

Resco Property Setup Guide

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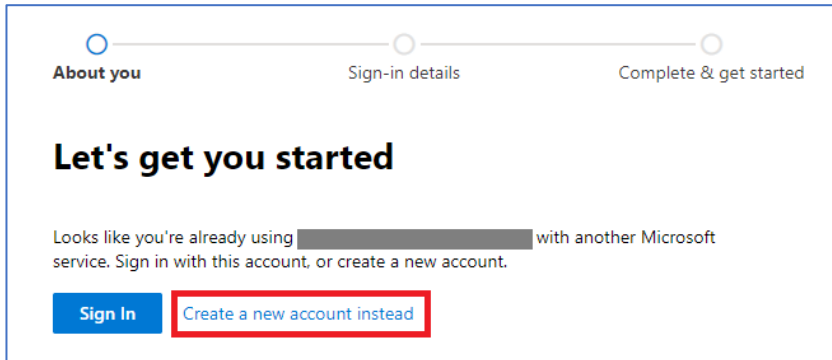
1. Create new Power Apps trial

Note: if you already have your own Dataverse environment for testing purposes where you can deploy Resco Property+, skip the chapters 1-4 and continue with chapter 5.

Note: the following trial-creation experience is managed by Microsoft, and it can be changed at any time. In case of any issues please contact Resco for a further assistance.

1.1. Web browser -> incognito/private mode -> open [URL](#) -> **Power Apps per user plan Trial** form is displayed.

1.2. Type in your email address into the Email field -> Next -> select **Create a new account instead**:



1.3. Fill out the **About you** form, choose the correct value in the **Country or Region** field -> Next.

1.4. If verification is needed, click **Send verification code** -> enter the verification code sent to your phone -> Verify.

1.5. Fill out the **Sign-in details** form:

- **Username**: e.g., admin
- **Domain name**: must be unique
- **Password** and **Confirm password**

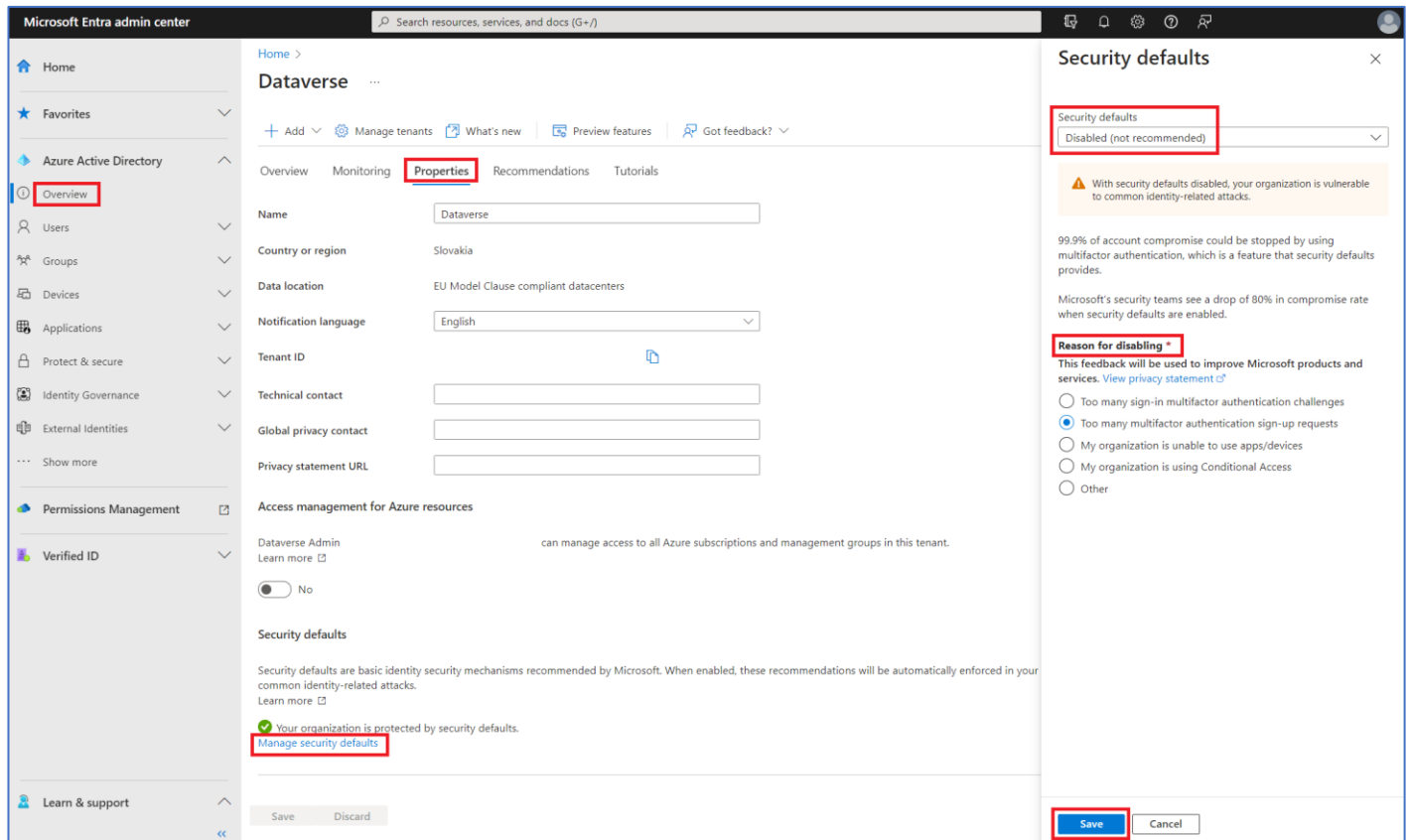
Then click Next -> **Confirmation details** form appears -> click **Start using Power Apps per user plan Trial** -> new tab called **Power Apps** opens.

