

# SPFx App Installation Procedure (AppSource)

## BPA Solutions

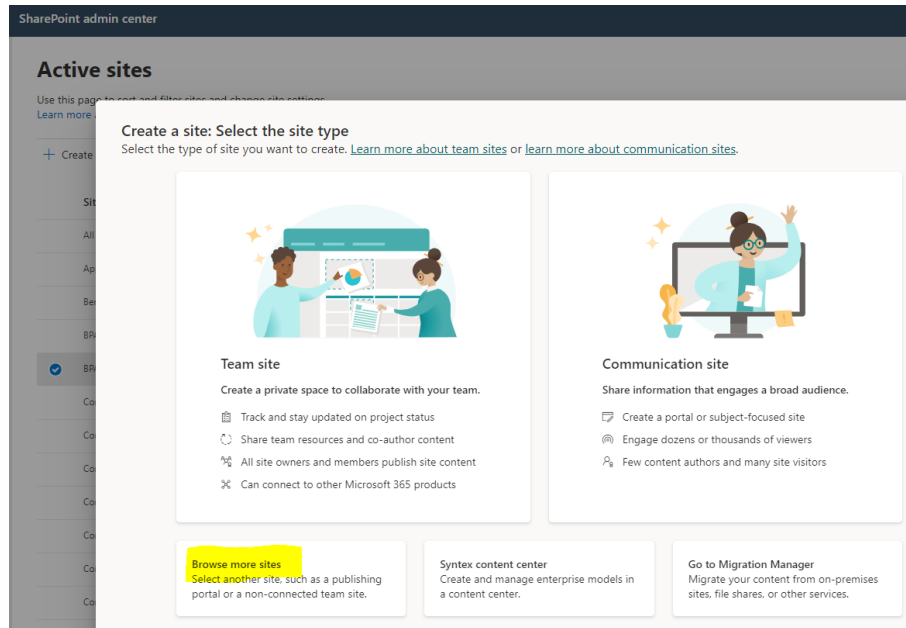
For Products :      BPAQuality365  
                             BPAMedical365  
                             BPACRM365  
                             BPAAppBuilder365

November 2023

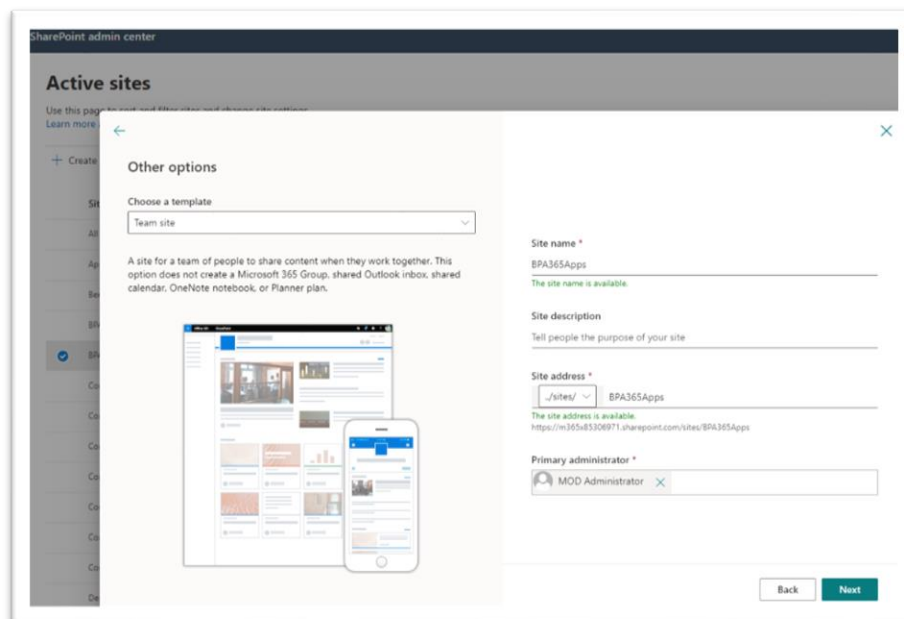
## 1. Prerequisites

- SharePoint Site - For BPAQuality365, BPAMedical365 or BPACRM365 a new site collection has to be created. We recommend using a Team Site that is **not linked to a Microsoft 365 Group**.

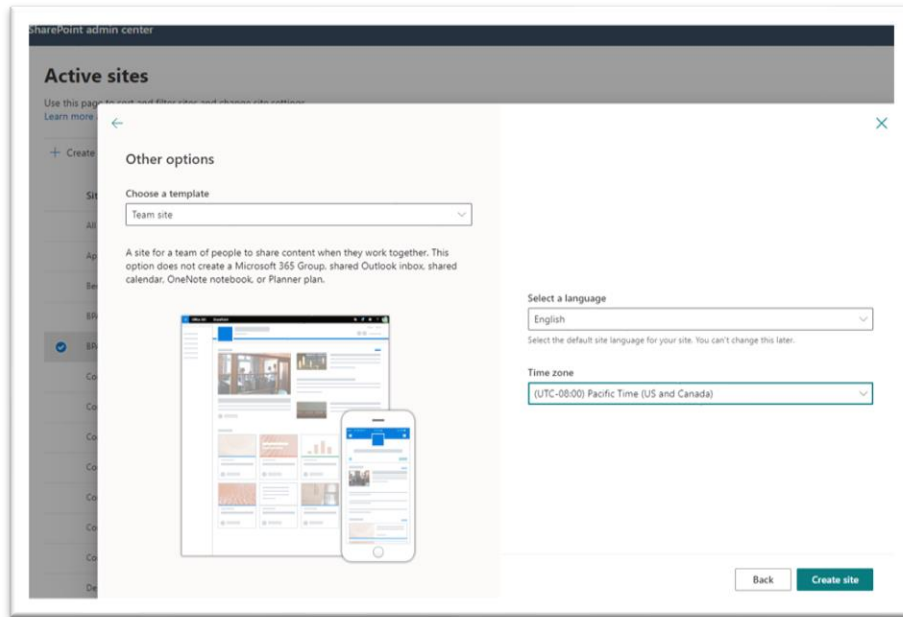
### a. Select **Browse more sites**



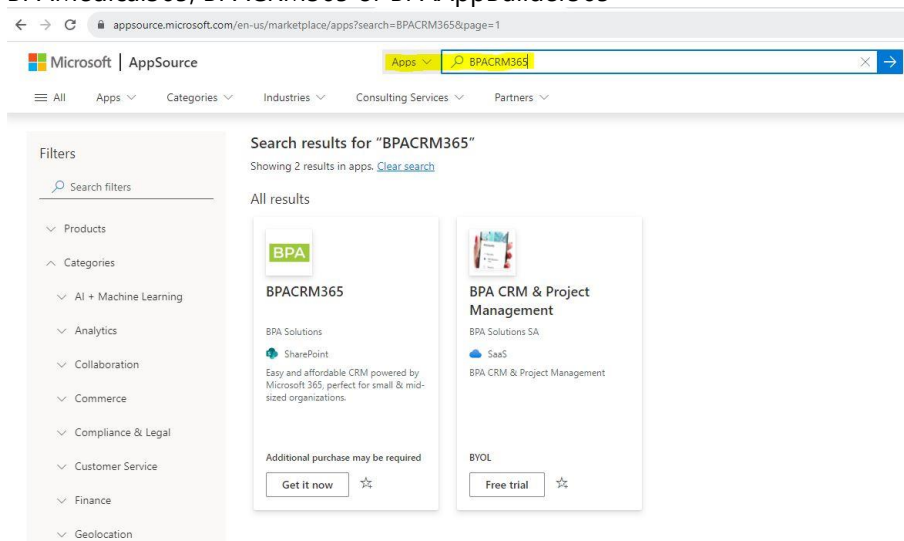
### b. Enter a site name and address that is available and specify the first Site collection Administrator. Continue with **Next**



- c. Set the sites main language and time zone. When all complete continue with **Create Site**.

