User Guide

Wrike for Dynamics - A MICROSOFT DYNAMICS 365 SOLUTION

BY

Contents

Wrike for Dynamics

Wrike for Dynamics is an integration of Wrike (Project Management tool) and Dynamics 365. This integration will enable you to manage tasks within Dynamics CRM. You can Get full visibility into the status of work being done for your clients. This makes collaboration between sales or other customer-facing teams and teams using Wrike easier, faster, and more transparent.

Once the integration is set up, you can check task status from within Dynamics 365. Any object in Dynamics 365 can be linked to a Wrike project or folder so you can work in Wrike and any changes that you make are instantly reflected in Dynamics 365.

Download Wrike for Dynamics:

Please follow the following steps in order to start using Wrike for Dynamics.

Download Wrike for Dynamics from Microsoft Appsource .

Wrike for Dynamics Roles:
There are three type of roles here:

- Wrike for Dynamics Admin:
  User with "Wrike for Dynamics Admin" role will have all permissions of Wrike for Dynamics entities.
- Wrike for Dynamics Read:
  User with "Wrike for Dynamics Read" role will only be allowed to read entities of Wrike for Dynamics except registration.
- Wrike for Dynamics Service:
  "Wrike for Dynamics Service" role should be assigned to the user for the connections and configurations. This role will be automatically assigned to the App User when you setup the profile.
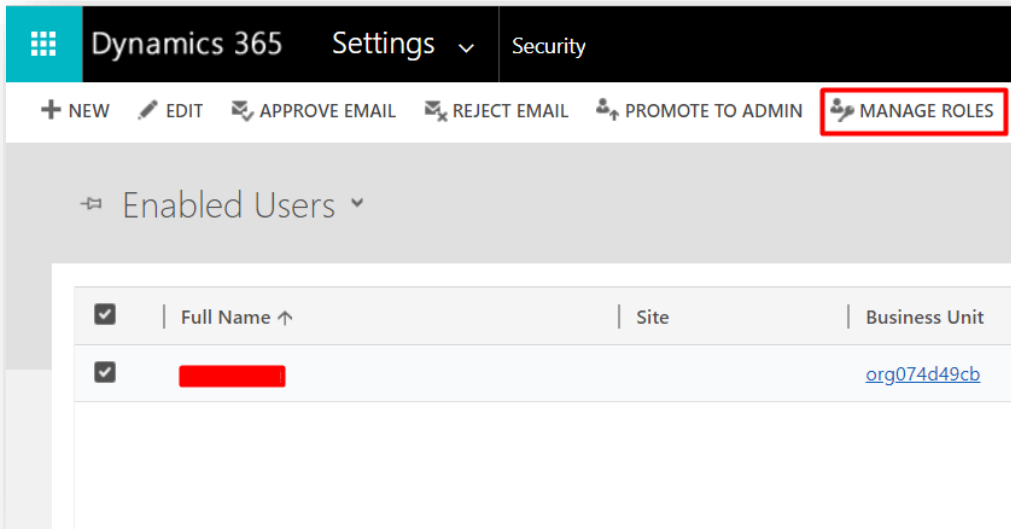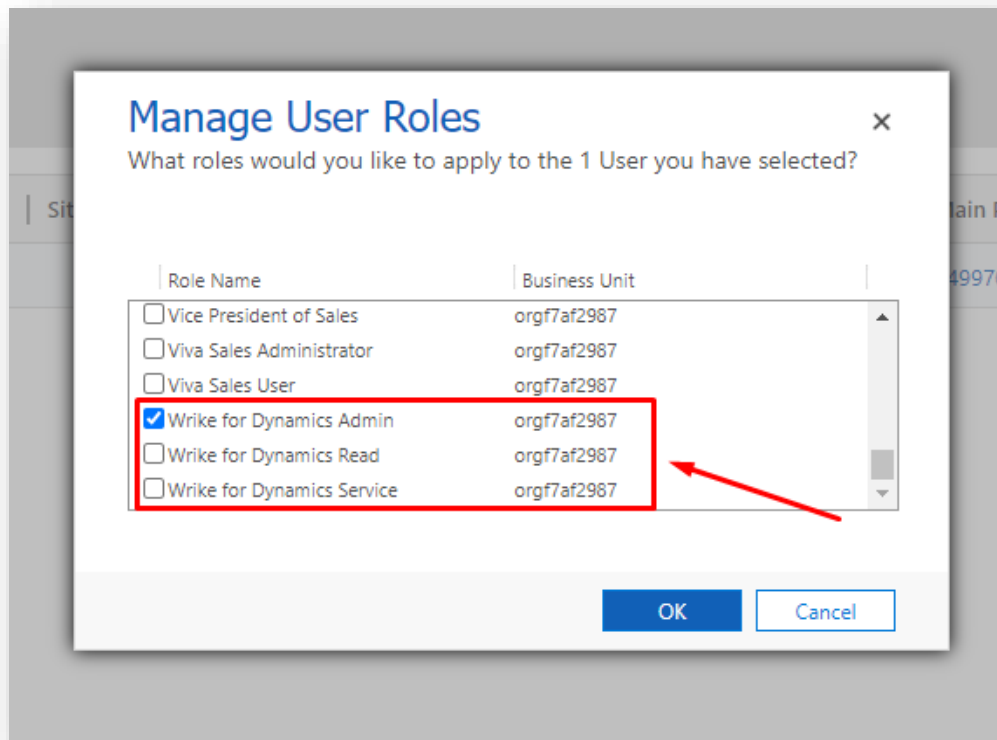
Assign Wrike for Dynamics Role

To assign roles to the users go to **Settings > Security > Users**
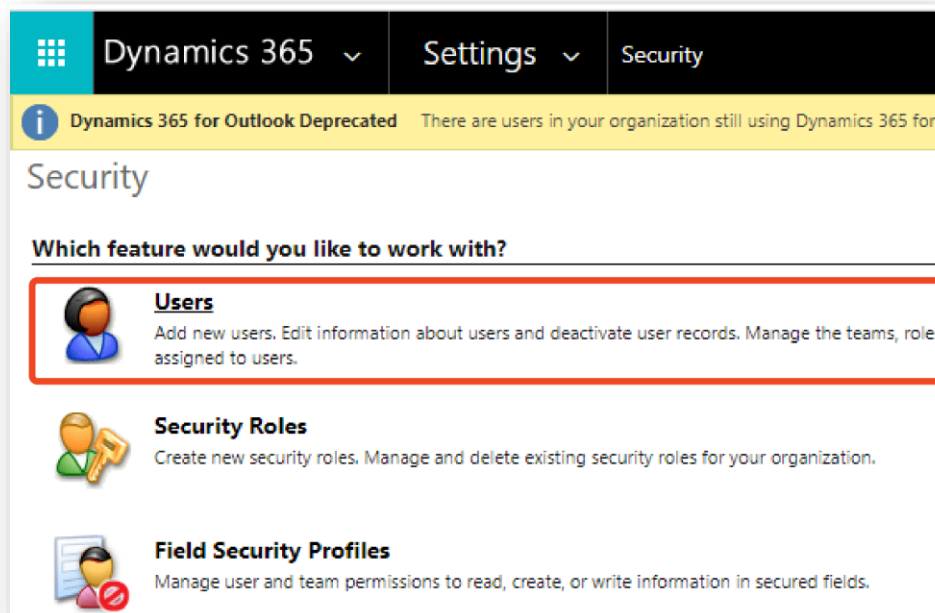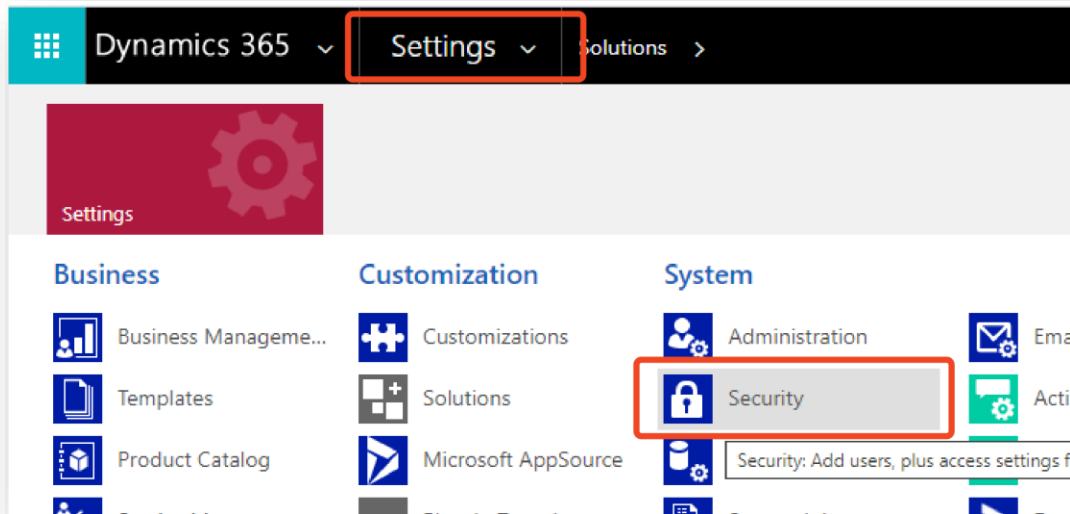
Select the user to assign role and click **Mange Role.**
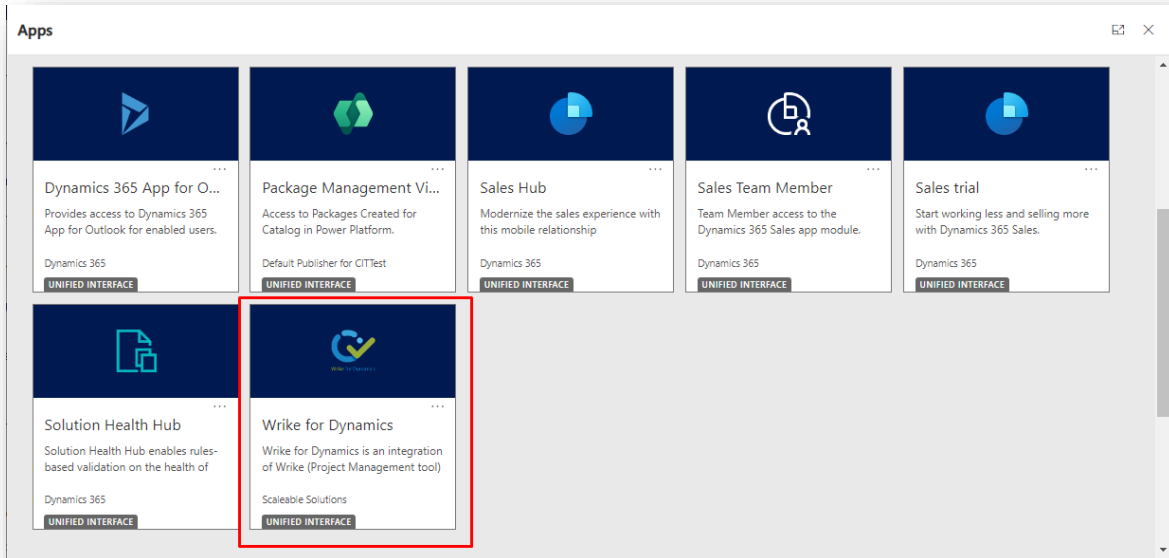
Assign role to the user

