LightUp Dynamics™
Installation & Evaluation Guide

Contents

Introduction

Welcome to the Evaluation Guide for LightUp Dynamics™

The goals of LightUp Dynamics™ are to:

- Increase user adoption of Dynamics 365.
- Actively drive usage of Dynamics 365, for both new users and experienced users.
- Reduce your training costs for Dynamics 365 end users.
- Reduce your help-desk incidents, especially when users have 'How do I' questions.

In this guide, you will follow specific procedures that build learning experiences and communication campaigns for Dynamics 365 end users.

Organization Keys

In various procedures below you will be instructed to use a combination of *Organization Name* and *Key*. The name and keys are only required to perform administrative functions. Your end users *never* need the keys, so you should not provide them the details you use as an administrator.

You should have been provided with your own combination of name and key by Westerly Media or one of its partners. If you do not have this information, please contact support at: support@westerlymedia.com

Installing and Activating the Solution

In this section you will get started by installing the LightUp Dynamics solution into your tenant, and then activating the solution.

Installing the Solution

1. Download and save the following zip file to your local computer:
   https://studio.lightupdynamics.com/downloads/LightUpDynamics365.zip
2. Log in to your Microsoft Dynamics 365 subscription as an administrative user.
3. Navigate to the *Sales* app that is provided by Microsoft as part of Dynamics 365.
4. On the top navigation bar, click the dropdown arrow next to Sales:
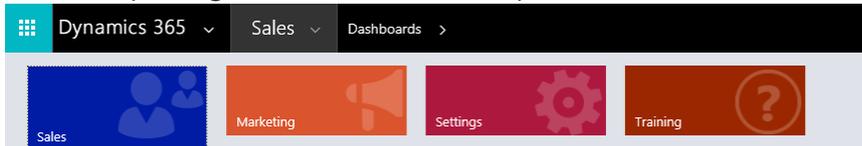
5. Click the **Settings** tile.
6. In the **Customization** group, click **Solutions**.
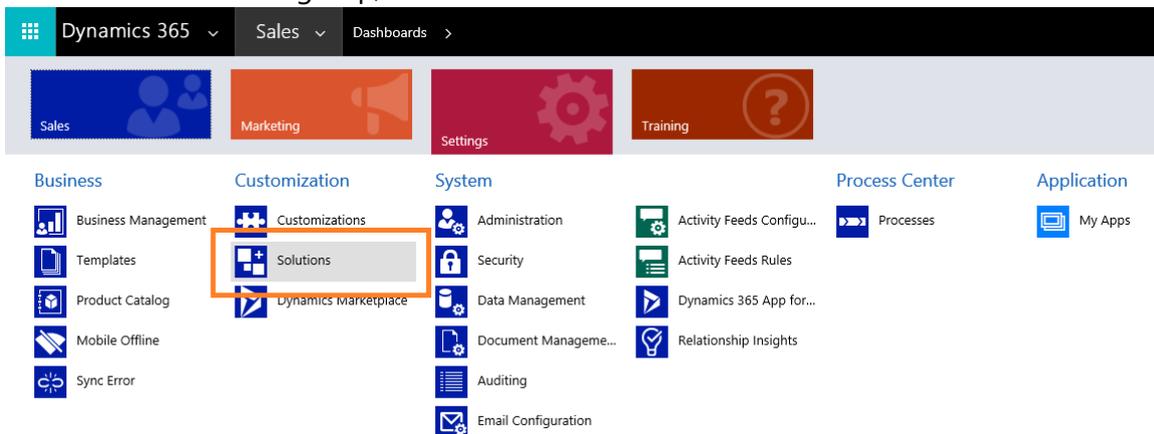
   The list of solutions that are currently installed appears.
7. On the ribbon, click **Import**.
8. In the **Select Solution Package** pop-up window, click **Browse**.
9. Browse to the location where you downloaded the zip file in step 1.
10. Select **LightUpDynamics365.zip** and then click **Open**.

(continued overleaf)

11. Click **Next**, and verify that the details of the package matches the following:
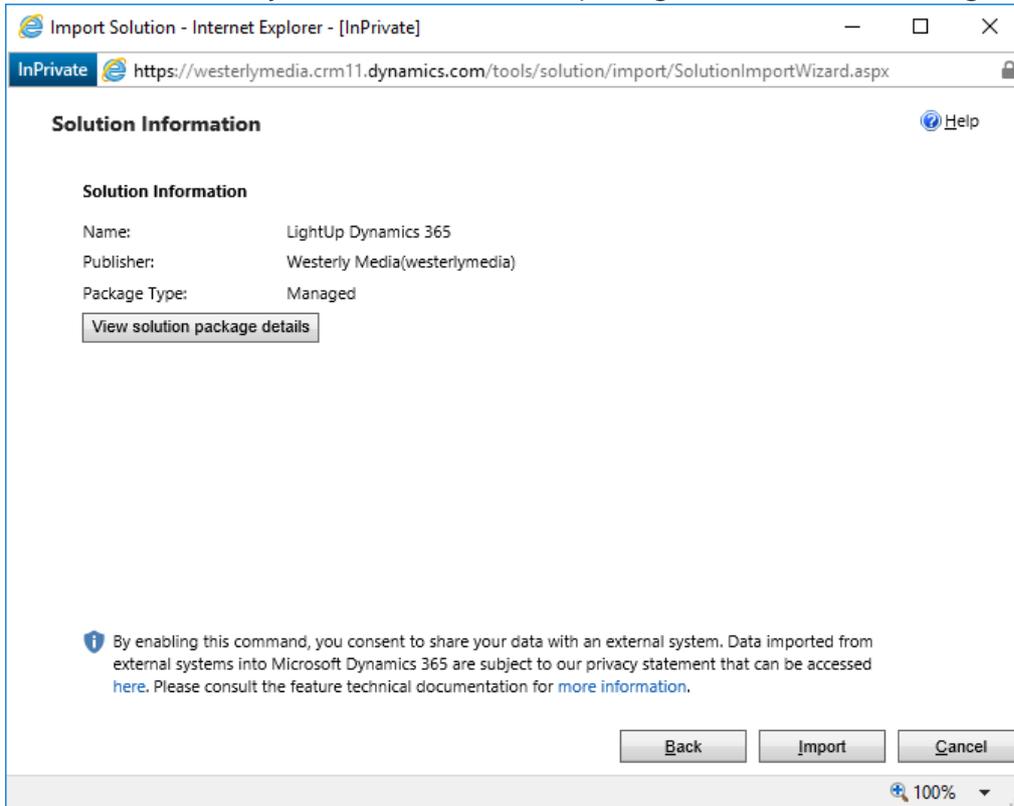
12. Click **Import**.