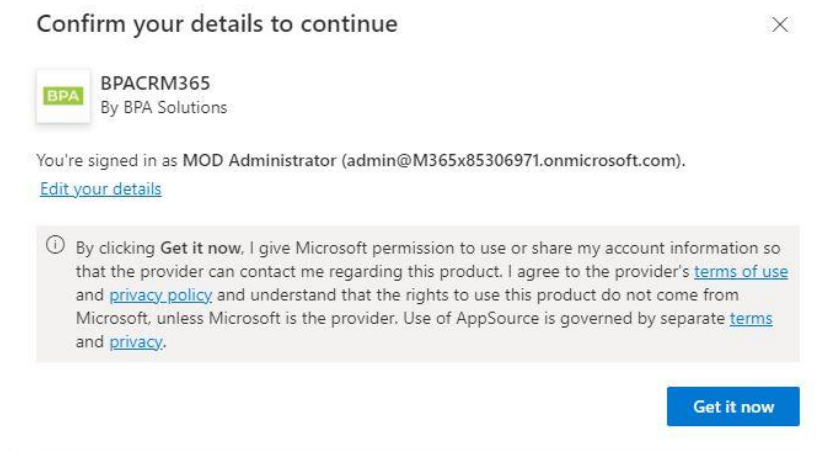


- BPA App has been downloaded from Microsoft App Source or SharePoint Store
  - a. Navigate to Microsoft AppSource Home page <https://appsource.microsoft.com/>
  - b. Search AppSource Apps for the product you want to install BPAQuality365, BPAMedical365, BPACRM365 or BPAAppBuilder365

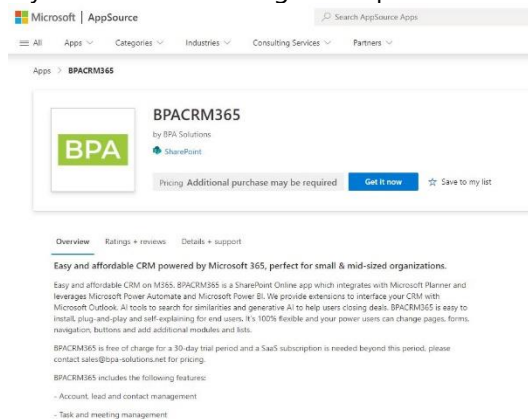


- c. Click on the logo and follow with e. or click on Get it now and follow with d.

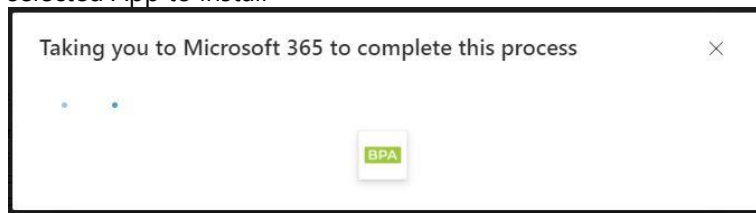
- d. Click on Get it now and confirm you want to continue by selecting Get it now again.



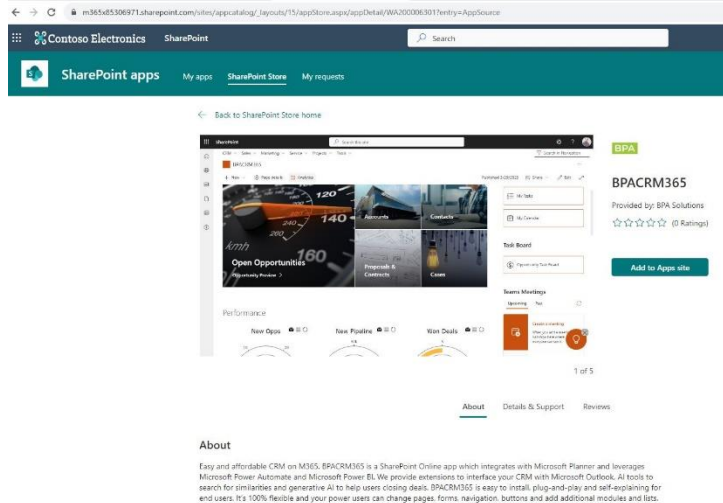
- e. If you clicked on the logo in step c. then confirm with **Get it now**



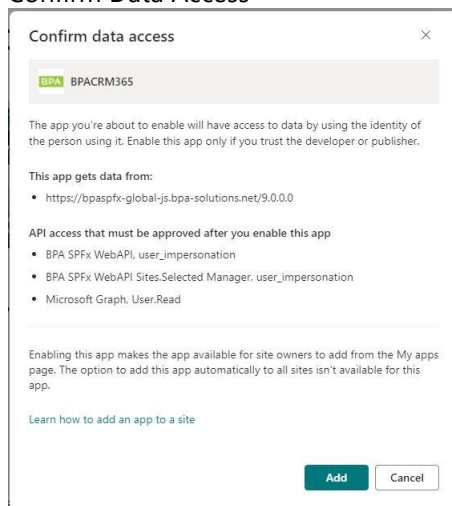
- f. Wait until you have been redirected to the SharePoint App Catalog displaying BPA's selected App to install



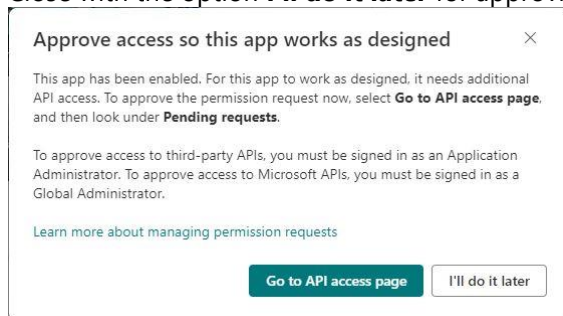
g. Click on Add to App site and confirm



h. Confirm Data Access



i. Close with the option **I'll do it later** for approving the API Acces Requests



## 2. Important Notice

**Do NOT use Incognito mode of Chrome or any other browser. That can cause unexpected page reloading hiding the needed links.**

You need **Global Tenant Administration** permissions to do initial installation as **BPA WebAPI App** and **SharePoint API** permissions are required to be approved.

### 3. BPA SPFx Installation Guide

#### API requests approval

1. Open **SharePoint Admin Center** and navigate to **Advanced > API Access** or use a direct link - [https://\[your\\_tenant\\_name\]-admin.sharepoint.com/\\_layouts/15/online/AdminHome.aspx#/webApiPermissionManagement](https://[your_tenant_name]-admin.sharepoint.com/_layouts/15/online/AdminHome.aspx#/webApiPermissionManagement) where change **[your\_tenant\_name]** to a name of your tenant. Like for <https://contoso.sharepoint.com/sites/testsite>, **contoso** is the tenant name and url will be - [https://contoso-admin.sharepoint.com/\\_layouts/15/online/AdminHome.aspx#/webApiPermissionManagement](https://contoso-admin.sharepoint.com/_layouts/15/online/AdminHome.aspx#/webApiPermissionManagement).
2. On the page, please review and approve all pending API requests described below from **BPA Solutions (DO NOT** approve other pending requests as they are not related to **BPA Solutions)**:

#### API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts.  
[Learn about managing permission requests](#)


API name	Package	Permission	Last requested
Pending requests (3)			
Organization-wide (3)			
BPA SPFx WebAPI	BPACRM365	user_impersonation	11/16/2023
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365	user_impersonation	11/16/2023
Microsoft Graph	BPACRM365	User.Read	11/16/2023

3. Approve **User.Read** permission (allows using groups in the permission settings of BPA Navigation to limit access to certain links):

## API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts.  
[Learn about managing permission requests](#)

 Approve  Reject

API name	Package	Permission
Pending requests (3)		
Organization-wide (3)		
BPA SPFx WebAPI	BPACRM365	user_impersonation
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365	user_impersonation
 Microsoft Graph	BPACRM365	User.Read
> Approved requests (1)		

## Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "User.Read" permission.



API name	Package name
Microsoft Graph	BPACRM365
Permission	Version
User.Read	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023


 

4. Approve **BPA SPFx WebAPI - user\_impersonation** permission request (allows calls to BPA backend WebAPI on behalf of the user and BPA WebAPI to connect to your SharePoint Online):

## API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts.  
[Learn about managing permission requests](#)

 Approve  Reject

API name	Package	Permission
Pending requests (2)		
Organization-wide (2)		
 BPA SPFx WebAPI	BPACRM365	user_impersonation
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365	user_impersonation
> Approved requests (2)		

## Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

API name	Package name
BPA SPFx WebAPI	BPACRM365
Permission	Version
user_impersonation	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023

- a. Accept minimal permissions to add the **BPA SPFx WebAPI** Enterprise application (service principal) to your AAD:

## API access

Manage access to Azure AD-secured APIs from SharePoint Framework components or custom scripts. [Learn about managing permission requests](#)

Approve Reject

API name
Pending requests (2)
Organization-wide (2)
BPA SPFx WebAPI
BPA SPFx WebAPI Sites.Selected
Approved requests (2)

Sign in to your account - [InPrivate] - Microsoft Edge

https://login.microsoftonline.com/common/oauth2/v2.0/auth...

