

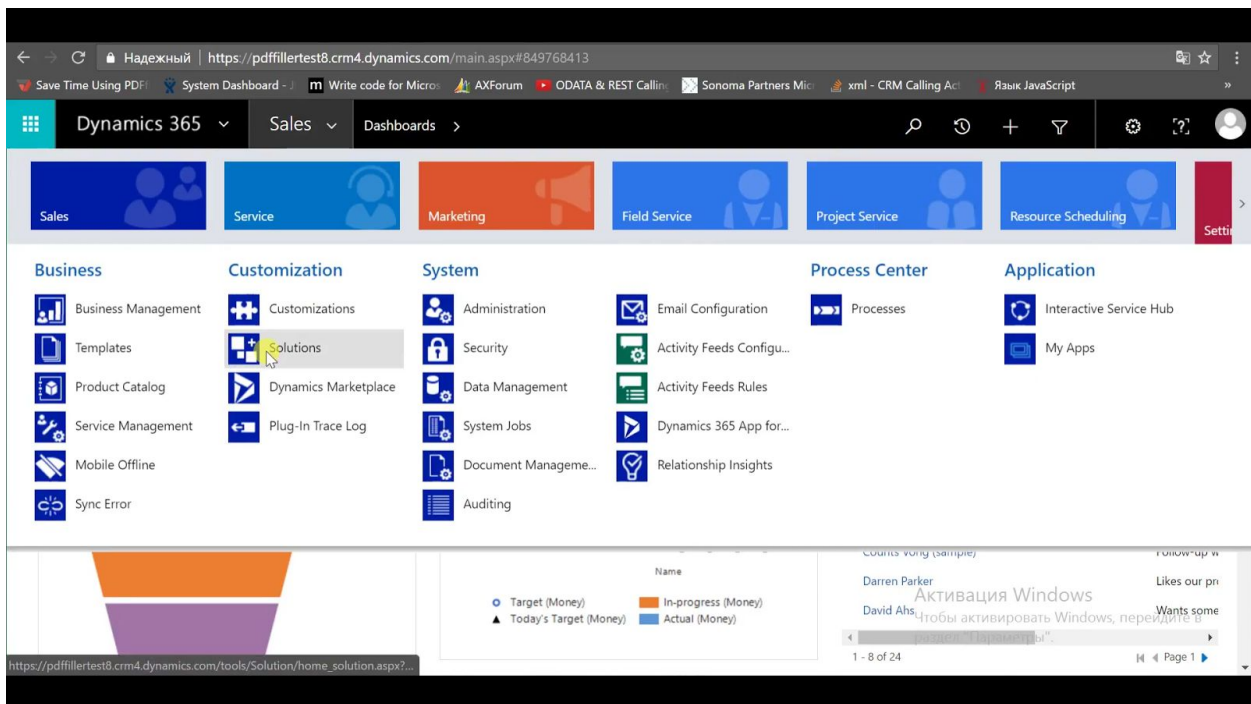


DaDaDocs installation

This tutorial demonstrates how to install DaDaDocs for MS Dynamics 365.