After selecting the desired role, Click on **Ok**.
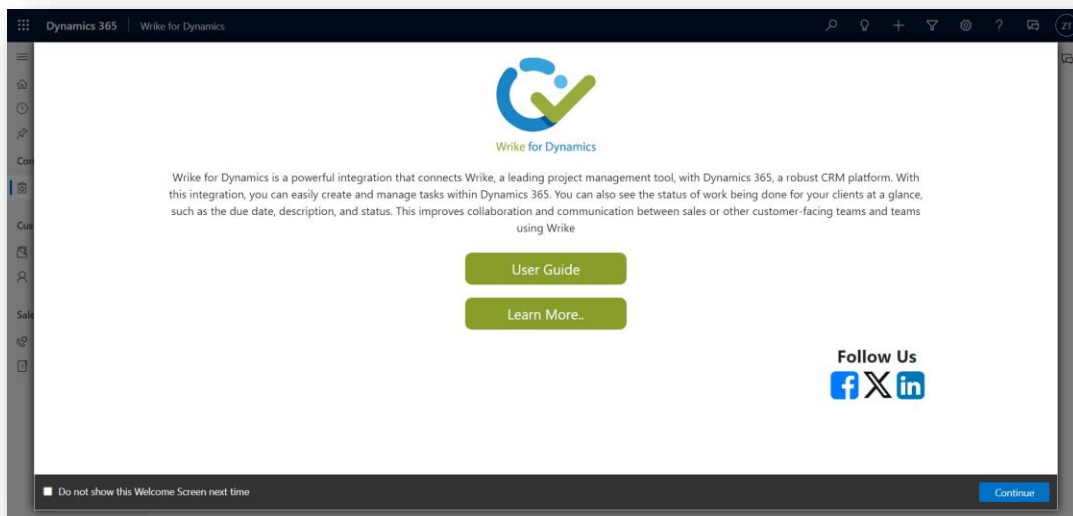
Dynamics 365 Apps

On Dynamics 365 apps you will find the Wrike for Dynamics Application.

Click on **Wrike for Dynamics**.

Welcome Screen

Welcome screen will appear. You can Download the User Guide and Learn More about the app and get access to our social Links from this page.
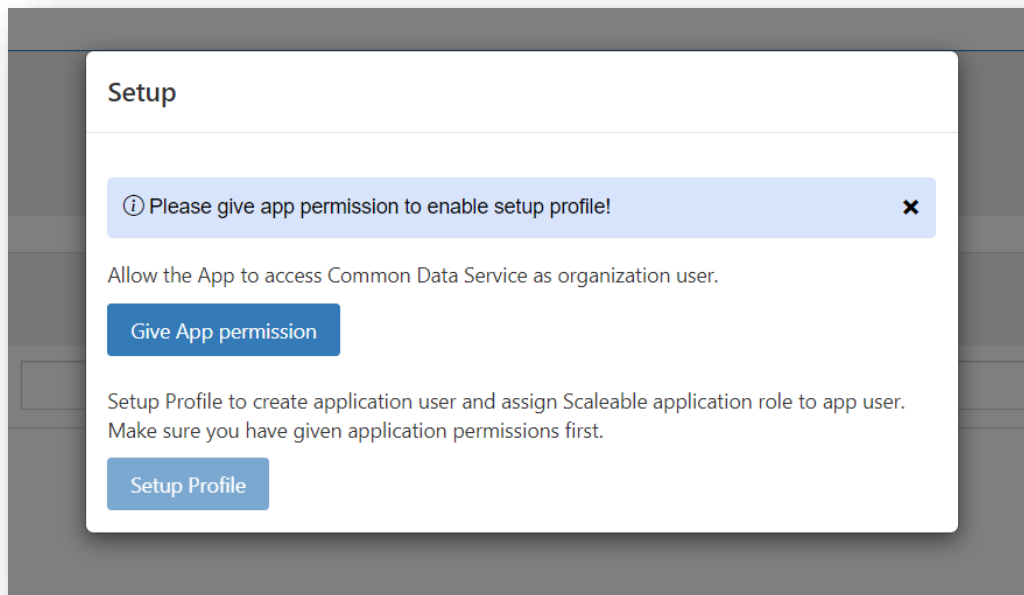
Configuration

Login to your wrike account. If you don't have an account on wrike create one.
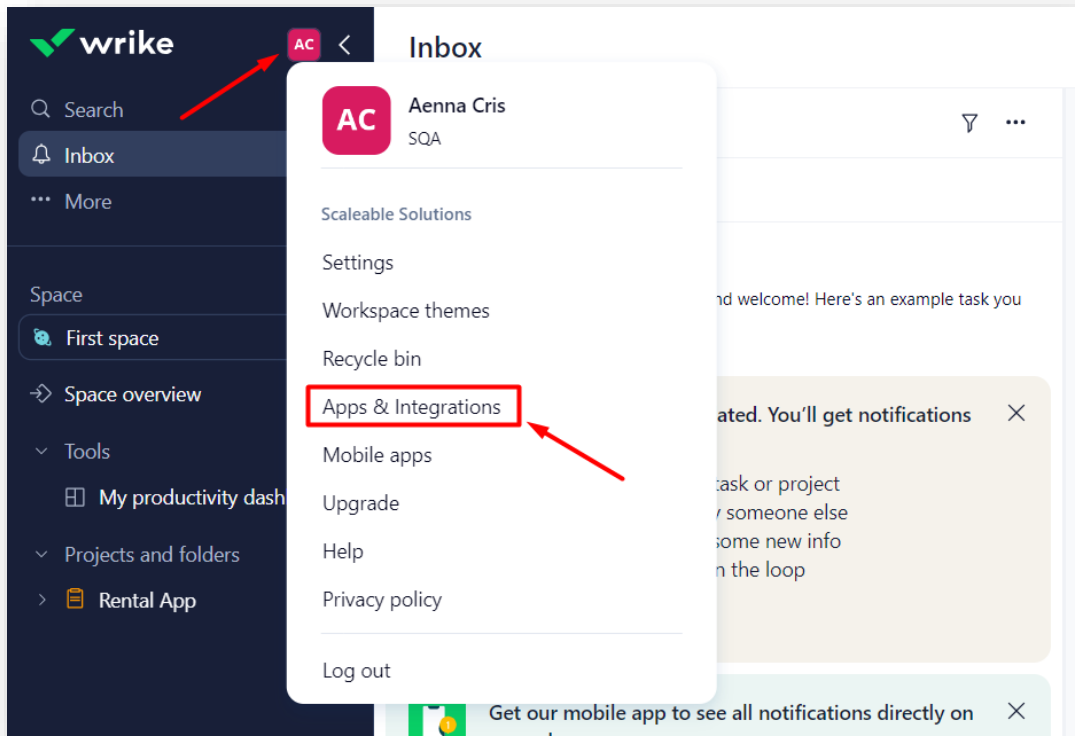
Setup:

Give app permissions to allow Wrike for Dynamics to access the Common Data Service as an organization user and then click on Setup Profile.
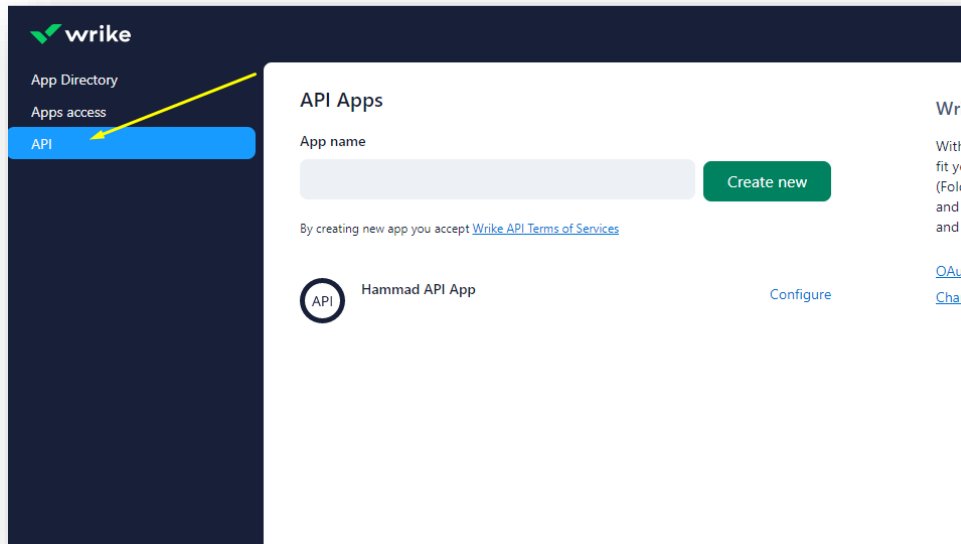

Copy Wrike API key:

Go to Wrike.com.

Click on the **Profile Settings** and Select **Apps & Integrations** option from the dropdown.

Select **API** from the sitemap.

Enter your **App name** and click on **Create New**.

Scroll down and click on **Create token** to get a permanent access token.

