

PragmaToolKit

User Manual

Version : Beta

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1 Pragma Tool Kit

1.1 Description

This tool is designed to improve developer's productivity in customizing MSCRM 2011. This tool is in the current release provides Ribbon Editor and Sitemap Editor.

1.1.1 Ribbon Editor

It is a simple tool that developer can easily use to create custom buttons on the ribbon of entity at any location such as existing groups or even custom group on the ribbon.

There are three ribbons associated with each entity in MSCRM 2011. HomepageGrid, Form and Sub-Grid. Developers can choose location where to add custom button.

1.1.2 Sitemap Editor

It is tool using which developers can easily make change in Navigation Pane of MSCRM. This tool provides facility to add Custom Area, Custom Group and Custom Sub-Area in the Navigation pane of MSCRM.

1.2 Features

1. Create Custom Buttons on Ribbon of Entity.
2. Customize Navigation Pane of MSCRM.

1.3 Requirements

To install and use this tool you must have the following:

1. Microsoft Windows XP 32-bit or Windows 7 32-bit or 64-bit.
2. .Net Framework 4.0 installed on machine.

2 How to Use PragmaToolKit

Install the PragmaToolKit.exe provided to you. It will store application files on your system. On successful installation of setup run PragmaToolKit.exe present on Desktop or Program Menu of your machine.

Note

This tool requires .Net framework 4.0 installed on machine.

2.1 Getting started with PragmaToolKit

Tool is getting started.



Wait for a while before the Connection screen appears.

Fill the required information on the form and click on Connect button. If information provided is correct this tool gets connected to MSCRM to the server in Server Url. Select organization to modify customization and click OK button at the bottom of the form.

Microsoft Dynamics CRM : PragmaToolKit

Connect to CRM

Enter the connection information and then click Connect. You may experience a short delay while connection is being made.

Connection Type: On-Premise

URL: 192.168.1.188:5555

User Name: Administrator

Domain: CRM2011

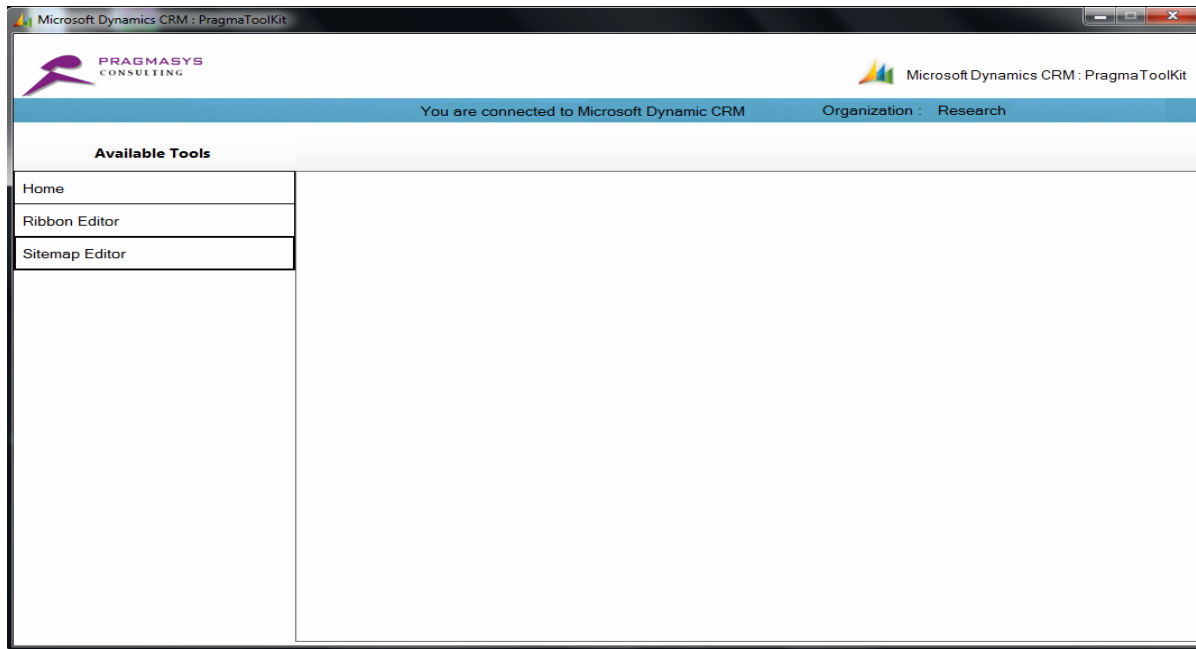
Password: *****

Connected

Organization: Research

- Coanities
- Research
- ATC
- Pragmatical
- Anis
- Pragmatical

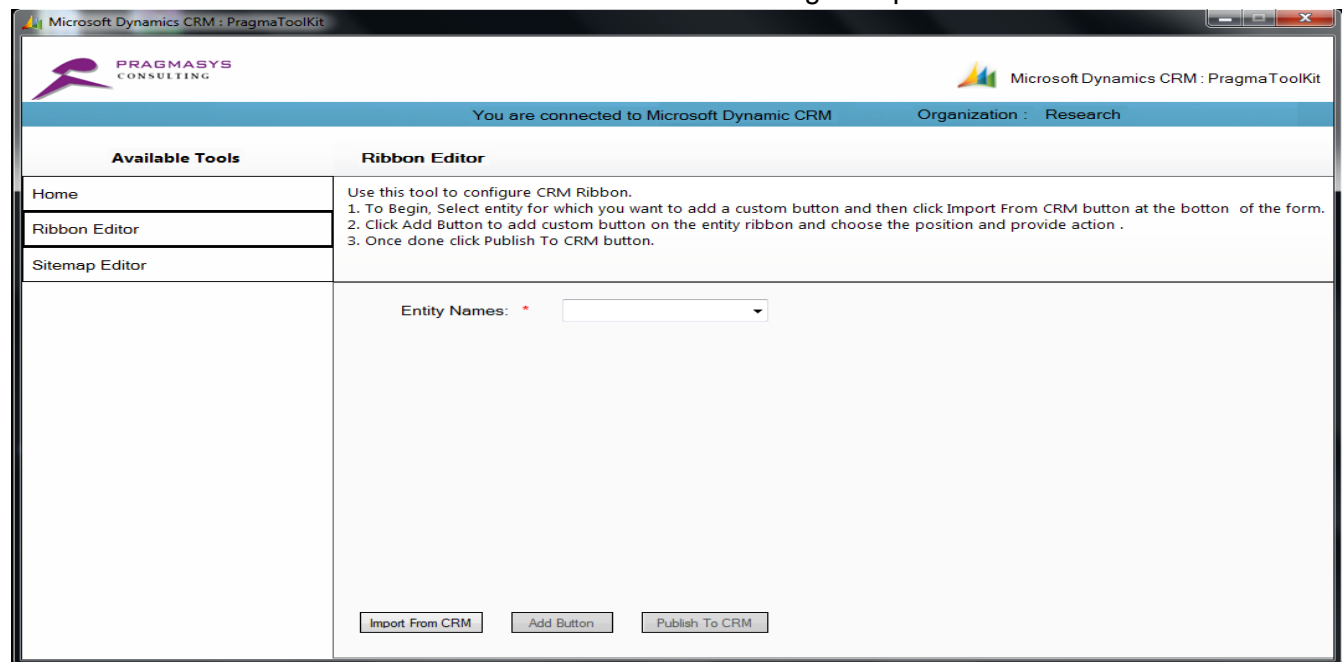
PragmaToolKit is connected to MSCRM Server and the organization. The name of the organization is showing in the on Tool screen.



2.3 Creating custom button on Ribbon of Entity.

Steps:

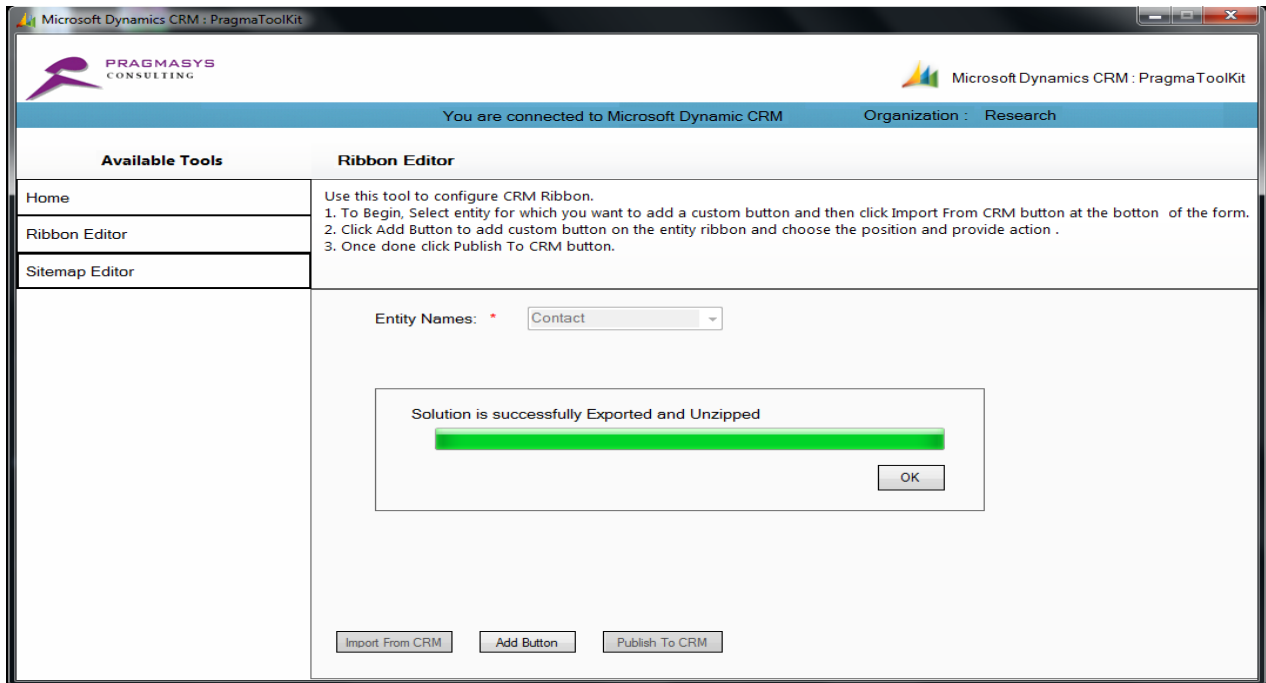
1. To create custom button select Ribbon Editor Menu from navigation pane of tool.



