AutoMerge for MS CRM 2011 Implementation Guide

Version 5.0

Implementation Guide
(How to install/uninstall)

Table of Contents

1 Common Information

Before installing AutoMerge for MS CRM 2011, please read this document and follow the steps carefully.

1.1 Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:
Follow each of the following steps, to complete the installation:

- Installing AutoMerge for MS CRM 2011.
- Configuring AutoMerge

2   License

The product comes with a 14-day trial license.

Information about licensing can be found on www.mscrm-addons.com

3   Prerequisites

3.1   Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

3.2   DocumentsCorePack Server

The DocumentsCorePack Server is required to install AutoMerge. It must have the version 5.21 or higher.

If you haven't installed the DocumentsCorePack Server or the version older than required, please install or update the latest version. It can be found under here: Download DC Server

Before you install the DocumentsCorePack Server we recommend reading the install guide: DCP Install Guide

3.3   User rights

The user with whom you are running the installation needs to have the following user rights:
* System administrator security role in CRM
* Deployment administrator (can be set in the deployment manager)

3.4   Internet Explorer

Internet Explorer 8 or higher is required.

3.5   Supported CRM Versions

* Microsoft Dynamics CRM 2011 On Premise
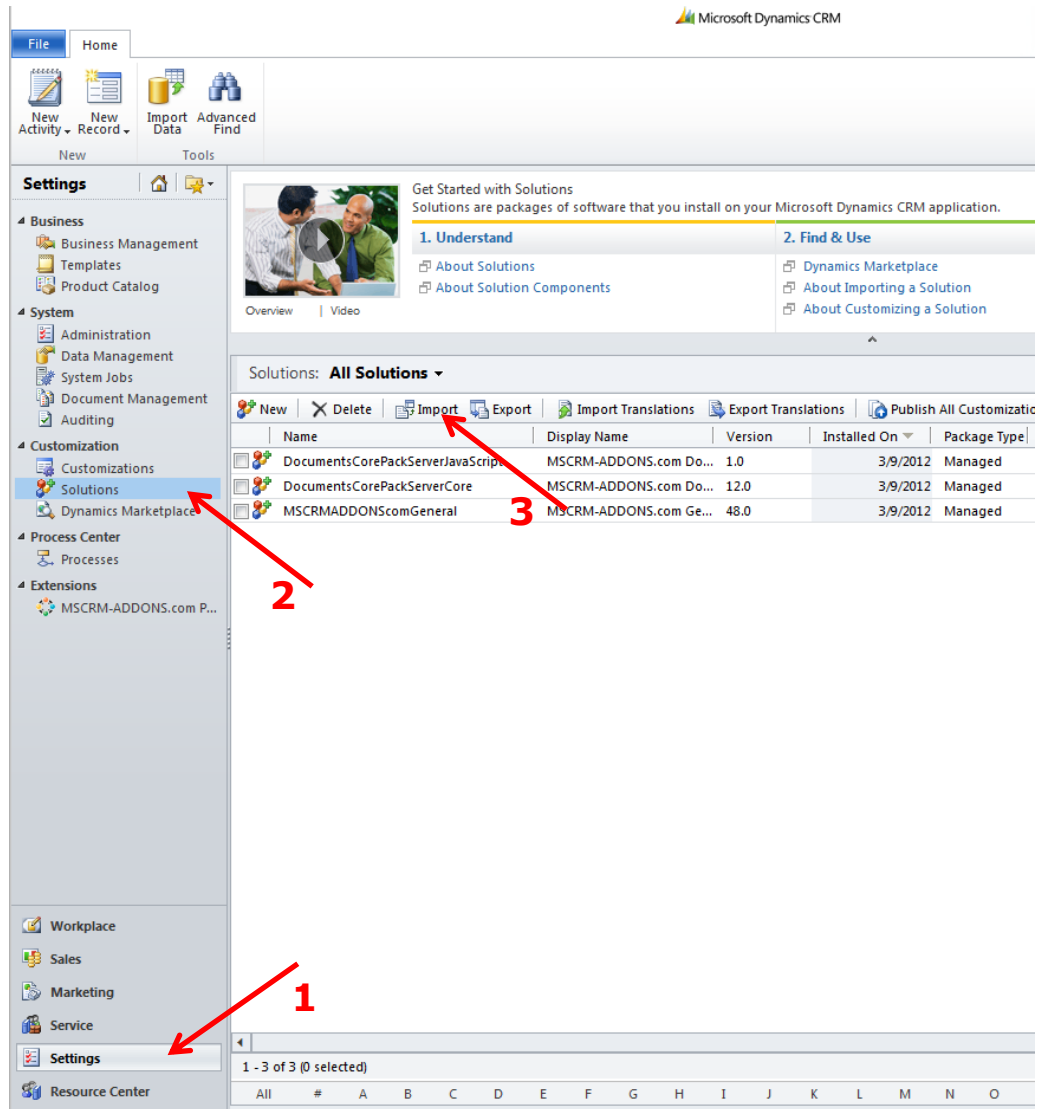* Microsoft Dynamics CRM 2011 Hosted (IFD)