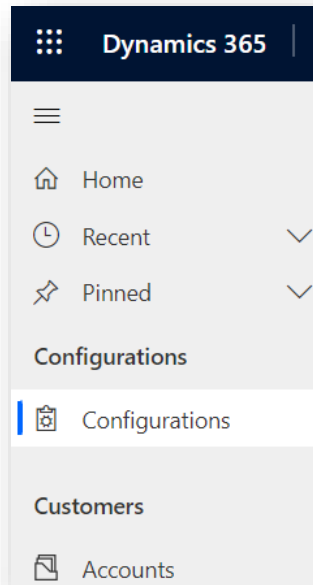Enter your password and click on **Obtain token**.
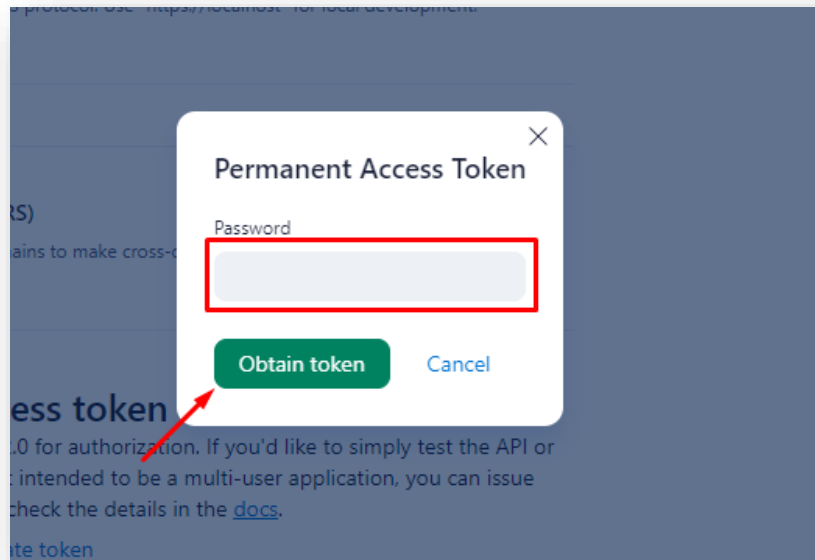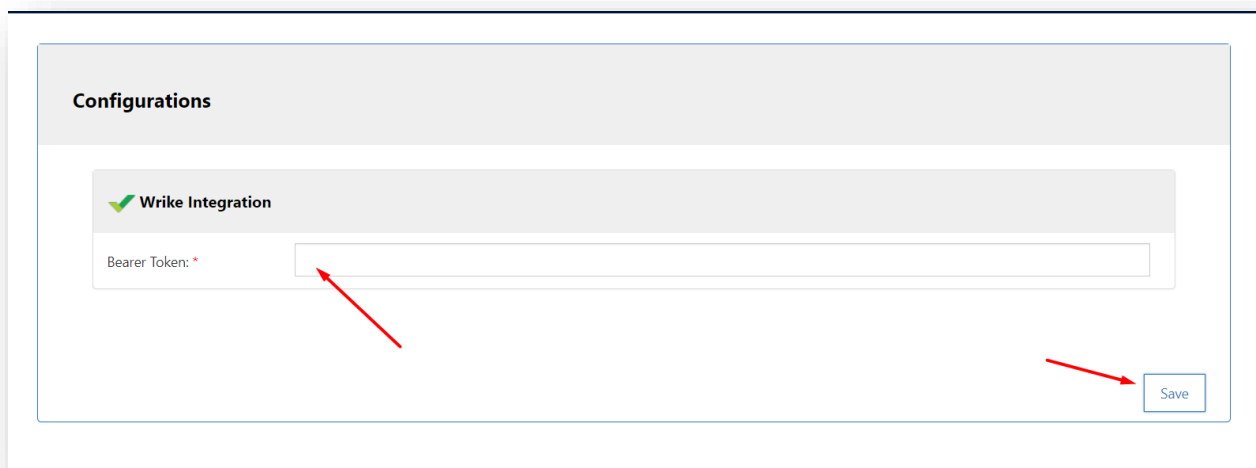
Now click on **Copy token**.
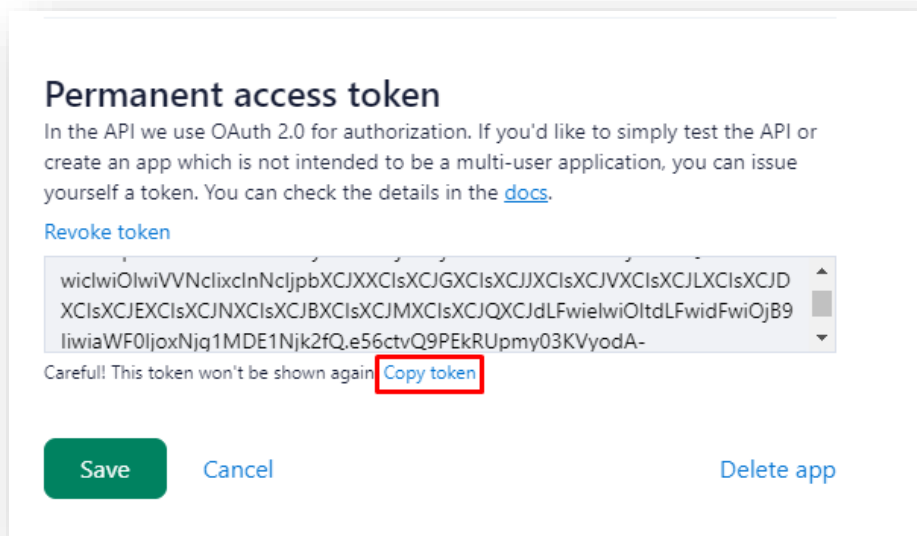
Paste Wrike API key:

Click on **Configurations** from site map.

Paste the Wrike Bearer Token in **Bearer Token** field of Wrike Integrations and Click on **Save** button.
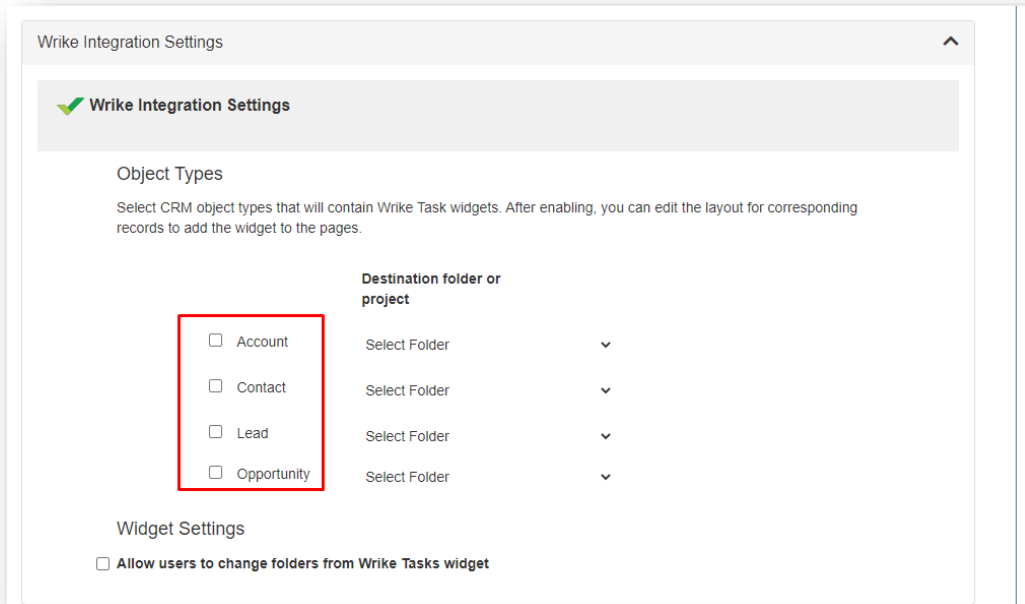

Your wrike account will be successfully connected with Wrike for Dynamics.
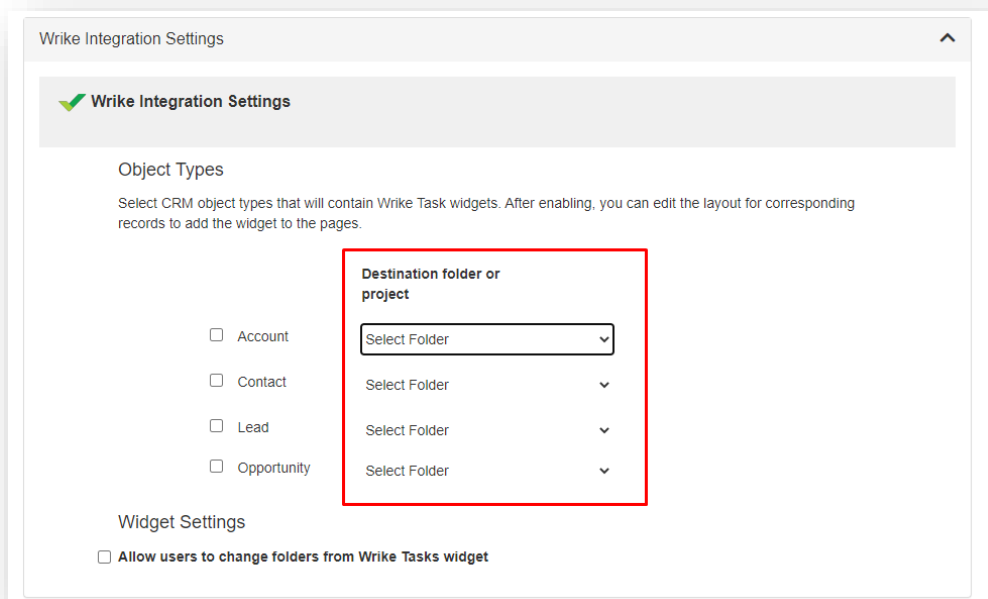
Wrike Integration Settings:

You can select any of the objects from the list so that these objects will contain Wrike Task Widget within their respective records.
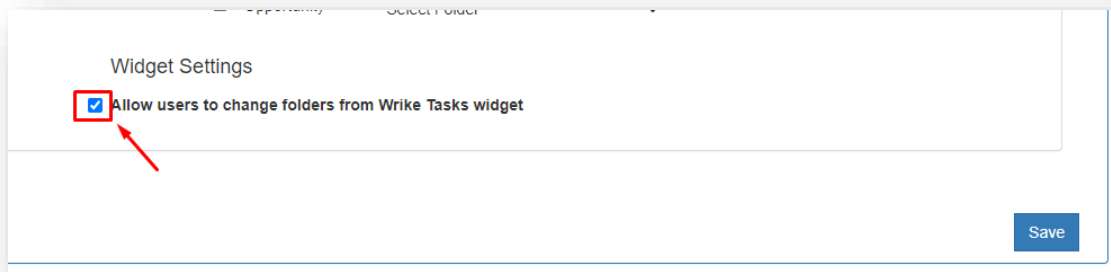

