

## Updating ClickDimensions

The updates solution is found in Settings | ClickDimensions Settings | Auto Update.

You can select to Auto Update – but this will overwrite customisations to Lead, Contact, Account and Marketing List Entities . The advised option is to do a manual update.

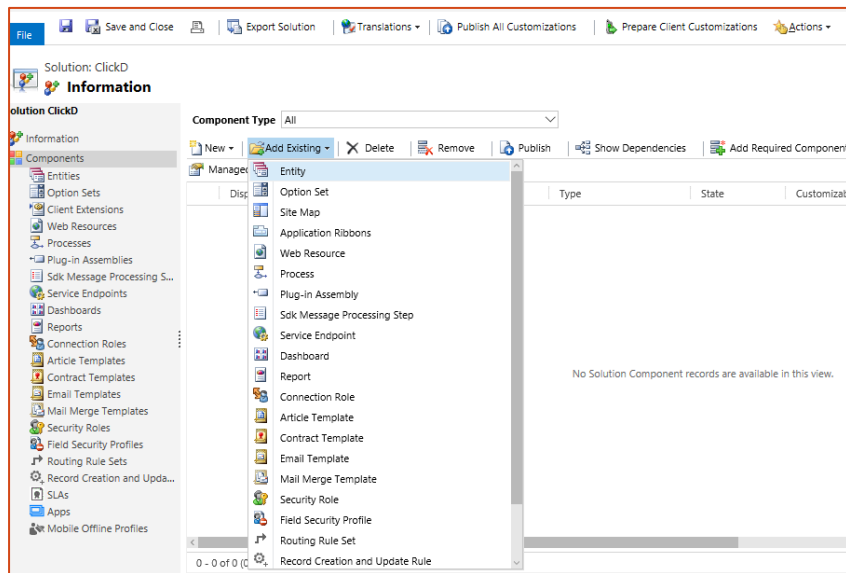
### Steps for Manual Update.

1. Create a Solution of Account, Contact, Lead and Marketing List entities. Take all attributes of these entities. Export the solution.
2. Take a note of your Duplicate detection rules – these can become unpublished when you import a solution , so you will need to go back and publish them after importing the ClickDimensions solution and your back up solution.
3. Download the ClickDimensions update.
4. Make sure the ClickDimensions Processes are assigned to the user who is running the update.
5. Make sure Document Management and Enabled for Mobile Offline are both enabled for Lead and Contact Entities.
6. Import the ClickDimensions solution.
7. Import your exported solution
8. Publish any duplicate detection settings that have become unpublished.

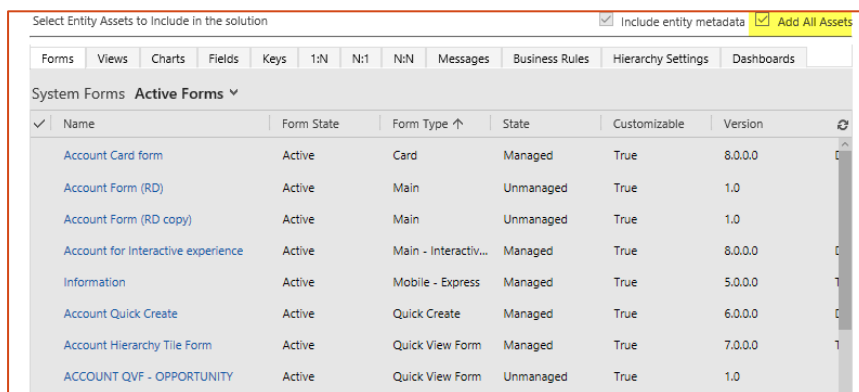
More details on each step are given below.

### 1. Create and Export a solution to back up the Account, Contact, Lead and Marketing List Entities.

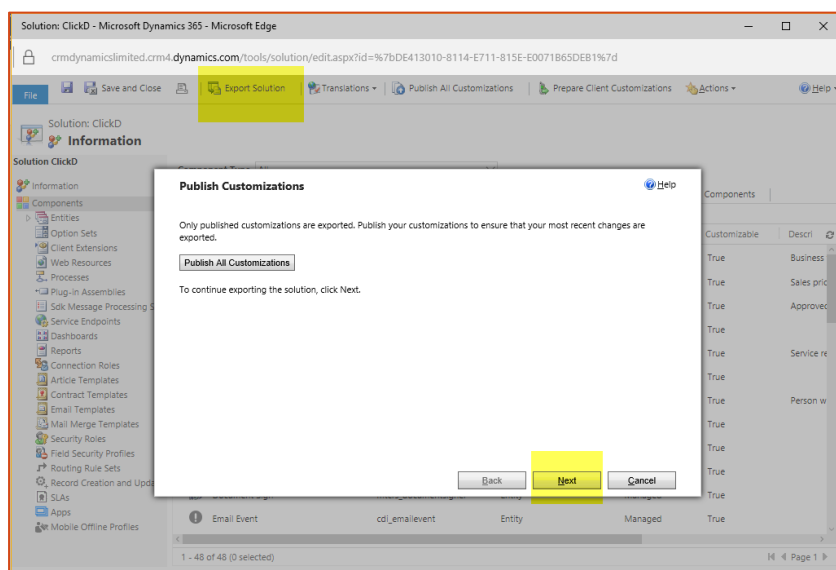
- a. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.
- b. Go to **Settings > Solutions**.
- c. Click on New to create a New Solution. Give it a name and select publisher. Give it a version number. Save.
- d. Add entities to the Solution. Click on Add Existing then select Entities. Select the Account, Lead, Contact and Marketing List Entities.