Note

Selected Entity must be Customizable and supported to customization of ribbon.

2. Select Entity from the list of entities for which you want to create custom button. Click on “Import From CRM” button.



Microsoft Dynamics CRM : PragmaToolKit

PRAGMASYS CONSULTING

You are connected to Microsoft Dynamic CRM Organization : Research

Available Tools

- Home
- Ribbon Editor
- Sitemap Editor

Ribbon Editor

Use this tool to configure CRM Ribbon.
1. To Begin, Select entity for which you want to add a custom button and then click Import From CRM button at the bottom of the form.
2. Click Add Button to add custom button on the entity ribbon and choose the position and provide action .
3. Once done click Publish To CRM button.

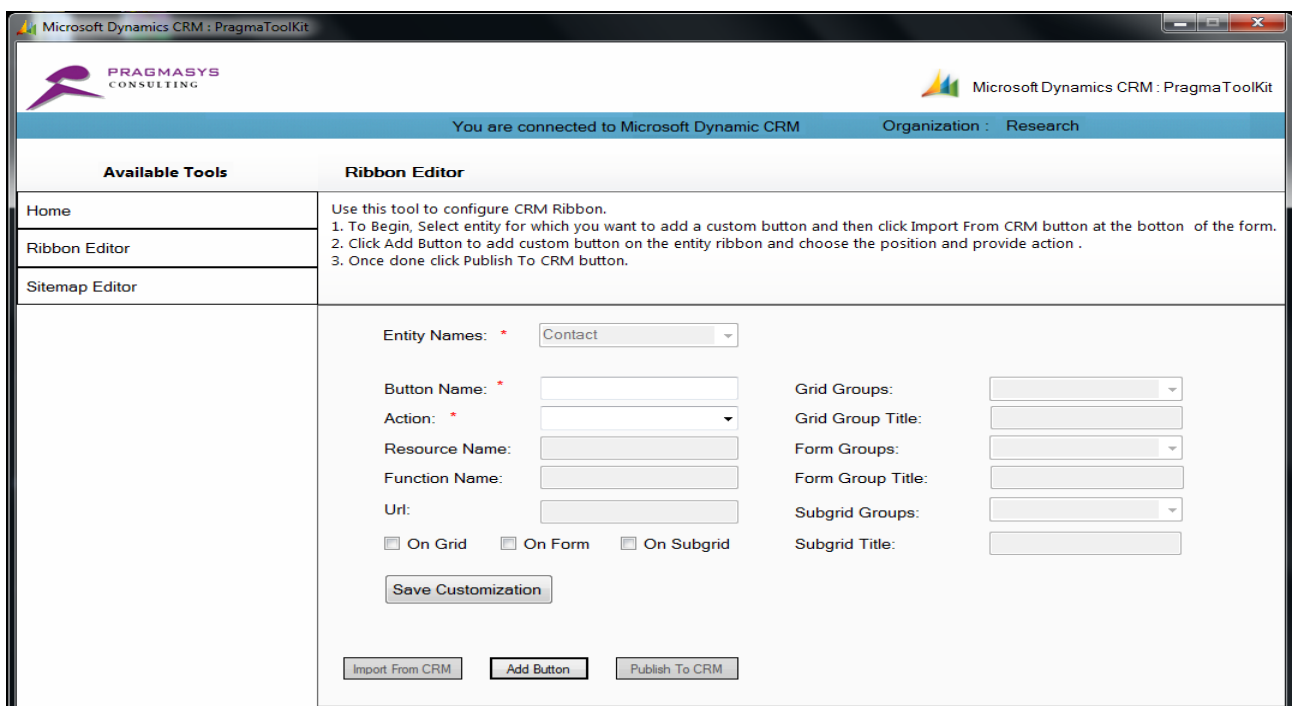
Entity Names: * Contact

Solution is successfully Exported and Unzipped

OK

Import From CRM Add Button Publish To CRM

3. Click on “Add Button” button.



Microsoft Dynamics CRM : PragmaToolKit

PRAGMASYS CONSULTING

You are connected to Microsoft Dynamic CRM Organization : Research

Available Tools

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Ribbon Editor

Use this tool to configure CRM Ribbon.
1. To Begin, Select entity for which you want to add a custom button and then click Import From CRM button at the bottom of the form.
2. Click Add Button to add custom button on the entity ribbon and choose the position and provide action .
3. Once done click Publish To CRM button.

Entity Names: * Contact

Button Name: *

Action: *

Resource Name:

Function Name:

Url:

☐ On Grid ☐ On Form ☐ On Subgrid

Save Customization

Grid Groups:

Grid Group Title:

Form Groups:

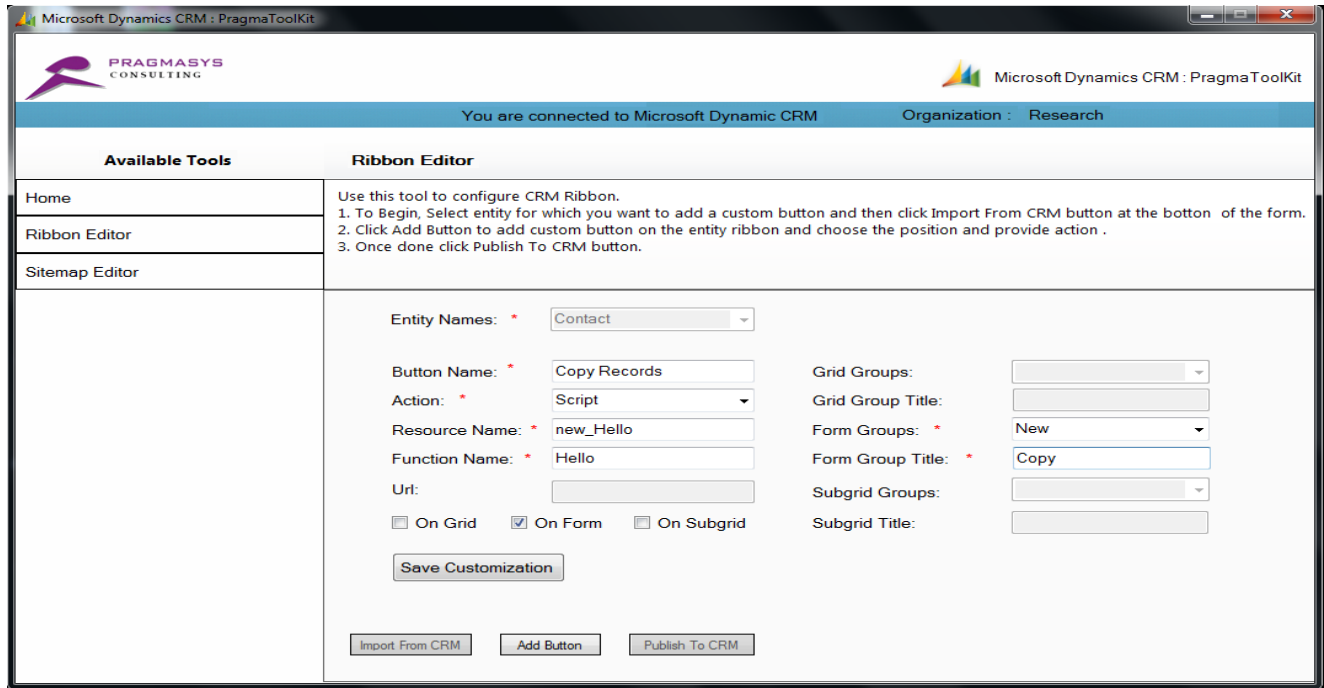
Form Group Title:

Subgrid Groups:

Subgrid Title:

Import From CRM Add Button Publish To CRM

4. Fill required information given on screen select location where you want to put custom button.



Microsoft Dynamics CRM : PragmaToolKit

You are connected to Microsoft Dynamic CRM Organization : Research

Available Tools

- Home
- Ribbon Editor
- Sitemap Editor

Ribbon Editor

Use this tool to configure CRM Ribbon.