You can select a folder from the dropdown under the heading **Destination folder or project**. This will allow you to create tasks within the selected folder in Wrike.
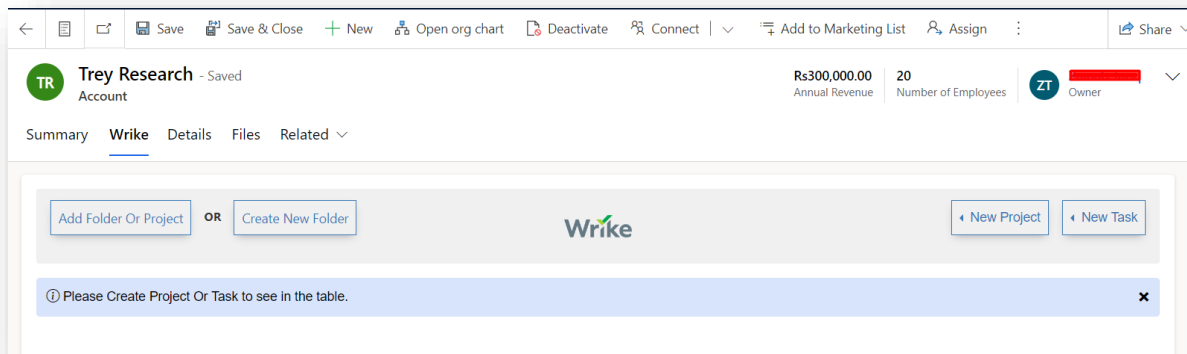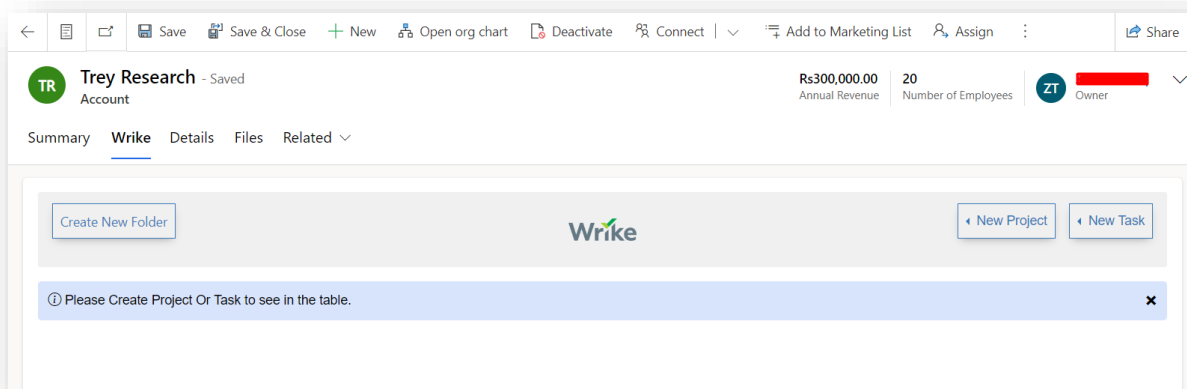
The check box in the **Widget Settings** will allow you to change the projects or folders from the Wrike Tasks Widget.
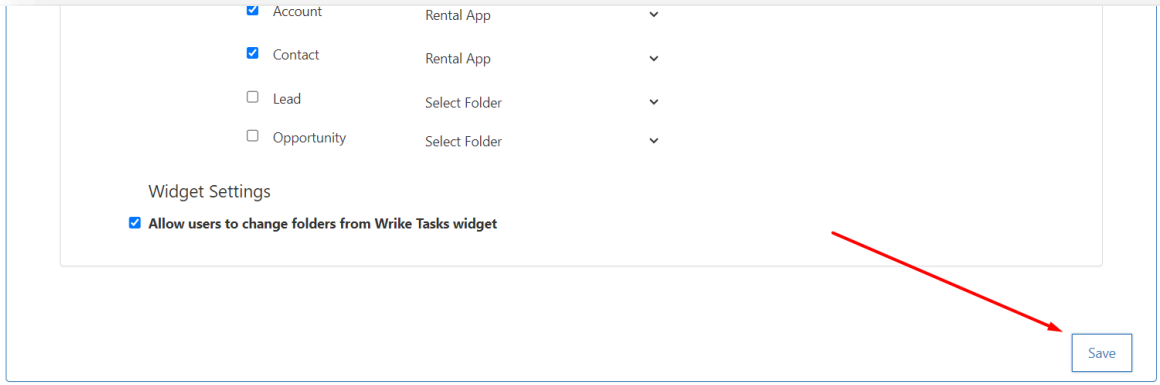

If this is **checked**, the widget will display as below:

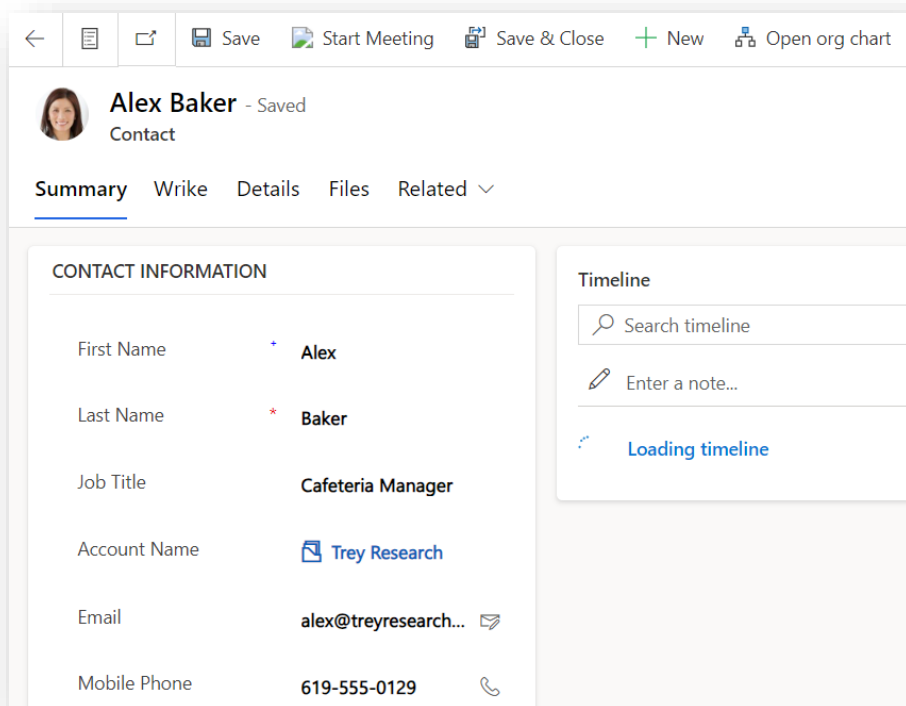If this is **unchecked**, the widget will display as below:

After that click on the **Save** button to save the integration settings.
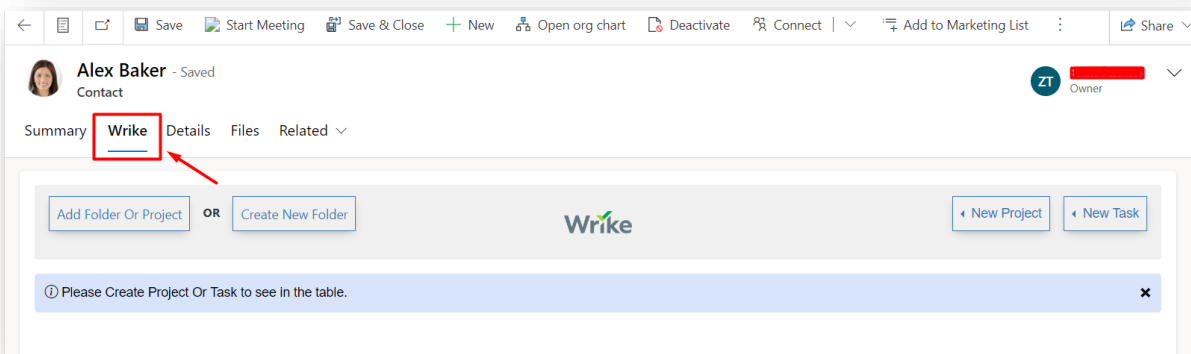
Create a new Folder:

Creating a new folder will create a folder for the record in Wrike with the name of the record.

To create a new folder, open a contact, account or lead record for which you want to create a new folder.
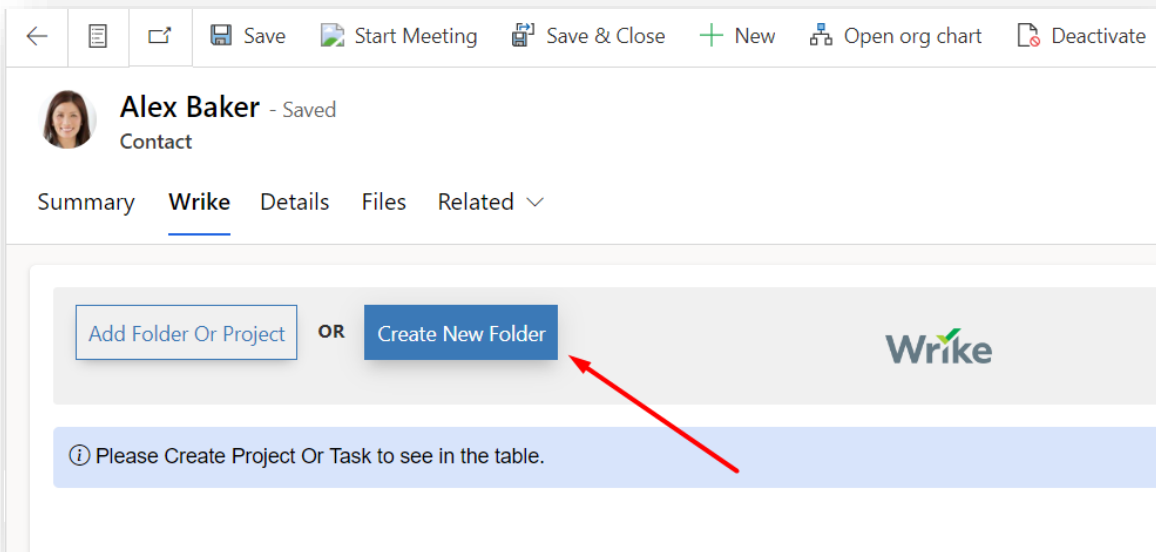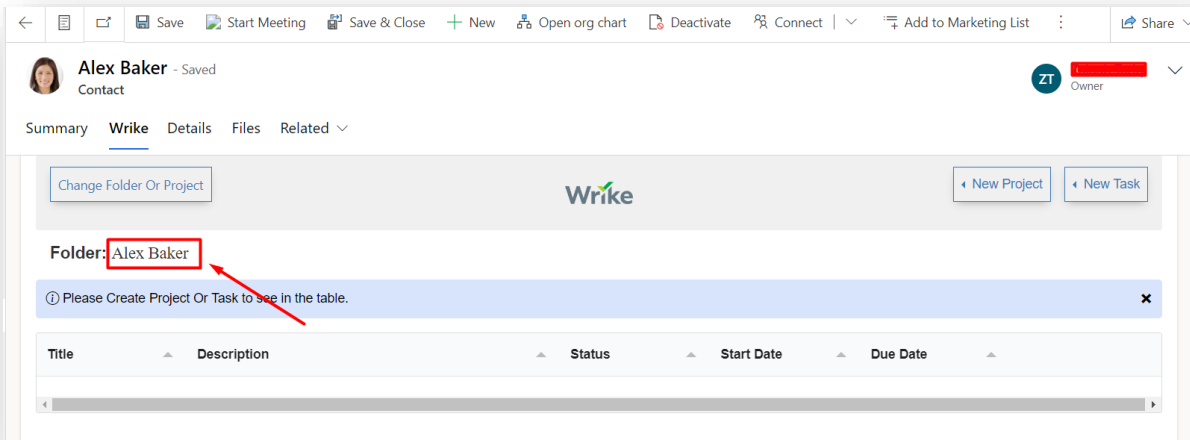
Select the **Wrike** tab from the top.