1.6. New Power Apps trial has been created.

2. Disable security defaults in Azure Active Directory

Note: this chapter is optional. But if you don't want to receive multifactor authentication sign-up requests, follow these steps:

- 2.1. Web browser -> incognito/private mode -> open [URL](#) -> if necessary, sign in using the credentials defined in step 1.5 -> Microsoft Entra admin center opens -> **Azure Active Directory** tenant overview is displayed.
- 2.2. Switch from **Overview** tab to **Properties** tab -> select **Manage security defaults**.
- 2.3. Set **Security defaults** to **Disabled (not recommended)** -> select any **Reason for disabling** -> Save -> Disable:



- 2.4. Security defaults have been disabled. You can close **Microsoft Entra admin center**.

3. Create new Dataverse environment

3.1. Web browser -> incognito/private mode -> open [URL](#) -> if necessary, sign in using the credentials defined in step 1.5 -> Power Platform admin center opens -> **Environments** section with the default environment is displayed.

3.2. New -> fill out the **New environment** form:

- **Name:** e.g., Dataverse
- **Region:** select your region
- **Type:** Trial (subscription-based)

Click Next -> continue filling-out the form:

- **Language:** select one from the list
- **Currency:** select one from the list
- **Security group:** select Open access/None -> click Done
- **URL:** (optional) define unique URL address of your environment
- **Enable Dynamics 365 apps:** No
- **Deploy sample apps and data:** No

Click Save -> if all information is correct, **New environment** form closes and new environment is being prepared.

3.3. Hit **Refresh** couple of times until the new environment is ready:

Power Platform admin center

+ New Refresh Recently deleted environments Environments overview Learn about Managed Environments

Home

Environments

Analytics

Billing (Preview)

Settings

Resources

Help + support

Data integration

Data (preview)

Policies

Admin centers

Environments

Environment	Type	State	Dataverse	
Dataverse	...	Trial (subscription-based)	Ready	Yes
Resco (default)	...	Default	Ready	No

