



North52 LaunchPad

The fun and free way to learn North52!



North52 Decision Suite Installation Guide

Learn more about North52 products at our [online knowledge base \(support.north52.com\)](https://support.north52.com)



[Launch BPA Knowledge Base](#)



[Launch TestShield Knowledge Base](#)



[Launch DP Knowledge Base](#)

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Install & Configuration

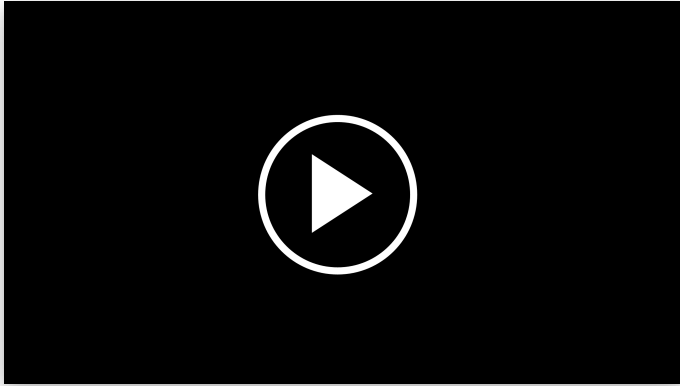
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Step 1: Install and Accept License

The North52 BPA solution can be downloaded from the following location:

<https://www.north52.com/business-process-activities/download-solution/>

The installation and configuration process is currently documented via the training video below:



[Open video on YouTube](#)

Step 2: Configure Security Roles

As part of the installation two security roles are created within your Dynamics 365 system:

- North52 BPA - Administrator
- North52 BPA - Standard

These security roles allow users to use formulas within the system. As a requirement ALL users of the system should have at least one of these roles assigned.

North52 BPA - Administrator

This security role is to be assigned to any users of the system that need to perform create/update/delete operations on formulas within the system.

North52 BPA - Standard

This is the standard security role which allows users to read formula data and therefore execute formulas when an action is carried out. This security role should be assigned to all users of the system that **do not** have the *North52 BPA - Administrator* role.

Note: When a user has the System Administrator role within Dynamics 365 then there is no requirement to assign one of the North52 BPA roles.

How to - Accept the license agreement

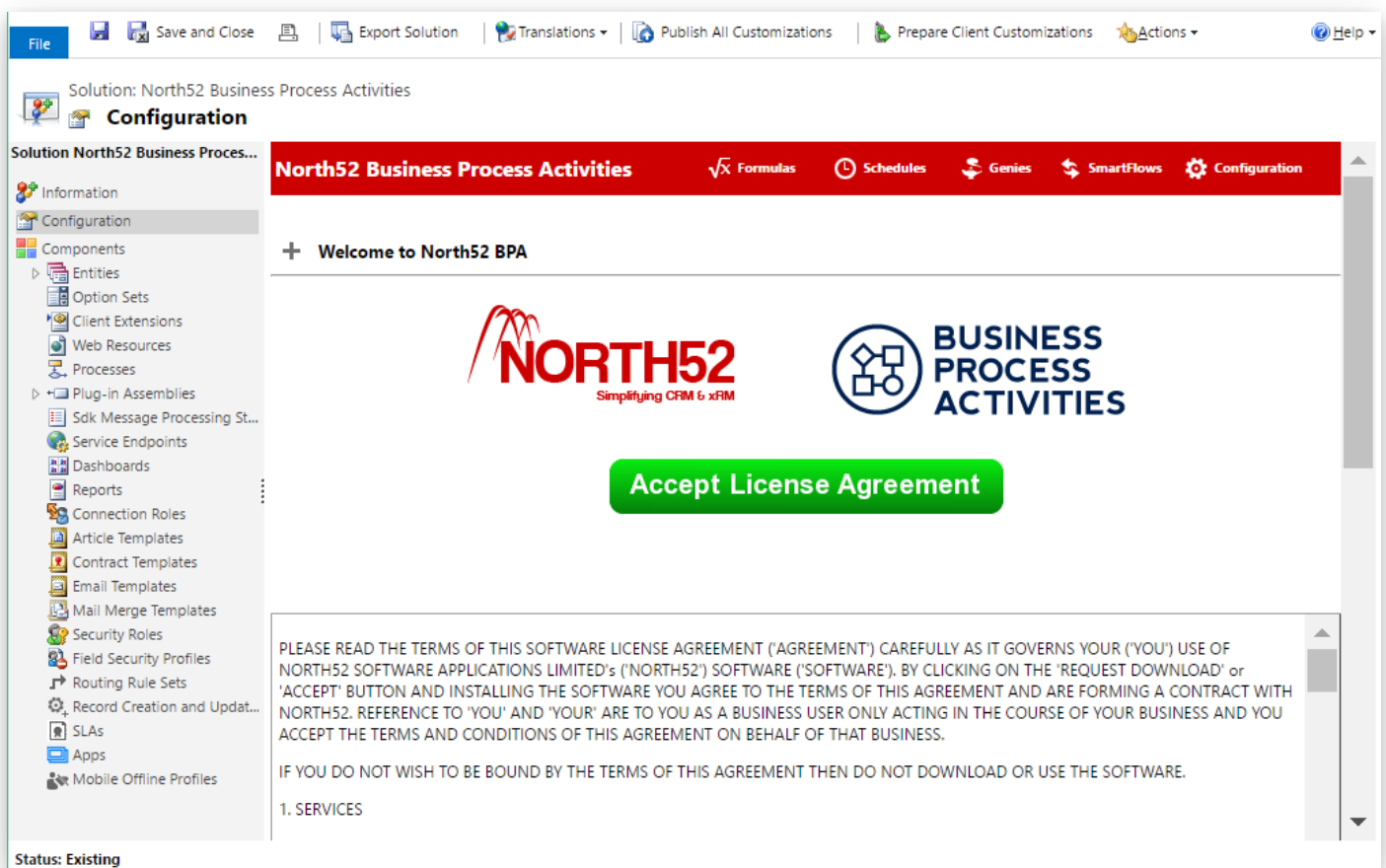
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Overview