Microsoft

admin@m365x65501825.onmicrosoft.com

### Permissions requested

BPA SPFx WebAPI  
BPA Solutions SA

This app would like to:

- View your basic profile
- Maintain access to data you have given it access to
- Consent on behalf of your organization

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel Accept

Terms of use Privacy & cookies ...

## Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

API name	Package name
BPA SPFx WebAPI	BPACRM365
Permission	Version
user_impersonation	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023

Approve Cancel



- b. Accept the actual permissions for the **BPA SPFx WebAPI** Enterprise application (service principal):

### API access

Manage access to Azure AD-secured APIs from SharePoint. [Learn about managing permission requests](#)

☒ Approve
 ☐ Reject

☒ BPA SPFx WebAPI

### Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

API name	Package name
BPA SPFx WebAPI	BPACRM365
Permission	Version
user_impersonation	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023

- c. Once accepted, the confirmation screen will show up, please close it and wait for the page to reload to show the permission request as accepted/

### API access

Manage access to Azure AD-secured APIs from SharePoint. [Learn about managing permission requests](#)

☒ Approve
 ☐ Reject

☒ BPA SPFx WebAPI

### Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

API name	Package name
BPA SPFx WebAPI	BPACRM365
Permission	Version
user_impersonation	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023

5. Approve **BPA SPFx WebAPI Sites.Selected Manager - user\_impersonation** permission request (allows calls to BPA Sites.Selected backend on behalf of the user to grant Sites.Selected permission to the site collection BPA is installed to):

### API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts.  
[Learn about managing permission requests](#)

☒ Approve ☐ Reject

API name	Package	Permission
Pending requests (1)		
Organization-wide (1)		
<input checked="" type="checkbox"/> BPA SPFx WebAPI Sites.Selected Manager	BPACRM365	user_impersonation
> Approved requests (3)		

### Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

API name	Package name
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365
Permission	Version
user_impersonation	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023

- a. Accept minimal permissions to add the **BPA SPFx WebAPI Sites.Selected Manager** Enterprise application (service principal) to your AAD:

### API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts.  
[Learn about managing permission requests](#)

☒ Approve ☐ Reject

API name
Pending requests (1)
Organization-wide (1)
<input checked="" type="checkbox"/> BPA SPFx WebAPI Sites.Selected Manager
> Approved requests (3)

### Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

API name	Package name
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365
Permission	Version
user_impersonation	9.0.0.2
Requested by	Last requested
MOD Administrator	11/16/2023

**Note:** you can revoke the granted **BPA SPFx WebAPI Sites.Selected Manager** permissions and delete the application after installing all planned BPA sites as it's not used after installation.

- b. Accept the actual permissions for the **BPA SPFx WebAPI Sites.Selected Manager** Enterprise application (service principal):

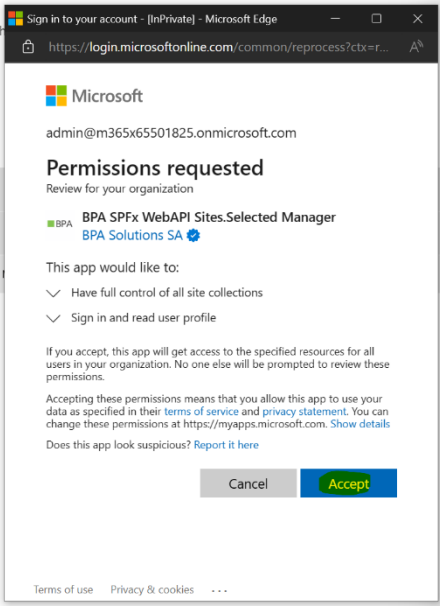
### API access

Manage access to Azure AD-secured APIs from SP

[Learn about managing permission requests](#)

☒ Approve
 ☐ Reject

☐ API name  
☐ Pending requests (1)  
☒ Organization-wide (1)  
☐ BPA SPFx WebAPI Sites.Selected Manager  
☐ Approved requests (3)



Microsoft  
admin@m365x65501825.onmicrosoft.com

**Permissions requested**  
Review for your organization

**BPA SPFx WebAPI Sites.Selected Manager**  
BPA Solutions SA

This app would like to:

- Have full control of all site collections
- Sign in and read user profile

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their [terms of service](#) and [privacy statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

[Terms of use](#)
[Privacy & cookies](#)
[...](#)

### Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

<b>API name</b>	<b>Package name</b>
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365
<b>Permission</b>	<b>Version</b>
user_impersonation	9.0.0.2
<b>Requested by</b>	<b>Last requested</b>
MOD Administrator	11/16/2023

- c. Once accepted, the confirmation screen will show up, please close it and wait for the page to reload to show the permission request as accepted.

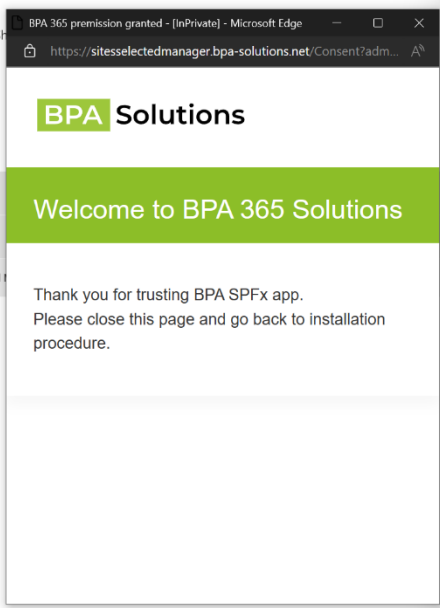
### API access

Manage access to Azure AD-secured APIs from SP

[Learn about managing permission requests](#)

☒ Approve
 ☐ Reject

☐ API name  
☐ Pending requests (1)  
☒ Organization-wide (1)  
☐ BPA SPFx WebAPI Sites.Selected Manager  
☐ Approved requests (3)



BPA Solutions

**Welcome to BPA 365 Solutions**

Thank you for trusting BPA SPFx app.  
Please close this page and go back to installation procedure.

### Approve access

If you approve access, any SharePoint Framework component or custom script can call this Azure AD-secured API with "user\_impersonation" permission.

<b>API name</b>	<b>Package name</b>
BPA SPFx WebAPI Sites.Selected Manager	BPACRM365
<b>Permission</b>	<b>Version</b>
user_impersonation	9.0.0.2
<b>Requested by</b>	<b>Last requested</b>
MOD Administrator	11/16/2023

6. All required permissions should now be granted and listed under **Approved requests > Organization wide**.

## App Installation

- If you want to install BPA as a subsite, create a new site from Site Contents. Please make sure you've selected **"Team Site (no Office 365 group)"** as site template to have the Modern UI:

Contents > New SharePoint Site

**Title and Description**

Title: YL

Description:

**Web Site Address**

URL name: https://bpasolutionssa1400.sharepoint.com/sites/de-/YL

**Template Selection**

Select a language: English

Select a template:

- Collaboration
- Enterprise
- Duet Enterprise
- Team site (no Office 365 group)**
- Team site (classic experience)
- Blog
- Project Site

A site with no connection to an Office 365 Group.