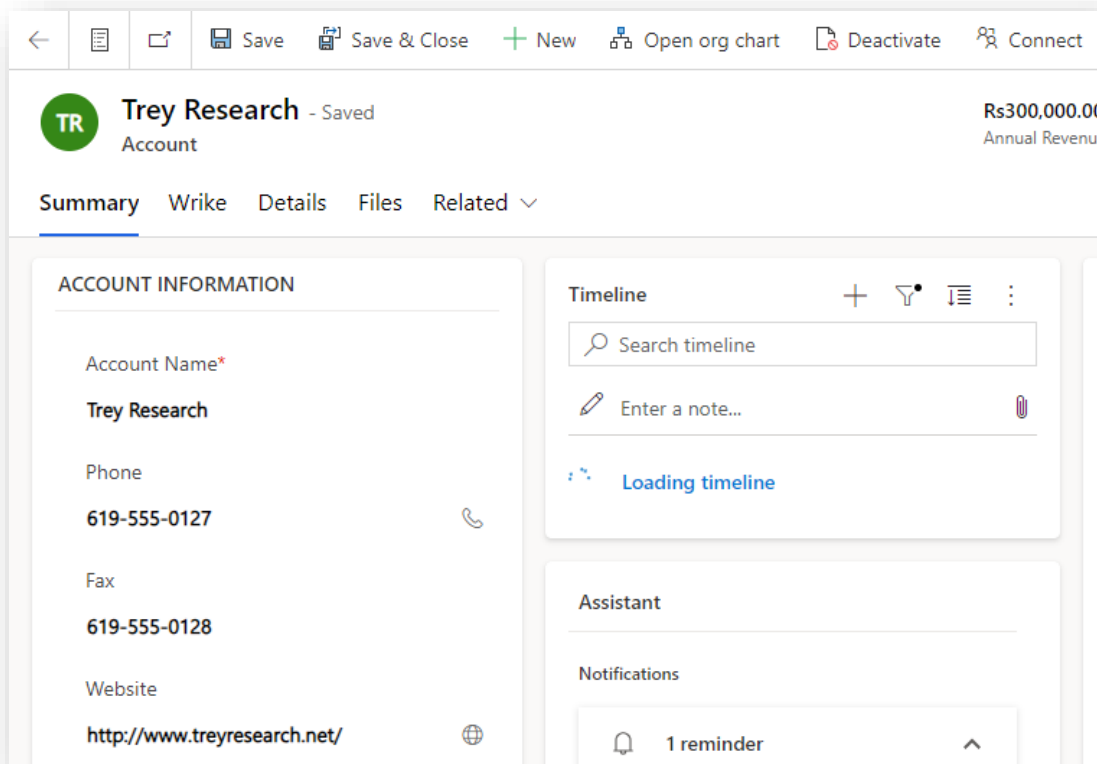Then click on the **Create New Folder** button displayed on the top of the Wrike Widget.

The folder will be created and will be displayed as shown below.
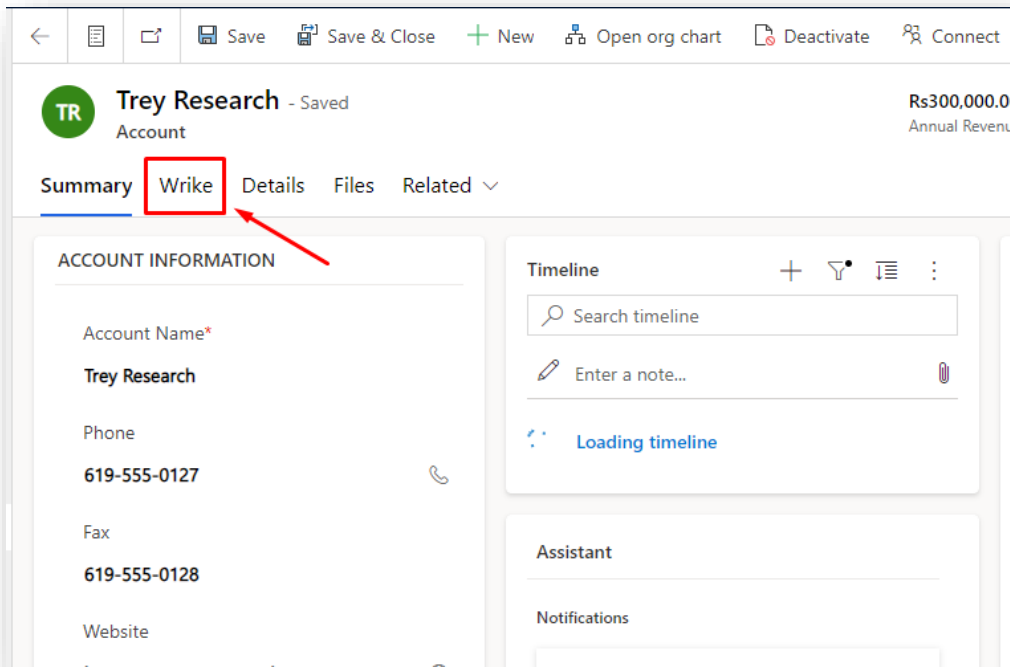
Add Folder or Project:

Adding a folder or a project will allow you to link an already created wrike folder or a project to your contact/account/lead record instead of creating a new folder or project.

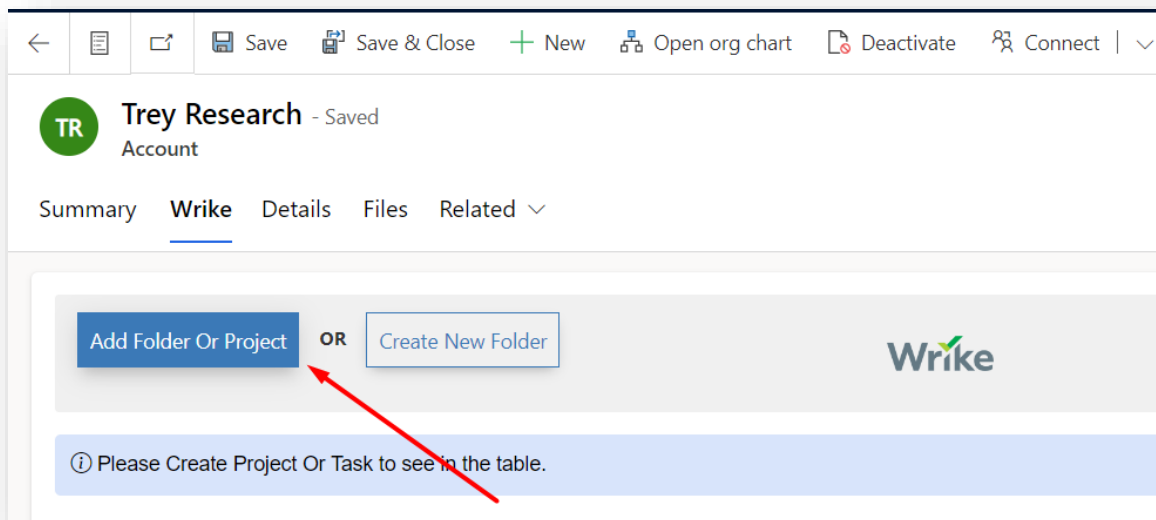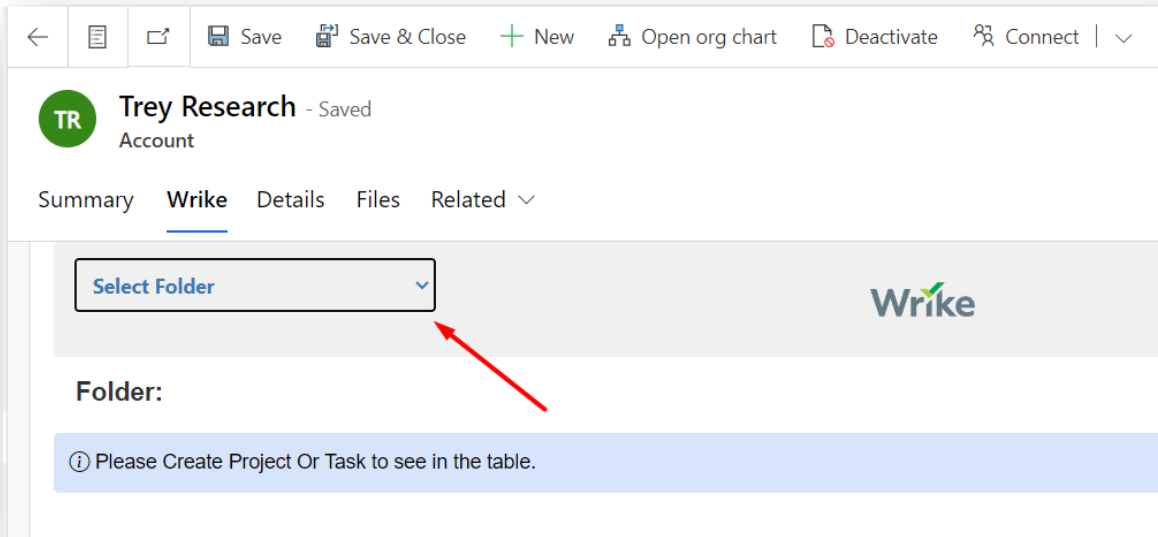To add a folder or a project, open a contact, account or lead record.
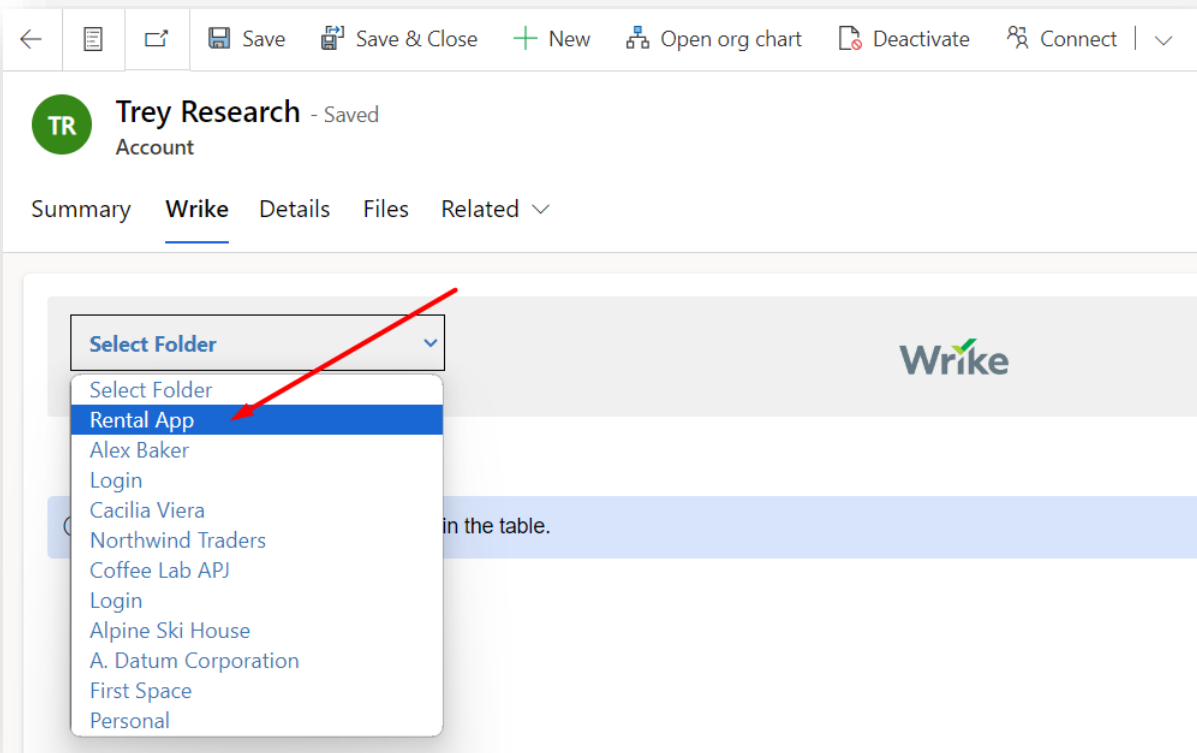
Select the **Wrike** tab from the top.