1. To Begin, Select entity for which you want to add a custom button and then click Import From CRM button at the bottom of the form.
2. Click Add Button to add custom button on the entity ribbon and choose the position and provide action .
3. Once done click Publish To CRM button.

Entity Names: *

Button Name: *

Action: *

Resource Name: *

Function Name: *

Url:

☐ On Grid ☒ On Form ☐ On Subgrid

Grid Groups:

Grid Group Title:

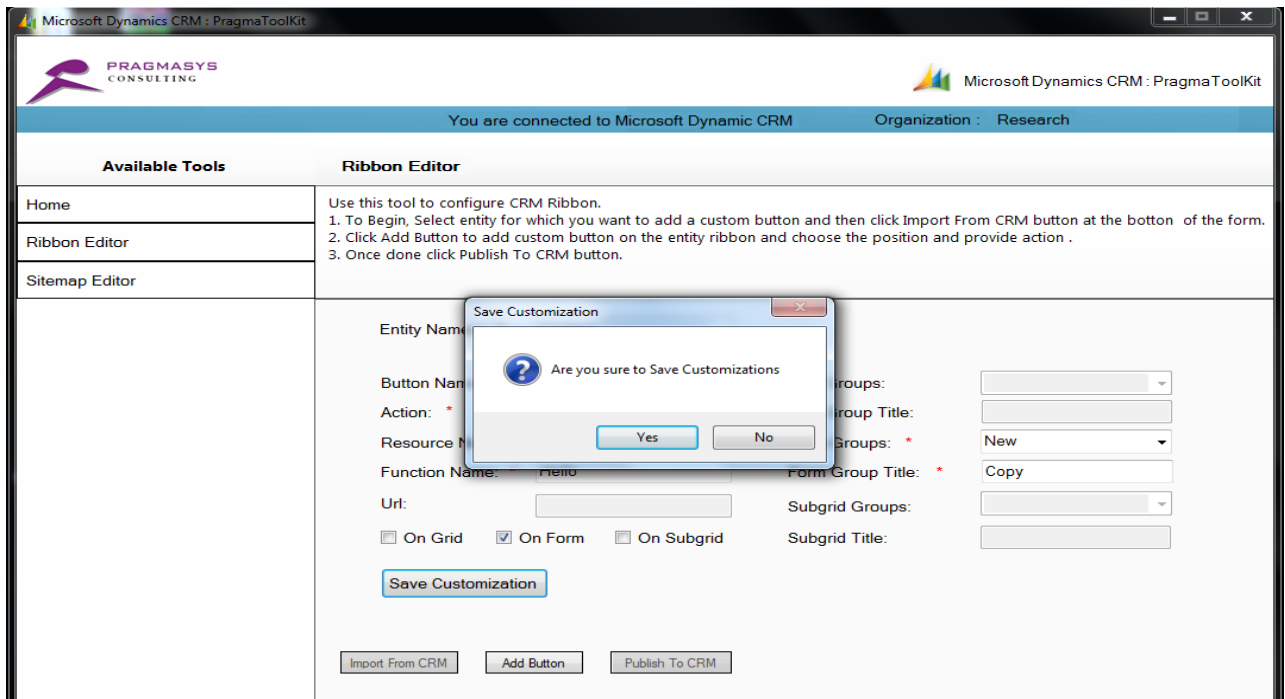
Form Groups: *

Form Group Title: *

Subgrid Groups:

Subgrid Title:

5. Once done click on “Save Customization” button to save changes in customization.xml file. To save changes click “Yes” button otherwise click “No” button.



Microsoft Dynamics CRM : PragmaToolKit

You are connected to Microsoft Dynamic CRM Organization : Research

Available Tools

- Home
- Ribbon Editor
- Sitemap Editor

Ribbon Editor

Use this tool to configure CRM Ribbon.

1. To Begin, Select entity for which you want to add a custom button and then click Import From CRM button at the bottom of the form.
2. Click Add Button to add custom button on the entity ribbon and choose the position and provide action .
3. Once done click Publish To CRM button.

Entity Names: *

Button Name: *

Action: *

Resource Name: *

Function Name: *

Url:

☐ On Grid ☒ On Form ☐ On Subgrid

Grid Groups:

Grid Group Title:

Form Groups: *

Form Group Title: *

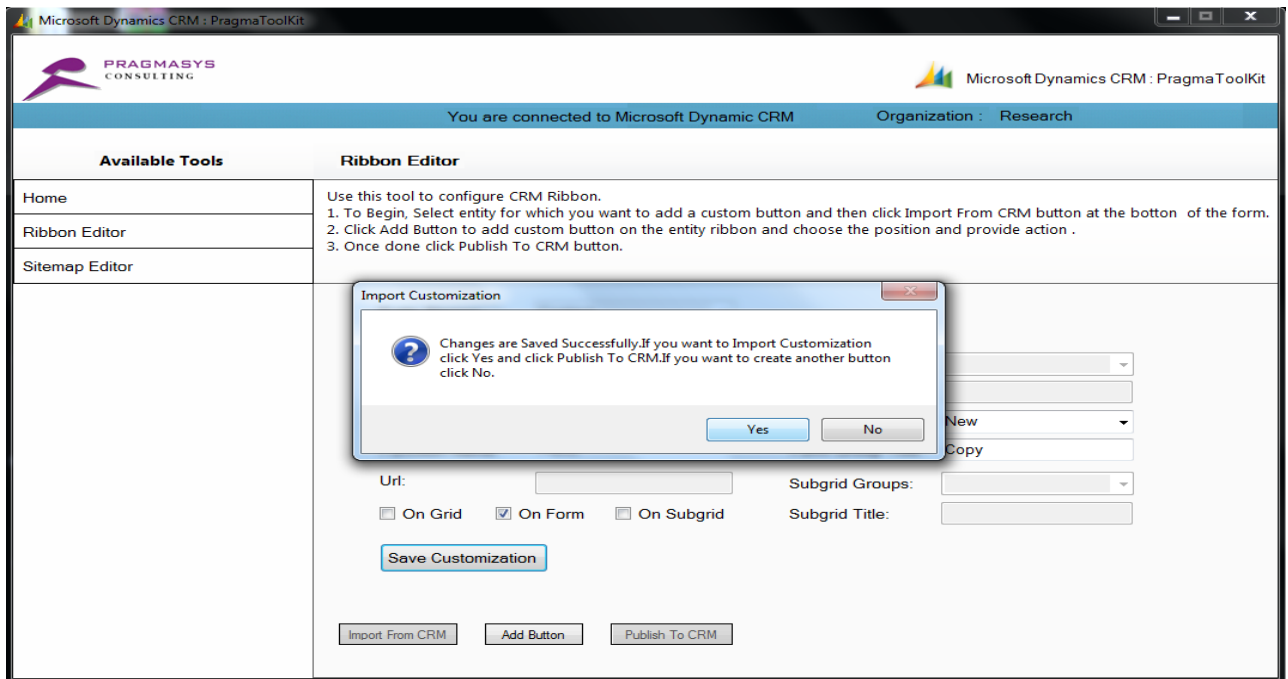
Subgrid Groups:

Subgrid Title:

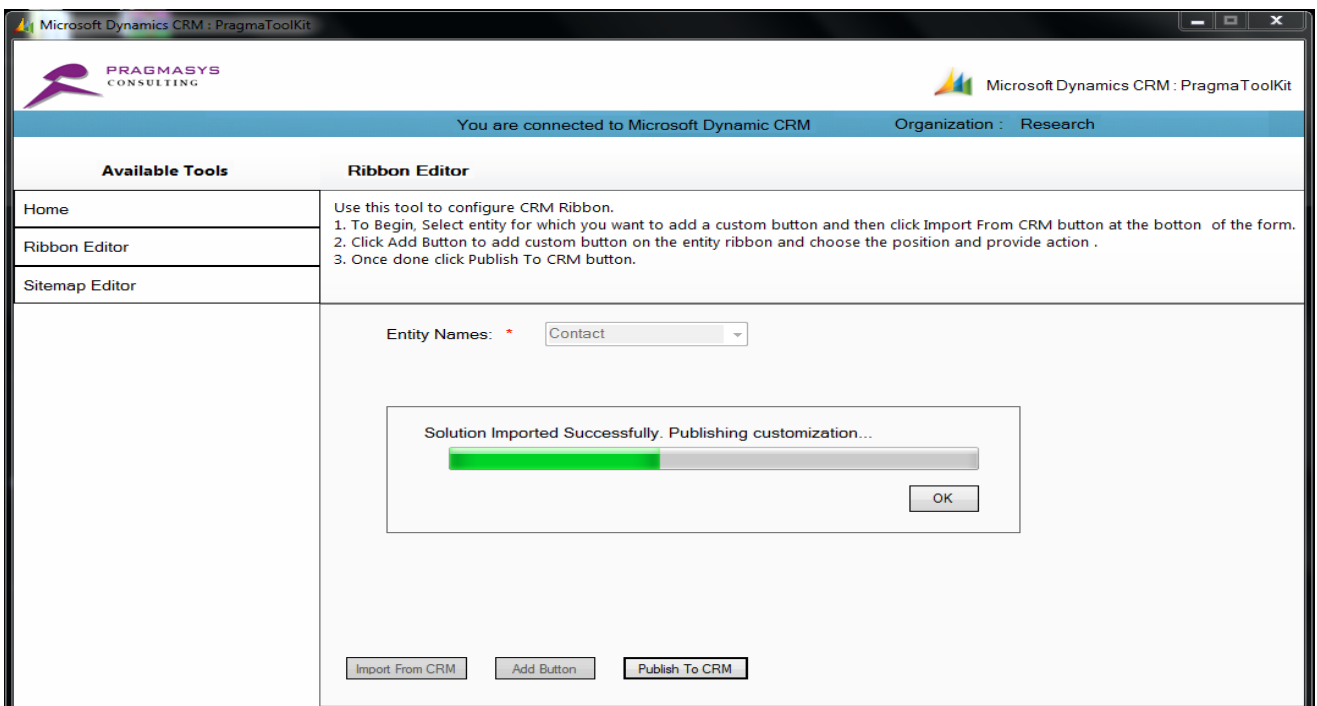
Save Customization

Are you sure to Save Customizations

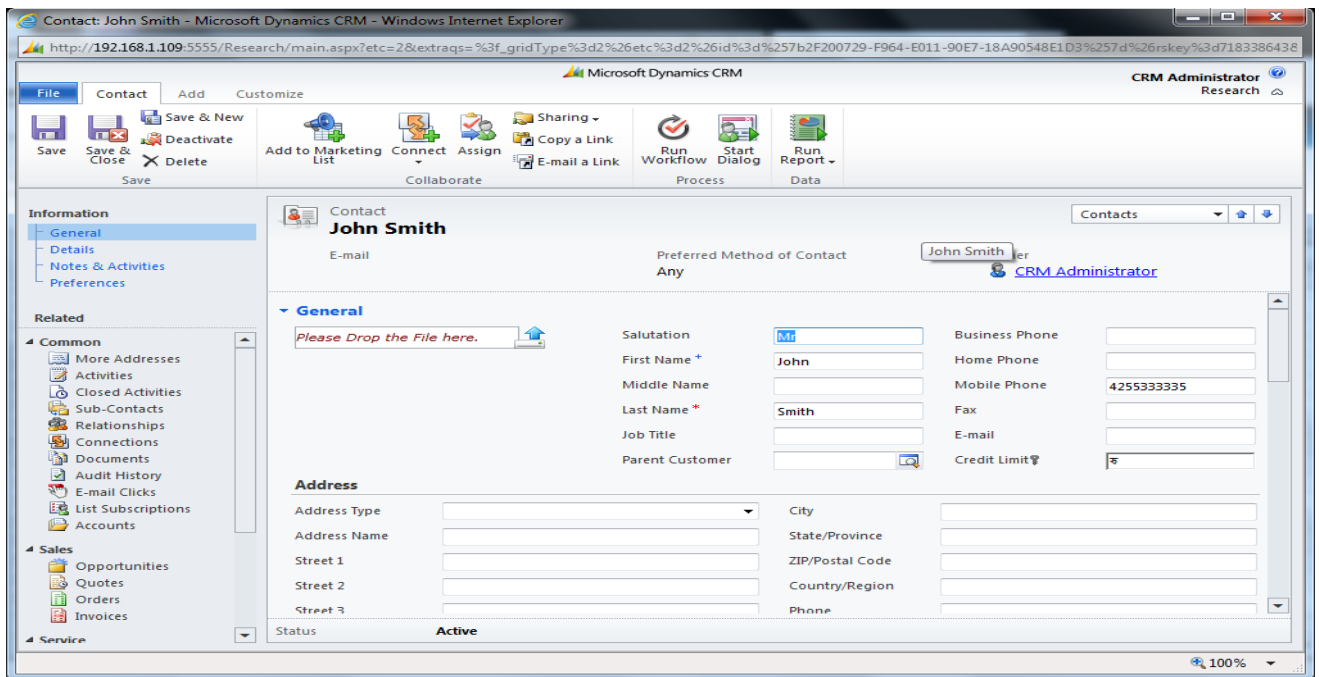
6. To publish changes to MSCRM. Click on “Yes” button.
To create more buttons on selected entity’s ribbon then click on “No” button.



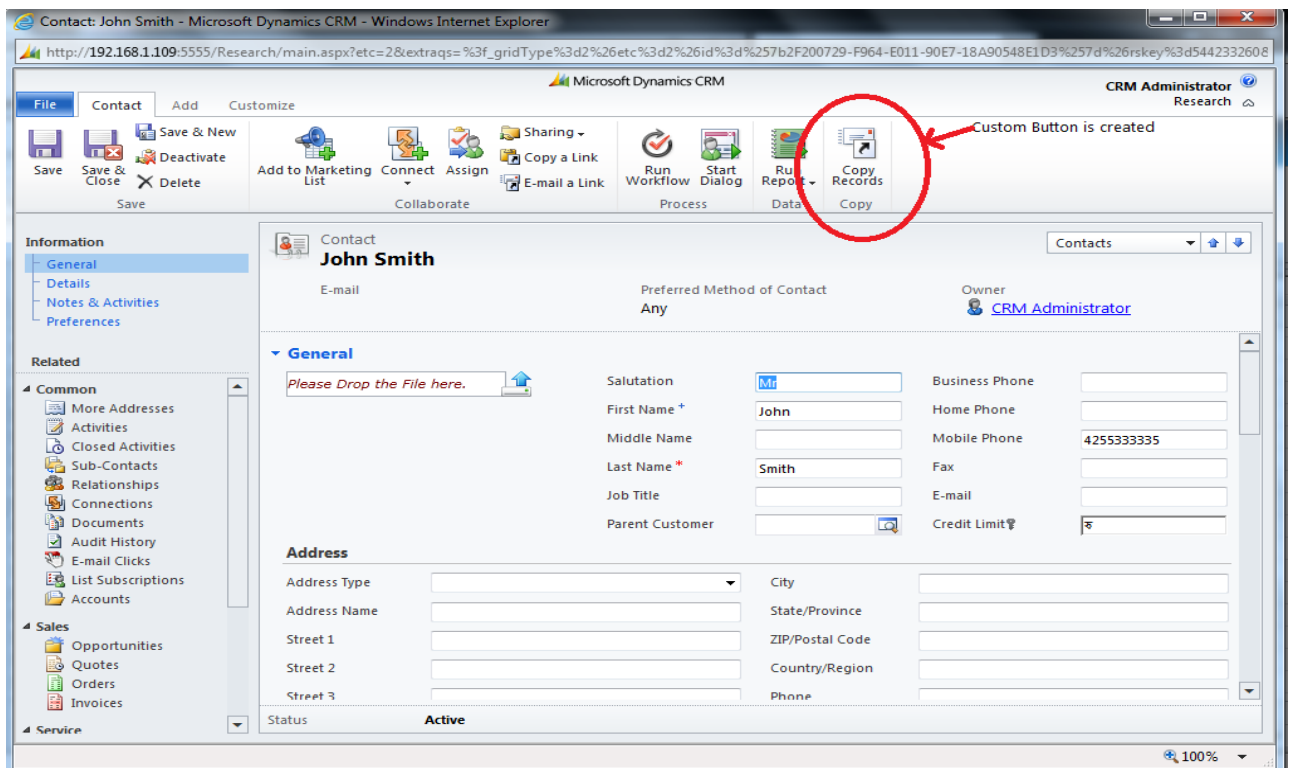
7. For publishing customizations to CRM click on “Publish To CRM”.



