# Versium Predict Setup Guide: Microsoft Dynamics 365 and Dynamics CRM

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Install Versium Predict

You can install Versium Predict in Microsoft Dynamics CRM 2016 or Dynamics 365 for Sales.

To install Versium Predict from AppSource

1. Sign in to a Dynamics CRM 2016 or Dynamics 365 account that has system administrator permissions and go to Settings.
2. Under Customization, select Dynamics Marketplace (or go directly to appsource.microsoft.com).
3. Under Categories, check Analytics.
5. Agree to the terms to start the install process.
6. Select the CRM organization to which you want to add Versium Predict, read and check the agreements, and then select Agree to complete the installation.

Uninstall Versium Predict

You can uninstall Versium Predict by removing the solution from Dynamics 365.

To uninstall Versium Predict

1. In Dynamics 365, go to Settings, and under Customization, select Solutions.
2. Select Versium Predict, and then select Delete.

For more information on removing a solution, see Dynamics 365 help.
Give Users Access to Versium Predict

To grant users access to Versium Predict, you may need to edit the custom or standard security roles assigned to those users.

To grant security role privileges

1. Sign in to Dynamics 365 as a system administrator.
2. In Dynamics 365, edit the security role that you want to grant permissions for Versium Predict to.
3. Make sure the role has the following minimum privileges, at any access level:

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Create</th>
<th>Read</th>
<th>Write</th>
<th>Delete</th>
<th>Append</th>
<th>Append To</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core Records tab</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Contact</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Lead</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
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<tr>
<td><strong>Marketing tab</strong></td>
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<tr>
<td>Marketing List</td>
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<td>Y</td>
<td>Y</td>
<td></td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td><strong>Business Management tab</strong></td>
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<tr>
<td>User</td>
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<tr>
<td><strong>Custom Entities tab</strong></td>
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</tr>
<tr>
<td>new_versiumscorecontact</td>
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</tr>
<tr>
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<tr>
<td>new_versiumscoreaccount</td>
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<td>Y</td>
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<td>Y</td>
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<td>Y</td>
</tr>
</tbody>
</table>
Authenticate Versium Predict

The first time you run Versium Predict, you may need to grant Predict permissions to access the CRM as you. Predict functionality requires these permissions to access your CRM records for generating predictive models, and add insights, scores, and validation grades to your CRM records.

This access is used to provide the integrated functionality of Predict. None of your data is sent outside your CRM, and you should only need to authenticate the first time you use Predict.

To authenticate Predict
1. Select Authenticate.
2. Review the permissions, and then select Accept.

Set up Custom Views in Dynamics 365

You can add the Predict Heads-Up view and Versium Predict Insights cards using Web Resources to Account, Lead, Contact, and Opportunity custom forms in Dynamics 365. The names of the Web Resources are shown in the table below:

<table>
<thead>
<tr>
<th>Predict View</th>
<th>Versium Predict Heads-Up</th>
<th>Versium Predict Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Resource</td>
<td>new_VersiumPredictHeadsup.html</td>
<td>new_VersiumPredictInsights.html</td>
</tr>
</tbody>
</table>

For details on how to add a web resource, see the procedure below, and the Dynamics help topic, Add or edit a form web resource.
To add the Versium Predict Heads-Up view or Insights cards to a custom form

1. Follow Add or edit a form web resource to open the entity to edit (for example, Lead), and then open Forms and pick or create a form to edit.

2. For Predict Insights cards only,
   a. From the Insert tab, insert a one-column tab.
   b. Double-click the tab and change the label to Versium Predict Insights.
   c. Select the section inside the newly-created tab.

   For the Heads-Up view, select a section with a width of no less than 115px near the top to add it to.


4. On the General tab, in Web resource, search for and select:
   - For the Heads-Up view, select new_VersiumPredictHeadsup.html
   - For Predict Insights cards, select new_VersiumPredictInsights.html

5. Under Field Name and Properties, enter a Name and Label.

6. Clear the Restrict cross-frame scripting, where supported box.

7. On the Formatting tab:
   a. Select One Column
   b. For the Headsup view, set the number of rows to 14.
      For Predict Insights cards, set the number of rows to 17
   c. Clear the Display Border box.

8. Select OK.

9. Repeat for the other section, if desired.