After you install North52 BPA you will need to accept the license agreement before you can create & use any formulas. The following set of steps will walk you through this process.

Accept the license agreement

- Navigate to the list of solutions within your CRM deployment as shown in the first screenshot below.
- When the list appears double click on the North52 Business Process Activities one.
- Next click on the left hand navigation link named 'Configuration'.
- Now you should see two buttons as shown in the second screenshot.
- Click on the 'Accept license Agreement' button to accept the license.
- The process should take around 10 seconds & you should see the final screenshot below if all goes well.



How to - Retrieve Unique Organization ID

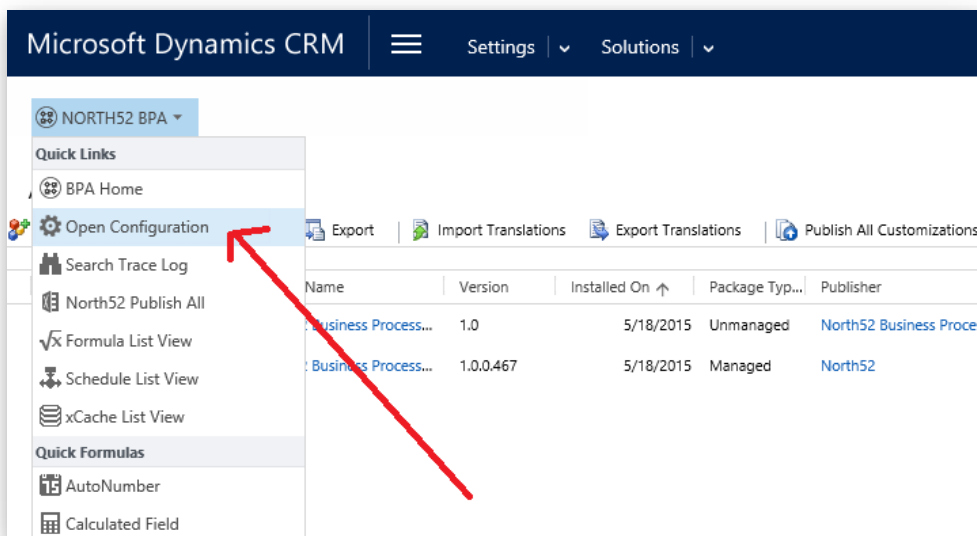
[TOC]

Overview

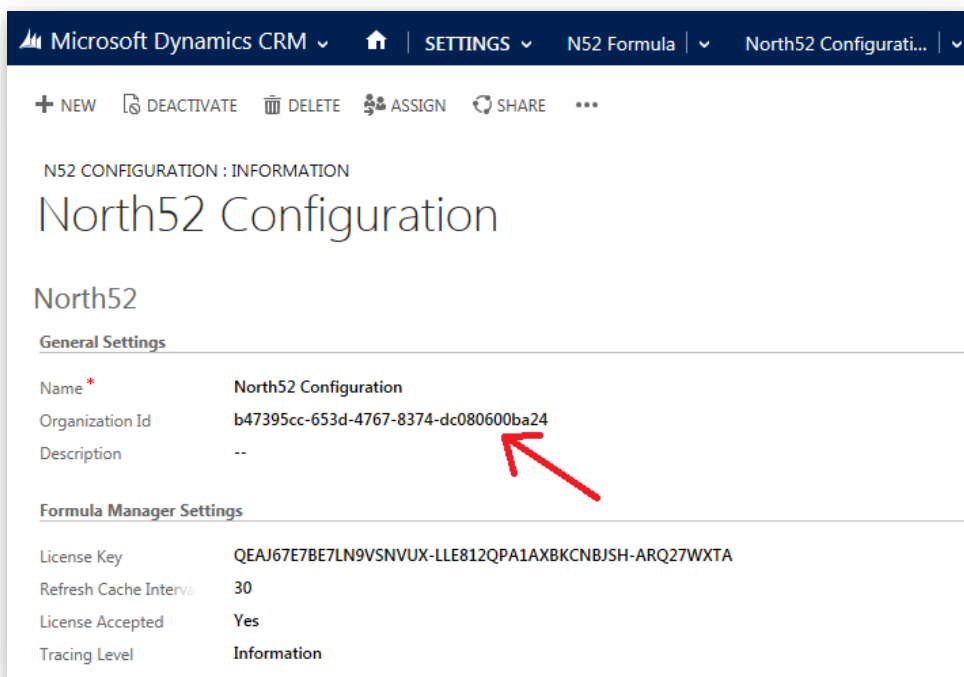
This set of steps will show you how to retrieve your unique organization ID for your Dynamics CRM deployment.