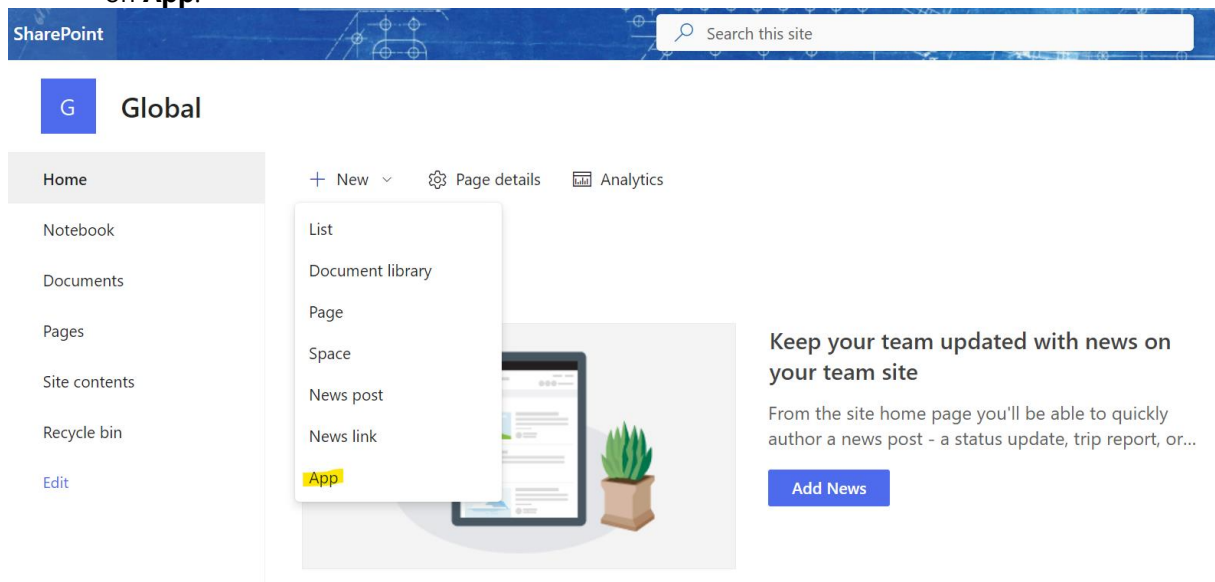
**Permissions**

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of

**User Permissions:**

- ☒ Use same permissions as parent site
- ☐ Use unique permissions

- Open the SharePoint site you want to install BPA, on the Home Page click on **New** and then on **App**:



- Find **BPACRM365** or any other BPA Solutions product (**BPAQuality365**, **BPAMedical365**, **BPAAppBuilder365**) you plan to install and click on **Add** to install in the Modern Experience:

[← Back to BPA CRM](#)

## My apps

### Filter

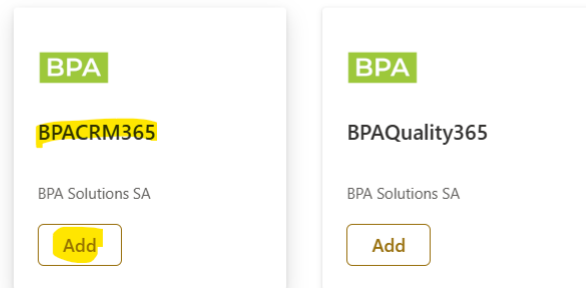
All

From my organization

From SharePoint Store

### Apps you can add

These are SharePoint Store or custom apps allowed by your orga in the **classic experience**.



- Wait while app is being installed and button shows **Adding**:

[← Back to BPA CRM](#)

## My apps

### Filter

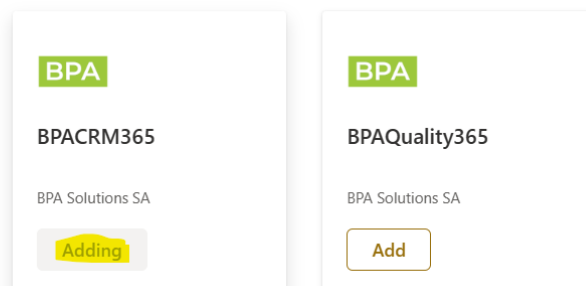
All

From my organization

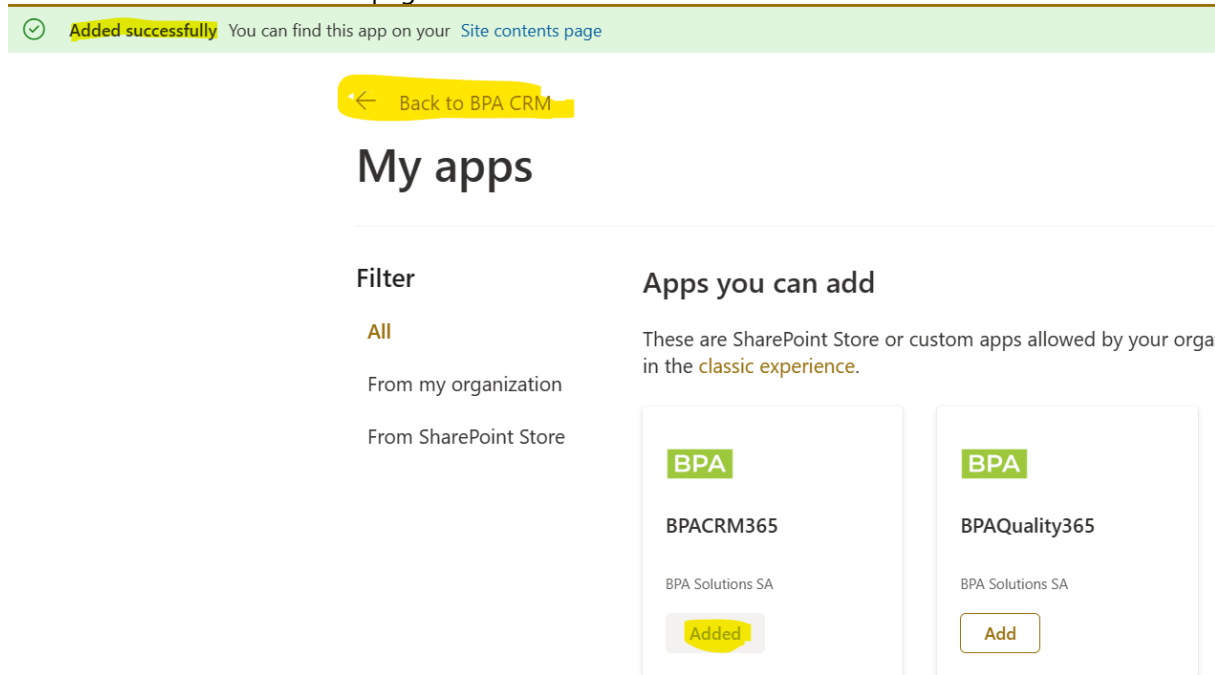
From SharePoint Store

### Apps you can add

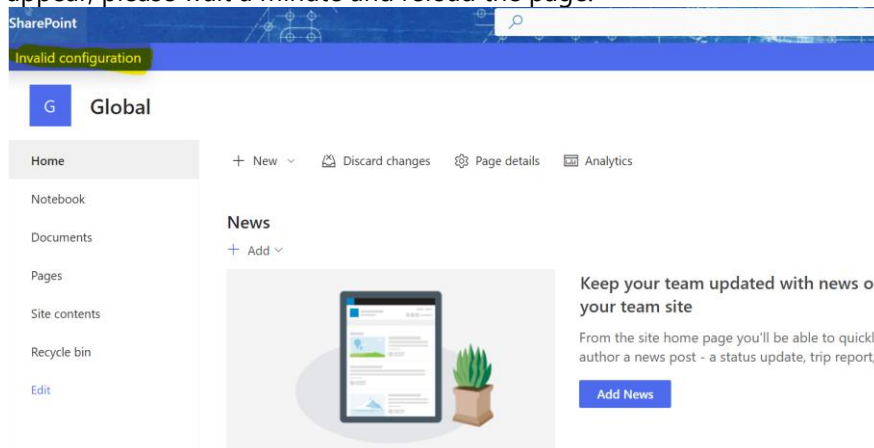
These are SharePoint Store or custom apps allowed by your orgar in the **classic experience**.



4. Once, installed, you'll see a green message – **Added successfully...**, please click on **Back to ...** to return to the Home page:

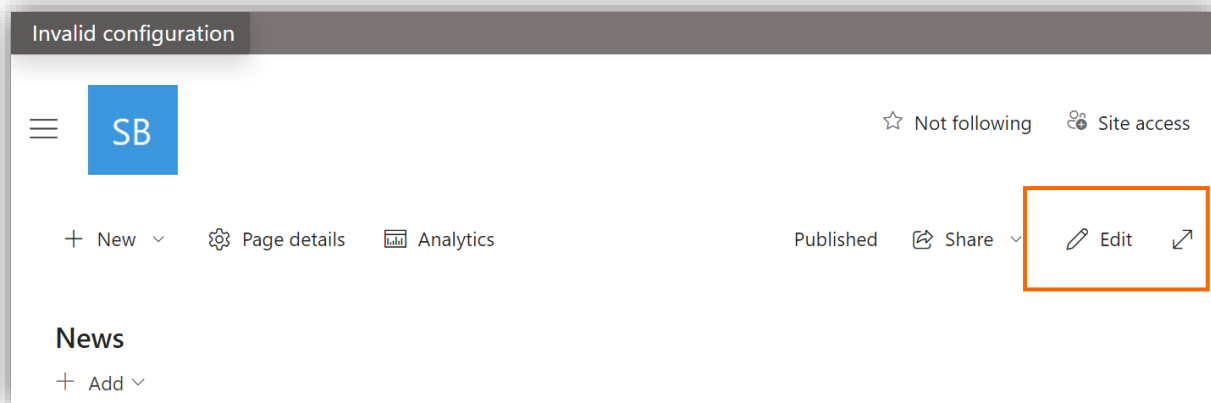


5. If app is installed successfully, you'll see a horizontal navigation bar in the top of the page with expected **Invalid configuration** label as nothing has been provisioned yet. If it does not appear, please wait a minute and reload the page.