e. Tick Add All Assets for each entity.

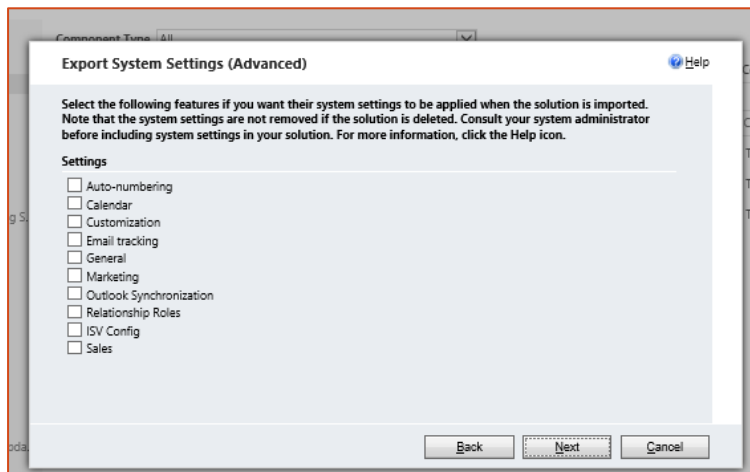
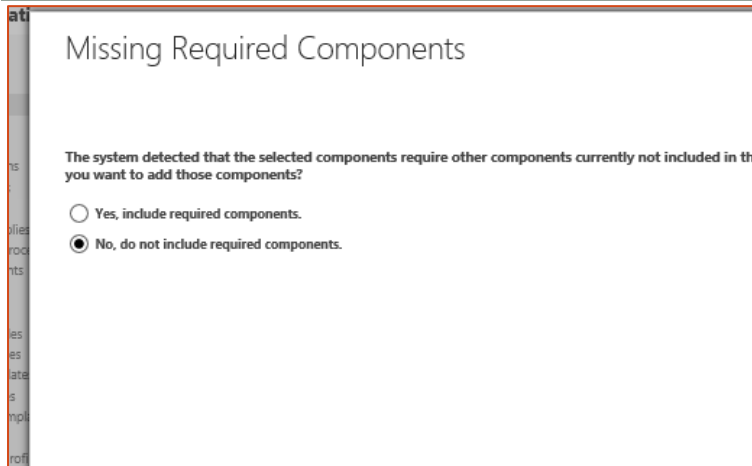


f. When the solution has been created – export it.

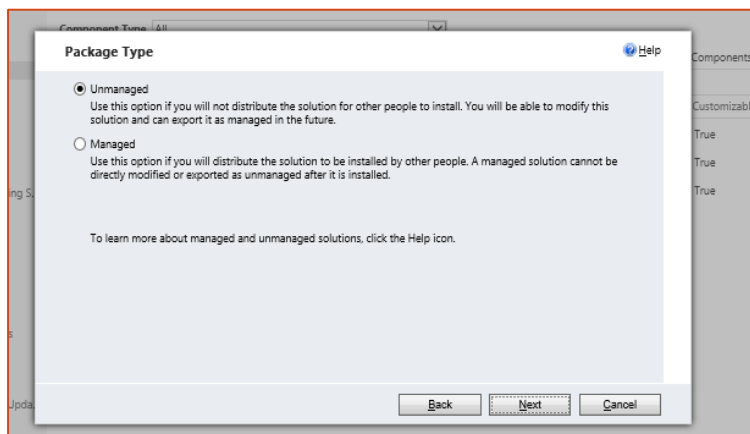


g. In the **Publish Customizations** step of the Export Solution wizard, you have the option to **Publish All Customizations**. Note that only published customizations are exported. When you're ready to proceed, click **Next**.

- h. You will be asked for missing components. Do not include required components when making an export for reimport into the same CRM system. Leave Export settings unchecked.