Then click on the **Add Folder or Project** button displayed on the top left of the corner of the Wrike Widget.

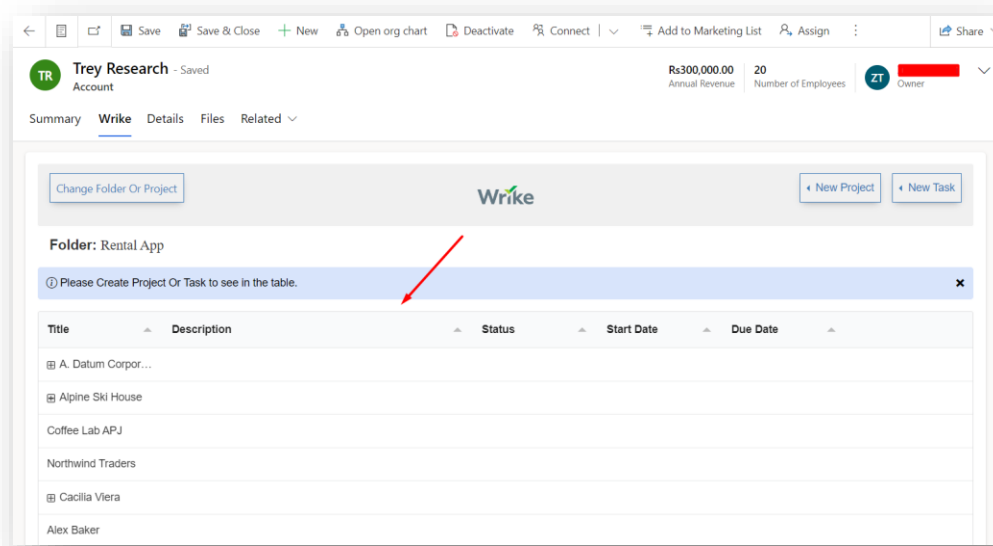After clicking on the button, you will see a dropdown list.

Select any folder or project from the list to link it with the opened record.
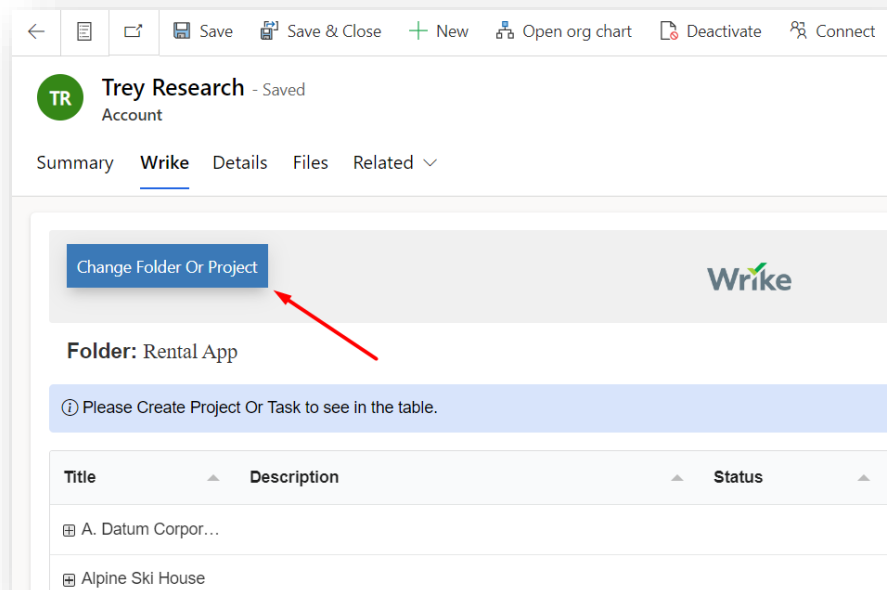
The selected folder or project will be displayed in the table on the widget as shown below.
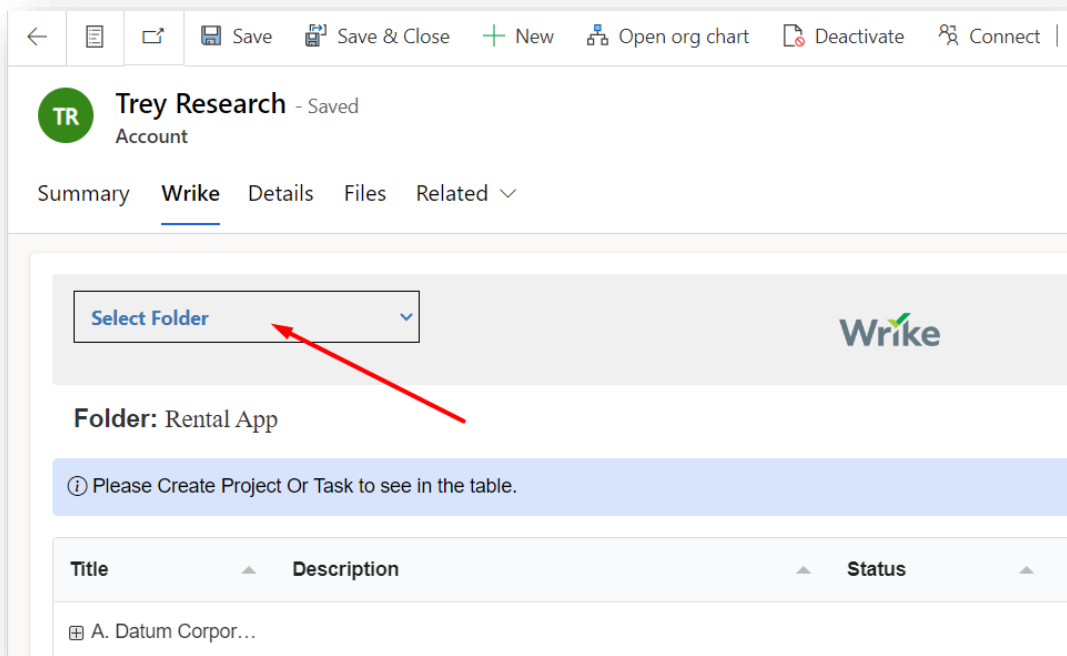

Change Folder or Project:

You can also change the already linked folder or a project.

To do so, Click on the **Change Folder or Project** button from the top of the Wrike Widget.
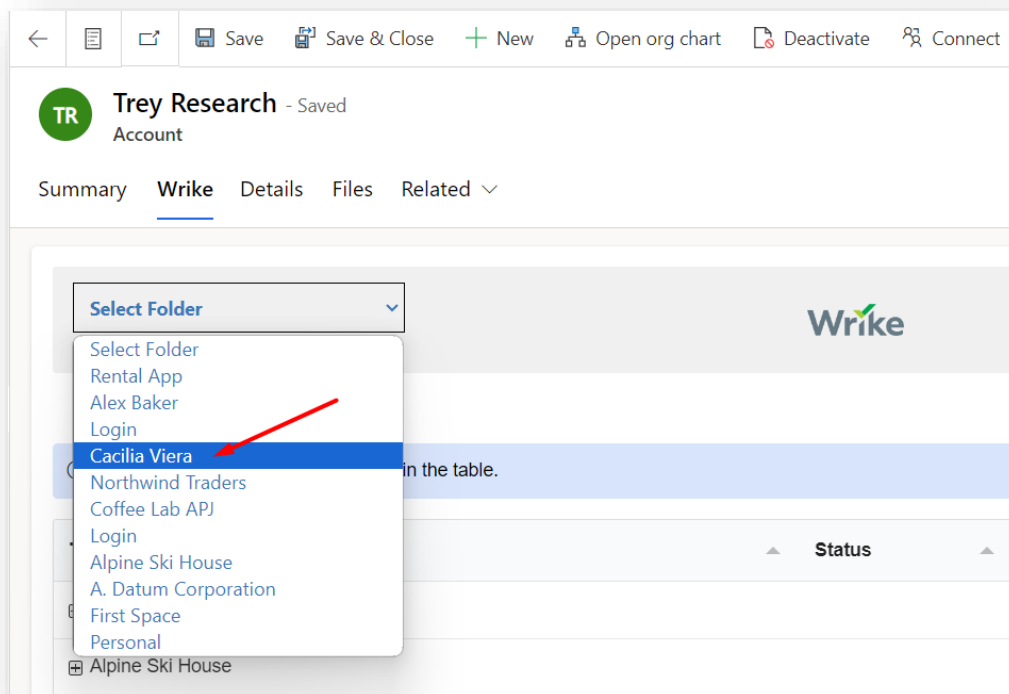
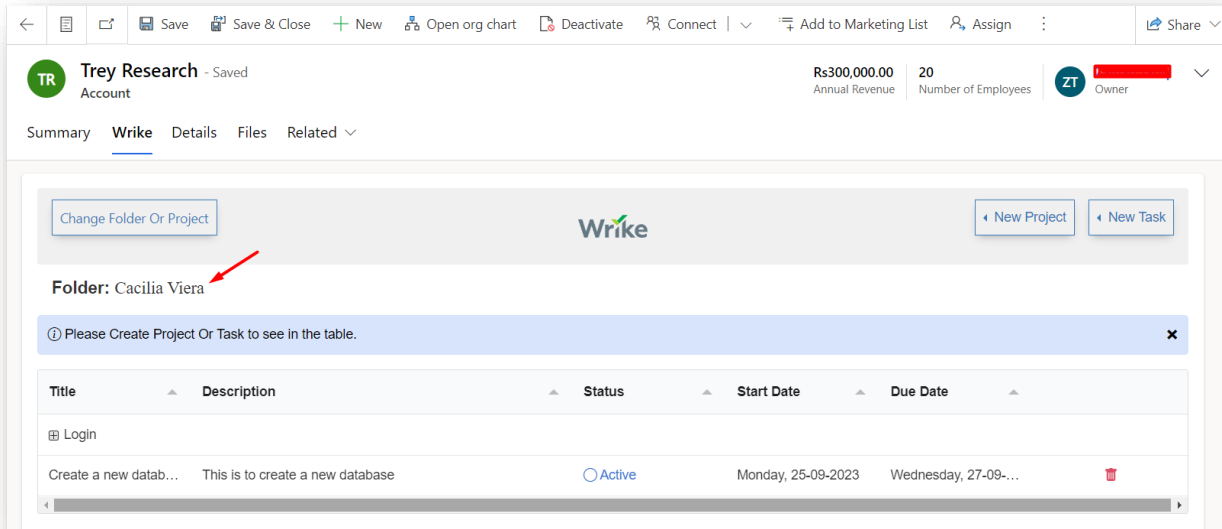After that, a dropdown list will display.