8. Before publishing to MSCRM.

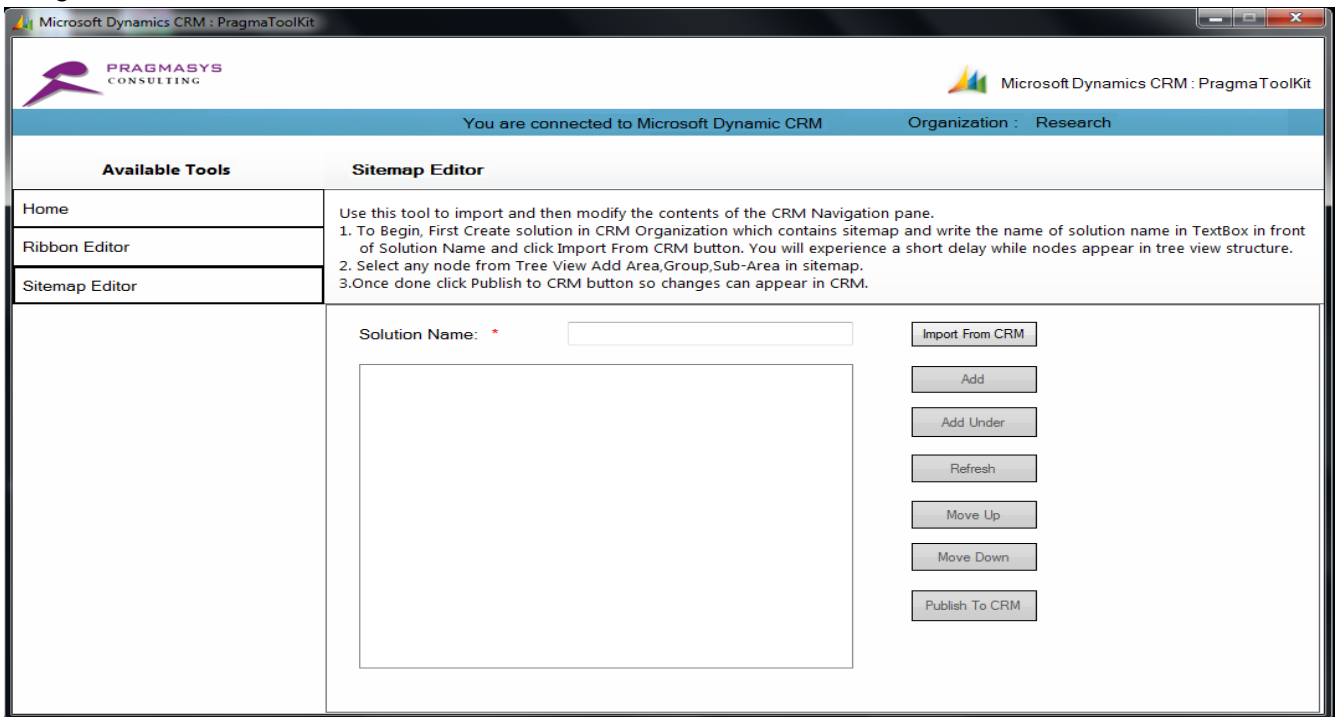


9. After publishing to MSCRM.



2.4 Customizing Navigation Pane of MSCRM.

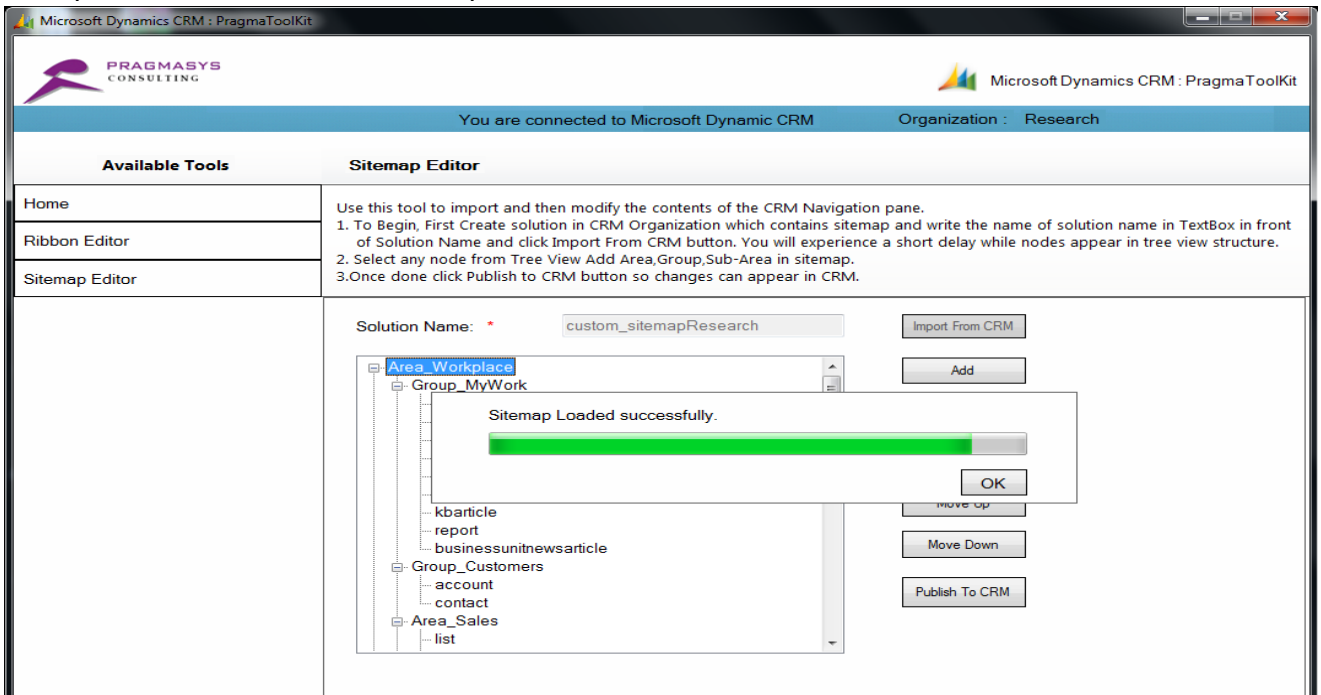
1. To customize Navigation Pane of MSCRM click Sitemap Editor Menu from navigation pane of PragmaToolKit.



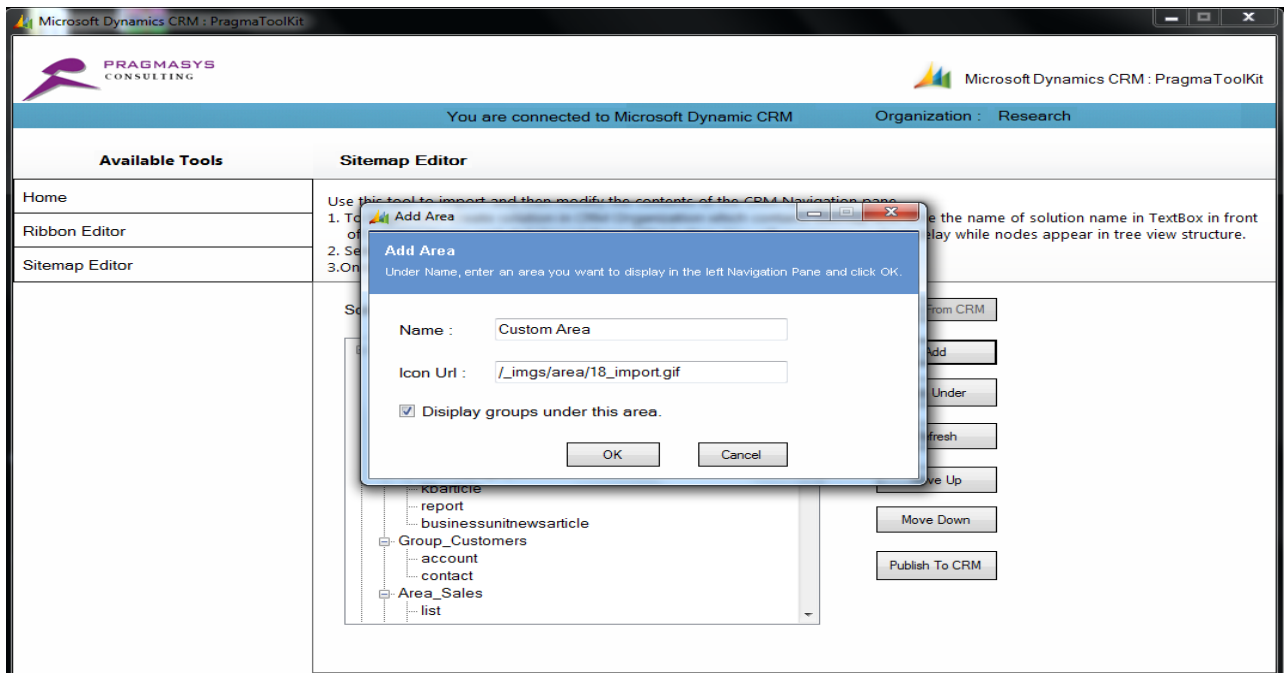
Note

Before using Sitemap Editor Menu create new solution and add sitemap as its component in MSCRM. Copy solution name from MSCRM and paste into Solution Name field of Sitemap Editor Screen.

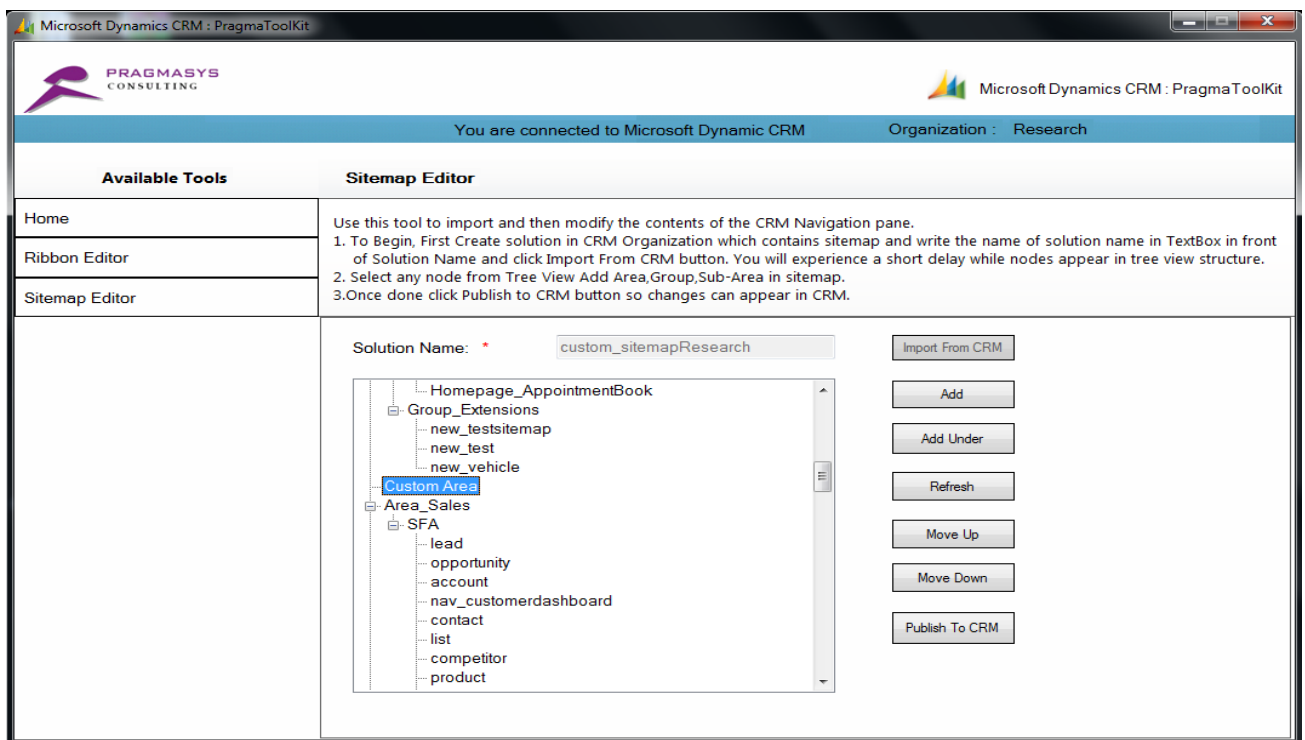
2. To export customization click on "Import From CRM" button.