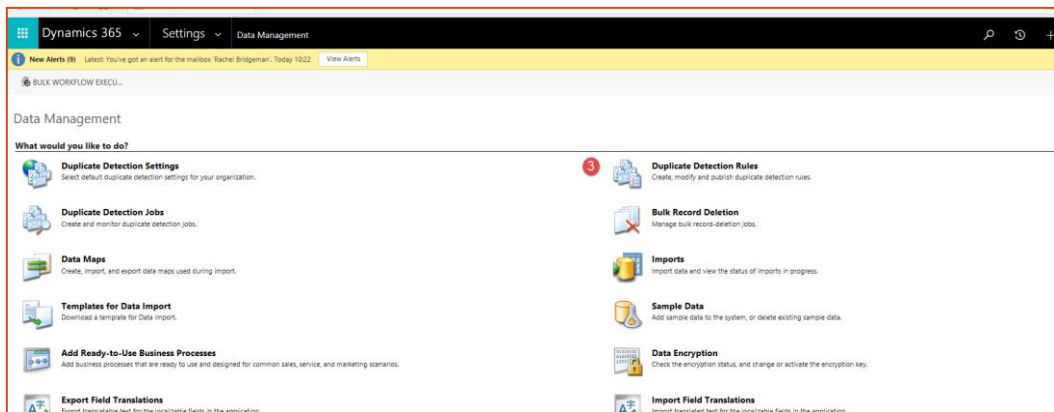
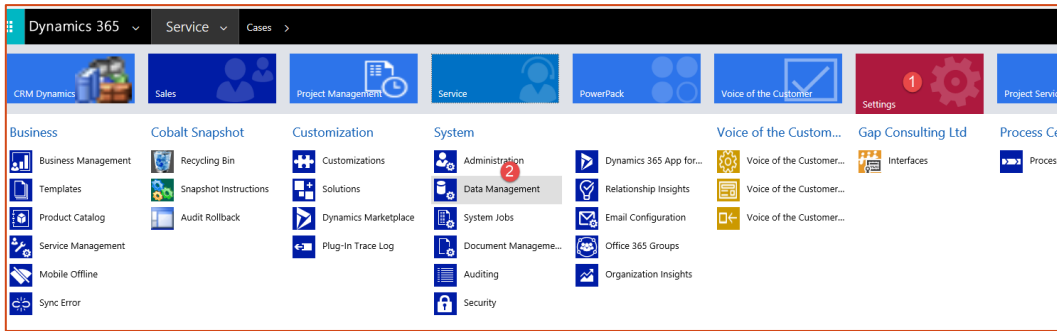
- i. In the **Package Type** step, specify the solution as Unmanaged, then click **Next**.



- j. In the **Source CRM Version** step, select the CRM version you want to export to. This will be the same version as your CRM as you will be reimporting it into your own system
- k. Click **Export** to download the solution file.

- l. When prompted to open or save the compressed (.zip) file, click **Save As**.
- m. Specify a location to save your solution, and then click **Save**.

## 2. Take a note of duplicate detection rules Settings | Data management



### Duplicate Detection Rules

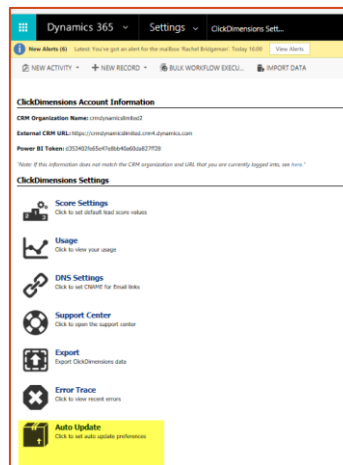
Entity Type: All View: All Duplicate Detection Rules

New Publish Unpublish More Actions

Rule Name	Status Reason	Base Record Type	Matching Record Type	Created By	Modified
Accounts with the same Account Name	Unpublished	Account	Account	Tony Bridgeman	
Accounts with the same e-mail address	Unpublished	Account	Account	Tony Bridgeman	
Accounts with the same phone number	Unpublished	Account	Account	SYSTEM	
Accounts with the same website	Unpublished	Account	Account	SYSTEM	
Contacts with the same business phone number	Unpublished	Contact	Contact	SYSTEM	
Contacts with the same e-mail address	Unpublished	Contact	Contact	Tony Bridgeman	
Contacts with the same first name and last name	Unpublished	Contact	Contact	SYSTEM	
Lead and Contact Name check	Unpublished	Lead	Contact	Pam Mannell	
Leads with the same e-mail address	Unpublished	Lead	Lead	Tony Bridgeman	
Revenues with duplicate invoice number	Unpublished	Revenue	Revenue	Rachel Bridgeman	
Social profiles with same full name and social channel	Published	Social Profile	Social Profile	SYSTEM	

Take a screenshot or simply note which rules are published.