The solution is imported and after a few moments you should see a dialog like the following:

13. Click **Close**.
14. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Sales** app.

15. You should see a new menu item called HOW-TO as shown:

Leave the browser open – you will use it in the next procedure.
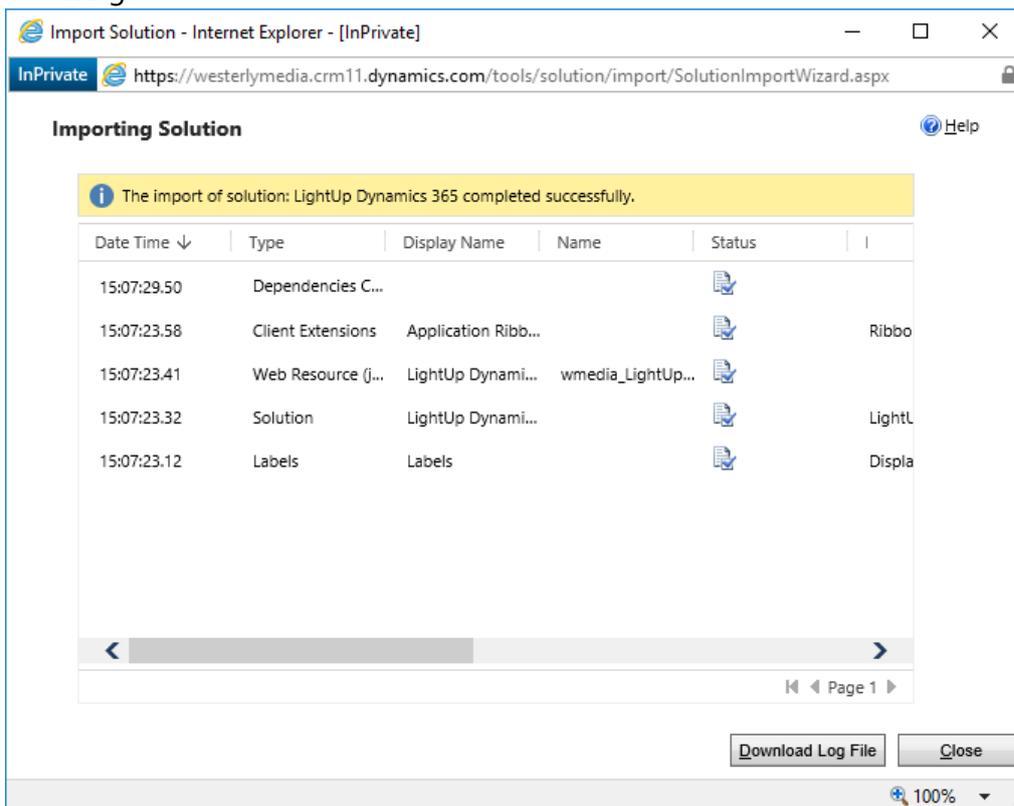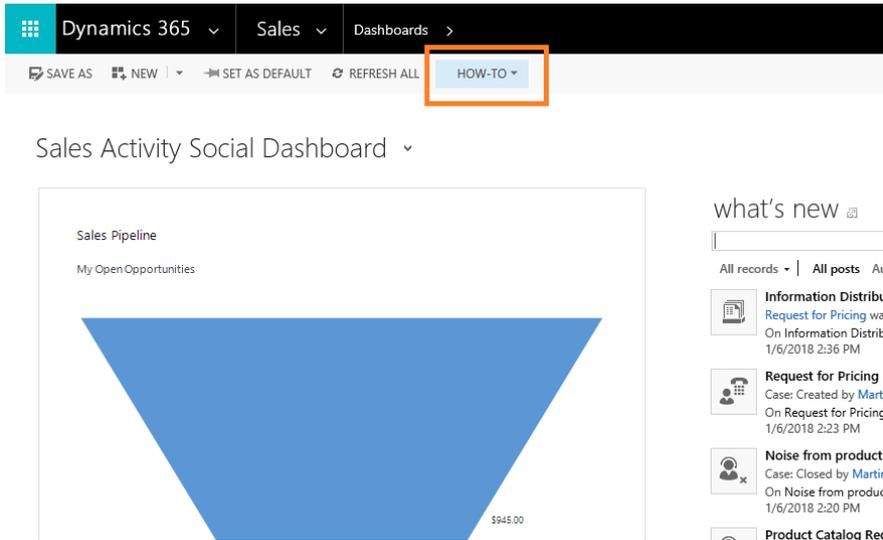
Activating the Solution.