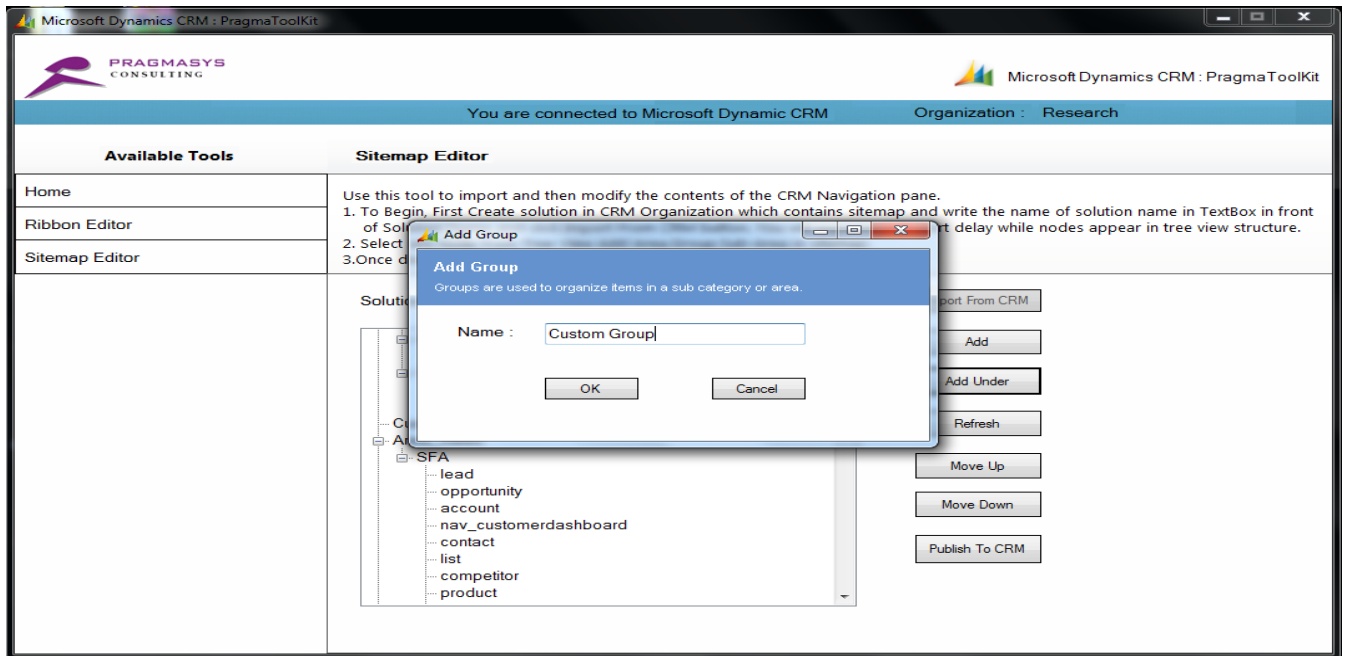
3. Click on “OK” button to start customization of sitemap.
4. To add Custom Area, select any Area e.g. Area_Workplace from sitemap and click on “Add” button. Fill all information in Add Area screen and click OK.



5. Click “Refresh” button to see the changes.

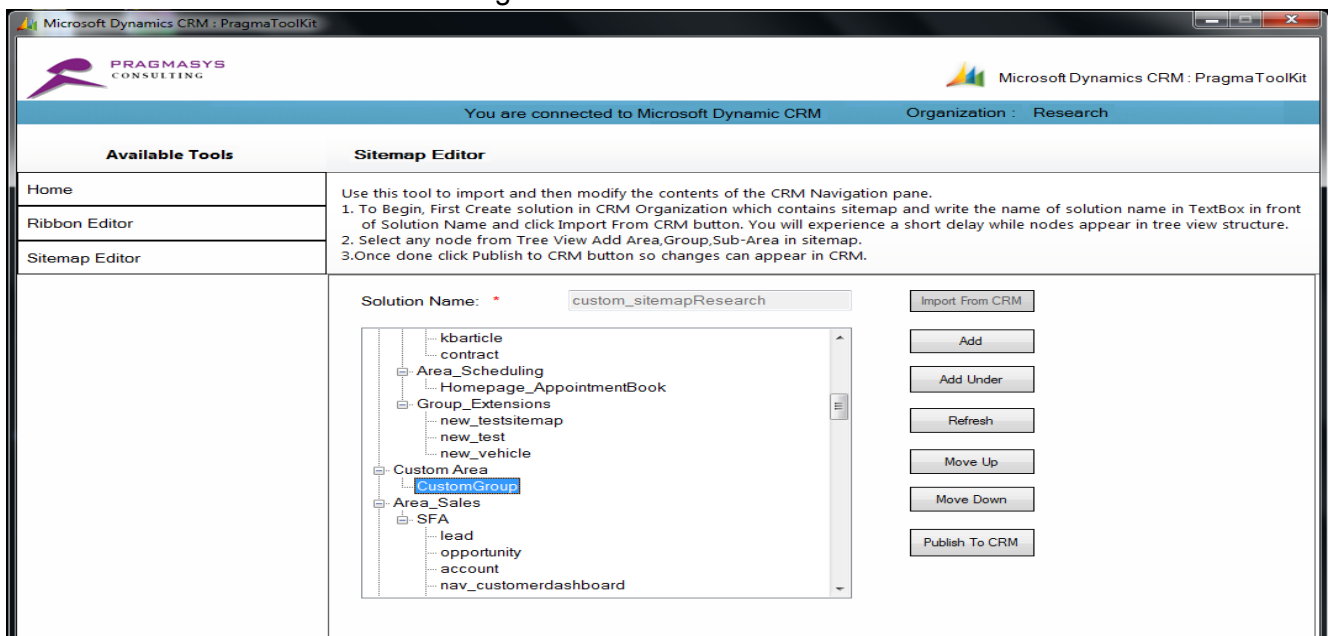


6. To add Custom Group there are two ways to do this,
 1. Select Area in which you want to add Custom Group from sitemap and click on “Add Under” button.e.g. Area_Workplace.
 - Or
 2. Select Group from the Area in which you want to add Custom Group from sitemap and click on “Add” button. e.g. Group_Extensions from Area_Workplace.
 Fill information and click on OK.