Retrieve Organization ID - Method 1

- Navigate to Settings -> Solutions
- Click 'North52 BPA'
- Click 'Open Configuration'



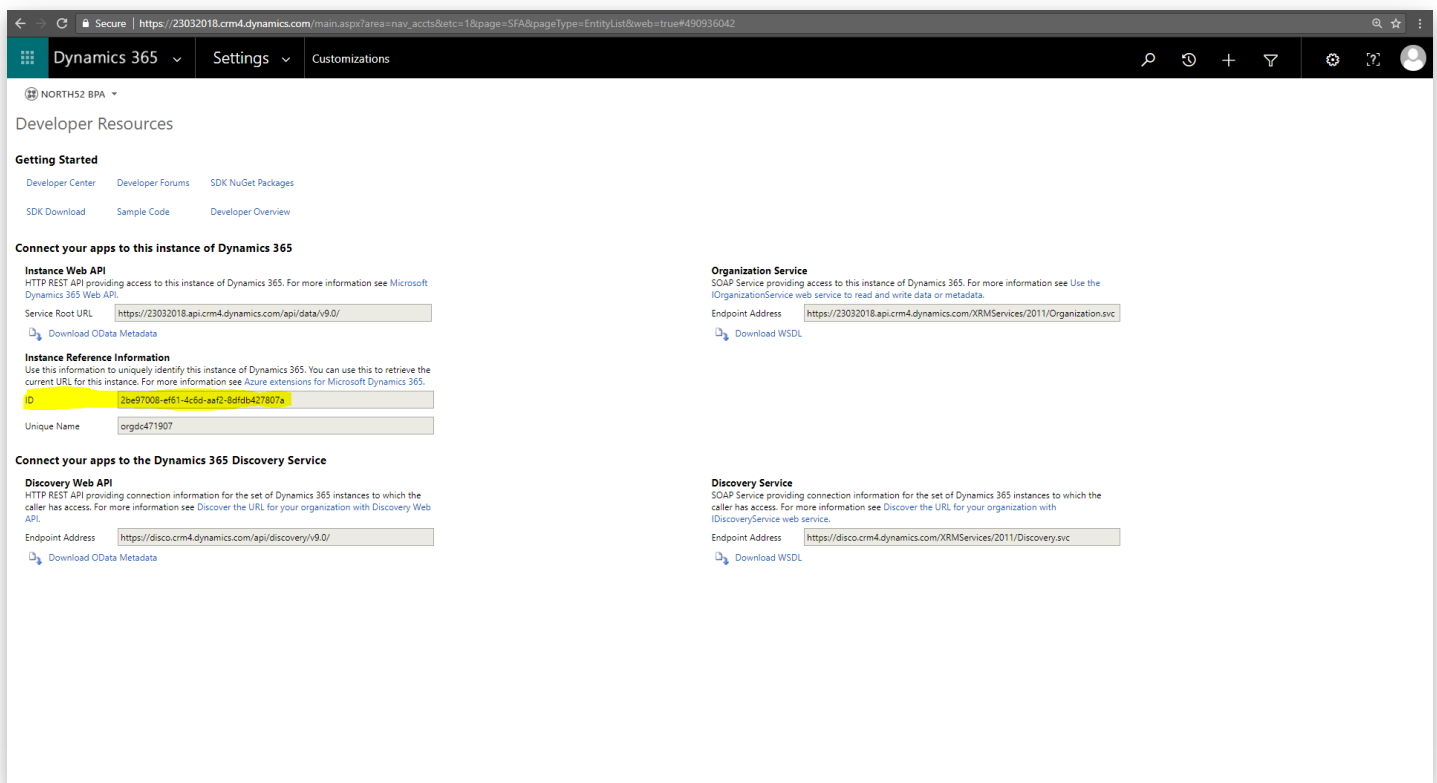
- Now the N52 Configuration entity will open
- Next find the field labelled Organization Id as shown in the screenshot below
- Now you can use this ID when making a purchase of N52 BPA Online
- Alternatively you can just send this Id to your contact at North52



Retrieve Organization ID - Method 2

Go to Settings > Customizations > Developer Resources

Your Org ID is under Instance Reference Information.



The screenshot shows the Dynamics 365 Developer Resources page. The breadcrumb navigation is Settings > Customizations > Developer Resources. The page title is "Developer Resources". Under the "Getting Started" section, there are links for Developer Center, Developer Forums, SDK NuGet Packages, SDK Download, Sample Code, and Developer Overview. The "Connect your apps to this instance of Dynamics 365" section contains two main areas: "Instance Web API" and "Instance Reference Information". The "Instance Reference Information" section shows the "ID" field with the value "2be97008-ef61-4c6d-aa02-6d4b417807a". The "Organization Service" section shows the "Endpoint Address" as "https://23032018.api.crm4.dynamics.com/XRMServices/2011/Organization.svc". The "Connect your apps to the Dynamics 365 Discovery Service" section contains two main areas: "Discovery Web API" and "Discovery Service". The "Discovery Service" section shows the "Endpoint Address" as "https://disco.crm4.dynamics.com/XRMServices/2011/Discovery.svc".