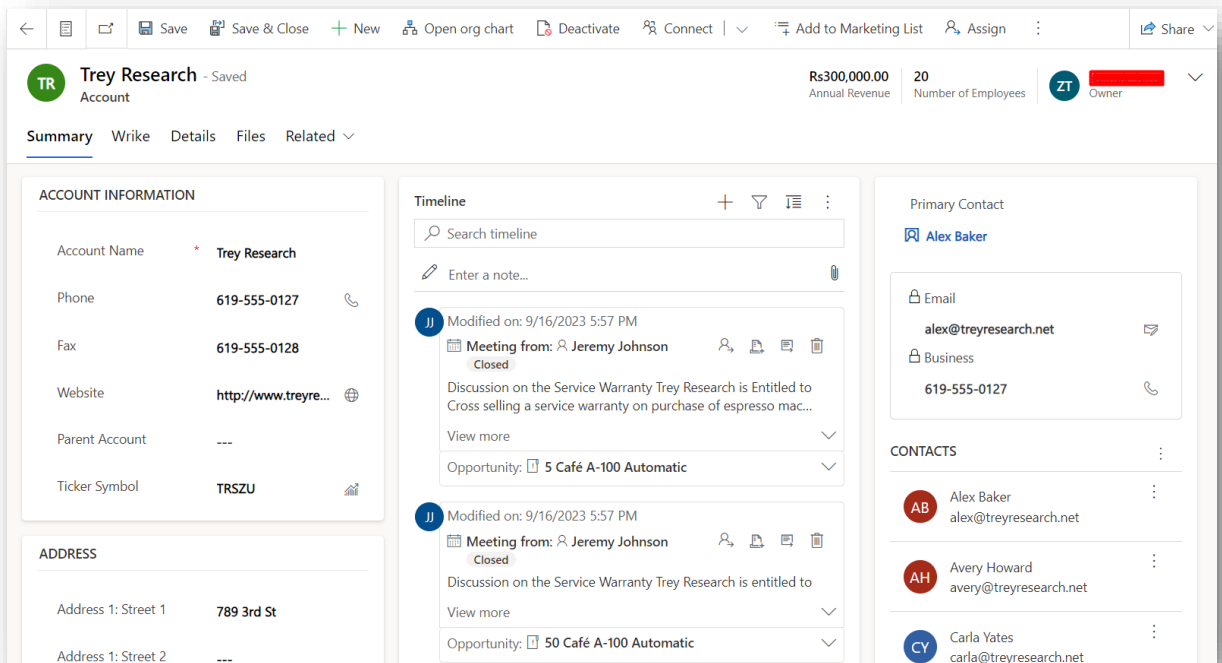Then select any option from the list.

The selected folder or project will replace the already linked folder or project.

Note – To change a folder or project, you must have to add a folder or project or create a new folder first.
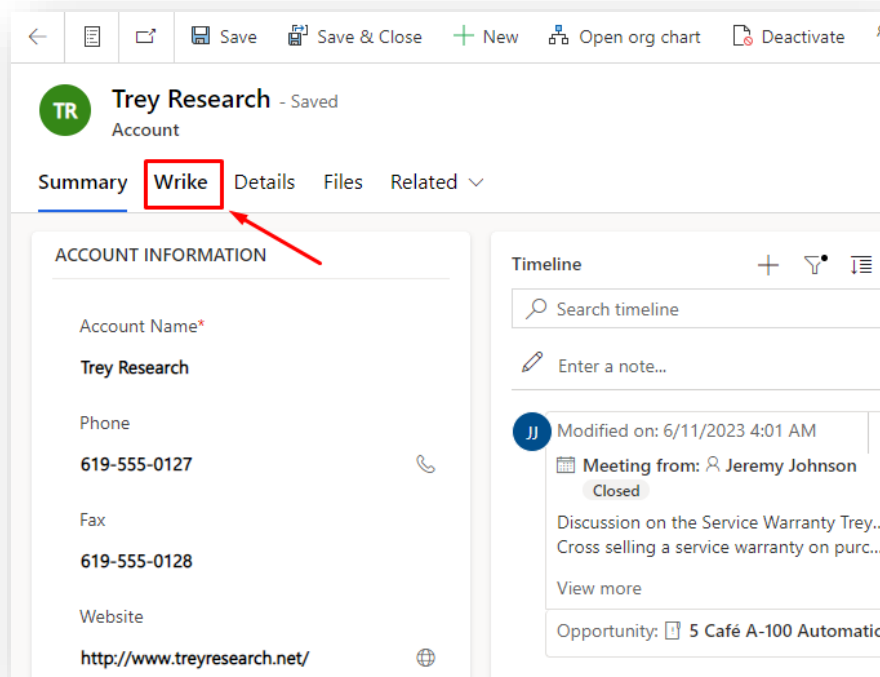

Create a new Project:

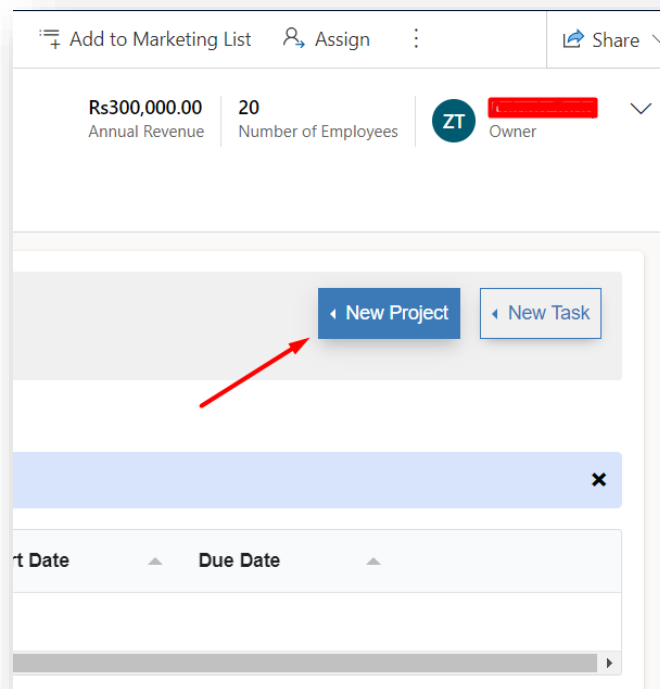You can create a new project by simply opening a contact/account/lead record.

Select a **Wrike** tab from the top.

Now click on the **New Project** button from the top of the Wrike Widget.

Fill in the details and click on the **Add Project** button from the bottom of the form to create a new project.
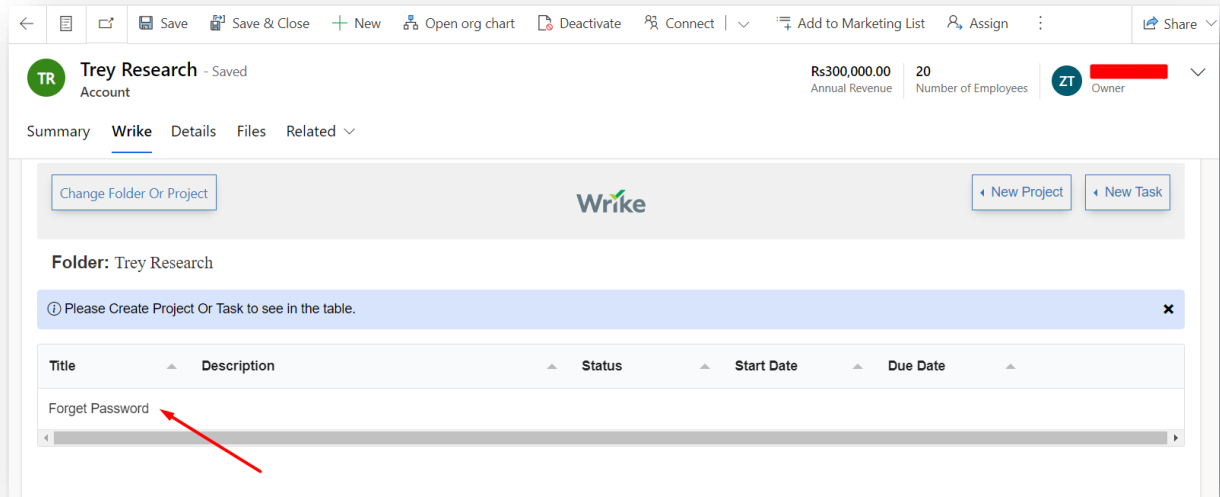
Note – Make sure to add the correct details of a project otherwise you have to change it from your Wrike account as we can only change the task details from within Wrike and not the project details.

The project will be created and will be displayed as below.

Create a new Task:

After creating a new project, you can create a new task within that project by simply clicking on the **New Task** button from the top right of the Wrike Widget.
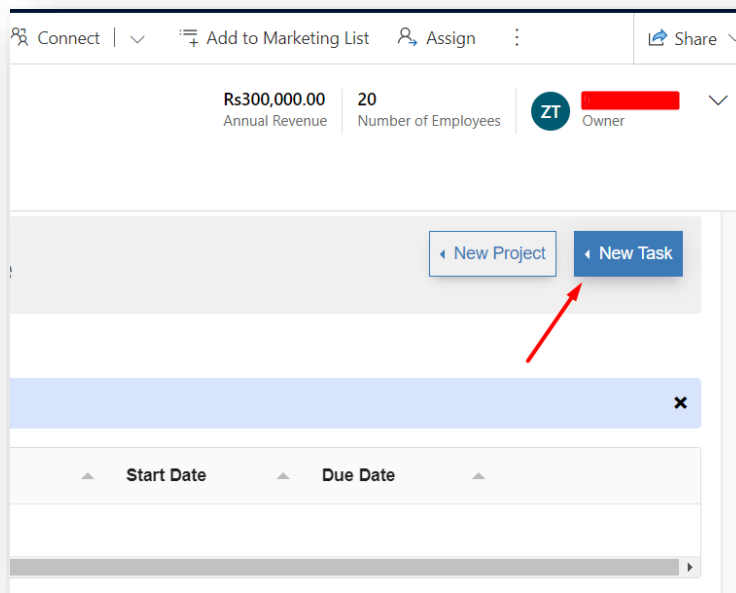
Fill in the details and click on the **Add Task** button from the bottom of the form to create a new task.