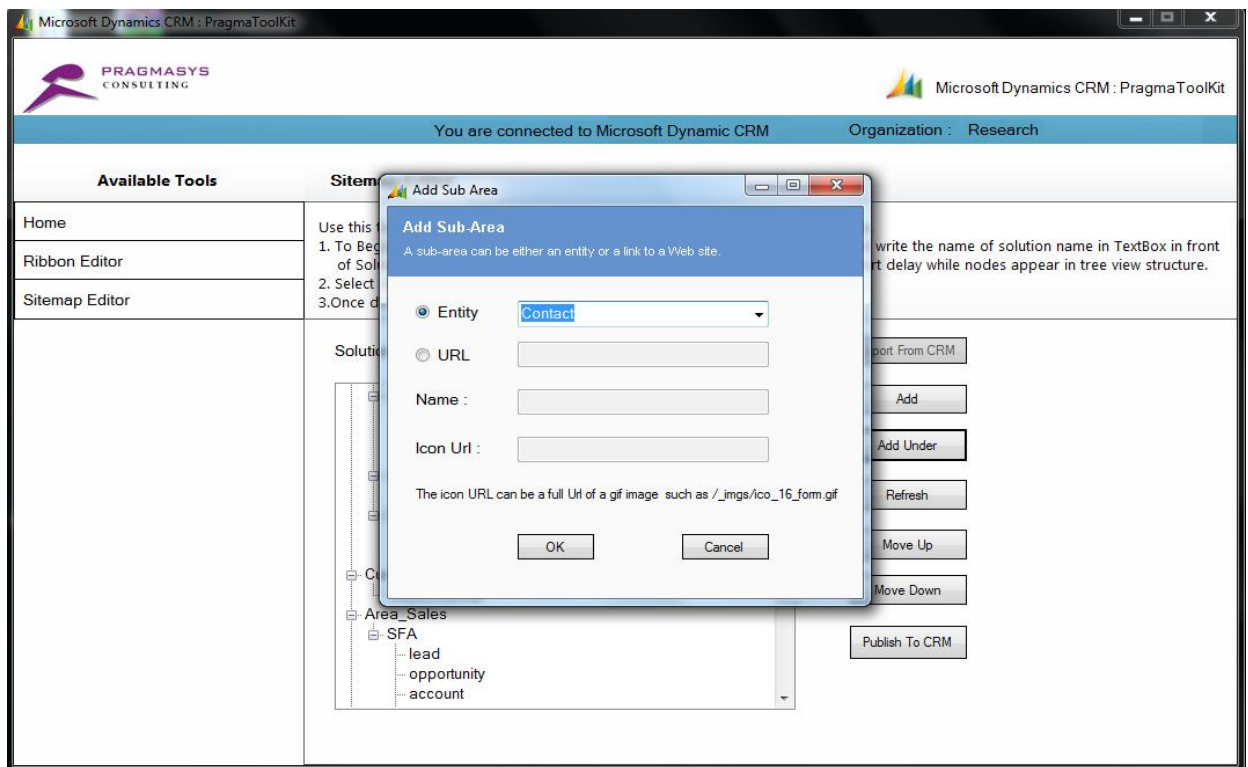
 **Note** Custom Area is selected to add Custom Group.

7. Click “Refresh” button to see the changes.



8. To add Sub-Area there are two ways to do this,
 1. Select Group in which you want Sub-Area from sitemap and click on “Add Under” button.
e.g. Group_Extensions, Custom Group.
 - Or
 2. Select Group from the Area in which you want Custom Group from sitemap and click on “Add” button. e.g. new_test from Group_Extensions and Area_Workplace.

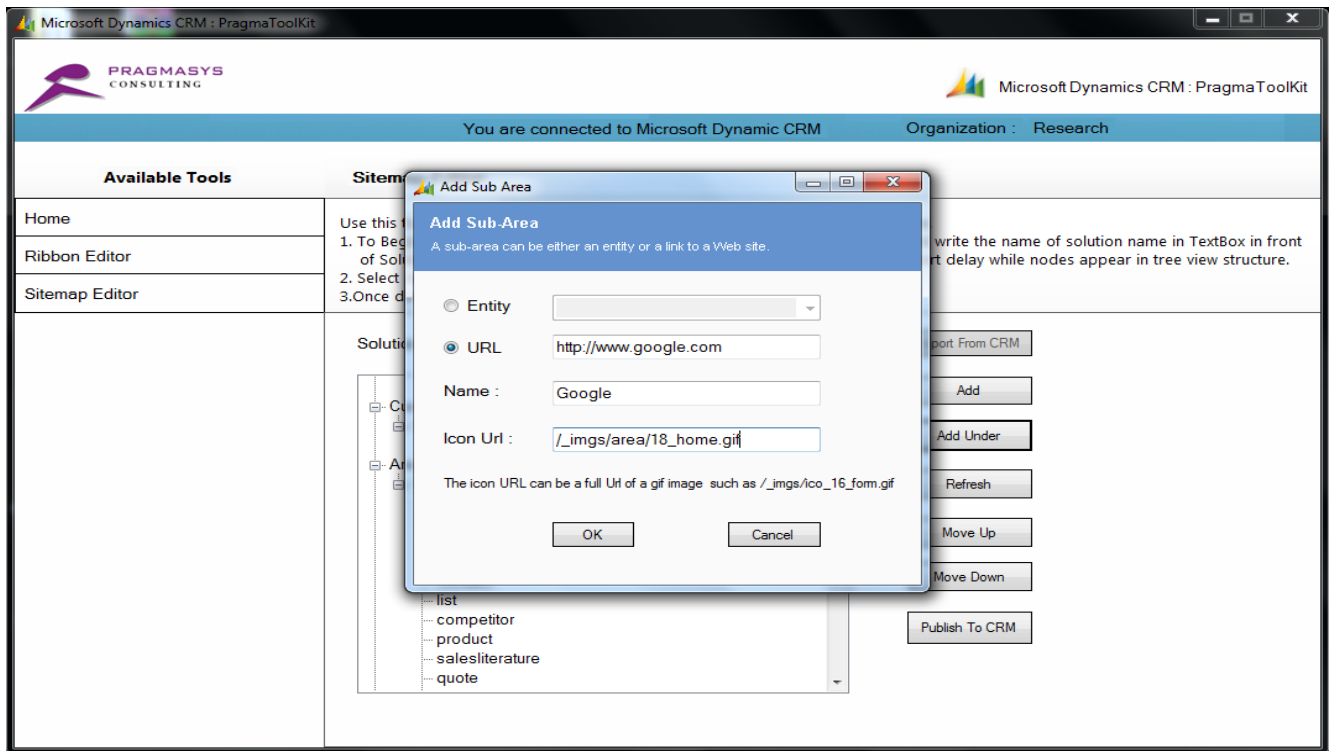
User can add Sub-Area as Entity from MSCRM. Select entity which you want add as Sub-Area and click OK.



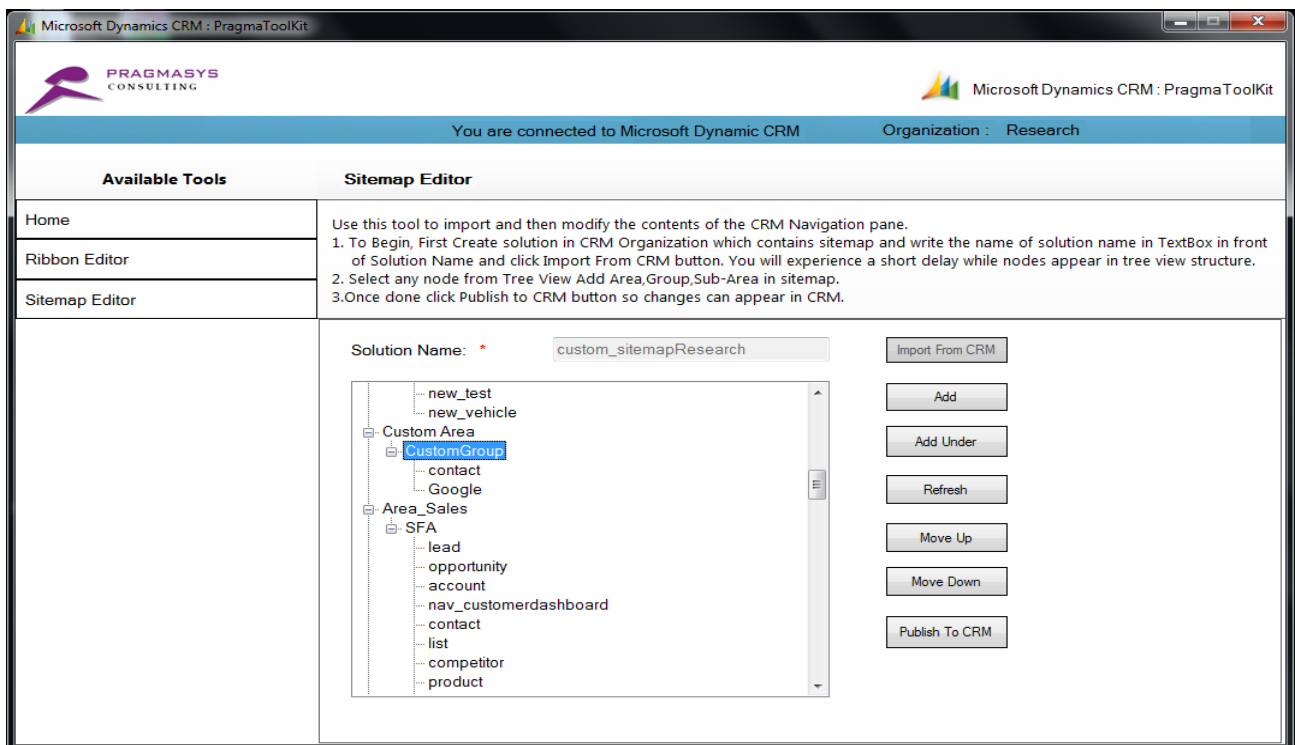
Note

Custom group is selected to add Sub-Area.