How to - Apply your license key

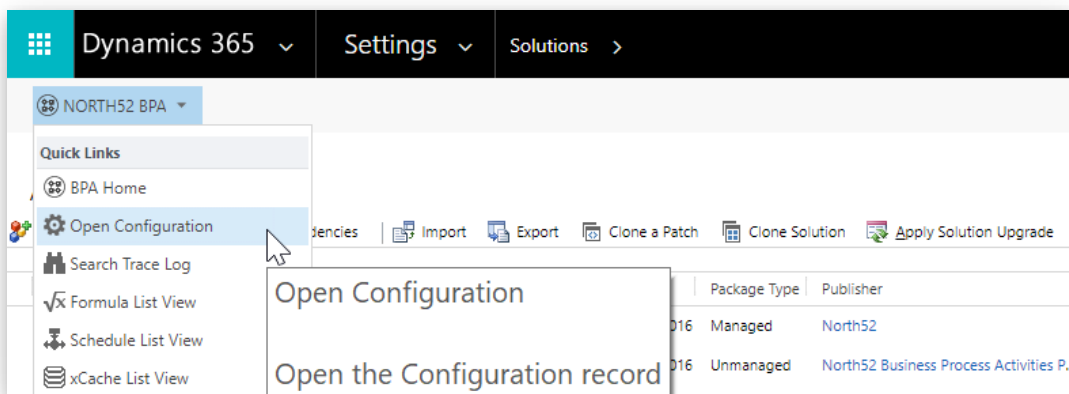
[TOC]

Overview

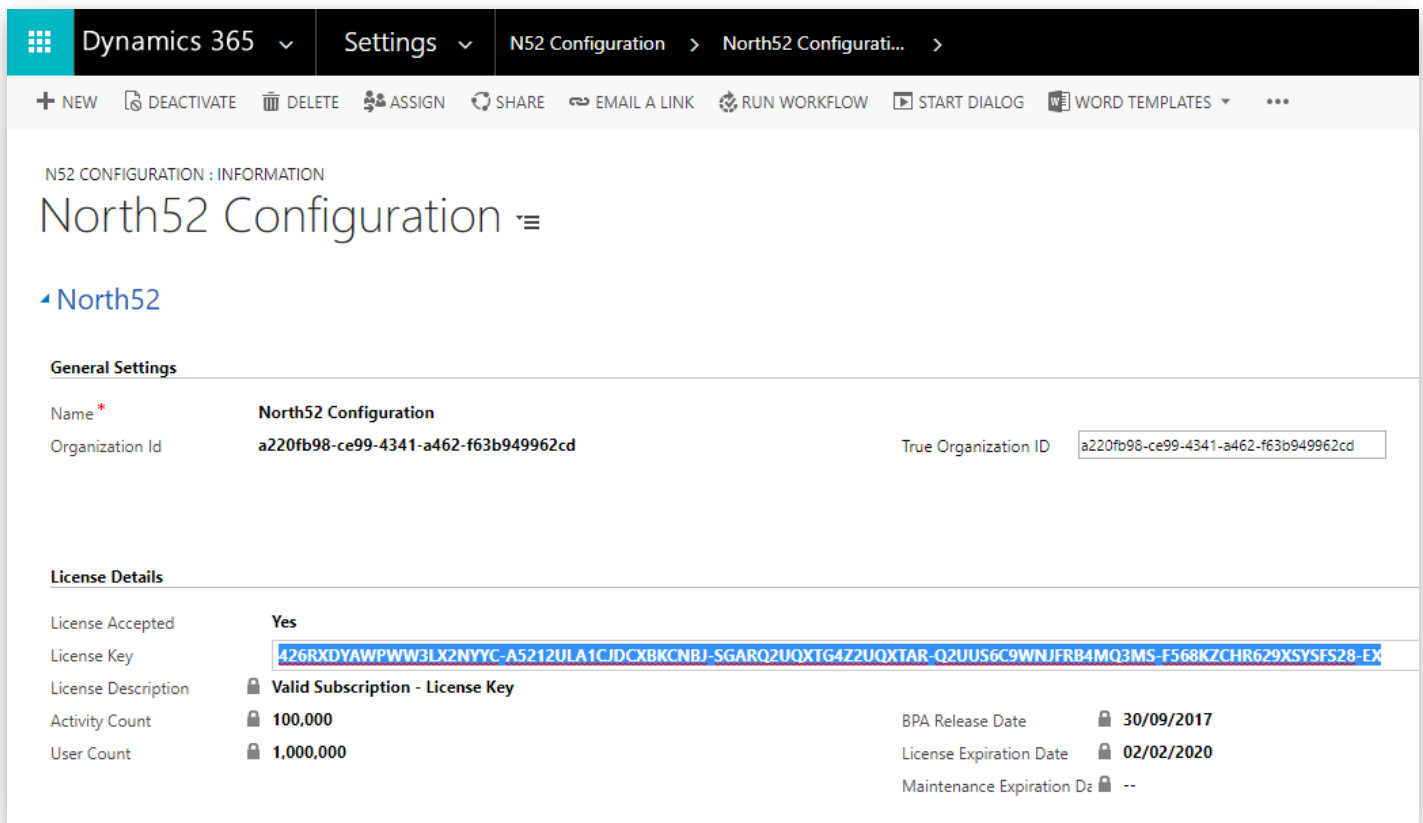
This set of steps will show you how to apply your license key for your Dynamics 365/CRM deployment.