1. Click the **HOW-TO** menu, and then click **All Learning**
   When the page has loaded you should see the **Activation Required** message.
2. In the **Organization Name** text box, type the organization name provided to you by Westerly Media or one of its partners.
3. In the **Activation Key** text box, type the key provided to you by Westerly Media or one of its partners.
4. Click **Apply**.
   If the training portal loads without errors, you have successfully installed LightUp Dynamics into your Dynamics 365 tenant, and you have successfully activated the solution. Your users can now simply start using the How-To menu in Dynamics 365 to learn.
5. Close the training portal tab, but leave Dynamics 365 running – you will use it in the next section.

Exploring the Solution as an End User

In this section, you will explore the training portal as an end user.

Exploring the Menu Locations

The HOW-TO menu appears in various locations, depending on how busy the Dynamics 365 screen is. You will explore some of the typical locations, as follows:

1. Switch back to the Dynamics 365 tab.
2. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Sales** app. Note the location of the HOW-TO menu.
3. On the top navigation bar, click the dropdown arrow next to **Sales**, and click the **Settings** tile. Then, in the **Business Section** click **Product Catalog**. Note the location of the HOW-TO menu.
4. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Customer Service** app. Note the location of the HOW-TO menu.
5. On the top navigation bar, click the dropdown arrow next to **Service**, and in the **Service** section click **Cases**. Click the ellipsis **[…]**, and note the location of the HOW-TO menu.
6. Click **New Case** and note the location of the HOW-TO menu.

Browsing Libraries, Learning Paths, and Videos

1. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Sales** app.
2. Click the **HOW-TO** menu, and then click **All Learning**.
   The training portal appears and shows a number of libraries organized into groups.
3. In the **Sales & Marketing** group, click **Accounts, Contacts, and Sales.**
   A number of learning paths are displayed.
4. Click **Working with Opportunities**.
   The videos in this learning path are displayed.
5. Click the first video. When it has loaded, click the **Play** icon.
   The video plays.
6. Hover the mouse over the video, and then click the Full Screen button.
   The video switches to full screen.
7. Press [Escape] to return to non-full screen view.
8. Near the bottom-left of the video, click the **Show Transcript** icon.
   The audio script appears below the video.
9. Click the **Show Transcript** icon one more time to hide the transcript.
10. Near the bottom of the video, click the right-pointing arrow to move to the next video in the learning path.
11. Just above the video, point the backwards pointing chevron to return to the learning path.
    Note how the two videos you have visited have a different background color and a check mark in the bottom-right corner.
12. Beneath the logo near the top of the page, click the **Home** icon. All libraries are displayed.
13. Leave the browser running – you will use it in the next procedure.

Adding a Video to your 'My Learning' Profile

1. In the **Sales & Marketing** group, click **Accounts, Contacts, and Sales.**
   A number of learning paths are displayed.
2. Click **Working with Opportunites**.
   The videos in this learning path are displayed.
3. Click the first video.
4. Near the bottom-left of the video, click the Person icon. (It has a tool-tip of 'Add to your 'My Learning' profile).
   The icon is replaced with a message that indicates the video has been added to your profile.

Viewing your 'My Learning' Profile and 'Learning History'

1. Close the training portal tab and switch back to the Dynamics 365 tab.
2. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Sales** app.
3. Click the **HOW-TO** menu, and then click **My Learning**.
   The training portal appears and shows that you have the video in your profile that you added previously.
4. Beneath the logo near the top of the page, click the calendar icon. (It has a tool-tip of 'Learning History'. All videos that you have watched are displayed, with the most recent at the top/left. This is your own personal history – other users will see their own personal histories.
5. Beneath the logo near the top of the page, click the person icon. (It has a tool-tip of 'My Learning'.) This is an alternative way to get to your personal 'My Learning' profile.
6. Click the [**X]** icon next to the video in your profile. The video is removed from your personal learning profile.

Searching for Videos

1. In the search box near the top-right of the page, type Campaign, and then press [Enter] (or click the Search icon).
   The results are displayed, organized by library.
2. Expand each of the library names in the results.
   Note that some of these results are returned because they have the word 'campaign' in their titles, while others are returned because the word 'campaign' is spoken in the audio soundtrack.

Launching the Relevant Learning View

1. Close the training portal tab and switch back to the Dynamics 365 tab.
2. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Sales** app.
3. On the top navigation bar, click the dropdown arrow next to **Sales**, in the **Sales** Section click **Competitors**.

4. Click the **HOW-TO** menu, and then click **Relevant Learning**.
   The training portal appears, and shows a targeted list of videos that are relevant to competitors. In other words, the **Relevant Learning** menu item is context-sensitive, and shows relevant training for many entities such as Leads, Accounts, Contacts, Competitors, Quotes, and so on.
5. Leave the training portal running – you will use it in the next section.

Administration

The following sections apply only to the staff who administer the learning experiences for your users. Your end users do NOT need to follow or understand the following content.

Controlling the Visibility of Libraries in the Training Portal

You can control all aspects of the Training Portal from LightUp Studio.

