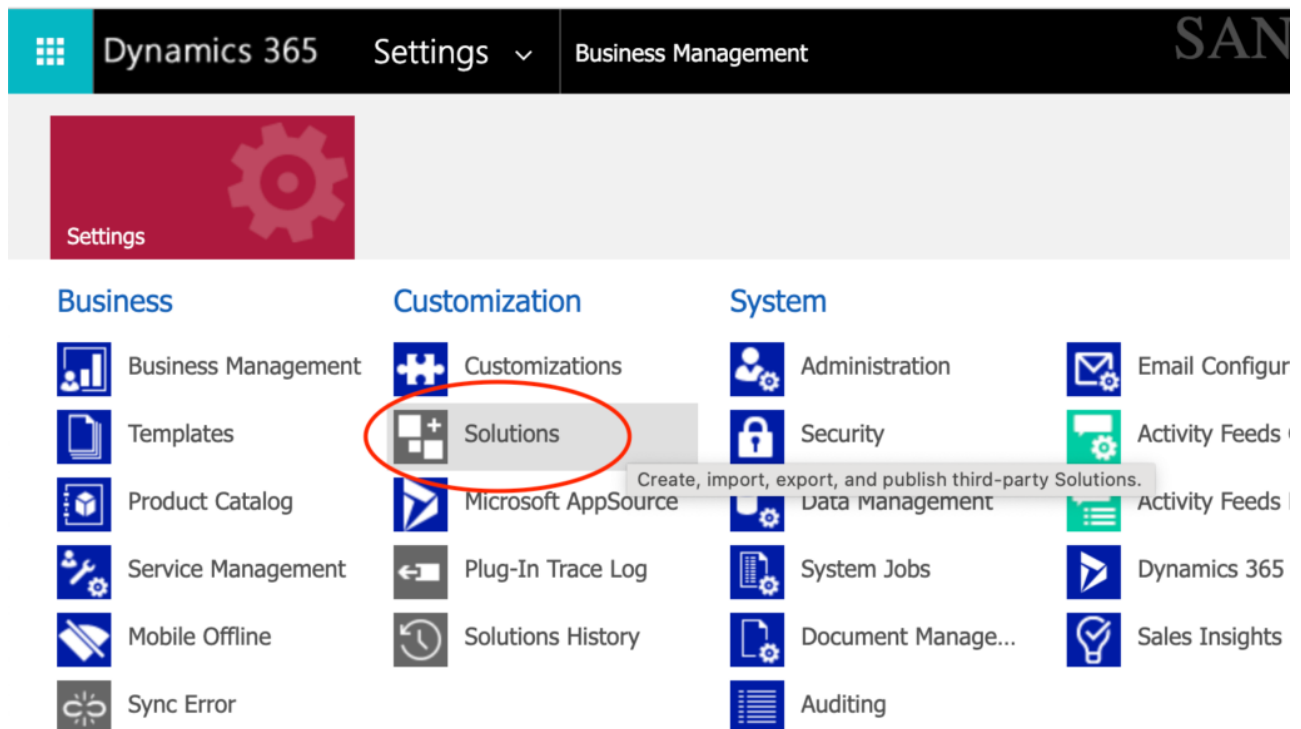
Upgrade from 2.x to 2.x

To update the 2.x package, you can install the new package on top of the old one!

1. Download the latest version of the package ZIP file
 - [Download Link](#)
2. Go to **Settings** > **Advanced Settings** inside Dynamics



3. Click the Settings dropdown and select **Customization** > **Solutions**



4. From the toolbar, select **Import**

Dynamics 365 Settings ▾ Solutions >

Web client experience for security settings is being deprecated Please use the Power Platform

All Solutions ▾

New |
 Delete |
 Show Dependencies |
 Import |
 Export |
 Clone a Patch

More Actions ▾

Import Solution

<input type="checkbox"/>	Name	Display Name	Version	Installed On ▾
	msdynce_CoreService...	Core Service Scheduling	9.0.21091...	10/3/2021
	msdynce_CoreService...	Core Service Scheduling...	9.0.21091...	10/3/2021
	msdynce_CSS_Helper	Core Service Scheduling...	9.0.21091...	10/3/2021
	ResourceSchedulingC...	Resource Scheduling ...	1.1.7.211...	10/3/2021
	MicrosoftDynamicsSch...	Universal Resource Sc...	3.12.52.4	10/3/2021

5. Browse and select the WalkMe package you downloaded, then click **Next**

Import Solution

wmdyn-packages-uat.crm4.dynamics.com/tools/solution/import/SolutionImportWizard.aspx