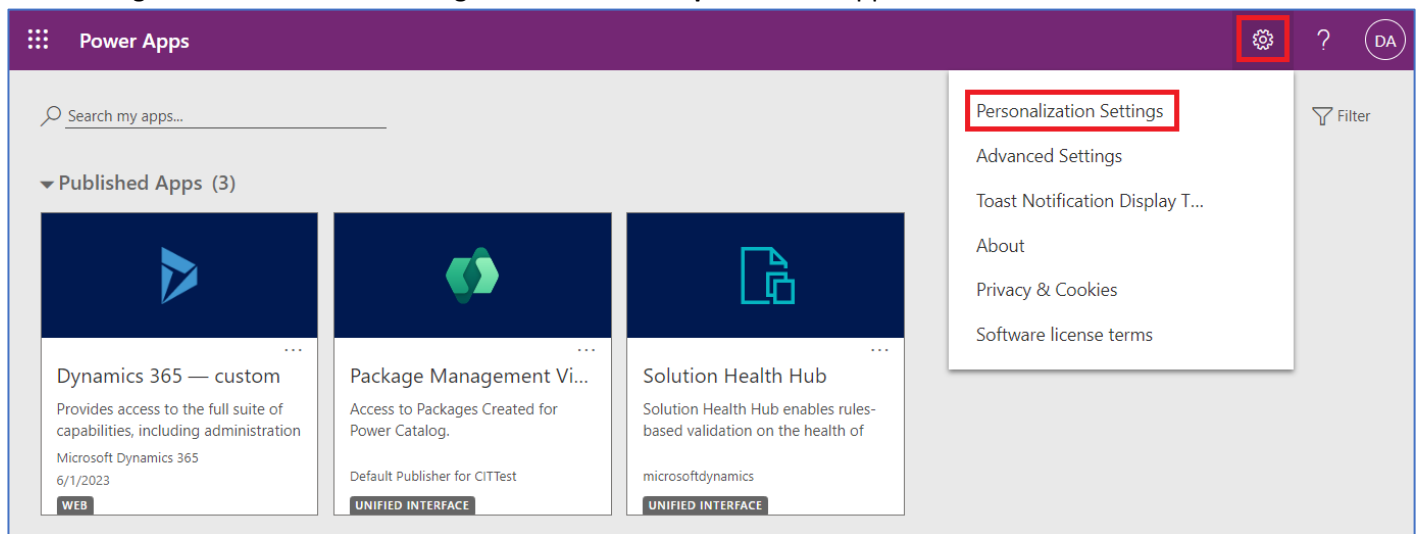
3.4. New Dataverse environment has been created -> click on the environment's name to see its details.

3.5. IMPORTANT: Notice the **Environment URL** – this is a link to your Dataverse trial organization:

Details		
Environment URL trial20230601.crm4.dynamics.com	State Ready	Region Europe
Refresh cadence Frequent	Type Trial (subscription-based)	Security group Not assigned
Organization ID 9e2dabe3-6400-ee11-a66b-6045bd8ea551	Environment ID 1e2b9989-7d55-e6b5-81f2-7019ed991a54	

4. Change personal options

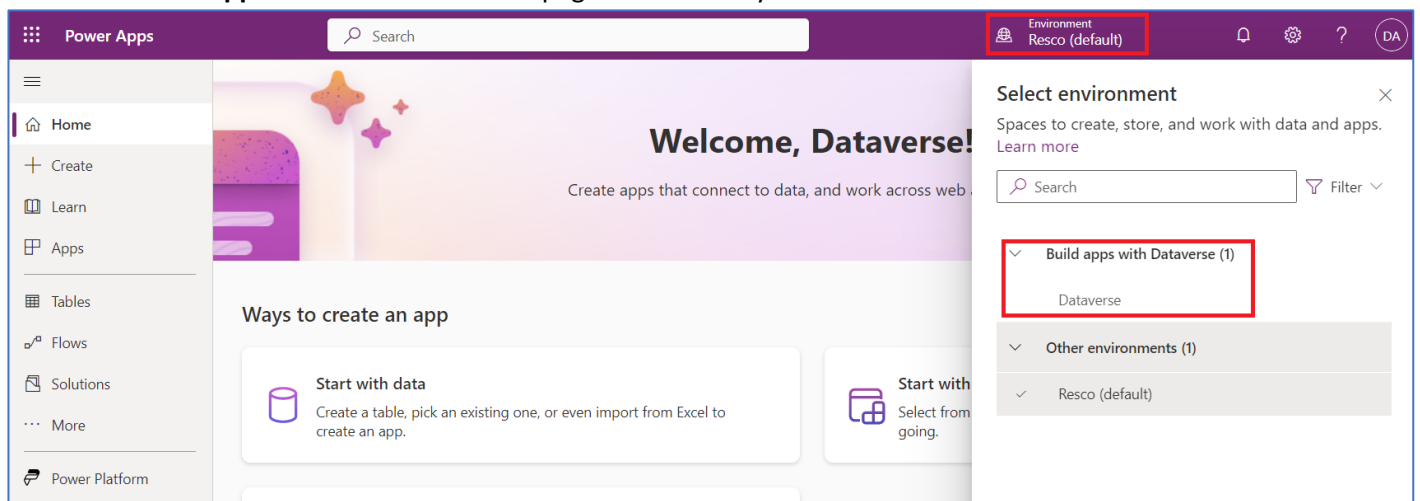
- 4.1. Web browser -> incognito/private mode -> open your Dataverse environment created in chapter 3 using URL from step 3.5 -> Power Apps home screen with the list of published apps opens.
- 4.2. Settings -> Personalization Settings -> **Set Personal Options** form appears:



- 4.3. On the **General** tab, change the following options:
 - **Records Per Page:** 250
 - **Time Zone:** select the corresponding time zone from the list
- 4.4. Switch to **Formats** tab and select the corresponding format under **Current Format** -> OK.
- 4.5. The page automatically reloads. Personal options have been changed.

5. Import solutions

- 5.1. Web browser -> open [URL](#) -> save the Resco Suite Solution (Woodford solution) ZIP file to your PC.
- 5.2. Web browser -> incognito/private mode -> open [URL](#) -> open **Select environment** dialog -> select the environment under **Build apps with Dataverse** -> the page automatically reloads:



- 5.3. Select **Solutions** in the left panel -> a list of solutions appears.
- 5.4. Click **Import solution** -> browse for the Woodford solution ZIP file downloaded in step 5.1 -> Next -> Import -> wait until you see a green confirmation bar saying that the solution is imported (it might take 4-5 minutes).

5.5. Select **More** in the left panel and click on **Connections**.

The screenshot shows the Power Apps interface. The left navigation pane has 'Solutions' selected. The 'More' menu is open, showing options like Tables, Flows, Websites, Chatbots, AI hub, Solutions, Cards, Choices, **Connections** (highlighted with a red box), and Dataflows. The main area displays a 'Set your preferred solution' dialog and a table of solutions.

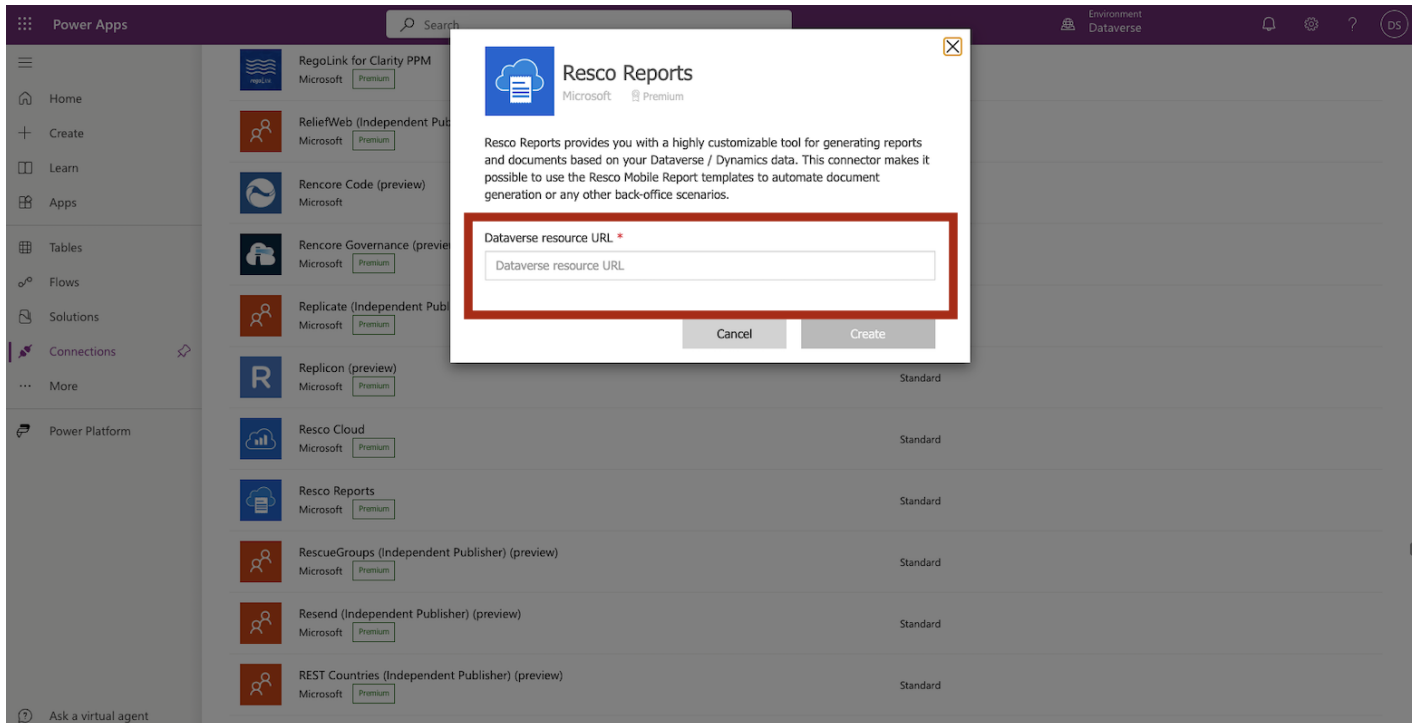
Name	Created	Version	Publisher	Solution check
Woodford	6 days ago	17.0.4.1114	Resco spol. s r.o.	Checked by publisher
msdyn_PowerAppsC...	1 week ago	2.0.0.11	Dynamics 365	Checked by publisher
msdyn_PowerAppsC...	1 week ago	2.0.0.11	Dynamics 365	Checked by publisher
msdyn_ContextualH...	1 week ago	1.0.0.0	Dynamics 365	Checked by publisher
msdyn_ContextualH...	1 week ago	1.0.0.0	Dynamics 365	Checked by publisher