1. On a new tab, browse to https://studio.lightupdynamics.com
2. In the **Organization or Login Name** text box, type the organization name provided to you by Westerly Media or one of its partners.
3. In the **Organization Key or Password** text box, type the key provided to you by Westerly Media or one of its partners.
4. Click **Log In**.
    If you have entered the credentials correctly, you will see various sections on the home page.
5. In the **Libraries** section, click a library you want to hide from the portal (such as **Project Service Automation**).
6. Click the **Visibility** tile.
7. Uncheck the **Visible** checkbox, and then click **Save**.
8. Switch to the tab where the training portal is running from the previous procedure, and near the top of the page click the **All Libraries** home icon. This refreshes the list of libraries. Note that the library is no longer visible.
9. Leave the Training Portal page running, and switch back to LightUp Studio.
10. In the **Libraries** section, click the same library you previously hid.
11. Click the **Visibility** tile.
12. Check the **Visible** checkbox, and then click **Save**.
13. Switch to the Training Portal, and near the top of the page click the **All Libraries** home icon. This refreshes the list of libraries.
    The library you chose is now visible again.

Managing Library Grouping in the Training Portal

By default, the libraries in the user training portal are arranged into a single group. However, you have complete control over the groups and the order in which they are displayed. You can also create your own groups. In this section, you will learn how to create groups, delete groups, and re-order groups.

Create a New Group

1. In LightUp Studio, in the **Libraries** section, click **Manage UI Grouping**.
   You will see the existing default groups.
2. Click **Add New Group**.
3. In the **New Group Name** text box, type **New Employee Training**, and then click **Save**.

Add Libraries to the New Group

A group that does not contain any libraries is hidden from the end user, so the next step is to add one or more libraries to the group.

1. In the breadcrumb control near the top of the page, click **Home**.
2. In the **Libraries** section, click a library (such as **Sales**).
4. Click the **Visibility** tile.
5. In the **Library Group** section, select **New Employee Training** from the dropdown list, and then click **Save**.
6. Switch to the Training Portal, and near the top of the page click the **All Libraries** home icon. This refreshes the list of libraries. The new group is now visible and contains the library you just added to it.

Reorder Groups

1. In the breadcrumb control near the top of the page, click **Home**.
2. Click **Manage UI Grouping**.
3. Click **Manage Group Order**.
4. Select the **New Employee Training** item and then click the upwards point arrow two times.
5. Click **Save**.
   You will see that the new group has moved up two places in LightUp Studio.
6. Switch to the Training Portal, and near the top of the page click the **All Libraries** home icon. This refreshes the list of libraries.
   The new group has also been moved up in the end user portal.

Rename Groups

1. Switch back to LightUp Studio.
2. In the breadcrumb control near the top of the page, click **Home**.
3. Click **Manage UI Grouping**.
4. Click the pen icon to the left of the **New Employee Training** item.
5. In the **Group Name** text box, change the text so that it reads **New Employees** and then click **Save**.
6. Switch to the Training Portal, and near the top of the page click the **All Libraries** home icon. You will see that the group has been renamed.

Delete Groups

You can only delete a group if it does not contain any libraries, so the first step is to remove the library you added to the new group.

1. Switch back to LightUp Studio.
2. In the breadcrumb control near the top of the page, click **Home**.
3. In the **Libraries** section, click the library that you added to the **New Employees** group.
4. Click the **Visibility** tile.
5. In the **Library Group** section, select **Dynamics 365 Core** from the dropdown list, and then click **Save**.
6. In the breadcrumb control near the top of the page, click **Home**.
7. Click **Manage UI Grouping**.
8. Click the trashcan icon to the right of the **New Employees** item.
9. Click **No**. You will use the group in the next procedure, but of course if you really wanted to delete the group you would click **Yes** at this point.

Library Administration

To Create a Library

1. Switch to LightUp Studio, and in the breadcrumb control click **Home**.
2. In the **Libraries** section, click **Add New Library**.
3. In the **Library Name** text box, type **Onboarding** (or any other name you want).
4. Optionally, in the **Description** text box type a description (such as **Training for New Employees**).
5. In the **Group** dropdown list, select the **New Employees** group.
6. Click **Save**.
   The new library is now included in the **Libraries** section.
7. Switch to the Training Portal, and near the top of the page click the **All Libraries** home icon. You will see that the new library is visible in the new group.

To Edit a Library

1. In the **Libraries** section, click **Onboarding** (or whatever you called your new library in the previous procedure).
2. Click **Edit**.
3. Make any changes you want to for the **Library Name** or **Description**, and then click **Save**.
4. In the breadcrumb control, click **Home**.

To Delete a Library

NOTE: You can only delete libraries that you have created.

1. In the **Libraries** section, click **Onboarding** (or whatever you called your new library).
2. Click the **Delete** tile.
3. Read the message, but in this case click **No**.
   You will continue to work with the library in further procedures.

Video Administration

To Edit Video Metadata

1. In the **Libraries** section, click **Sales** (or any other library).
2. Click the **Asset Bin** tile.
3. Click the **Edit** icon to the left of any video.
4. Review the options available to you.

   NOTE: Search Tags can be used to add additional tags, although the entire contents of the Transcript text box is also used in search. The difference between the two is that the text in the Transcript text box is also displayed when the user clicks the Transcript button while they are watching a video.

5. In the breadcrumb control, click **Home**.

To Upload New Videos

1. In the **Libraries** section, click **Onboarding** (or whatever you called your new library).
2. Click **Asset Bin**.
3. Click **Add your own content**.
4. In the **Add a new asset** section, click **Upload**.
5. Browse to a video file that you want to upload, and select it.

   NOTE: MP4 formats or other HTML5-compliant videos are the best formats to work with.

6. Click **Open**.
7. Click **Save**, and wait until the video has been uploaded.
8. Click the **Edit** icon to the left of your new video.
9. Edit the **Friendly Name** text box, and then click **Save**.
10. In the breadcrumb control, click **Home**

To Link to Existing Videos

1. In the **Libraries** section, click **Onboarding** (or whatever you called your new library).
2. Click **Asset Bin**.
3. Click **Add your own content**.
4. In the **Add a new asset** section, click **Link**.
5. In the **Friendly Name** text box, type a name.
6. In the **URL** text box, type the URL to a video that is accessible in a Web browser. For example, the video may be in a SharePoint document library or similar location.
7. Click **Save**.