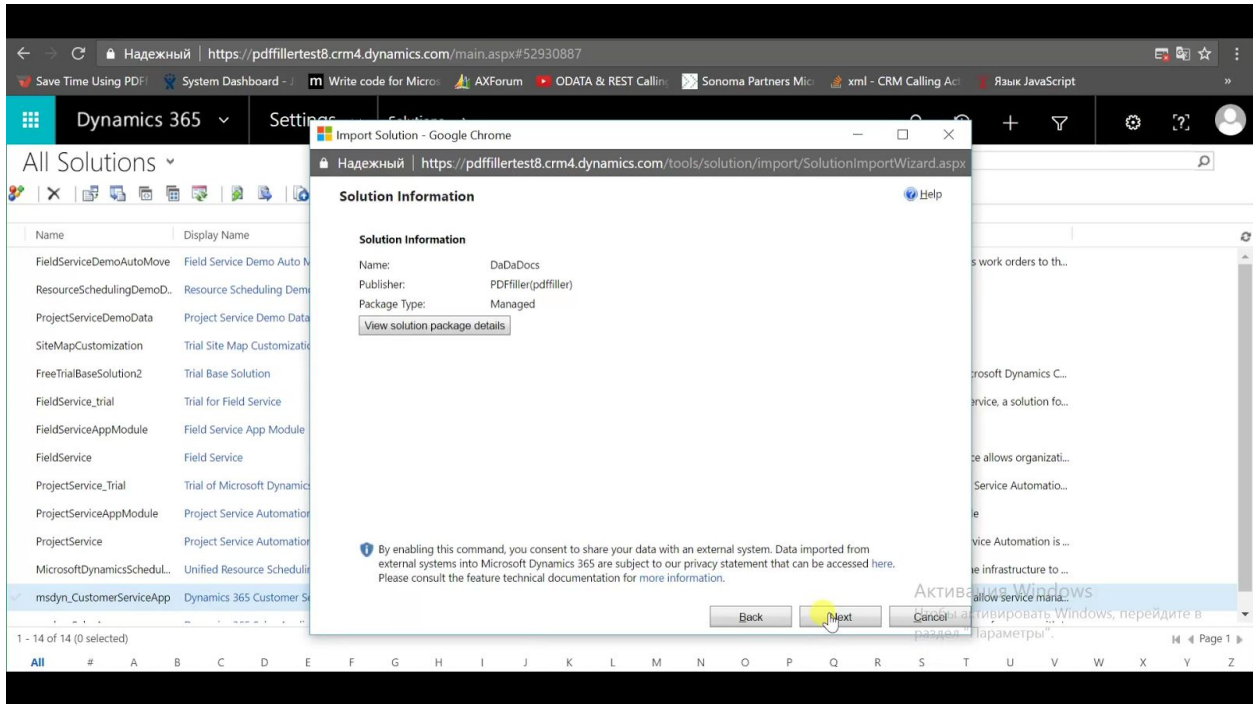
Begin by downloading DaDaDocs for Dynamics 365 [here](#)

Once the app is downloaded, open your Dynamics 365 dashboard and under the 'Settings' tab select 'Customization' and then **Solutions**:

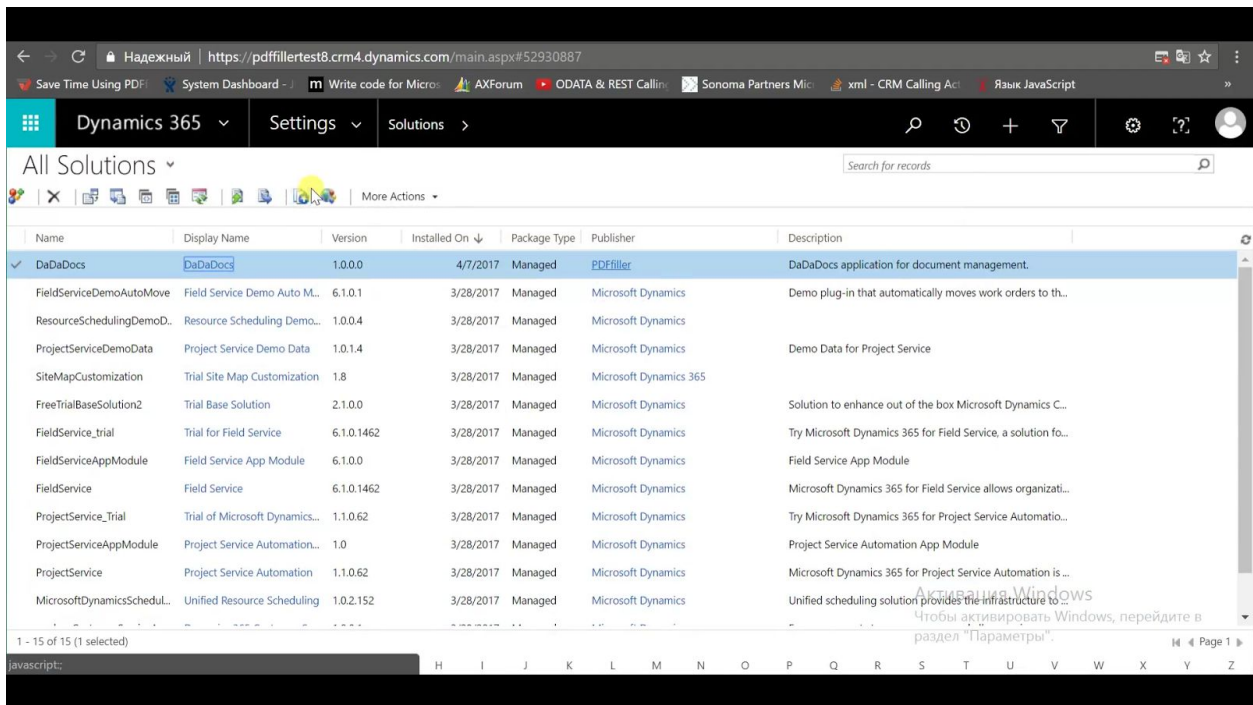


Import

1. Click the 'Import' button and select the dadadocs_managed.zip file:

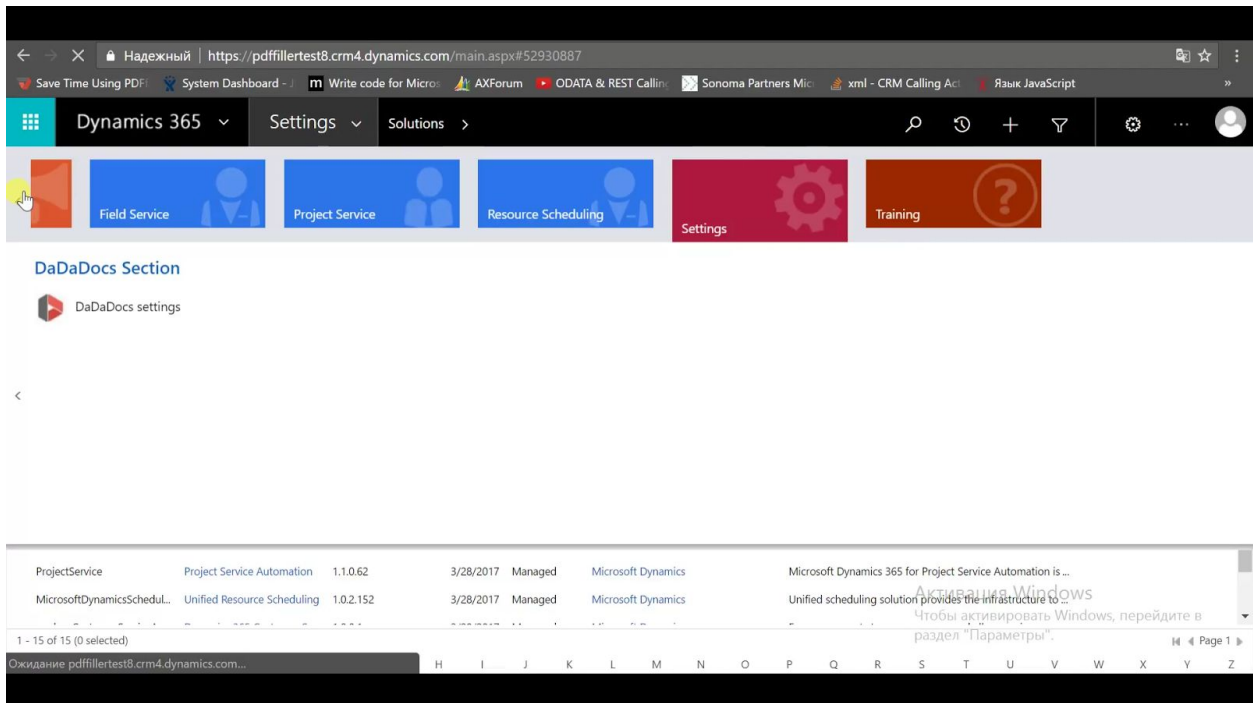


2. Once importation has completed, select your 'DaDaDocs' solution and click the **Publish All Customizations** option (publication may take a minute):



3. When Dynamics 365 has finished publishing, refresh the webpage to load the latest applied changes.

4. Proceed to your Dynamics 365 dashboard. Scroll right under the 'Settings' menu until you see the **DaDaDocs Section** (to confirm DaDaDocs was imported successfully).



Select Menu Object (ex: contact)

1. To use the DaDaDocs feature with a Dynamics 365 contact, simply return to your dashboard and under the 'Settings' tab select 'Sales' and then **Contacts**.