Apply License Key

- Navigate to Settings -> Solutions
- Click on the North52 BPA menu
- Click Open Configuration



- On the Configuration form find the field labelled License Key as shown in the screenshot below
- Paste in the supplied License Key
- Click Save in the bottom right hand corner



How to - Install Data Maps

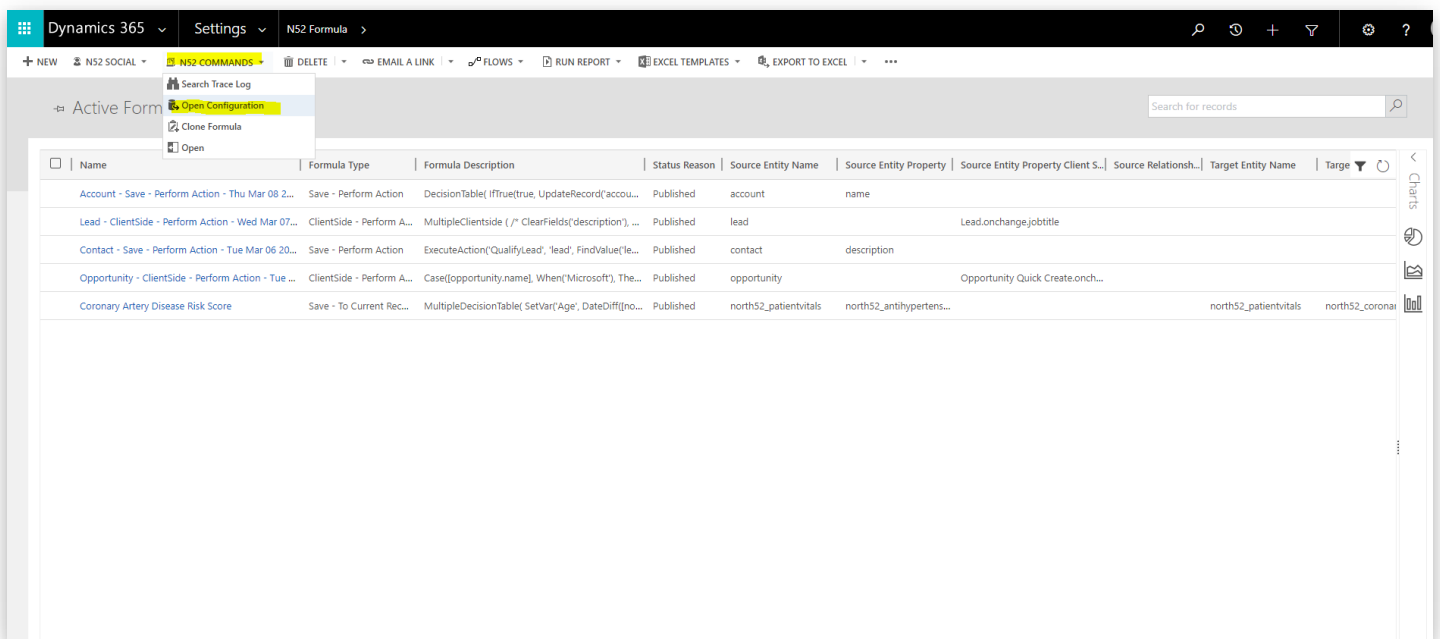
[TOC]

Overview

Normally our data maps install by default but if you started on an older version of N52 BPA or deleted them by mistake then its easy to just re-install them. All you need to do is follow the set of steps below.

Re-Install Data Maps

- Navigate to the formula list within Dynamics CRM.
- Next click on **N52 Commands > Open Configuration** button on the ribbon.



- Now the N52 Configuration entity will open
- Next you need to choose 'Install Data Maps' from the command pick list under 'System Settings'.
- Finally just click the save button on the ribbon, wait a few seconds for the save to complete which will also install the data maps for you.
- You can now check to see that the out of the box data maps have been installed.

Dynamics 365 Settings N52 Configuration > North52 Configurati...

NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS

N52 CONFIGURATION : INFORMATION

North52 Configuration

Activity Count	0	BPA Release Date	28/02/2018
User Count	0	License Expiration Date	
		Maintenance Expiration Date	

Formula Manager Settings

Tracing Level	Information (Show Exception Details)	Refresh Formula Cache	3/8/2018 1:31:18 PM
Refresh Cache Interval (Secs)	30	Refresh User Cache	3/6/2018 9:26:50 AM
Publish Auto	Yes	Refresh Metadata Cache	3/6/2018 9:26:50 AM
Publish Count	10	Refresh XCache	3/2/2018 12:19:36 PM

System Settings

System Settings

Command **Install Data Maps**

Command Parameter

Bing Translator ClientID Open Exchange Rates AppID

- If there are any issues or you receive any further error messages please contact our support team via this website or email support@north52.com

North52 - Bulk Delete System Jobs

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Bulk Delete System Jobs

When you install North52 BPA several bulk delete jobs are installed into the CRM organization. These bulk delete jobs perform house-keeping operations on some of the North52 entities. The house-keeping involves deleting records from the following North52 entities,

- North52 Command
- North52 Trace
- North52 Formula Calculation

These entities contain temporary data such as trace information which we clean up using the bulk delete jobs on a daily basis. These system jobs will not affect any other operations within Dynamics CRM. The names of the system jobs are listed below & you can see their daily operation under the 'System Jobs' section of Dynamics CRM.

- North52 Command Bulk Delete
- North52 Trace Bulk Delete
- North52 Formula Calculation Bulk Delete

Un-Install Procedure

- Navigate to Settings -> Data Management -> Bulk Record Deletion
- Change the view to 'Recurring Bulk Deletion System Jobs'
- Select all the North52 related jobs & then under the 'More Actions' menu click cancel

How to - Upgrade North52

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Upgrading North52

Depending on your environment, you may encounter different steps for upgrading.

For Dynamics 365 Online deployments, please see the first section below.

For all other deployments, see the second section: [All Other Deployments](#).

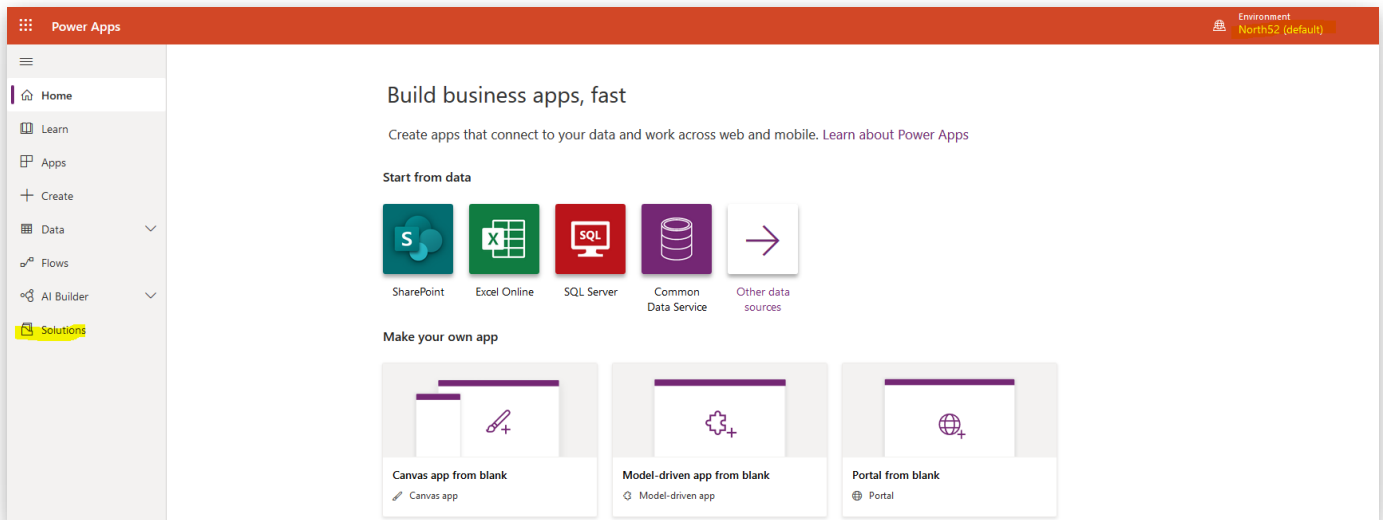
Dynamics 365 Online deployments

Step 1: Download Solution

The North52 Decision Suite solution can be downloaded from the following location: www.north52.com/download-solution/

Step 2 : Import Solution

- Signin to make.powerapps.com
- Select the target environment you want, and then select **Solutions** from the left navigation



- On the command bar, select **Import**

Power Apps

Environment: North52 (def)

+ New solution ← Import Open AppSource Publish all customizations Switch to classic See history

Solutions

Display name	Name	Created ↓	Version	Managed externally?	Solution check
Service management controls extension	msdyn_ServiceMa...	3/19/2020	9.1.20034.2007	🔒	Checked by publisher
North52 Quick Tile	North52QuickTile	3/19/2020	1.11	🔒	Checked by publisher
North52 Quick Button	North52QuickButton	3/19/2020	4.9	🔒	Checked by publisher
North52 Business Process Activities	North52FormulaMan...	11/28/2019	1.0.0.596	🔒	Checked by publisher
Contextual Help Base	msdyn_ContextuallH...	11/16/2019	1.0.0.10	🔒	Checked by publisher
Contextual Help	msdyn_ContextuallH...	11/16/2019	1.0.0.10	🔒	Checked by publisher
PowerApps Checker Update	msdyn_PowerAppsC...	11/8/2019	1.1.1.24	🔒	Checked by publisher
TestRemoveJohn	TestRemoveJohn	7/30/2019	1.0.0.0	🔒	Checked by publisher
PowerApps Checker Base	msdyn_PowerAppsC...	7/5/2019	1.1.1.24	🔒	Checked by publisher
CRM REST Builder	CRMRESTBuilder	5/17/2019	2.6.0.0	🔒	Checked by publisher
PowerApps Checker	msdyn_PowerAppsC...	5/4/2019	1.1.0.10	🔒	Checked by publisher

