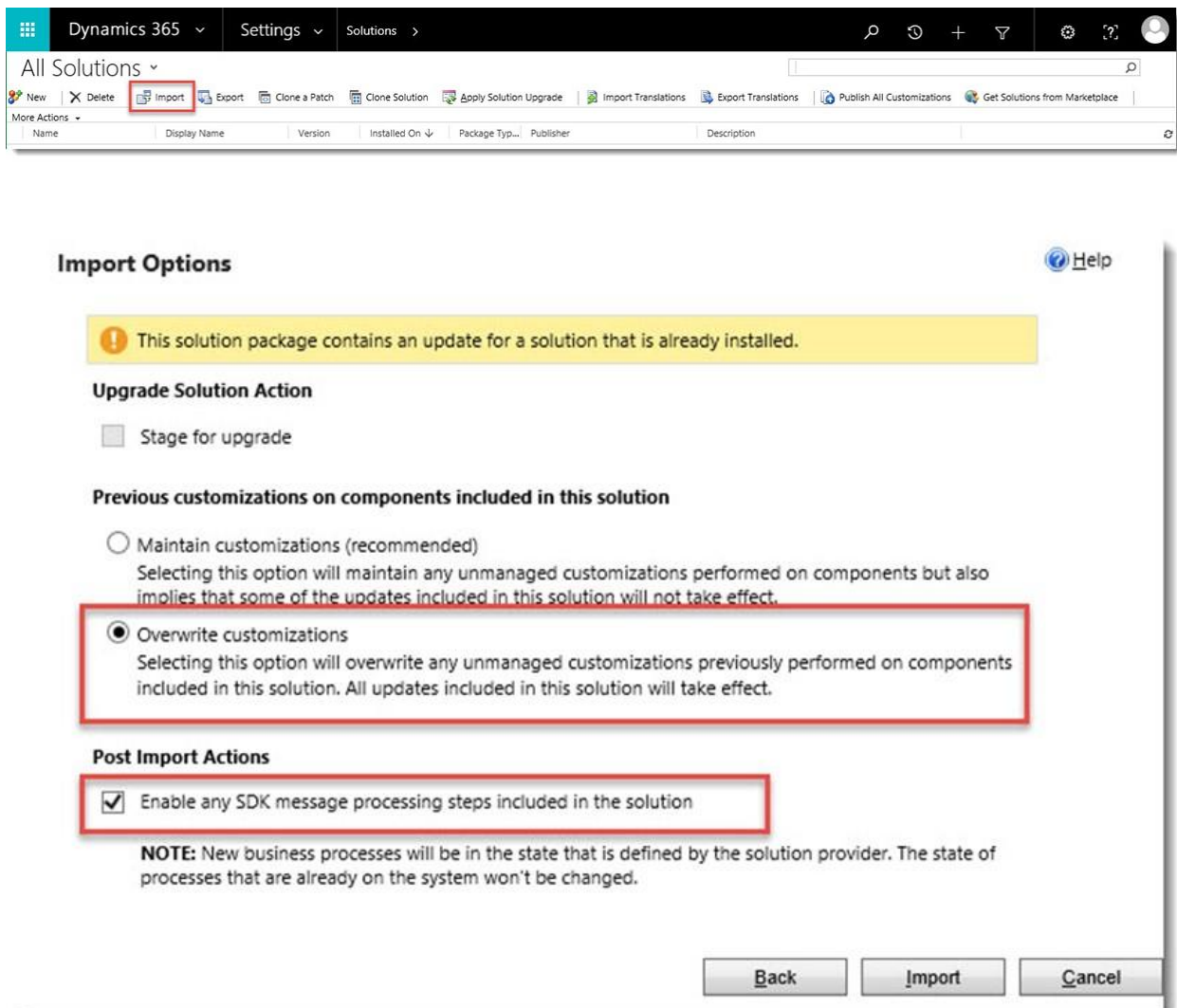


Updating a Solution

Updating an add-on is quick and easy! Simply follow these 5 steps:

- 1.) Download the latest solution .zip file: <http://www.zapevent.com/microsoft-dynamics/>
- 2.) Log into CRM and navigate to Settings > Solutions
- 3.) Click Import and walk through the import steps. **Remember to select the options to Overwrite Customizations and activate and processes upon re-import.** If presented with the option to “Stage for update”, leave the checkbox un-checked.

Note: Choosing to Overwrite Customizations will only overwrite any back-end plugins that may have been updated since the previous version was installed.



The screenshot shows the Dynamics 365 interface with the 'Solutions' menu open. The 'Import' option is highlighted. Below the interface, the 'Import Options' dialog box is displayed. It features a yellow warning banner at the top stating: 'This solution package contains an update for a solution that is already installed.' The dialog is divided into three sections: 'Upgrade Solution Action' with a 'Stage for upgrade' checkbox; 'Previous customizations on components included in this solution' with two radio button options: 'Maintain customizations (recommended)' and 'Overwrite customizations' (which is selected and highlighted with a red box); and 'Post Import Actions' with a checked checkbox for 'Enable any SDK message processing steps included in the solution' (also highlighted with a red box). A 'NOTE' at the bottom explains that new business processes will be in the state defined by the solution provider, while existing ones remain unchanged. At the bottom right, there are 'Back', 'Import', and 'Cancel' buttons.

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.