The screenshot shows the Dynamics 365 main dashboard. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below this are tiles for Sales, Service, Marketing, Field Service, Project Service, and Resource Scheduling. The main area is divided into sections: 'My Work' (Dashboards, What's New, Activities), 'Customers' (Accounts, Contacts), 'Sales' (Leads, Opportunities, Competitors), 'Collateral' (Quotes, Orders, Invoices, Products, Sales Literature), 'Marketing' (Marketing Lists, Quick Campaigns), 'Goals' (Goals, Goal Metrics, Rollup Queries), and 'Tool'. A table at the bottom lists various Microsoft Dynamics components:

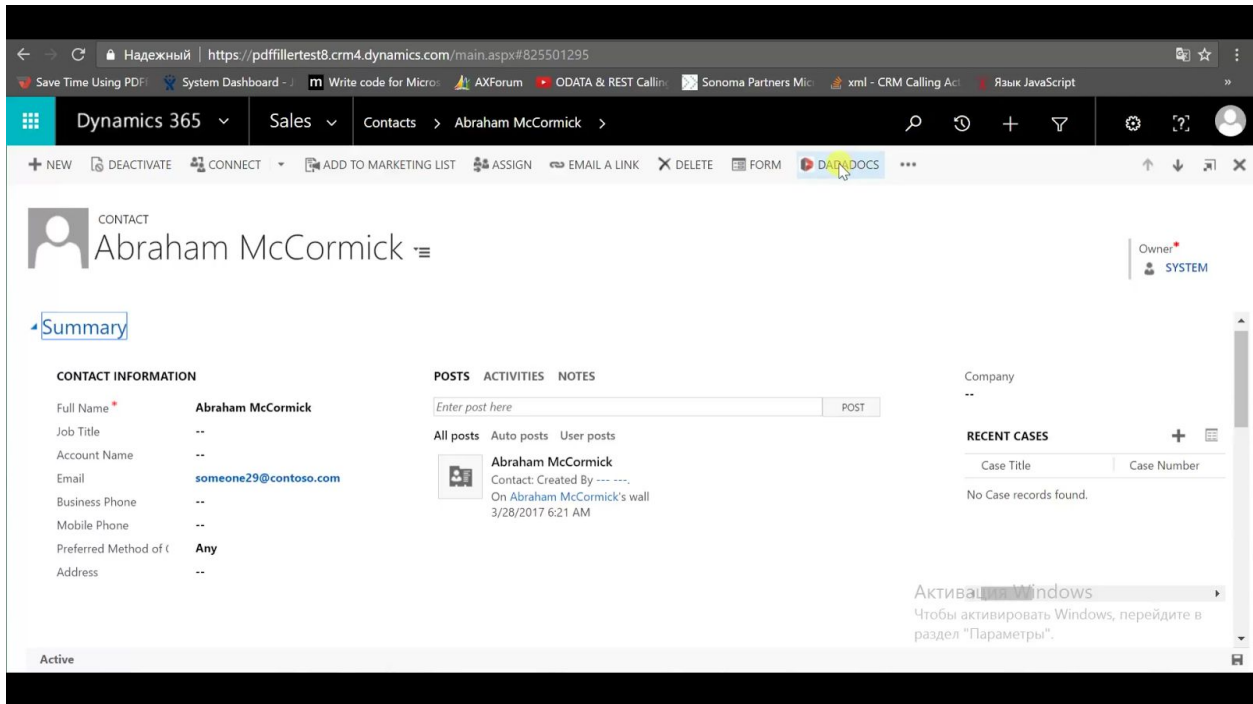
Component Name	Version	Date	Status	Provider	Description
ProjectService_Trial	1.1.0.62	3/28/2017	Managed	Microsoft Dynamics	Try Microsoft Dynamics 365 for Project Service Automatio...
ProjectServiceAppModule	1.0	3/28/2017	Managed	Microsoft Dynamics	Project Service Automation App Module
ProjectService	1.1.0.62	3/28/2017	Managed	Microsoft Dynamics	Microsoft Dynamics 365 for Project Service Automation is ...
MicrosoftDynamicsSchedul...	1.0.2.152	3/28/2017	Managed	Microsoft Dynamics	Unified scheduling solution provides the infrastructure to ...