- Find and select the North52 solution you previously downloaded
- For Solution Action, select Upgrade (recommended)
- For Previous customizations on components included in this solution, select Overwrite customizations

Import Solution - Google Chrome

north52sandbox.crm4.dynamics.com/tools/solution/import/SolutionImportWizard.aspx

Import Options [Help](#)

⚠ This solution package contains an update for a solution that is already installed.

Solution Action [Learn more](#)

☒ Upgrade (recommended)
This option upgrades your solution to the latest version and rolls up all previous patches in one step. Any components associated to the previous solution version that are not in the newer solution version will be deleted.

☐ Stage for Upgrade
This option upgrades your solution to the higher version, but defers the deletion of the previous version and any related patches until you apply a solution upgrade later.

☐ Update (not recommended)
This option replaces your solution with this version. Components that are not in the newer solution will not be deleted and will remain in the system.

Previous customizations on components included in this solution [Learn more](#)

☐ Maintain customizations (recommended)
This option maintains any unmanaged customizations performed on components, but also implies that some of the updates included in this solution will not take effect.

☒ Overwrite customizations (not recommended)
This option overwrites or removes any unmanaged customizations previously performed on components in this solution. This option does not affect components that support merge behavior (forms, sitemap, ribbon, app modules). Components that have other managed solutions on top of the existing solution you are replacing do still remain on top and are not affected by this option.

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.

[Back](#) [Import](#) [Cancel](#)

- Select Import and follow instructions

All other deployments

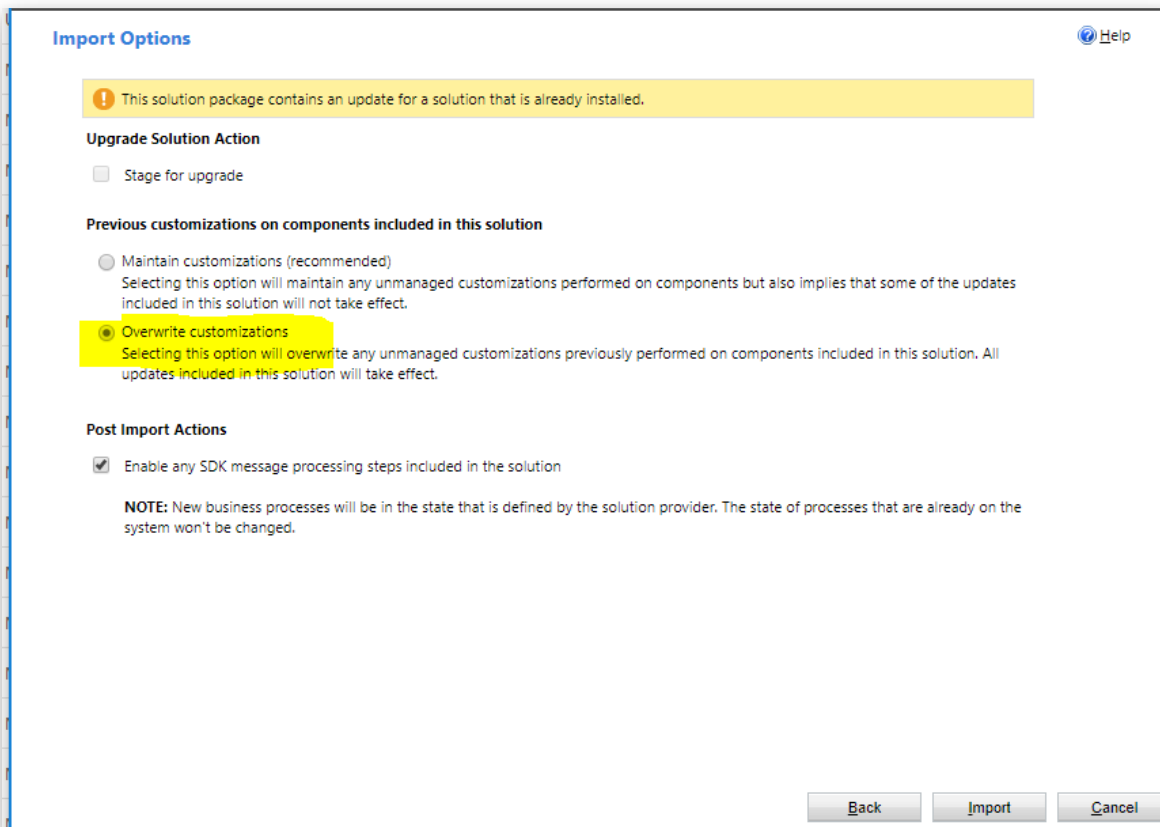
Step 1: Download Solution

The North52 Decision Suite solution can be downloaded from the following location: www.north52.com/download-solution/

Step 2 : Import Solution

We import the upgrade using the solution wizard:

- Go to **Settings > Solutions**
- Click on **Import**
- Click on **Choose File**
- Find and select the **North52 solution** you previously downloaded
- Click on **Next**
- Click **Next** again
- Under **Previous Customizations on Components** included in this solution, select 'Overwrite Customizations'
- Click **Import**
- Wait for it to finish



Import Options Help

! This solution package contains an update for a solution that is already installed.