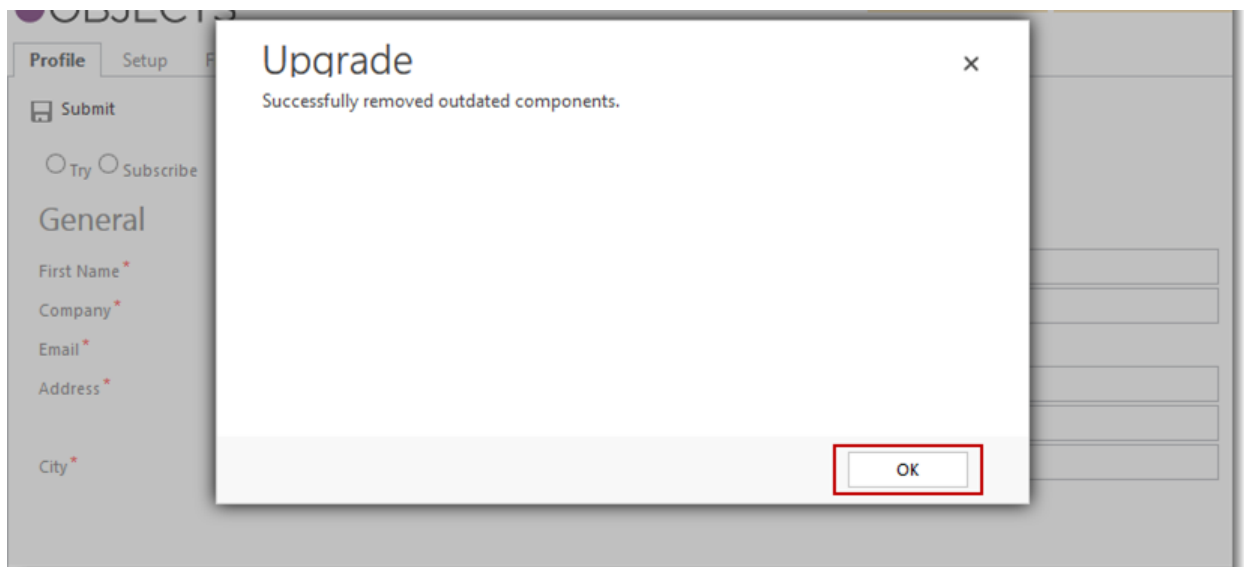
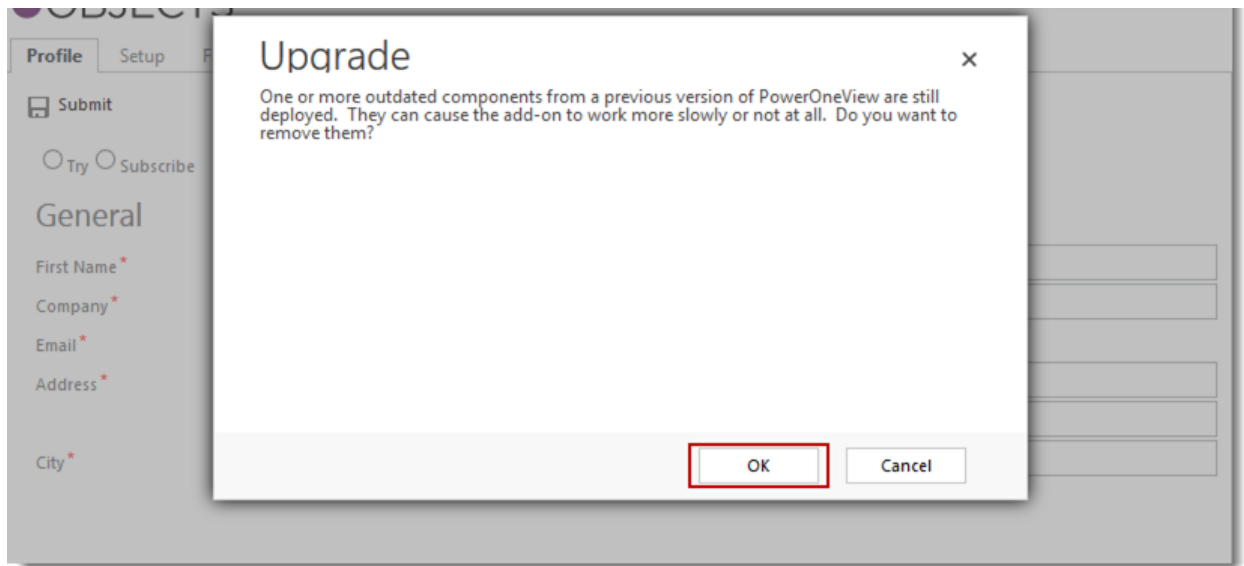
Post Import Actions

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**

4.) Once the import has completed navigate back to the solutions list and double click on the solution you just imported to open the configuration. Here you may be asked to clean up the components of the solution. If prompted, select ok.



5.) Once the clean-up has completed, select Submit to re-sync your registration with the ZapEvent system and you are done!



Status
Registered

Profile

Submit

General

| | | | |
|-----------------|--|------------------|---|
| First Name * | <input type="text" value="J"/> | Last Name * | <input type="text" value="Wheeler"/> |
| Company * | <input type="text" value="ZEP"/> | Main Phone * | <input type="text" value="612-222-2222"/> |
| Email * | <input type="text" value="jw@zapevent.com"/> | State/Province * | <input type="text" value="MN"/> |
| Address * | <input type="text" value="718 West"/> | Postal Code * | <input type="text" value="55401"/> |
| City * | <input type="text" value="Minneapolis"/> | Country * | <input type="text" value="USA"/> |
| Write Checks To | <input type="text" value="ZapEvent"/> | | |

CRM Credentials

| | | | |
|------------|--|------------|---------------------------------------|
| Username * | <input type="text" value="jw@zapevent.com"/> | Password * | <input type="password" value="••••"/> |
|------------|--|------------|---------------------------------------|