Select Solution Package

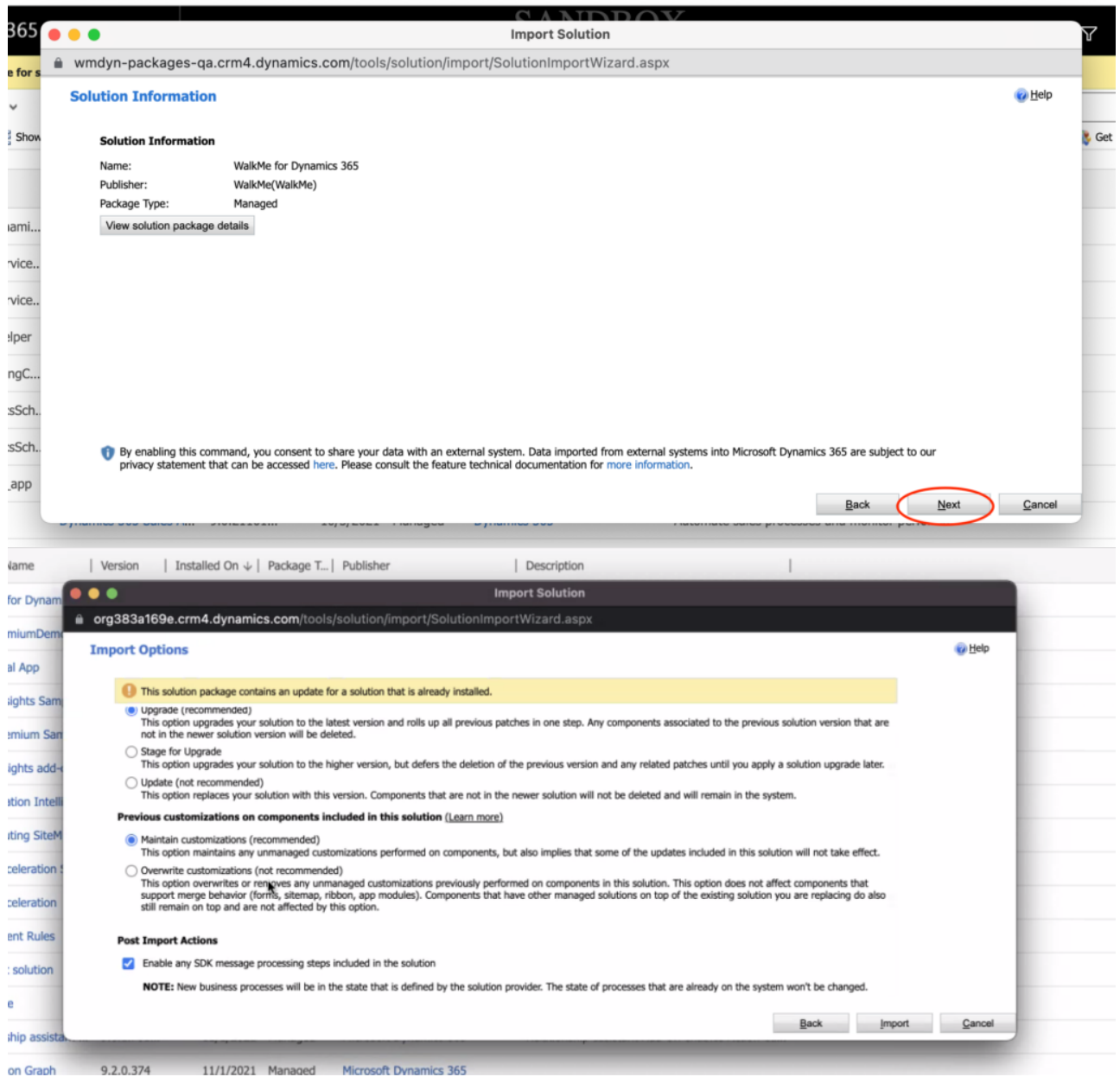
Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.