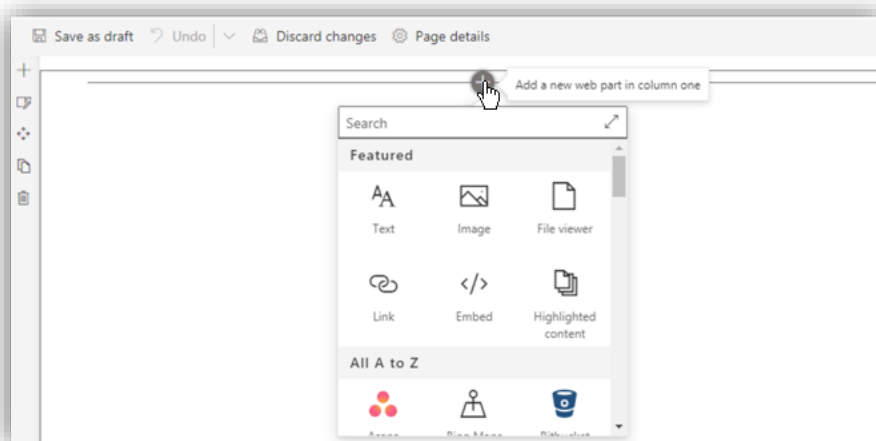


## FirstLoad web part

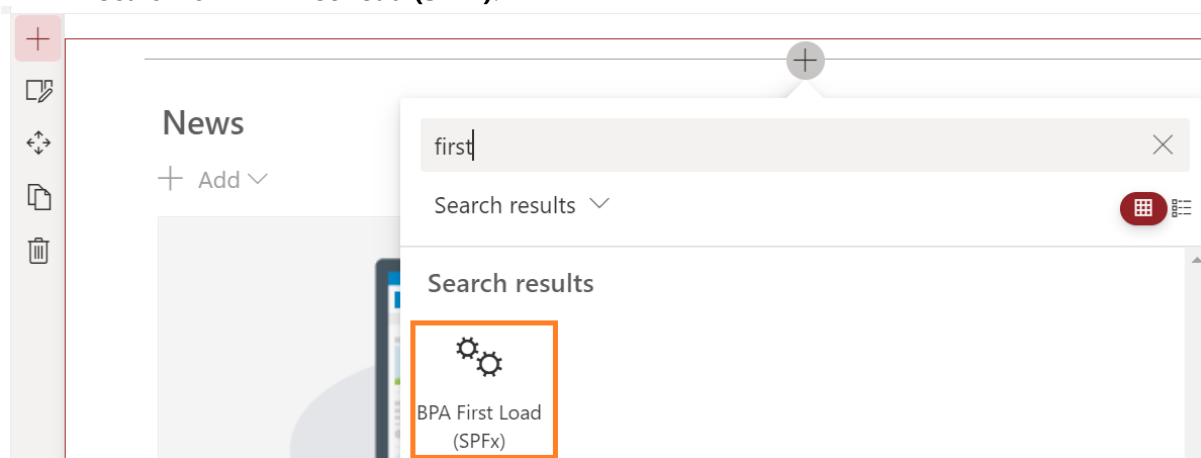
- Please **Edit** Home Page in the top right corner of the page:



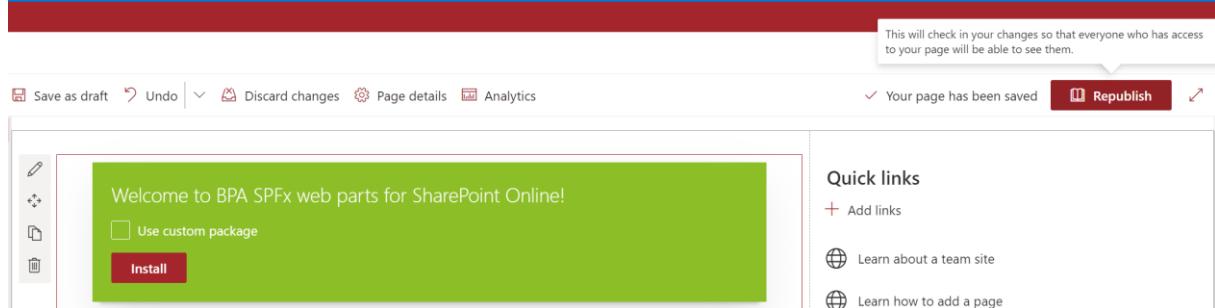
- Locate any horizontal line with a + by hovering your mouse in between existing web parts. Click on any area to add a new web part:



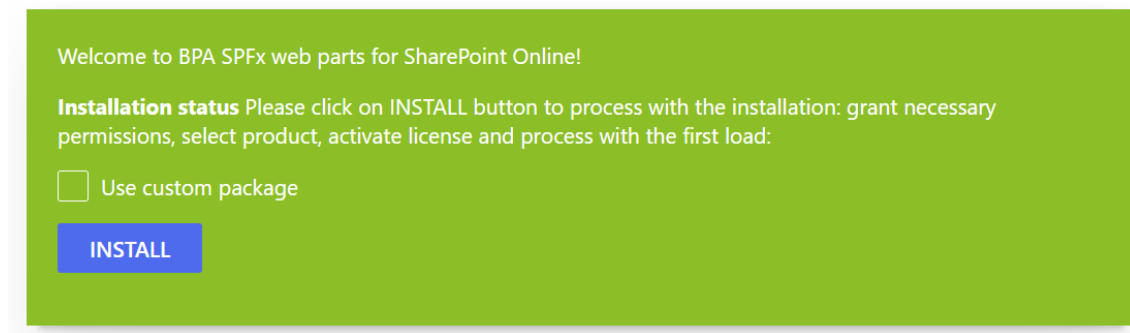
- Search for **BPA First Load (SPFx)**:



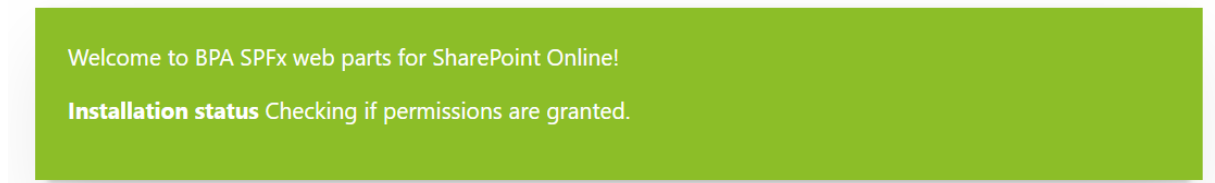
- Add it to the page and **Republish**:



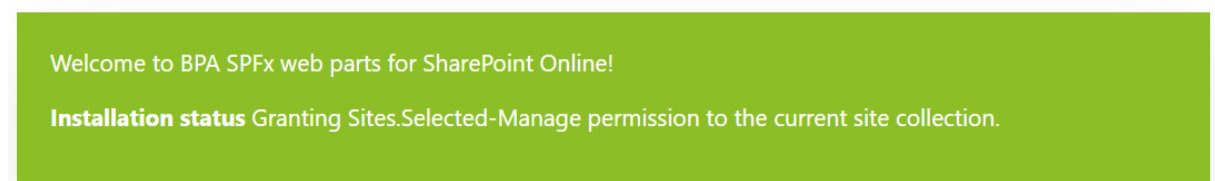
- Click **Install** button:



- It'll check permissions to access your site collection:



- And if not available – try to grant them using 2 apps approach (**BPA SPFx WebAPI Sites.Selected Manager** API request should be approved):



- If the second application is not trusted, you'll see similar message to grant permissions using the PnP PowerShell commands for SharePoint Online:



Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** We can't grant the necessary permissions to the current site collection only automatically. Please apply the following PnP PowerShell commands manually to grant BPA AzureAD app (c48ca0c8-70c5-4135-b79c-4b694fce1ec8) permission for the current site collection only:

```
$siteUrl="https://[redacted].sharepoint.com/sites/Global"  
$appId="c48ca0c8-70c5-4135-b79c-4b694fce1ec8"  
Connect-PnPOnline -Url $siteUrl -Interactive  
Grant-PnPazureADAppSitePermission -Permissions "FullControl" -Site $siteUrl -AppId  
$appId -DisplayName "BPA Sites Selected"
```

Please click on the **RETRY** button below to re-check access once permissions are granted:

Retry

- Please execute them and click on **Retry** button to check for site collection access again.