5.6. Select **New Connection** and search for **Resco Reports**.

The screenshot shows the Power Apps 'Connections' page. The left navigation pane has 'Connections' selected. The main area displays a list of connections. 'Resco Reports' is highlighted with a red box.

Icon	Name	Publisher	Version	Status
RegoLink	RegoLink for Clarity PPM	Microsoft	Premium	Standard
ReliefWeb	ReliefWeb (Independent Publisher) (preview)	Microsoft	Premium	Standard
Rencore Code	Rencore Code (preview)	Microsoft		Standard
Rencore Governance	Rencore Governance (preview)	Microsoft	Premium	Standard
Replicate	Replicate (Independent Publisher) (preview)	Microsoft	Premium	Standard
Replicon	Replicon (preview)	Microsoft	Premium	Standard
Resco Cloud	Resco Cloud	Microsoft	Premium	Standard
Resco Reports	Resco Reports	Microsoft	Premium	Standard
RescueGroups	RescueGroups (Independent Publisher) (preview)	Microsoft	Premium	Standard
Resend	Resend (Independent Publisher) (preview)	Microsoft	Premium	Standard
REST Countries	REST Countries (Independent Publisher) (preview)	Microsoft	Premium	Standard

5.7. Enter URL of your organization and click **Create**.



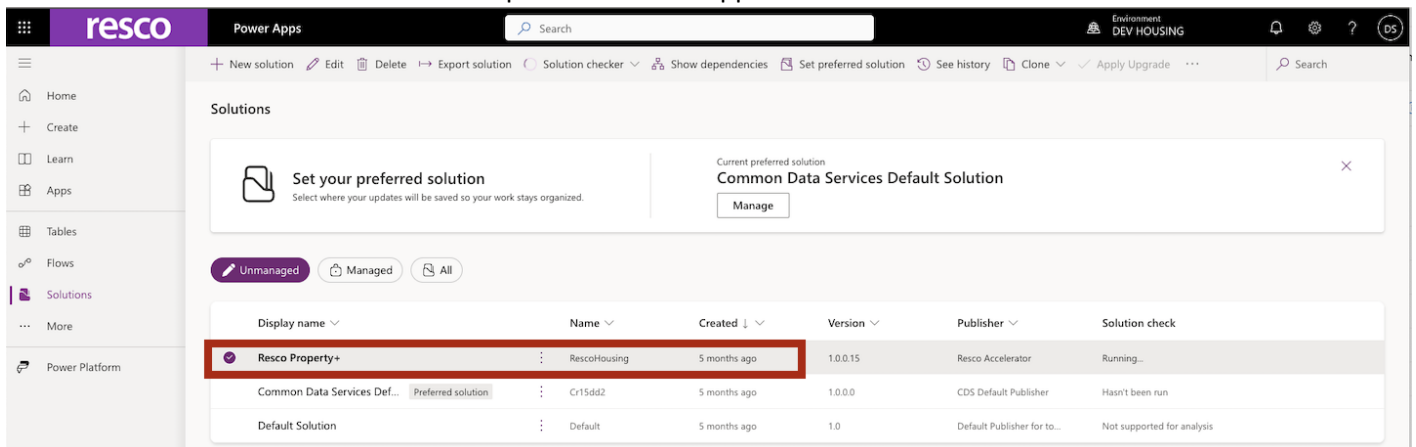
5.8. In the **Solutions** section click **Import solution** again -> browse for the Resco Property+ solution ZIP file located in the **01_Solution** folder inside the **Resco Property+ Setup Package** -> Next -> **Connections** form appears.