## 3. Download the ClickDimensions Update. From Settings | ClickDimensions Settings



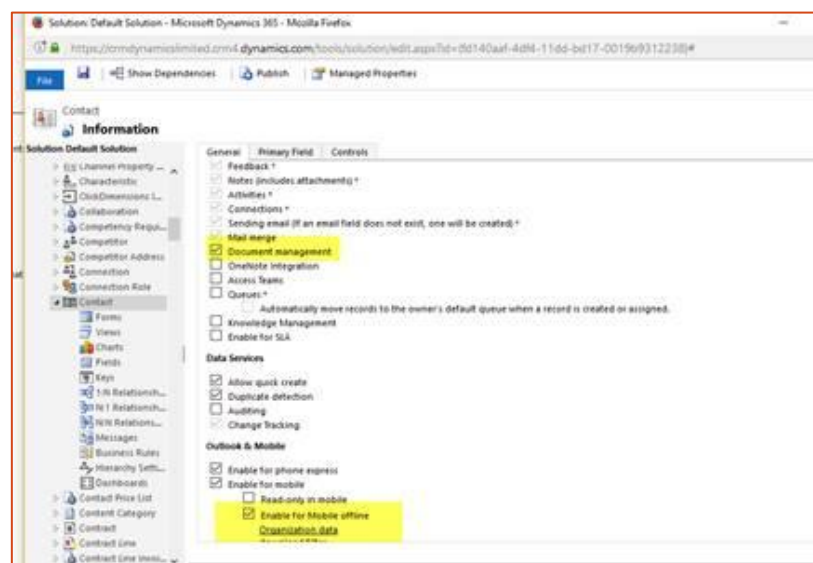
#### 4. Assign the ClickDimensions Processes to yourself.

Settings | Processes

ClickDimensions Execute Send	Workflow	Email Send	Activated	28/04/2015 10:13	Rachel Bridgeman
ClickDimensions Execute Social Post	Workflow	Social Post	Activated	23/03/2017 10:49	Rachel Bridgeman
ClickDimensions Execute Text Message Send	Workflow	Bulk Text Message	Activated	28/04/2015 10:13	Rachel Bridgeman
ClickDimensions Form Auto Responder	Workflow	Posted Form	Activated	28/04/2015 10:13	Rachel Bridgeman
ClickDimensions Subscription Auto Response	Workflow	Posted Subscription	Activated	28/04/2015 10:13	Rachel Bridgeman
ClickDimensions Survey Auto Responder	Workflow	Posted Survey	Activated	28/04/2015 10:13	Rachel Bridgeman

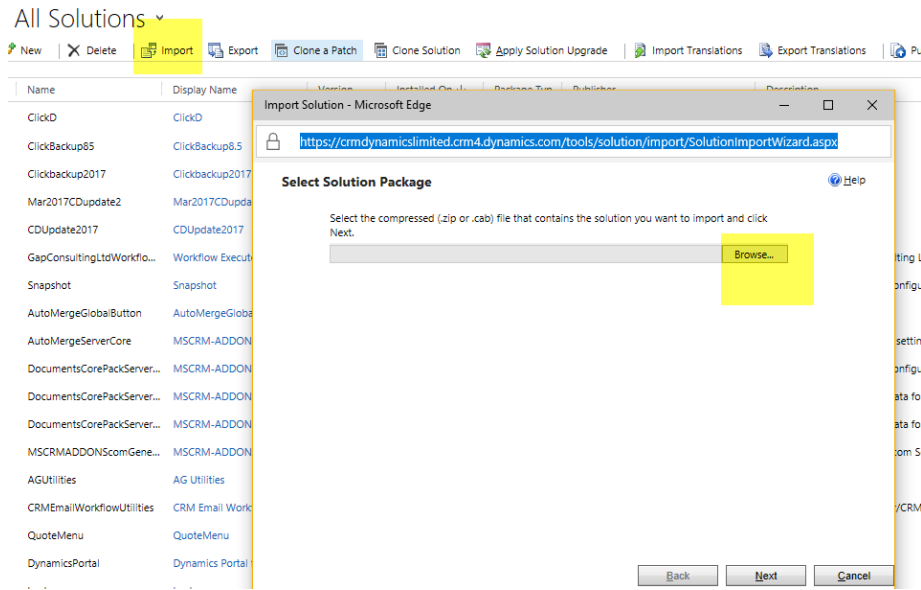
#### 5. Make sure Lead and Contact Entities have Document Management and Mobile Offline enabled.

Settings | Customisations. Then click on the Contact Entity to change / check the settings



#### 6. Import the ClickDimensions Solution.

Settings | Solutions then click on Import Solution then browse for the file.



7. **Import your own created solution** of Account, Contact, Lead and marketing List entities and publish customisations when it has finished.
8. **Go back to Duplicate Detection rules and publish any that have become unpublished**
  - (1) Select the rule(s) then (2) click on Publish