**Note:** you can revoke the granted **BPA SPFx WebAPI Sites.Selected Manager** permissions and delete it after installing all planned BPA sites as it's not used after installation.

- Once redirected back, please select the product you want to install:

Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** Please select a product to use on this site.

- ☐ BPACRM365
- ☒ BPAQuality365
- ☐ BPAMedical365
- ☐ BPAAppBuilder365

Confirm

Note: if you have a product pre-selected package, you'll see a bit different screen, please just confirm the product if you do not really need the other product:

Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** Please select a product to use on this site:

Your product is: **BPAQuality365**. Please confirm it or **select** a different product.

Confirm

- Once product selection is confirmed, you'll be asked to activate license. It's possible to use an already known key or request a trial. If you do not have the key already, please use trial option, then you'll be contacted by BPA to purchase/apply a full license:

Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** You do not have a valid license. Please use options below to activate a new license.

[Request Trial](#) [Activate license](#)

Please fill in all required fields and click **Submit**:

Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** You do not have a valid license. Please use options below to activate a new license.

---

**Existing license activation form**

Key \*

[Submit](#) [Cancel](#)

Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** You do not have a valid license. Please use options below to activate a new license.

---

**Trial request form**

First name \*

Last name \*

Company \*

Direct Phone \*

Email \*

Country \*

[Submit](#) [Cancel](#)

- Once license is submitted and applied, link to start site installation will be generated, please click on it to process:

Welcome to BPA SPFx web parts for SharePoint Online!

**Installation status** Please click on installation link to convert the site to the selected BPA product:

[Start site installation](#)

## Site installation

- You'll be redirected to WebAPI backend page to process with installation, please confirm the selected template and site transformation:

Welcome to BPA's 365 Solutions

You already have incomplete installation of **BPAQuality365**.

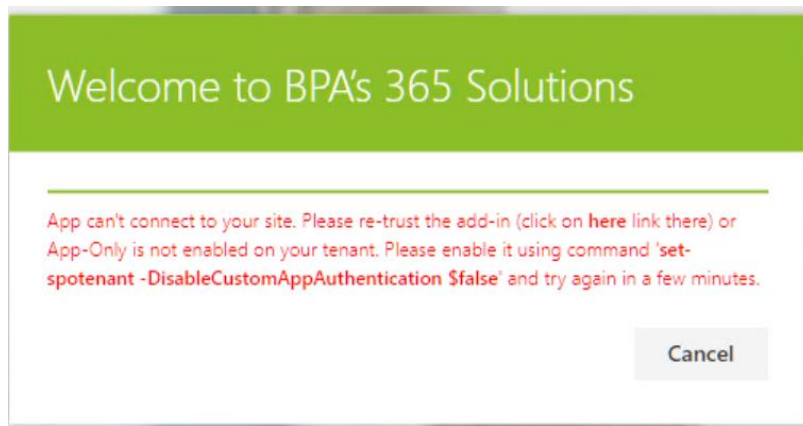
Please confirm transformation of the current site to the selected BPA product.  
Additional lists and configurations will be added to the site. We recommend to use a blank site. The current site contains these lists and libraries:

- BPA\_BATCHER 0 items
- BPA\_BSL 11 items
- BPA\_LOGS 6 items
- Composed Looks 18 items
- Documents 0 items
- Master Page Gallery 6 items
- Site Assets 1 items
- Site Pages 1 items

Ok

Cancel

**NOTE:** If you see the screenshot below it means the WebAPI backend can't connect to your site due to permission issues.

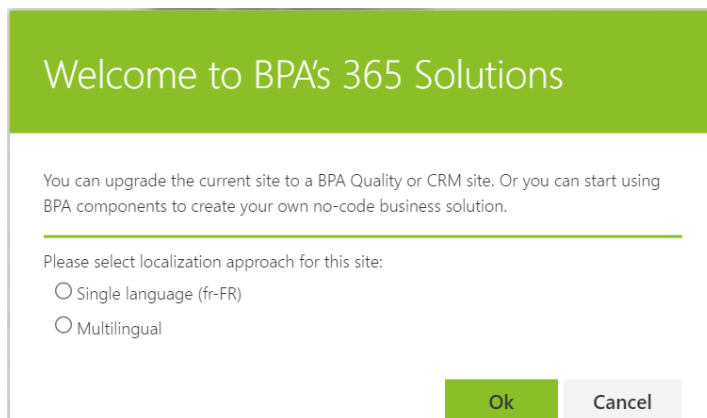


Possible solutions:

1. App-Only is not enabled on your tenant. We need it to make batcher and Remote Event Receivers work correctly. It needs to be enabled by the following command executed from SharePoint Online Management Shell (please make sure you have the latest version):  
`set-spotenant -DisableCustomAppAuthentication $false`
2. Permissions of the BPA SPFx App are not granted, most likely clicked on **Ok**, instead of **here**. Please navigate back in the browser and click on **here** link as shown above.

*Please contact BPA if none of the suggestions above worked for you.*

- Once template is confirmed, the installer will check if site/language is allowed to process (root site of the root site collection and app catalog are not allowed) and ask to select localization approach:
  - **Single language** – template will be provisioned with a single language – base language of the site (the one specified when site was created, can be checked in Site Settings -> Language Settings). It's faster and easier to manage and recommended if you do not need other languages.
  - **Multilingual** – template will be provisioned for all languages supported by BPA. It's possible to add support for other languages manually later. Recommended when need or plan to use multiple language.



- Once **OK** is clicked, the provision engine will start working:

## BPA Model processing

0 %

Model installation started, please wait until completion or wait 30 minutes to re-run it.

[Refresh status](#)

Provision engine initialization.

Status displayed 3/30/2020 1:40:20 PM

- The green progress bar will refresh automatically. You can as well use the links to the right **Refresh status** or even **Show details**.

## BPA Model processing

43%

Model installation started, please wait until completion or wait 30 minutes to re-run it. [Run again](#)

[Refresh status](#)

Creation/check of Content types

[Show details](#)

Model creation/check started 3/30/2020 1:53:10 PM  
Last status computation 3/30/2020 1:54:30 PM  
Status displayed 3/30/2020 1:54:31 PM

**NOTE:** If you get an error that a field cannot be created or the underlying connection was closed, please wait a few minutes and click on **Run again**. This happens when SharePoint sends a time out due to Throttling.

## BPA Model processing

10%

Model installation started, please wait until completion or wait 30 minutes to re-run it. [Run again](#)

[Refresh status](#)

Creation/check of Fields

[Run again](#)

Creates field(2) : The underlying connection was closed: An unexpected error occurred on a receive. ISO Regulations.PCDAPhase (PDCA Phase)

[Show details](#)

- Please wait till it's finished and return back to the site, clicking on **Go to home page**:

## BPA Model processing

100%

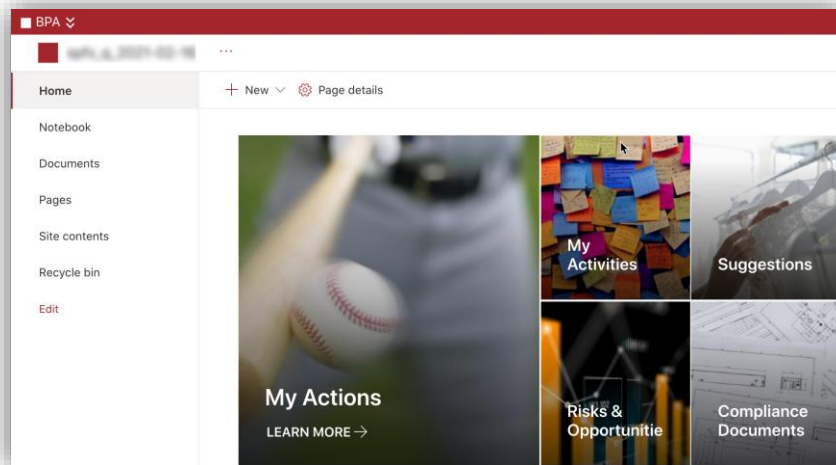
[Refresh status](#)

