



Setup Guide

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Install Protomator

You can install Protomator in Dynamics 365 for Sales.

To install Protomator from AppSource

1. Sign in to Dynamics 365 account that has system administrator permissions and go to Settings.
2. Under Customization, select Dynamics Marketplace (or go directly to appsource.microsoft.com).
3. Under Categories, check Productivity.
4. On the Protomator tile, select Get.
5. Agree to the terms to start the install process.
6. Select the CRM organization to which you want to add Protomator, read and check the agreements, and then select Agree to complete the installation.

Review Sample Data

Protomator solution comes with a sample data with which will give you a glance on how to create templates with dynamics values in it. Once installation is completed, you can review sample data provided with Protomator solution. See below:

Uninstall Protomator

You can uninstall Protomator by removing the solution from Dynamics 365.

To uninstall Protomator

1. In Dynamics 365, go to Settings, and under Customization, select Solutions.
2. Select Protomator, and then select Delete. For more information on removing a solution, see Dynamics 365 help.