5.9. Create three new connections should already be created and signed in:

- RescoProperty_MicrosoftDataverseLegacy -> Select a connection -> New connection -> new tab automatically opens.
- Click Create in the **Microsoft Dataverse (legacy)** dialog -> sign in using your credentials (step 1.5) if necessary -> the second connection has been created.
- Close the **Connections in Dataverse** tab -> you should be back in the **Import a solution** screen -> click Refresh -> RescoProperty_MicrosoftDataverseLegacy connection is also configured.
- RescoProperty_MicrosoftDataverse -> Select a connection -> New connection -> new tab automatically opens.
- Click Create in the **Microsoft Dataverse** dialog -> sign in using your credentials (step 1.5) if necessary -> the third connection has been created.
- Close the **Connections in Dataverse** tab -> you should be back in the **Import a solution** screen -> click Refresh -> RescoProperty_MicrosoftDataverse connection is also configured.

5.10. Import -> wait until you see a green confirmation bar saying that the solution is imported (it might take 1-2 minutes).

5.11. Both solutions have been imported and appear in the list of available solutions:



5.12. You can close the Power Apps tab.

6. Import and publish Woodford project

- 6.1. Web browser -> incognito/private mode -> open your Dataverse environment created in chapter 3 using URL from step 3.5 -> Power Apps home screen with the list of published apps opens.
- 6.2. Select **Resco Property+** app -> in the left panel select **Customize App** to open the Woodford customization tool -> **Register User** dialog appears -> fill out the form -> REGISTER -> an empty list of App Projects appears.
- 6.3. Click Import -> browse for the Resco Property+ Woodford file located in the **02_Project** folder inside the **Resco Property+ Setup Package** -> **Import Project** dialog appears -> go through the simple wizard:
 - **Type** = Standard User -> NEXT
 - **New App Name** = Resco Property+ -> NEXT
 - **Name** = Resco Property+
 - **Priority** = 0
 - **Roles**: select the corresponding security role assigned to your Dataverse user (e.g., System Administrator) -> CREATE -> new project has been imported.
- 6.4. Select **Resco Property+** app project -> Edit -> project details are displayed -> click **Publish** -> it takes 10-20 seconds to publish the project -> go back to the list of App Projects to see the published Resco Property+ project:

The screenshot shows the Power Apps 'Woodford v17.1.0' customization tool interface. The left sidebar contains a menu with categories: GENERAL, INSPECTIONS, TIMESHEETS, PROJECTS, and TOOLS. The 'App Projects' item under the 'PROJECTS' category is highlighted with a red box. The main area displays a table of App Projects. The 'Resco Property+' project is selected and highlighted with a red box. The table has columns: Project Name, Priority, Parent, Published On, Custom Version ID, Type, and Format. The 'Resco Property+' project has a priority of 0 and was published on 07/22/2024 04:13:48 PM. The bottom of the screen shows the 'Info Panel' with links to 'Current release', 'Resco Wiki', and 'Resco Academy'.

Project Name	Priority	Parent	Published On	Custom Version ID	Type	Format
Housing Demo App						
Resco Property+	0		07/22/2024 04:13:48 PM		StandardUser	2

7. Import sample data

Note: This chapter is optional. The goal is to import sample data into 5 tables (Account, Asset, Contact, Project Category and Project). If you don't want to import sample data, skip this chapter and continue with chapter 8.

7.1. Web browser -> incognito/private mode -> open your Dataverse environment created in chapter 3 using URL from step 3.5 -> Resco Property+ app is displayed.

7.2. Click Settings -> Advanced Settings -> new tab opens automatically:

The screenshot shows the Power Apps interface for the 'Resco Property+' app. The main view is a table titled 'All Accounts' with columns: Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary). The table lists 10 accounts, including A. Datum Corporation, Adventure Works, Alpine Ski House, Blue Yonder Airlines, City Power & Light, Coho Winery, Contoso Pharmaceuticals, Fabrikam, Inc., Fourth Coffee, and Litware, Inc. On the right, the 'Settings' menu is open, showing options like General, About, Privacy & Cookies, Legal terms, More Settings, Personalization Settings, and Advanced Settings. The 'Advanced Settings' option is highlighted with a red box.