[Go to home page](#)

[Show details](#)

Model creation/check started 3/27/2020 12:34:25 PM  
Last status computation 3/27/2020 12:35:18 PM  
Status displayed 3/27/2020 12:35:57 PM

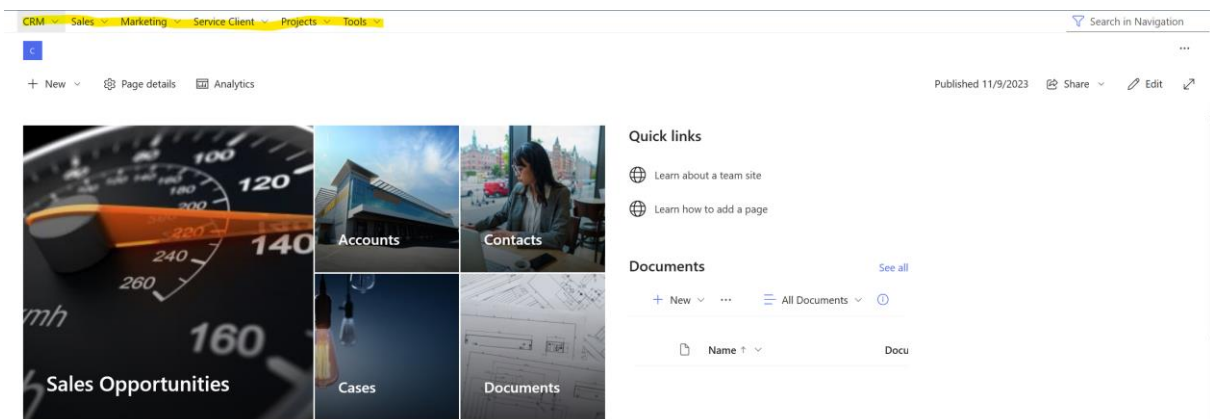
- You'll be redirected to home page of the selected BPA SPFx application which concludes the installation:

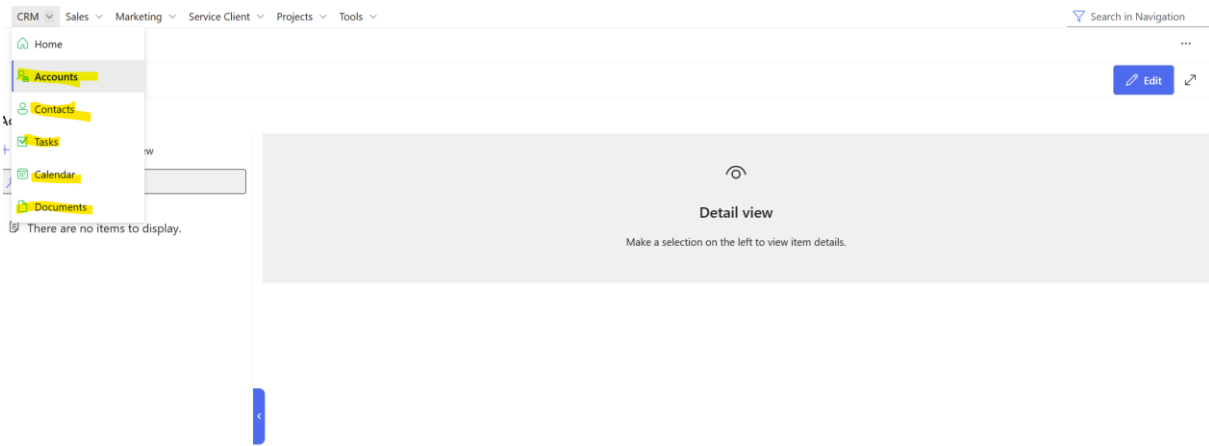


- We recommend you deploy a second BPA Site for Site Owners to be used during BPA Admin trainings and mockup of configurations. i.e. .../sites/BPATest or ..../sites/BPASandbox

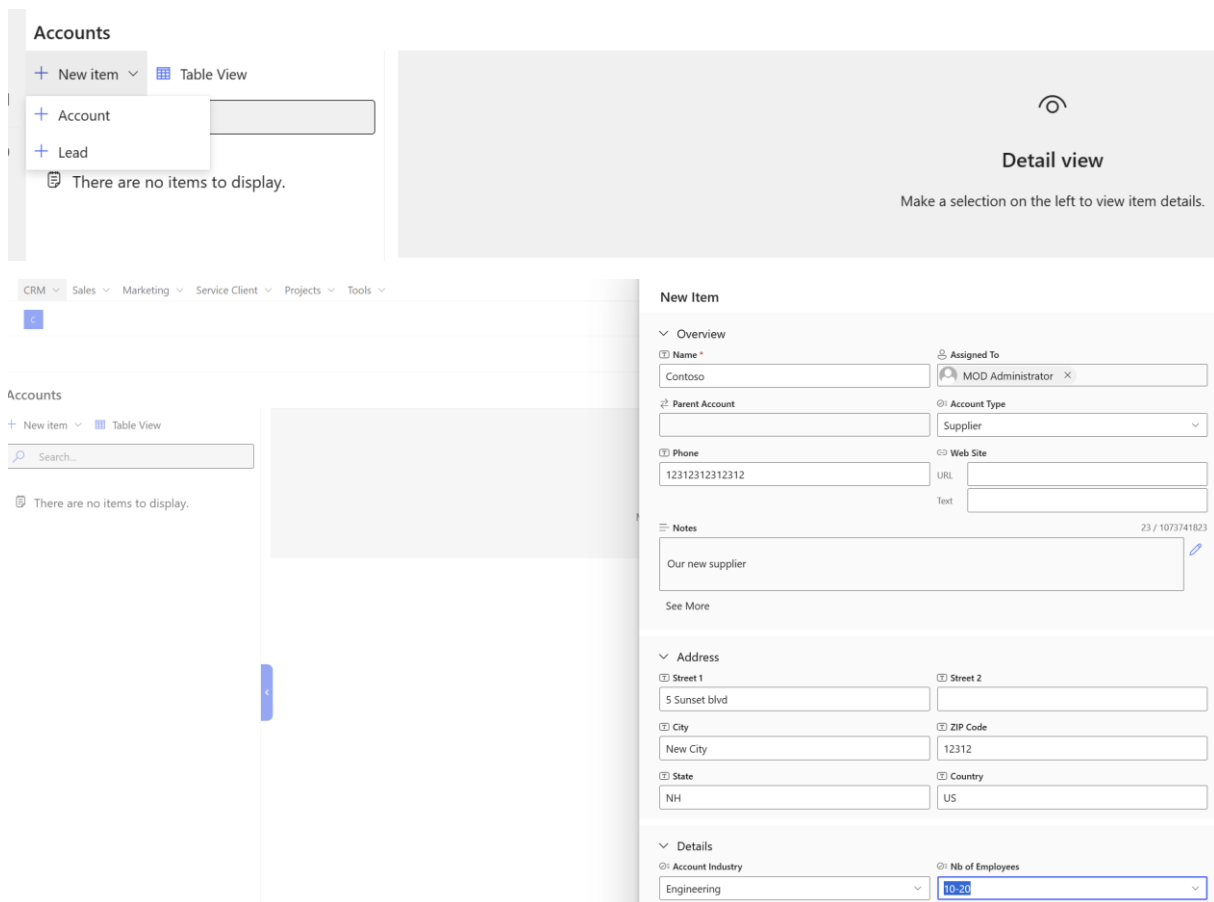
## 4. Validation of the installation

- Once site is installed, navigate through the links in the navigation to see all pages are created successfully.





2. Add test items to check Forms are working correctly.



3. Check different kinds of fields.

Save and Close

New Item

Overview

Name \*

Alex Smith

Parent Account

Phone

1231231232131

Notes

See More

Address

Street 1

Save

Cancel

Notes

Normal

8pt

arial

B

I

U

A

test

4. Items should be saved successfully, and details are displayed.

Accounts

New item

Table View

Search...

Contoso

New City

View Item

Edit

Delete

Table View

Contoso

New City

Supplier

Account Overview

Name

Contoso

Assigned To

MOD Administrator

Parent Account

Phone

12312312312312

Web Site

Contacts

Opportunities

Cases

Projects

Tasks

Emails

Calendar

Attachments

Customer Feedback

New item

Full Name

Contact Ty...