4 Installation Server Component

You can install AutoMerge from every operating system which is able to connect to your CRM 2011. You only need the required permissions and must have Internet Explorer 8 or higher installed.

Attention: After the installation is completed, you have to run the AutoMerge Configuration once like shown in chapter "7 Configuration". The Config will write important settings into CRM. **Otherwise AutoMerge won't work!**
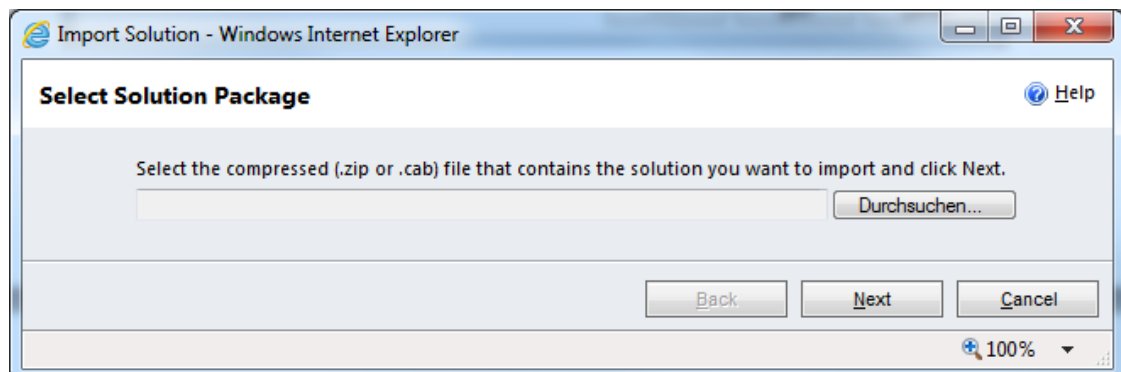
4.1 Start of installation