To Embed Videos from External Systems

In this procedure, you will use a YouTube video as an example but you can use any other system that supports embed codes.

1. In a new browser tab or window, browse to http://www.youtube.com
2. Search for a suitable training video for Dynamics 365.
3. Beneath the video, click **Share**.
4. Click **Embed**.
5. Press CTRL+C to copy the embed code to the clipboard.
6. Switch back to LightUp Studio.
7. In the **Libraries** section, click **Onboarding** (or whatever you called your new library).
8. Click **Asset Bin**.
9. Click **Add your own content**.
10. In the **Add a new asset** section, click **Embed**.
11. In the **Friendly Name** text box, type a name.
12. In the **Embed Data** text box, paste the embed code that you copied from YouTube**.**
13. Click **Save**.

Learning Path Administration

Learning paths are a collection of videos that you want your users to learn from together. LightUp Studio already includes many different learning paths, most of them organized to teach users how to perform related tasks in Office 365.

You can create your own learning paths, and you can even modify the ones included in LightUp Studio.

To Create a Learning Path

1. In the **Libraries** section, click **Onboarding** (or whatever you called your new library).
2. Click the **Learning Paths** tile.
3. Click **Add Learning Path**.
4. In the **Learning Path** name text box, type **A Quick Primer**
5. In the **Description** text box, type **A few simple 'how-to' videos**
6. Click **Save**.
7. In the right-hand pane, check the checkboxes for a few videos.
8. Click the left pointing arrow to move the selected videos to the left-hand pane.
9. Click **Save**.

   You now have a new learning path that will be visible when users browse a library. You can also use the learning path in a campaign, as described later in this evaluation guide.

To Edit a Learning Path

1. Click the **Edit** icon to the left of your new learning path.
2. Check the checkbox for the final video in the learning path, and then click the right-pointing arrow to remove it from the left-hand pane.
3. Check the checkbox for the first video in the left-hand pane, and then click the downward pointing arrow to move the selected video down the list.
4. Click **Save**.

   Changes to learning paths are reflected immediately to end users.

To Use Content Channeling in a Learning Path

1. Click the **Edit** icon to the left of your new learning path.
2. In the right-hand pane, in the **Source Library** dropdown list, select a different library. The video list in the right-hand pane is updated.
3. In the right-hand pane, check the checkboxes for a few videos.
4. Click the left pointing arrow to move the selected videos to the left-hand pane.
5. Click **Save**.

Note: You can channel content from any library to any other this way, even for libraries that you may have created. This enables you to build specific learning paths for different groups of users who may require tailored training depending on their roles.

To Delete a Learning Path

Note: You can only delete Learning Paths that you have created.

1. Click the **Delete** icon to the right of your new learning path.
2. When prompted, click **Yes**.

    NOTE: Only the definition of the learning path is deleted. The assets that may have been contained in the learning path still remain in the asset bins of their respective libraries.

To Hide a Learning Path

1. In the breadcrumb control click **Home**.
2. In the **Libraries** section, click **Sales**.
3. Click **Learning Paths**.
4. Click one of the learning paths.
5. Uncheck the **Visible** checkbox**.**
6. Click **Save**.

    Note: The only effect of hiding a learning path is that it is not visible when a user is browsing a library.

To Unhide a Learning Path

1. In the breadcrumb control click **Home**.
2. In the **Libraries** section, click **Sales**.
3. Click **Learning Paths**.
4. Click the learning path you previously hid.
5. Check the **Visible** checkbox**.**
6. Click **Save**.

To Reorder Learning Paths

1. In the breadcrumb control click **Home**.
2. In the **Libraries** section, click **SharePoint Sites**.
3. Click **Learning Paths**.
4. Click **Reorder Learning Paths**.
5. Select the **All New SharePoint Experience** item.
6. Click the downward-pointing arrow three times, and then click **Save**.

Creating Learning Campaigns

Learning campaigns are a way to drive usage of Dynamics 365 by communicating training to your users. In effect, you can encourage users to learn and then practice specific actions by surfacing learning campaigns to them via email, social networks, or any other external system you choose.

To Create a Learning Campaign Based on an Entire Library

1. Switch to LightUp Studio, and in the breadcrumb control click **Home**.
2. In the **Libraries** section, click a library tile of your choice.
3. Click the **Integration** tile.
4. In the **Public Sharing** section, next to the URL click the **Copy** button.
   You may be prompted to allow access to the clipboard.
5. You can now email the link you have copied, or include it in a Yammer post (or even a tweet).
6. To test the link, open a new tab or browser window, and paste it into the address bar.

To Create a Learning Campaign Based on a Learning Path

1. Switch to LightUp Studio, and in the breadcrumb control click **Home**.
2. In the **Libraries** section, click a library tile of your choice (such as **Sales**).
3. Click the **Learning Paths** tile.
4. Locate a learning path of your choice, and near the right side of the page click the **Integration Points** icon.
5. In the **Public Sharing** section, next to the URL click the **Copy** button.
   You may be prompted to allow access to the clipboard.
6. You can now email the link you have copied, or include it in a Yammer post (or even a tweet).
7. To test the link, open a new tab or browser window, and paste it into the address bar.