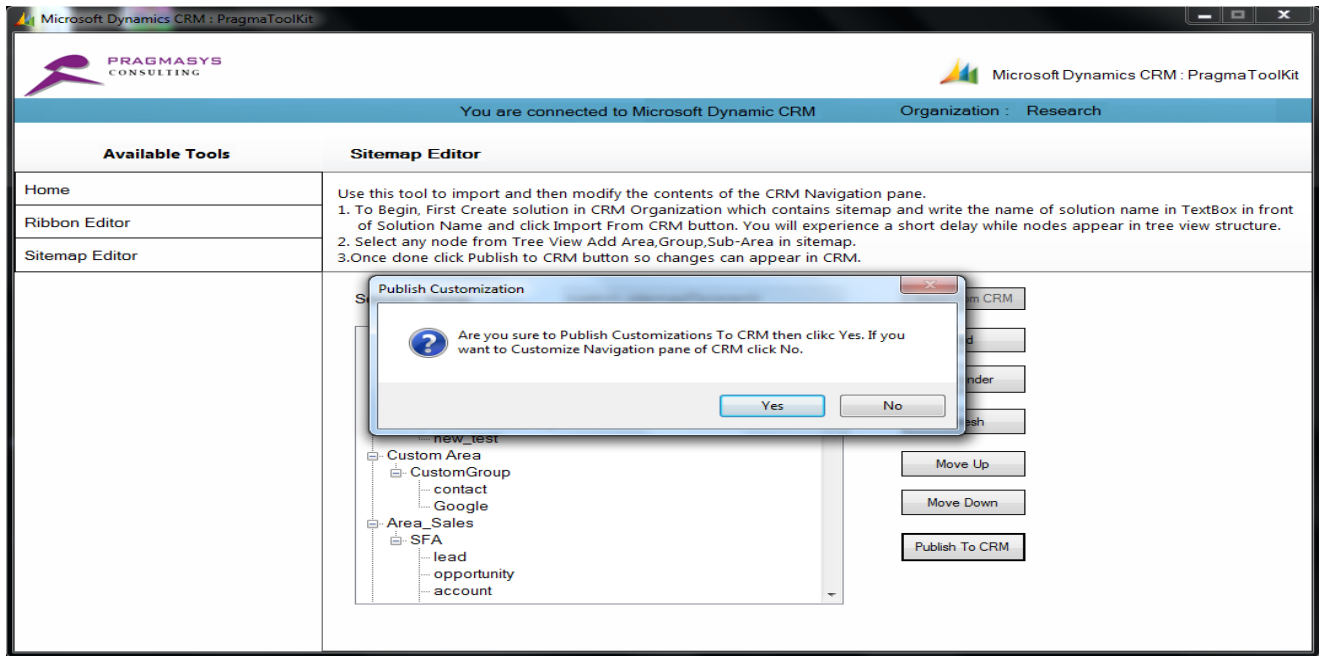
User can Add Sub-Area as Url that opens page from MSCRM or any Web page. Write the Url for Sub-Area and Fill other information and click OK.



9. Click "Refresh" button to see the changes.



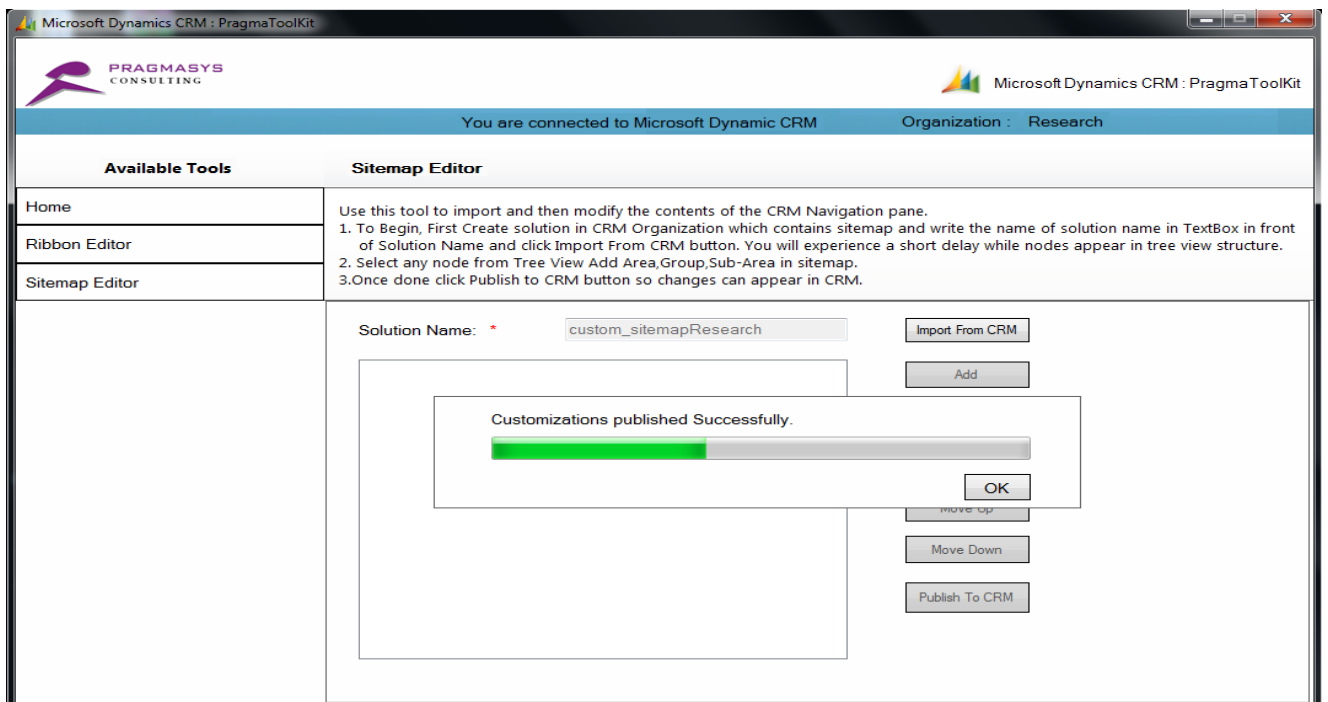
10. Once done click on “Publish To CRM” button and for confirmation click on “Yes” button.



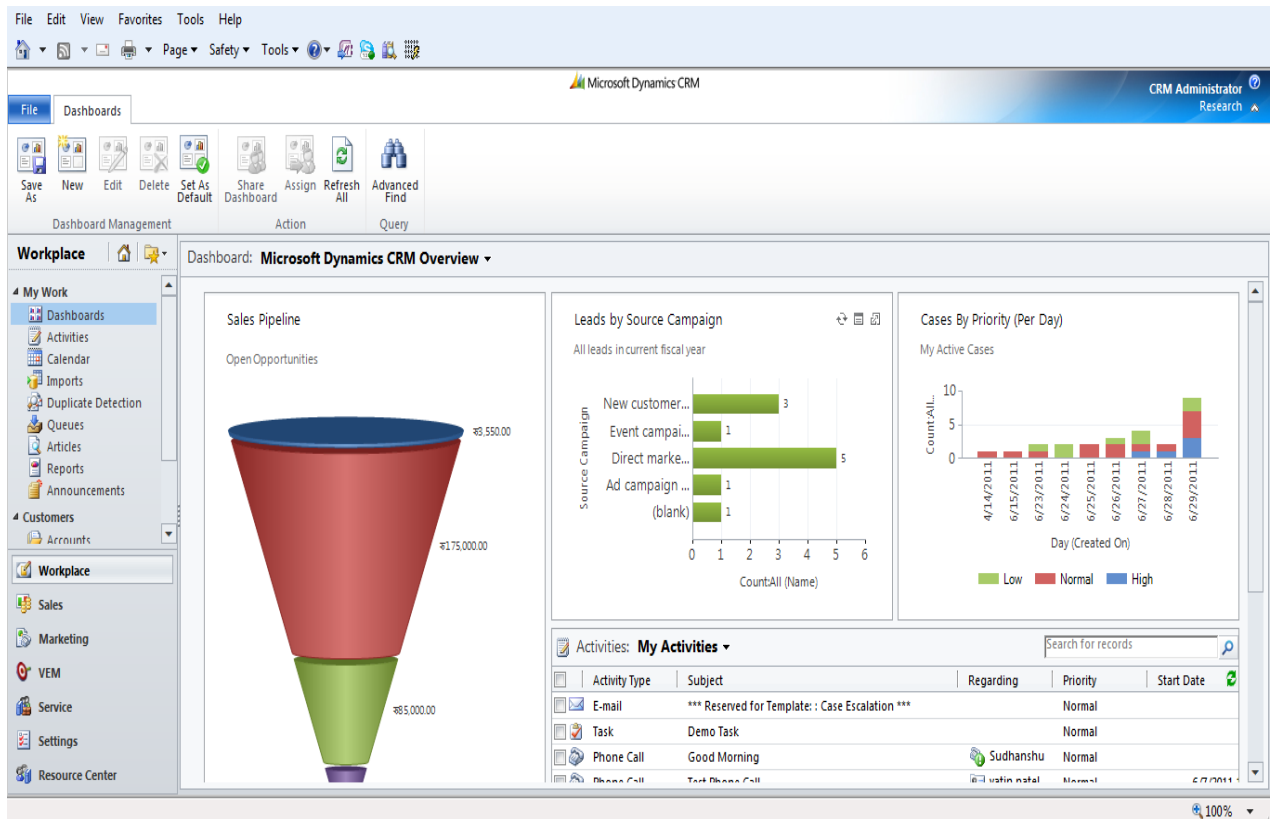
 **Note**

To publish the changes to MSCRM to publish click “Yes” button. To customize sitemap again click on “No” button.

11. Publish To MSCRM.



12. Before publishing Sitemap to MSCRM.



13. After publishing Sitemap to MSCRM.