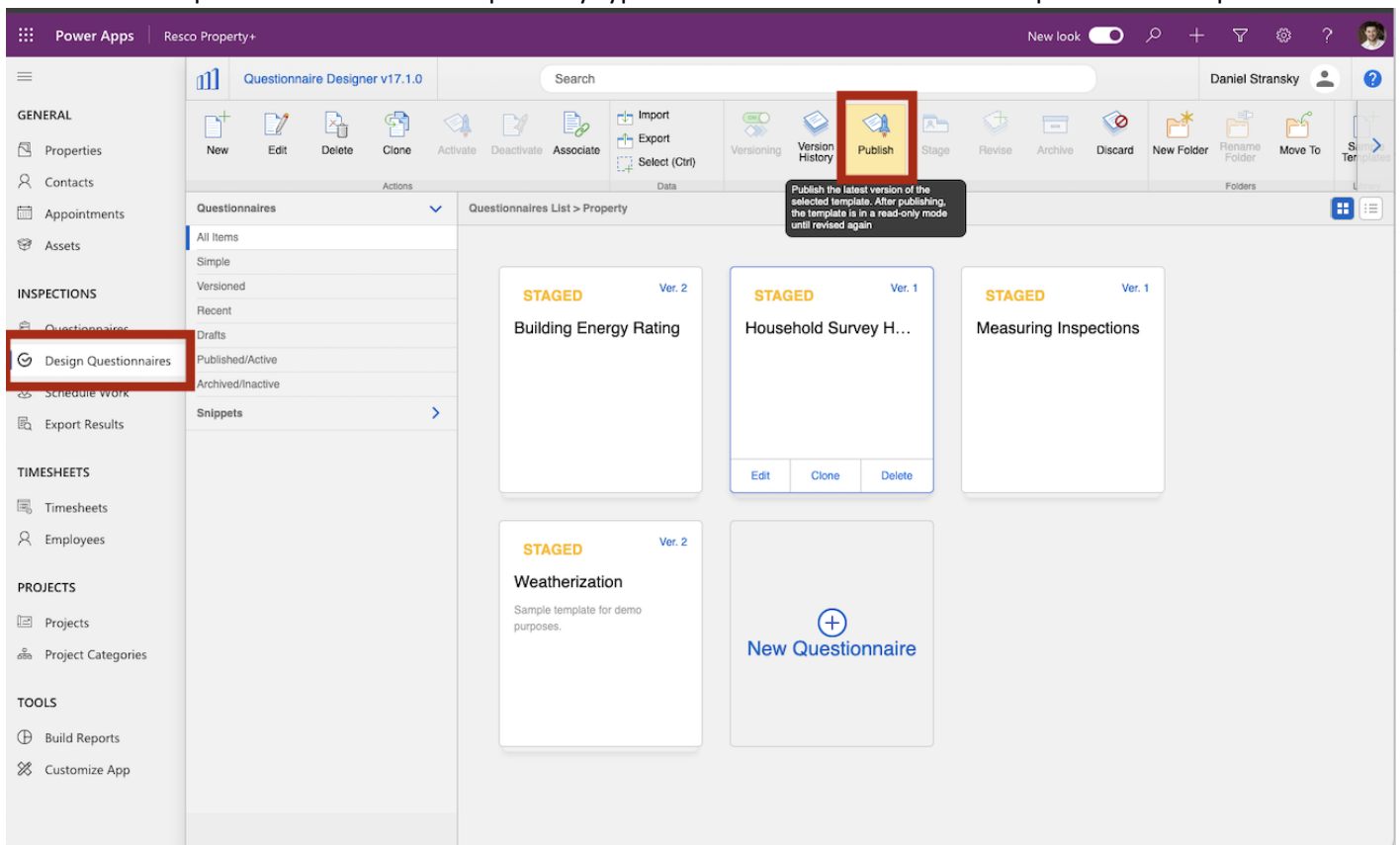
7.3. Expand Settings -> System -> Data Management:

The screenshot shows the Dynamics 365 Settings menu. The 'Settings' dropdown is expanded, showing categories: Business, Customization, System, Process Center, Application, and MobileCRM. The 'System' category is highlighted with a red box. Under 'System', the 'Data Management' option is highlighted with a red box. Other options under 'System' include Administration, Security, System Jobs, Document Management, and Auditing.