Upgrade Solution Action

☐ Stage for upgrade

Previous customizations on components included in this solution

☐ Maintain customizations (recommended)
Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.

☒ Overwrite customizations
Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.

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.

Back Import Cancel

How to - Uninstall - North52 BPA

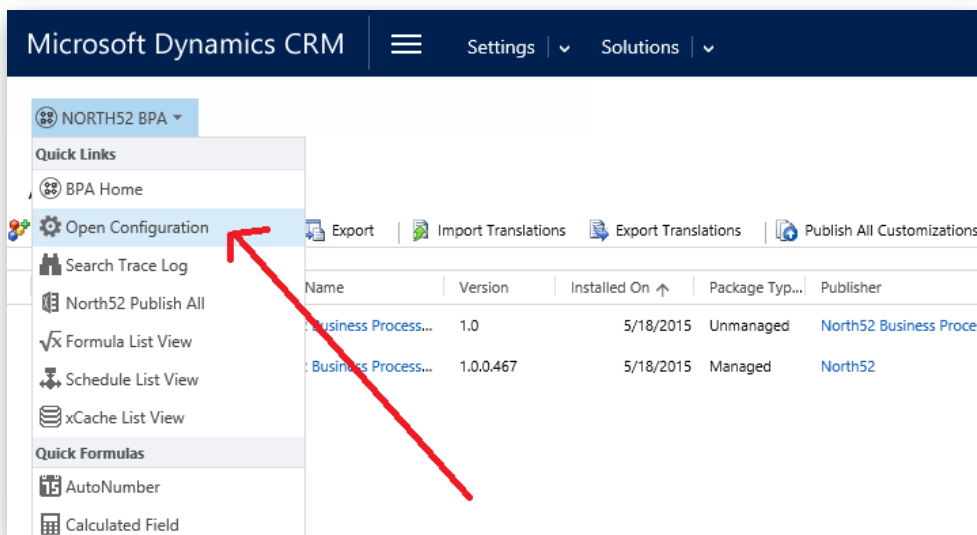
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Introduction

If you need to uninstall North52 BPA you can follow these set of steps to do so.

North52 Uninstall Dependencies

- Navigate to **Settings -> Solutions**
- Click 'North52 BPA'
- Click 'Open Configuration'
- When the record opens then click 'Start Dialog' from the command menu
- Select to run the North52 Maintenance Operations dialog
- Next choose the Uninstall Dependencie option
- Click next, this may take 1-2 minutes to complete
- Then click finish and finally close the dialog
- Finally, navigate to the list of Solutions within Dynamics CRM
- Then delete the solution with the name North52 Business Process Activities



North52 BPA Maintenance Operations

N52 Maintenance Operations
 Pick a maintenance operation

Which maintenance operation do you require?

- ☐ ClientSide - Bind All
- ☐ ClientSide - Unbind All
- ☐ Install \ Refresh Data Maps
- ☐ Refresh Cache
- ☐ Saved Views - Rebuild
- ☐ Saved Views - Remove
- ☐ Set License Information
- ☐ Sitemap Install
- ☐ Sitemap UnInstall
- ☒ Uninstall Dependencies

The steps listed below are the ones required if you need to perform a manual un-install.

Manual Un-Install

- Delete all formulas (both active & non-active) within the system.
- Delete all schedules (both active & non-active) within the system.
- Delete any workflows, actions or dialogs which contain a reference to the North52 Process Genie custom workflow activity step
- Remove any North52 WebResources from forms you may have placed them on & perform a Publish All.
- Modify the sitemap to remove the reference to the North52 group element under Settings
- Remove the installed Bulk Record Deletion Jobs.
 - Navigate to **Settings -> Data Management -> Bulk Record Deletion**
 - Change the view to 'Recurring Bulk Deletion System Jobs'
 - Select all the North52 related jobs & then under the 'More Actions' menu click cancel
- Remove the installed Data Maps.
 - Navigate to **Settings -> Data Management -> Data Maps**
 - Select all North52 related data maps & click the delete button
- Remove the solution.
 - Navigate to **Settings -> Solutions**
 - Select the solution 'North52FormulaManager' & click the delete button

Additional Steps

If for some reason you still cannot delete the solution you

- Navigate to **Settings -> Customizations**
- Click on Plug-In Assemblies
- Next click on the node North52.FormulaManager
- Select the record with the name 'N52 Process Genie'
- Click the menu option 'Show Dependencies'
- Remove any of the dependencies that it shows