To Create a Learning Campaign Based on an Individual Video

1. Switch to LightUp Studio, and in the breadcrumb control click **Home**.
2. In the **Libraries** section, click a library tile of your choice (such as **Sales**).
3. Click the **Asset Bin** tile.
4. Locate a video of your choice, and near the right side of the page click the **Integration Points** icon.
5. In the **Public Sharing** section, next to the URL click the **Copy** button.
   You may be prompted to allow access to the clipboard.
6. You can now email the link you have copied, or include it in a Yammer post (or even a tweet).
7. To test the link, open a new tab or browser window, and paste it into the address bar.

Tracking & Analysis

In brief, every single view of every single video by every single user is tracked. This data provides the basis for our rich analytics and reporting features. It's unlikely that you will have generated much data so far if you are evaluating the product, but do feel free to explore the analysis features. Out of interest, the most commonly-run reports are:

1. **User Tracking Analysis**. A full log of each user and the videos they have watched is analyzed. The data for each user can be viewed as a timeline or as a list.

2. **Content Usage Reports**. The most interesting sub feature is the Histogram, where you can see the most-frequently watched videos. A typical usage pattern shows high usage for some topics, and a long tail of less-frequently watch videos, similar to the following real data from one of our larger customers:
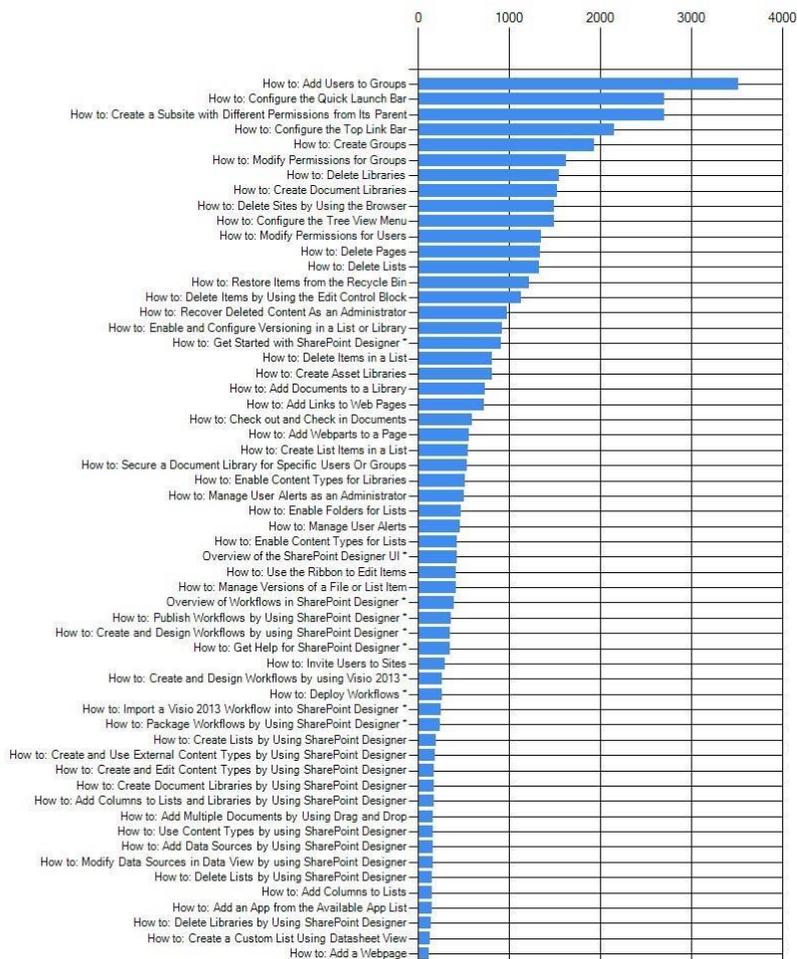
Note: The report is curtailed to fit on this page.

3. **Content Usage Timeline Report**. This extremely interesting piece of analysis shows the actual adoption of *our* solution over time. The following timeline is again real data from one of our larger customers:

Usage Timeline
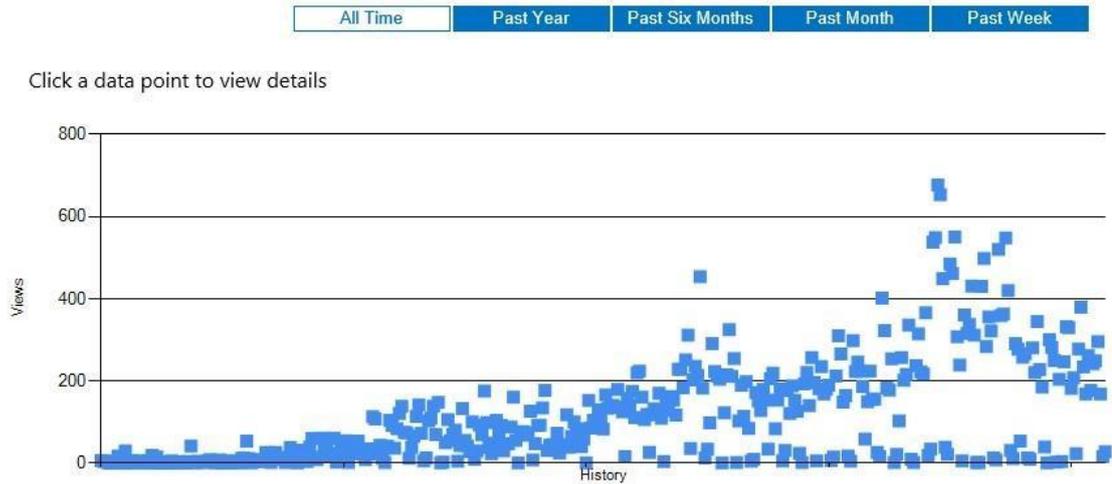
Note: Each dot represents a single day. This particular set of data represents a little under two years' worth of usage. The dots are also clickable, and will display a list of users and the videos that they watched on that particular day.