- 7.4. Select Imports -> an empty list of data imports is displayed.
- 7.5. Click IMPORT DATA -> browse for the Resco Property Sample Data zip file located in the **03_Sample_Data** folder inside the **Resco Property+ Setup Package** -> go through the import wizard, no actions needed -> Submit -> Finish -> refresh the list until all three imports are completed -> you can close Imports tab -> sample data is imported.

8. Import and publish demo questionnaire templates

- 8.1. Web browser -> incognito/private mode -> open your Dataverse environment created in chapter 3 using URL from step 3.5 -> Resco Property+ app is displayed.
- 8.2. In the left panel select **Design Questionnaires** to open the Questionnaire Designer tool -> an empty list of templates is displayed.
- 8.3. Click Import -> browse for the **Building Energy Rating** file located in the **04_Questionnaire_Templates** folder inside the **Resco Property+ Setup Package** -> the first draft template is imported.
- 8.4. Again click Import -> browse for the **Household Survey Housing/Safety** file located in the **04_Questionnaire_Templates** folder inside the **Resco Property+ Setup Package** -> if "Select import method..." dialog appears, click **Create New** -> the second draft template is also imported. Click Import -> browse for the **Personal Protective Equipment** file located in the **04_Questionnaire_Templates** folder inside the **Resco Property+ Setup Package** -> the first draft template is imported.
- 8.5. Click Import -> browse for the **Measuring Inspections** file located in the **04_Questionnaire_Templates** folder inside the **Resco Property+ Setup Package** -> the first draft template is imported.
- 8.6. Click Import -> browse for the **Weatherization** file located in the **04_Questionnaire_Templates** folder inside the **Resco Property+ Setup Package** -> the first draft template is imported.
- 8.7. Select each template -> click **Publish** -> optionally type in some comments -> OK -> templates are now published:



9. Import and activate demo mobile reports

- 9.1. Web browser -> incognito/private mode -> open your Dataverse environment created in chapter 3 using URL from step 3.5 -> Resco Property+ app is displayed.
- 9.2. In the left panel select **Build Reports** to open the Report Designer tool -> an empty list of reports is displayed.
- 9.3. Click Import -> browse for the **Resco Property Account Overview** file located in the **05_Mobile_Reports** folder inside the **Resco Property+ Setup Package** -> **Import New Mobile Report** dialog is displayed -> type **Resco Property Account Overview** in the Name field -> OK -> the first draft report is imported.
- 9.4. Again click Import -> browse for the **Resco Property Visit Report** file located in the **05_Mobile_Reports** folder inside the **Resco Property+ Setup Package** -> **Import New Mobile Report** dialog is displayed -> type **Resco Property Visit Report** in the Name field -> OK -> the second draft report is also imported.
- 9.5. Again click Import -> browse for the **Weatherization Report** file located in the **05_Mobile_Reports** folder inside the **Resco Property+ Setup Package** -> **Import New Mobile Report** dialog is displayed -> type **Weatherization Report** in the Name field -> OK -> the second draft report is also imported.
- 9.6. Select each report -> click **Activate** -> reports are now activated:

The screenshot shows the Power Apps Report Designer v17.1.0 interface. The left sidebar contains a navigation menu with categories: GENERAL (Properties, Contacts, Appointments, Assets), INSPECTIONS (Questionnaires, Design Questionnaires, Schedule Work, Export Results), TIMESHEETS (Timesheets, Employees), PROJECTS (Projects, Project Categories), and TOOLS (Build Reports, Customize App). The 'Build Reports' tool is selected and highlighted with a red box. The main area displays a table of imported reports. The 'Activate' button for the first report is highlighted with a red box.

Name	Source	Entity	Language	GUID
Resco Property Account Overview	Single Record	account	Language Neutral	a4f3001f-c1c9-ee11-9079-0022489ba5ab
Resco Property Visit Report	Single Record	appointment	Language Neutral	dc59fe0d-96d1-ee11-9079-0022489ba5ab
Weatherization Report	Single Record	resco_questionnaire	Language Neutral	3ac6f115-cde5-ee11-904d-0022489ba5ab