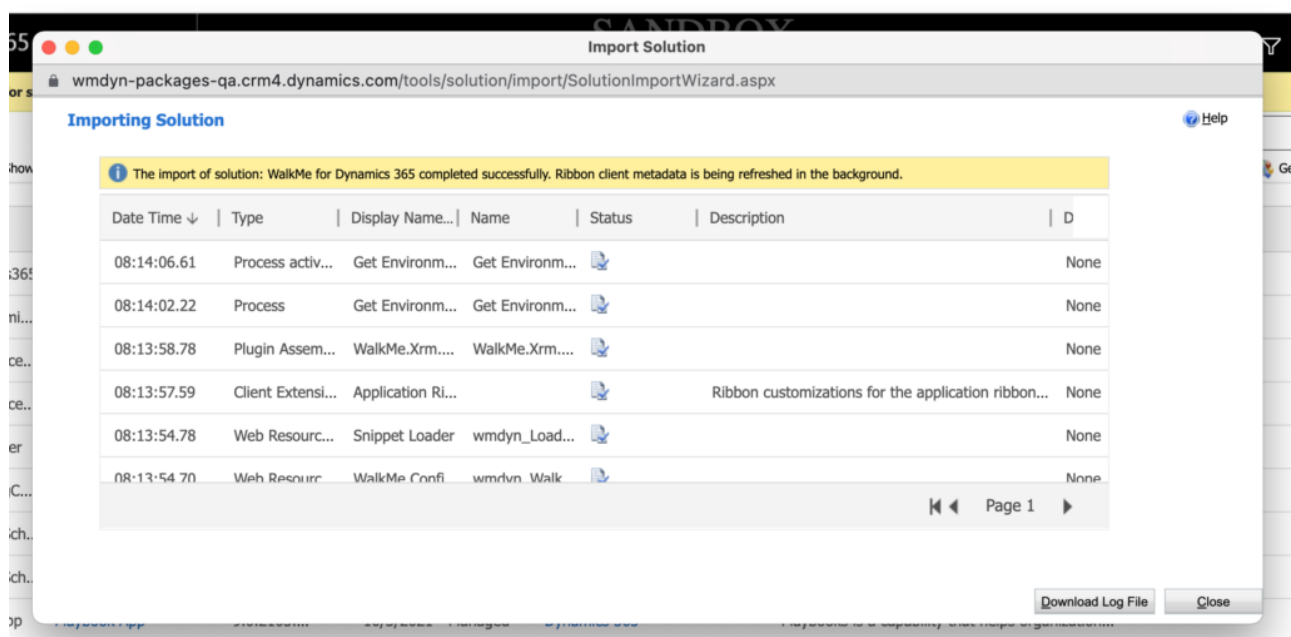
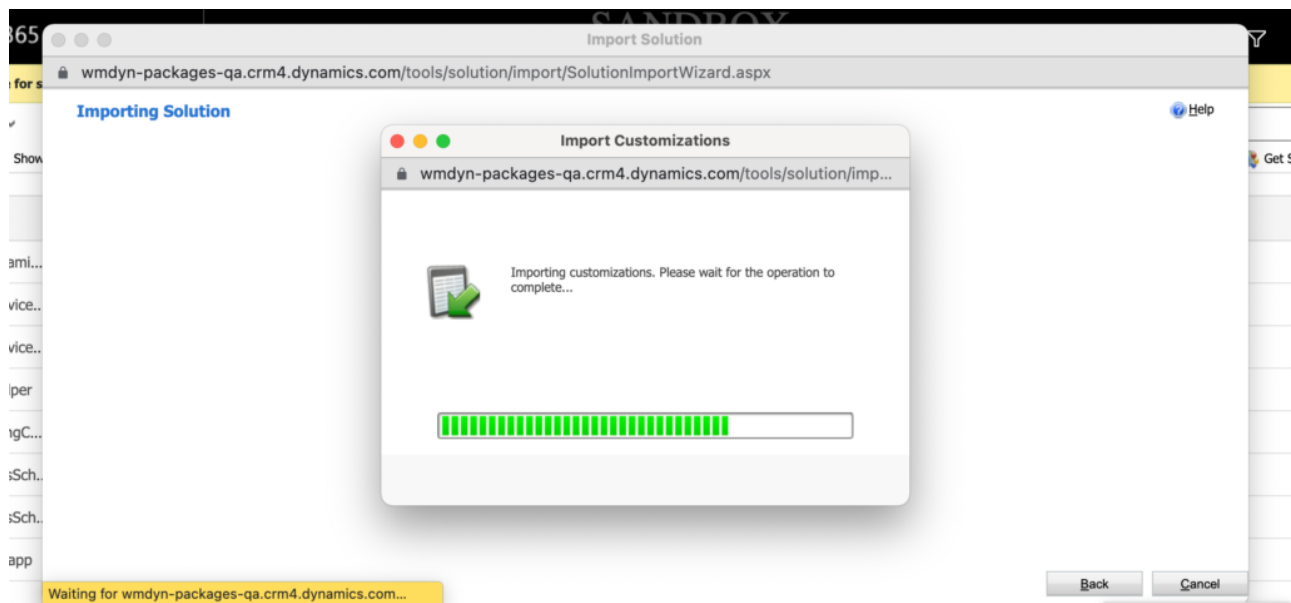
Choose file | WalkMeForDynamics365_Managed.zip

Back Next Cancel

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6. Follow the prompts to import the solution





Note

For Import Options, leave the defaults as-is:

- Upgrade
- Maintain Customizations
- Enable any SDK message

Get to Know & Use

Once deployed successfully, a Dynamics CRM administrator can configure WalkMe. To access the WalkMe package configuration as an administrator:

Configure 2.0 package

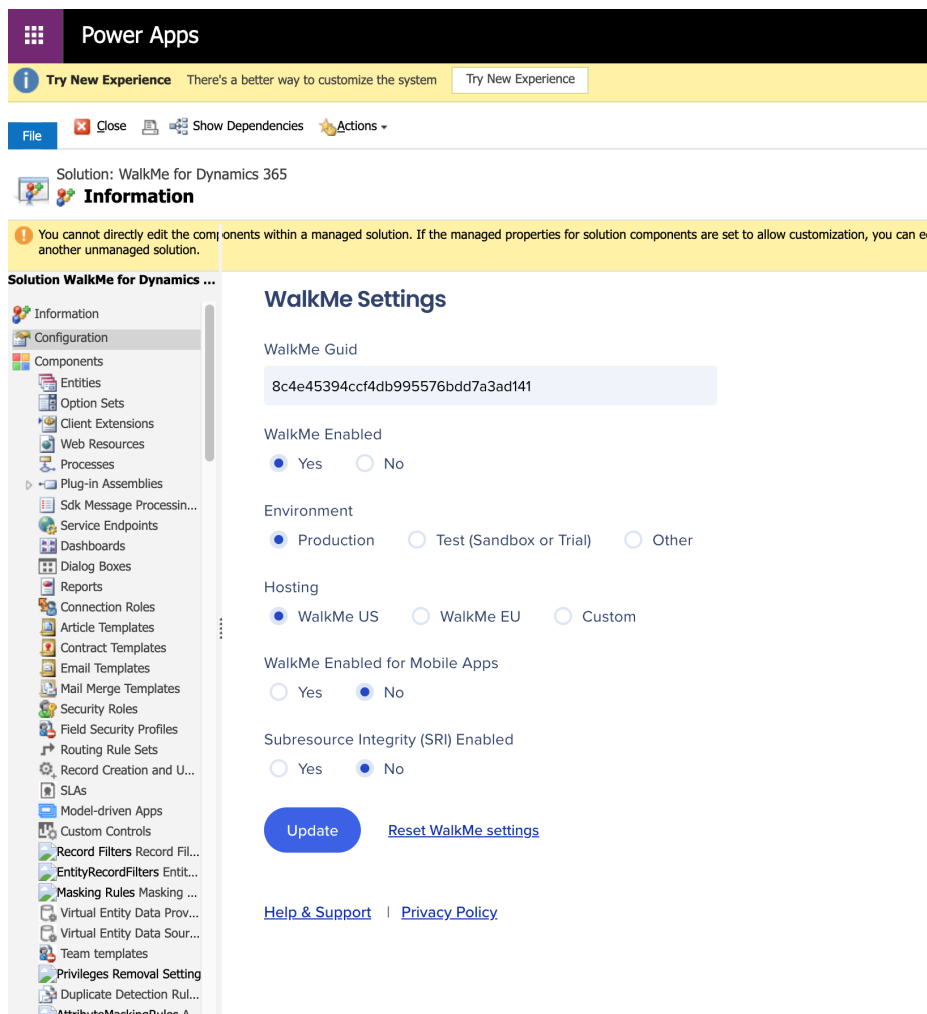
Note

Any configuration changes will not reflect until users do one of the following:

- Restart their browser
- Open Dynamics in a new tab
- Clear session storage (cache)
- Run the following command in the console: `_walkmePackage.clearConfig();`

Navigate to the configuration page:

- Click **Settings > Advanced Settings**
- Click the **Settings** dropdown and select **Customization > Solutions**
- Click **WalkMe for Dynamics 365**



Adjust the configuration as needed:

Settings

- **WalkMe Guid:** You will have received your Guid from WalkMe in an email. If not, contact your WalkMe CSM or DAC or WalkMe Support to request it
- **WalkMe Enabled:** Enables or disables WalkMe for all end users
- **Environment:** This should align with your WalkMe Editor environment (choose **Other** for any non-standard / custom environment, then you can enter the environment name)

Additional options

- **Hosting** (from ver 2.1): Choose US or EU data center, or self hosted
- **Mobile Apps Enabled** (from ver 2.3): Enables WalkMe to load (web version) on the Android and iOS mobile apps for Field Service and Dynamics
- **Subresource Integrity (SRI) Enabled** (from ver 2.2): For accounts configured with SRI

Other notes:

- For **Other** (custom) environments, you should use the custom environment name (i.e. 'dev', 'uat' etc) and ensure it is case sensitive

Configure older (1.x) package

Follow the [support article for installing the Dynamics package](#).