4. **Export All Activity**. This feature generates a CSV file that can be opened directly in Excel for further analysis. It contains each view of each video by every single user.

Branding

You can brand the training portal that is used by your end users.

To Apply Your Own Branding for the End User Experience

1. Switch to the training portal.
2. Near the top of the page, the branding includes a logo, a title, and a color scheme.
3. Switch back to LightUp Studio and in the breadcrumb control click **Home**.
4. Scroll down until you can see the **Branding** section.
5. In the **Portal Title** text box, type a title of your choice.
6. Click **Save** before continuing.
7. If you want to change the logo, click the ellipsis button to the right of the **Logo Image** text box. Then click **Browse** and then locate a logo image with the approximate dimensions indicated. Then click **Save**.
8. Switch back to the training portal, and refresh the page.
   Your custom branding is displayed.

To Apply Color Schemes

1. Switch back to LightUp Studio, and scroll down to the Branding section.
2. In the **Pick a Portal Color Scheme** section, click a different scheme to the one that is already selected.
3. Switch back to the training portal, and refresh the page.
   The color scheme has been applied.

Managing Administrative Users for LightUp Studio™

You do **not** need to create user accounts for *end users* of LightUp Dynamics. Any user who accesses the training portal will be automatically logged in with their Dynamics 365 account in a single sign-on environment. However, you *may* wish to create additional *administrative* users to help delegate administration tasks in LightUp Studio.

To Create an Administrative User

1. Switch to LightUp Studio, and scroll down to the **Administrative Accounts** section. By default, there are no accounts set up, and you have been using the *Organization Login* so far in this guide.
2. Click **Add Account**.
3. Near the top of the page, in the **Account Name** text box, type a user name (such as Melissa) or an email address if you prefer (such as melissa@westerlymedia.com).
4. Note that the Account Key (or in other words the password) is automatically created. Make a note of this key here:

5. In the **Direct Permissions** section, check the **Run Analytics/Reports** checkbox and the **Create New Libraries** checkbox.
6. In the **Library Access** section, check only the **Marketing** checkbox.
7. Near the bottom of the page, click **Save**.
   The new account is created.
8. Near the top left of the page, click **Log Out**.
9. Log in with the new user's name and key.
10. Note that the user can now only see and manage the **Marketing** library, and that they can create new libraries if they need to. They can also run any of the analytics and reports.
11. Near the top left of the page, click **Log Out**.

To Edit an Administrative User

1. In the **Organization or Login Name** text box, type the organization name provided to you by LightUp 365 or one of its partners.
2. In the **Organization Key or Password** text box, type the key provided to you by LightUp 365 or one of its partners.
3. Scroll down to the **Administrative Accounts** section.
4. Click the pen icon to the left of the user you created.
   Note that you can add or remove any permissions.
5. Near the bottom of the page, click **Cancel**.

To Delete an Administrative User

1. Click the trashcan icon to the left of the user you created.
2. Click **Yes**.

   The user has now been deleted.

Leave LightUp Studio running – you will use it in the next section.

Targeting Content to the 'Relevant Learning' Command

Your subscription is already set up with a powerful, context-sensitive targeting system. In brief, the targeting system enables users to click the 'Relevant Learning' menu option in Dynamics 365, and the result is training targeted to the type of entity they are currently working with (for example, Accounts, Contacts, Orders, Quotes, Cases, and so on). In many cases, you will not need to configure the targeting system, as we have included a full configuration by default. However, if you do need to modify how it works or perhaps add additional rules-driven contexts for custom entities, then this section explains how it works.

NOTE: You will need to work through this entire section in the specified order to get a good understanding before you start modifying the targeting system.

To Review How an Existing Context Works

1. Switch to Dynamics 365.
2. On the top navigation bar, click the dropdown arrow next to **Dynamics 356**, and then click the **Sales** app.
3. On the top navigation bar, click the dropdown arrow next to **Sales**, in the **Sales** Section click **Leads**.
4. Click **New Lead**.
5. In the ribbon, click **HOW-TO** and then click **Relevant Learning**.
   The portal appears and shows the result of the targeting system. Note that there are 13 videos.
6. Leave the training portal showing the results, and switch to LightUp Studio.
7. On the Home page, click the **Accounts, Contacts, and Sales** library.
8. Scroll down, and click the **Targeting** tile.
   A number of predefined rules-driven contexts are shown.
9. Click the **Leads** tile.
   Near the top of the definition, a number of Dynamics 365 Entities are selected that relate to leads – these are called **Entity Rules**. Beneath the Entity Rules, there are a number of videos in the **Assets in this rules-driven context** box on the left side of the screen – These videos are displayed whenever a user is currently working with any of the selected entities in the **Entity Rules** box.
   Note that there are 5 videos, and these are the first five of the videos shown in the training portal.
10. In the Breadcrumb control, click **Targeting** to return to the list of rules-driven contexts.
11. Click the **Accounts and Leads** tile.
    Note the selected Entity Rules, specifically that **Lead** is one of them. Then review the **Assets in this rules-driven context** box – some of the same videos as the previous rules-driven context are selected, but there are a few additional ones. These additional ones are the next set of videos displayed in the training portal.
12. In the Breadcrumb control, click **Targeting** to return to the list of rules-driven contexts.
13. Click the **Leads and Opportunities** tile. Again, this rules-driven context includes **Lead** as an entity rule, and provides additional videos.
14. In the Breadcrumb control, click **Targeting** to return to the list of rules-driven contexts.