Job Title

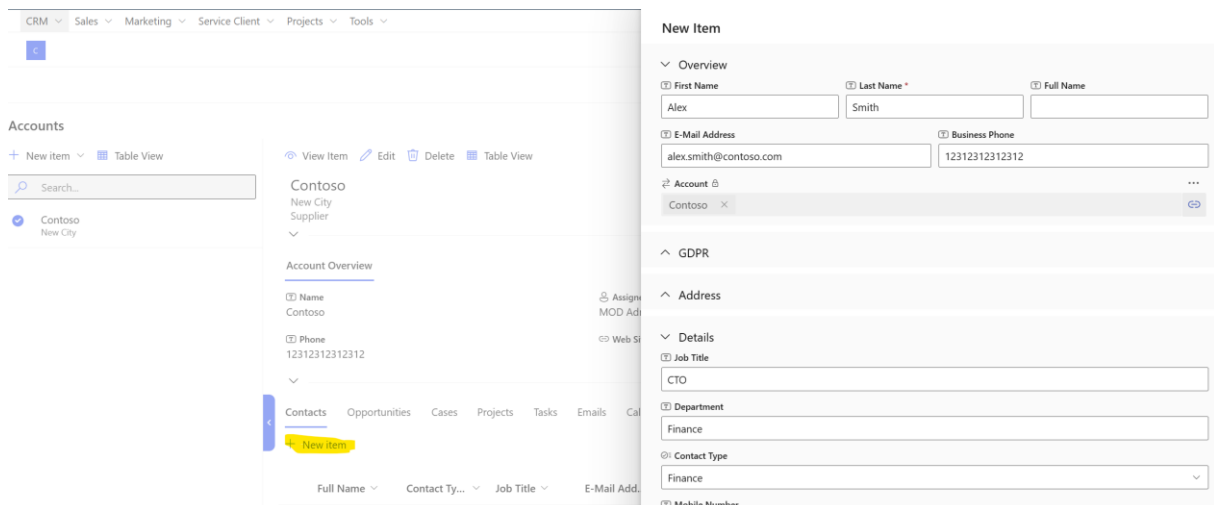
E-Mail Add...

Business P...

Mobile Nu...

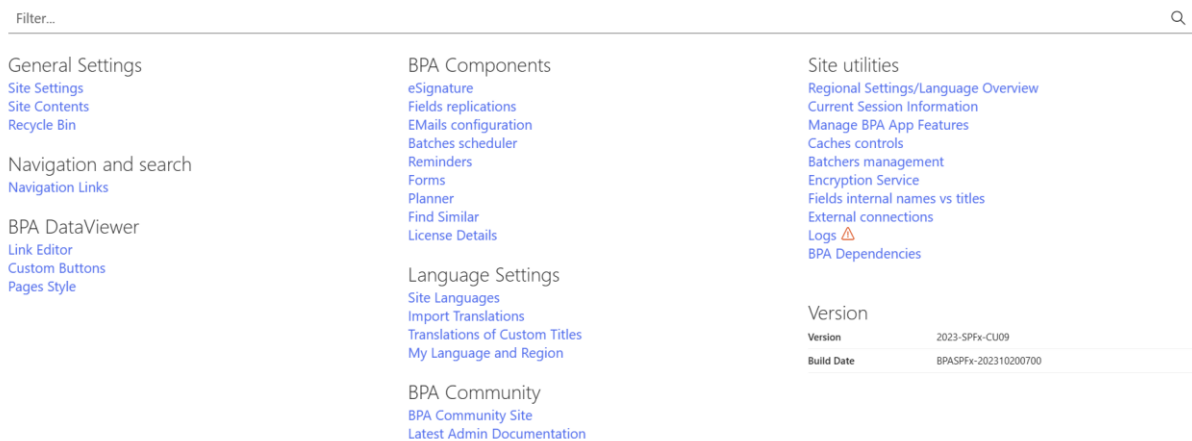


## 5. Add a related item.

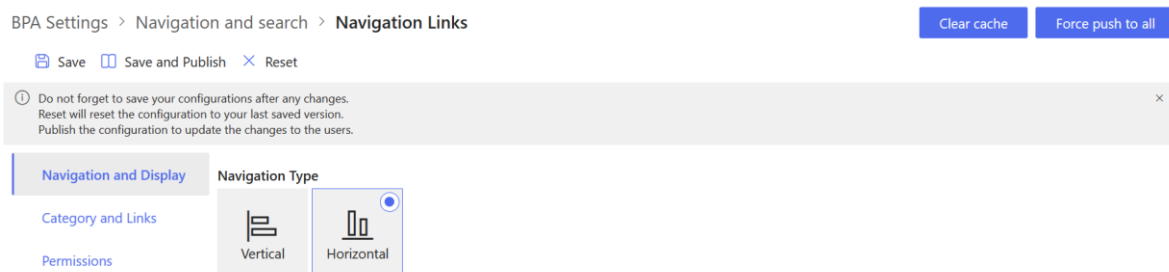


## 6. Go to BPA Settings in the navigation (Tools -> Settings).

### BPA Settings



## 7. Check common functionality that can be used on CRM site, like a. Navigation links, where you can add a new one or re-name any existing one.





## b. License Details

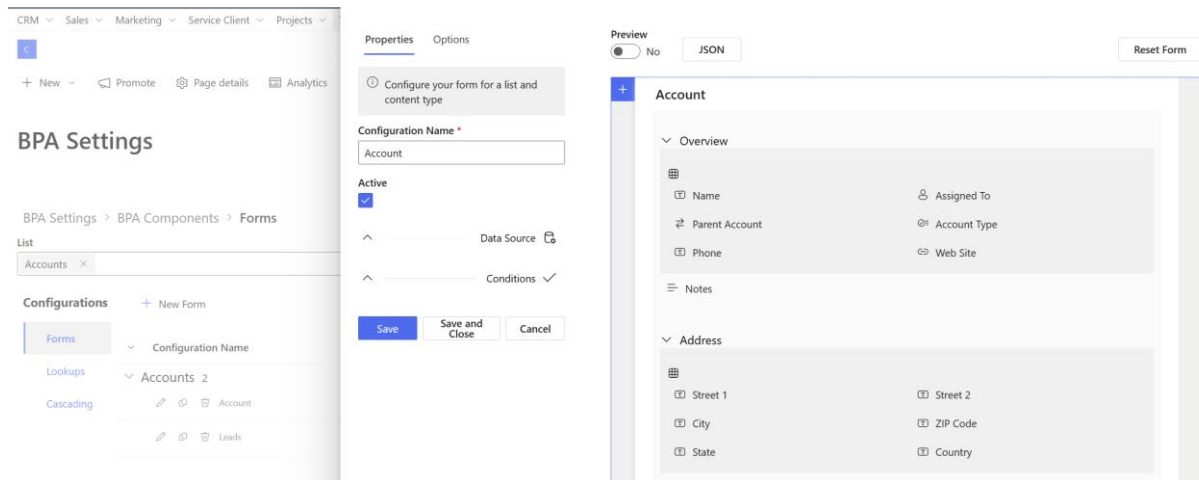
BPA Settings > BPA Components > License Details

+ Request Trial + Activate license + Register license  View/Modify license

### License Information

License	Single Site License
Type	Trial
Key	be479f14-e71e-4f19-a1c3-59ad7454fc41
Product	BPACRM365
Expires on	09 Dec 2023
Number Of Sites	1
Number Of Readers	0/0
Number Of Full Users	1/5
Number Of Activated Users	1/5
Comment	
Is user licensed?	Yes

## c. Forms – you can add or remove fields and check that behavior changed on a page.



The screenshot displays the BPA Settings interface for configuring forms. On the left, the sidebar shows the navigation menu with 'BPA Settings' and 'Forms' sections. The main content area is titled 'BPA Settings' and shows the 'Forms' configuration for the 'Account' form. The 'Properties' tab is active, showing the 'Configuration Name' as 'Account', the 'Active' checkbox checked, the 'Data Source' set to 'Accounts', and the 'Conditions' set to 'Leads'. The 'Preview' tab shows a form layout with fields for Name, Assigned To, Parent Account, Account Type, Phone, Web Site, Street 1, Street 2, City, ZIP Code, State, and Country. The 'Reset Form' button is visible in the top right corner of the preview area.