2. Select which contact you would like to use the DaDaDocs feature for.

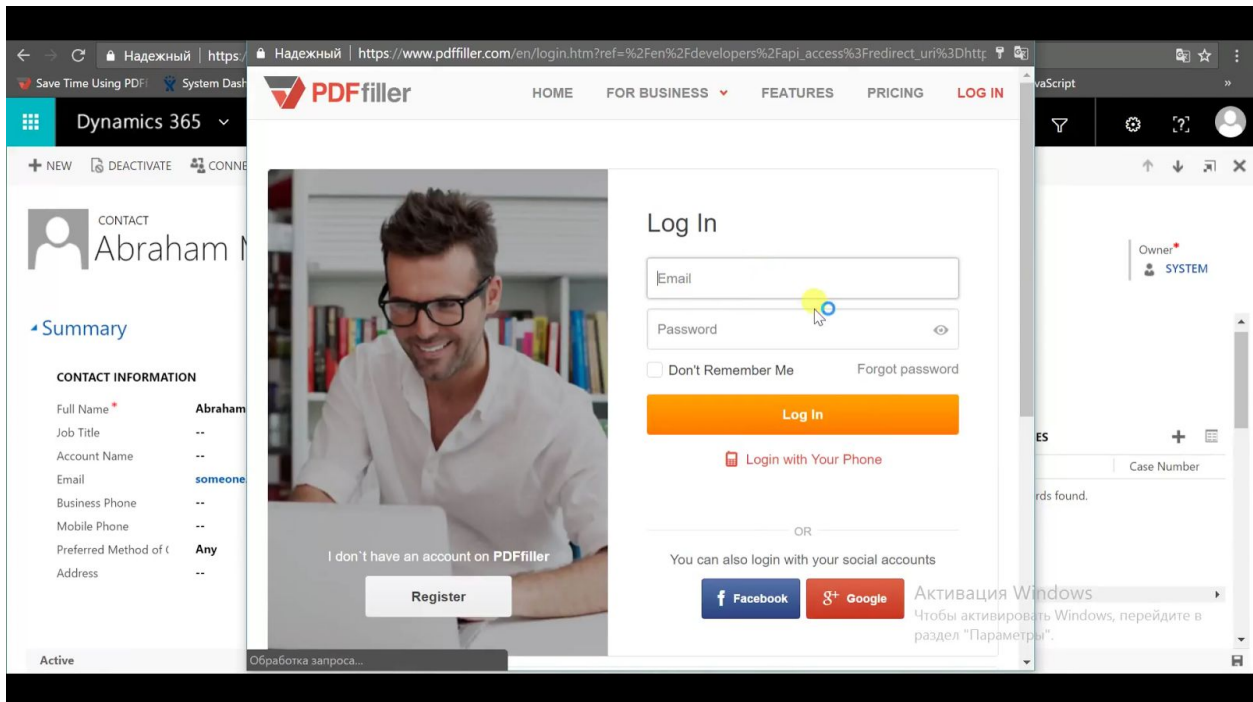
The screenshot shows the 'Active Contacts' list in Dynamics 365. The list is displayed in a table format with the following columns: Full Name, Email, Company Name, Business Phone, Owner, Address 1: City, Address 1: Country/Region, and Klout Score. The first record, 'Abraham McCormick', is highlighted. Other contacts include Adrian Dumitrascu, Adrienne McMillan, Alex Simmons, Alex Wu, Alexis Fry, Allan Saddler, Allison Brown, Allison Dickson, Amie Gonzales, Amos Conger, Andrew Book, Andrew Dixon, and Angelo Razo.

Full Name	Email	Company Name	Business Phone	Owner	Address 1: City	Address 1: Country/Region	Klout Score
Abraham McCormick	someone29@contoso.com			SYSTEM			
Adrian Dumitrascu	Adrian@adventure-works.c...	Adventure Works	768-555-0156	SYSTEM	Johannesburg	South Africa	
Adrienne McMillan				SYSTEM			
Alex Simmons	george@graphicdesigninst...	Graphic Design Institute	1-555-555-5554	Jamie Reding (Sa...	Redmond	US	
Alex Wu	alex.wu@outlook.com	Northwind Traders	555-123-4879	Allie Bellew (Sam...	Columbus	US	
Alexis Fry				SYSTEM			
Allan Saddler				SYSTEM			
Allison Brown	info@thephone-company.c...	The Phone Company	1-555-555-5555	Allie Bellew (Sam...	Birmingham	USA	
Allison Dickson	someone32@contoso.com			SYSTEM			
Amie Gonzales				SYSTEM			
Amos Conger				SYSTEM			
Andrew Book				SYSTEM			
Andrew Dixon	andrew@litware.com	Litware	555-789-8856	Allie Bellew (Sam...	Dallas	USA	
Angelo Razo				SYSTEM			

3. Upon opening the contact you should now have access to the DaDaDocs feature. Be sure to allow pop-ups in your browser so that the DaDaDocs editor can initialize.



4. Once pop-ups have been allowed you just need to login to your PDFfiller account.



Be sure to confirm that the DaDaDocs menu feature is present in all Dynamics 365 objects.