15. Click the **Contacts, Leads, and Opportunities** tile. Again, this rules-driven context includes **Lead** as an entity rule, and provides yet more additional videos.

Now, although the four rules-driven contexts all contain the **Lead** entity as a rule, they all contain various videos to display. The resulting 13 videos you actually saw are the distinct list of videos from all of the rules-driven contexts combined, with any duplicates removed. Furthermore, the final result set is assembled by working through the rules-driven contexts in the order they appear in LightUp Studio. (You can change this order by clicking the **Set Rule Order** when you view the list of rules-driven contexts.) The order of the videos in each rules-driven context is also applied (and again, you can modify this order).

## Creating a Custom Entity and a Simple Rules-Driven Context

We have included all possible Entities by default, so you do not need to create entities for Orders, Quotes, Accounts, Cases, Marking Lists, and so on. However, your organization may have customized Dynamics 365 to include a custom entity. If so, you can add this to the Targeting system, and it will then become available as a rules for rules-driven contexts.

1. In the Breadcrumb control, click **Targeting** to return to the list of rules-driven contexts.
2. Click the filter icon (with a tool-tip of **Manage Custom Entities**).
   You won't yet have any custom entities, so the list will be empty.
3. Click the plus icon (with a tool-tip of **Add Custom Entity)**.
4. In the **Internal Entity** textbox, type **acmemarketinglist**.
5. In the **Display Name** textbox, type **ACME Marketing List**.
6. Click **Save**.
7. In the Breadcrumb control, click **Targeting** to return to the list of rules-driven contexts.
8. Click the **[+]** icon to add a new Rules-Driven context. Provide a name of **Test** and then click **Save**.
9. In the **Entity** Rules box, select the checkbox for **ACME Marketing List.**
   In the right-hand box below the Entity Rules section, select two or three videos and use the left-pointing arrow to move them to the left-hand box. Then click **Save.**
   A new rules-driven context is created. The videos included in this rules driven context would be shown if a user was working with a custom entity with an internal name of **acmemarketinglist** and then clicks the **Relevant Training** menu.
10. Now you will undo these customizations:
11. On the **Test** tile, click the trashcan icon. Then click **Yes**.
12. Click the filter icon (with a tool-tip of **Manage Custom Entities**).
13. Select the **ACME Marketing List** entity checkbox, and then click the **Delete** icon.
14. Close the LightUp Studio tab – you have completed the evaluation process!

Uninstalling the Solution

If you no longer require LightUp Dynamics, it is very easy to uninstall and leave your environment exactly as it was before installing the solution.

1. Log in to your Microsoft Dynamics 365 subscription as an administrative user.
2. Navigate to the *Sales* app that is provided by Microsoft as part of Dynamics 365.
3. On the top navigation bar, click the dropdown arrow next to Sales:
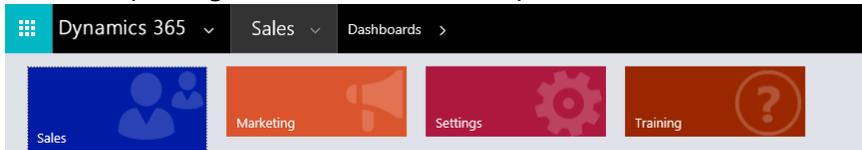
4. Click the **Settings** tile.
5. In the **Customization** group, click **Solutions**.
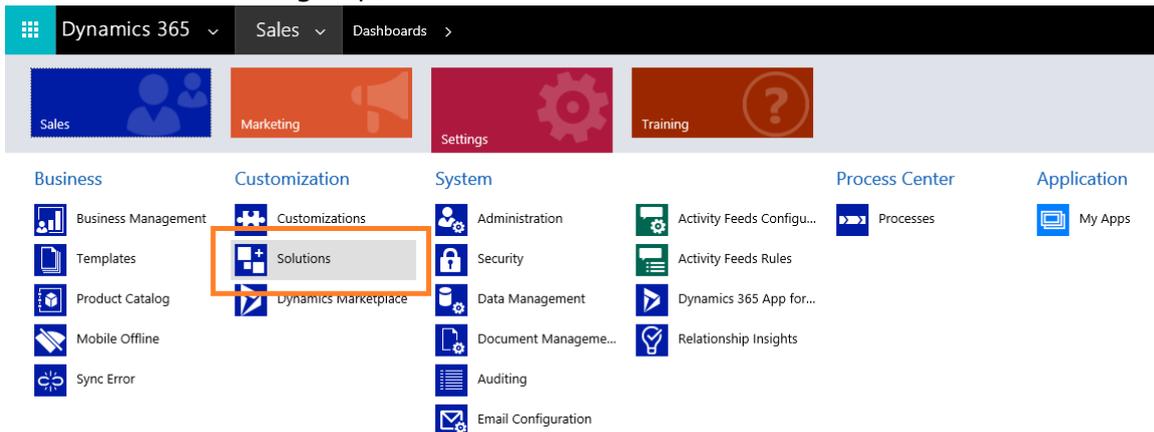
   The list of solutions that are currently installed appears.
6. Select the **LightUp Dynamics** solution, and on the ribbon click **Delete.**
7. In the pop-up, click **OK**.
   The solution is removed. You may need to refresh the page, and then the HOW-TO menus will disappear.

Feedback and Support

We are always interested in feedback on the quality of documents and solutions that we produce. If you have any comments or need assistance in any way please contact support@westerlymedia.com. Thank you!