The task will be created and will be displayed as shown below:

Note – Make sure to select a day between 5 working days for Start Date and Due Date and not the weekends otherwise it will automatically select the next coming weekday.

Update a Task:

You can change the Description, Status, Start Date and Due Date of the task from within Wrike for Dynamics but you cannot change the tittle of the task.

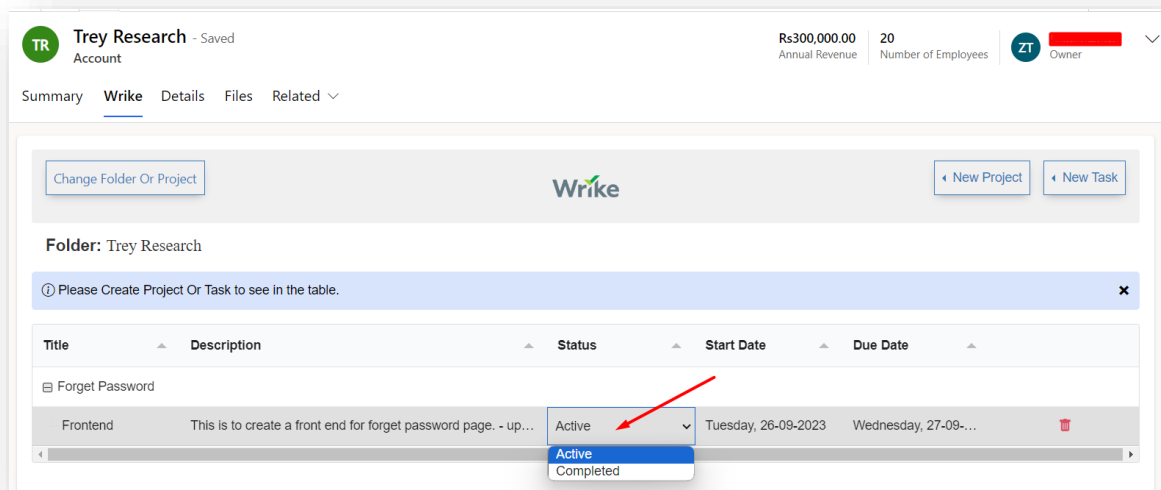- To update the **Description**, click on the description field of the task from the table and enter the updated value. The description will be changed success.
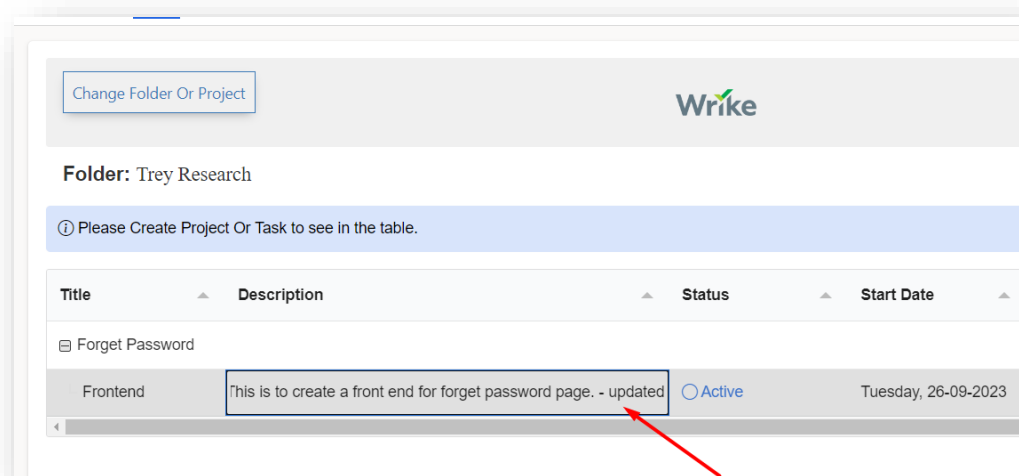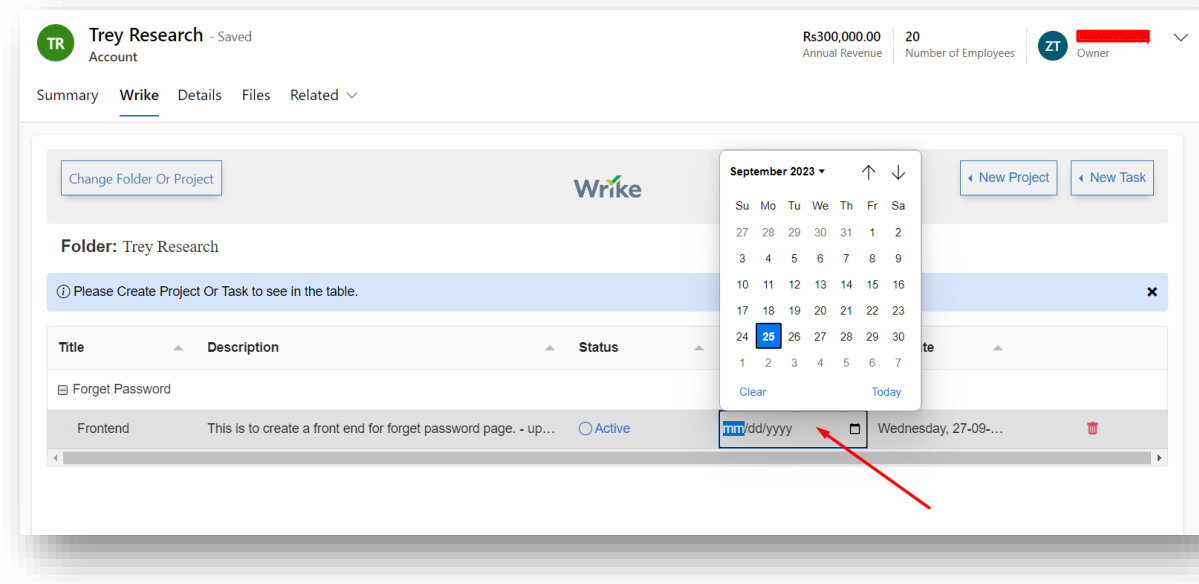

- To update the **Status**, click on the status field of the task. A dropdown list of available status options will display. Select any option from the list. The status will be changed successfully.
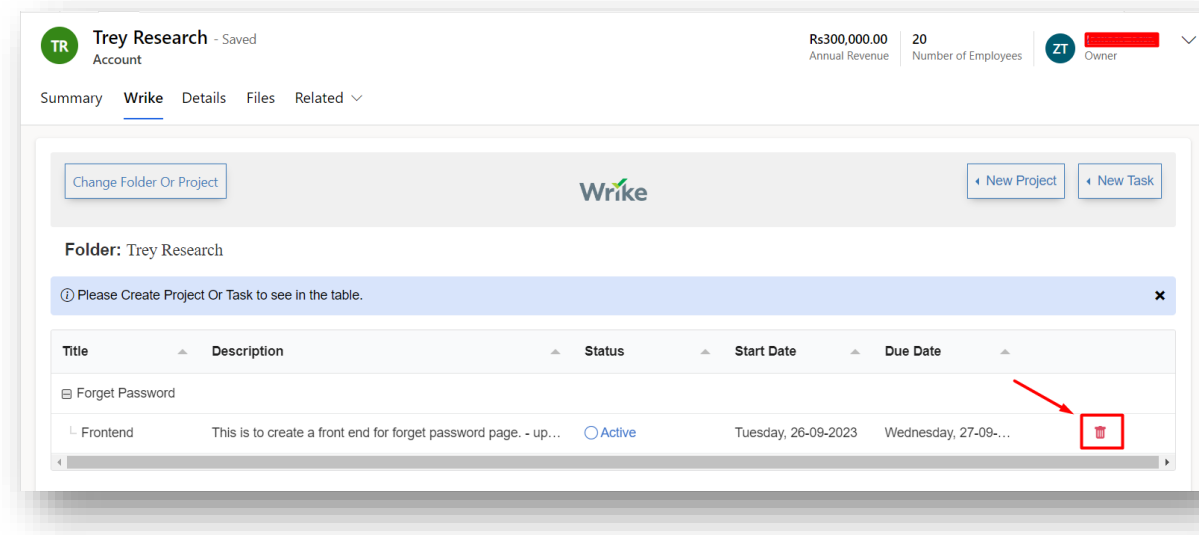
- To update the **Start Date** and **Due Date**, click on the field and select the date that you want. The Dates will be changed successfully.

Note – The changes done in wrike will also reflect in dynamics.
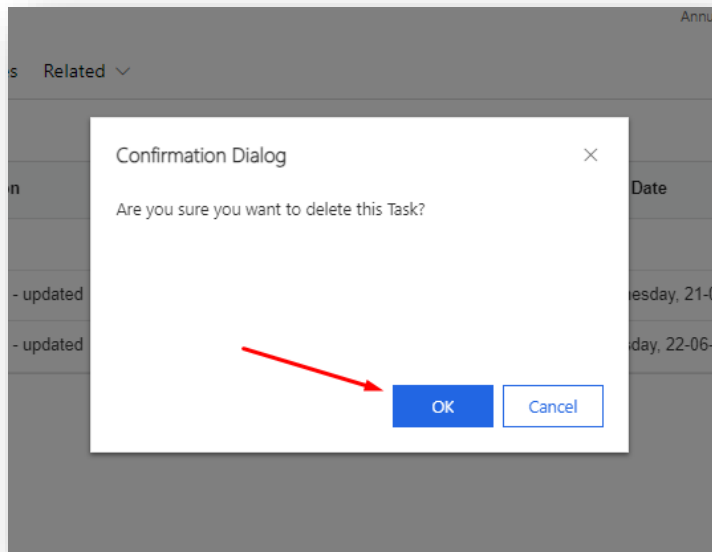
Delete a Task:

To remove or delete a task, click on the bin icon displayed next to the task .

A confirmation dialog will display. Click on the **Ok** button to confirm deletion.

The task will be deleted successfully.

Uninstall:

If you wish to uninstall Wrike for Dynamics, go to **Solutions**. Select Wrike for Dynamics and click on **Delete**.