Open your CRM root site in the Internet Explorer and navigate to "Settings" [1] -> "Solutions" [2].
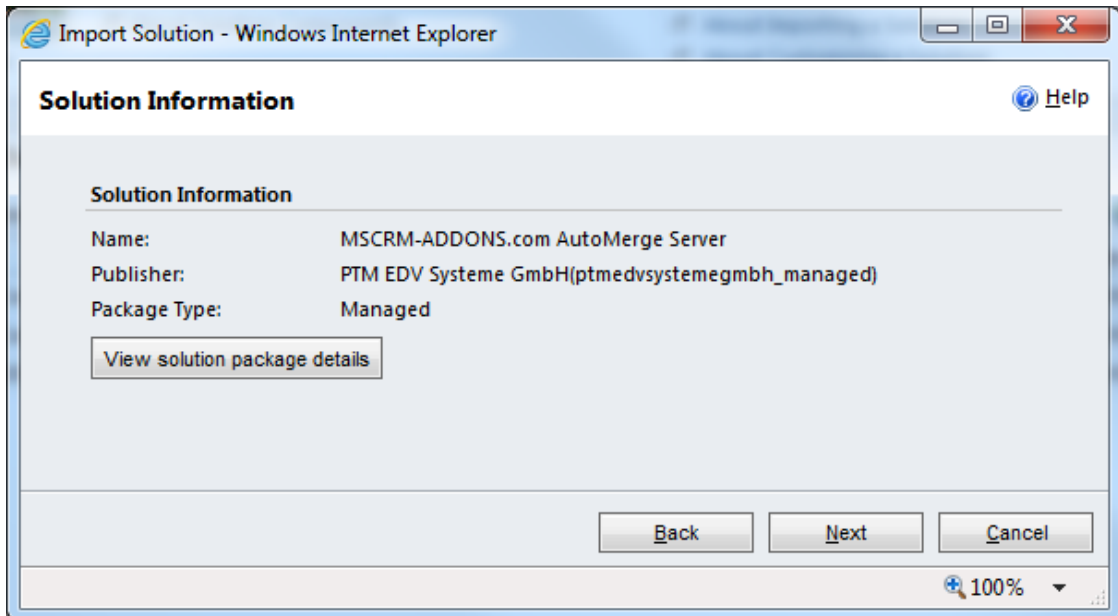

Hit the "Import"-button [3] and the following dialog will appear:

Select "AutoMergeServer.zip" – solution that was downloaded from our homepage.
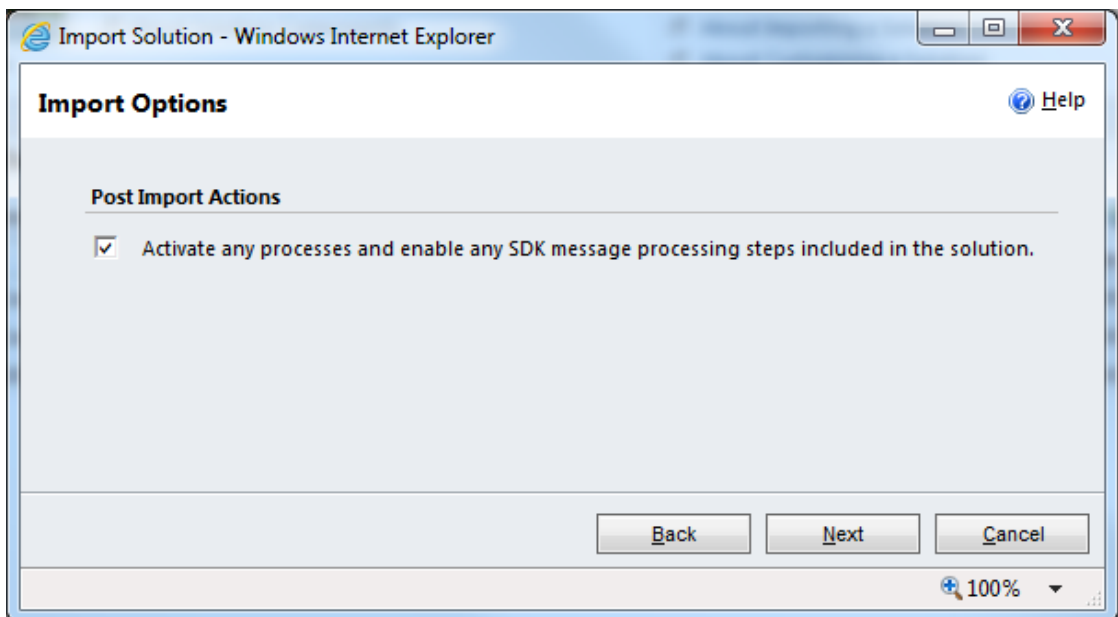Then click [Next] to continue.
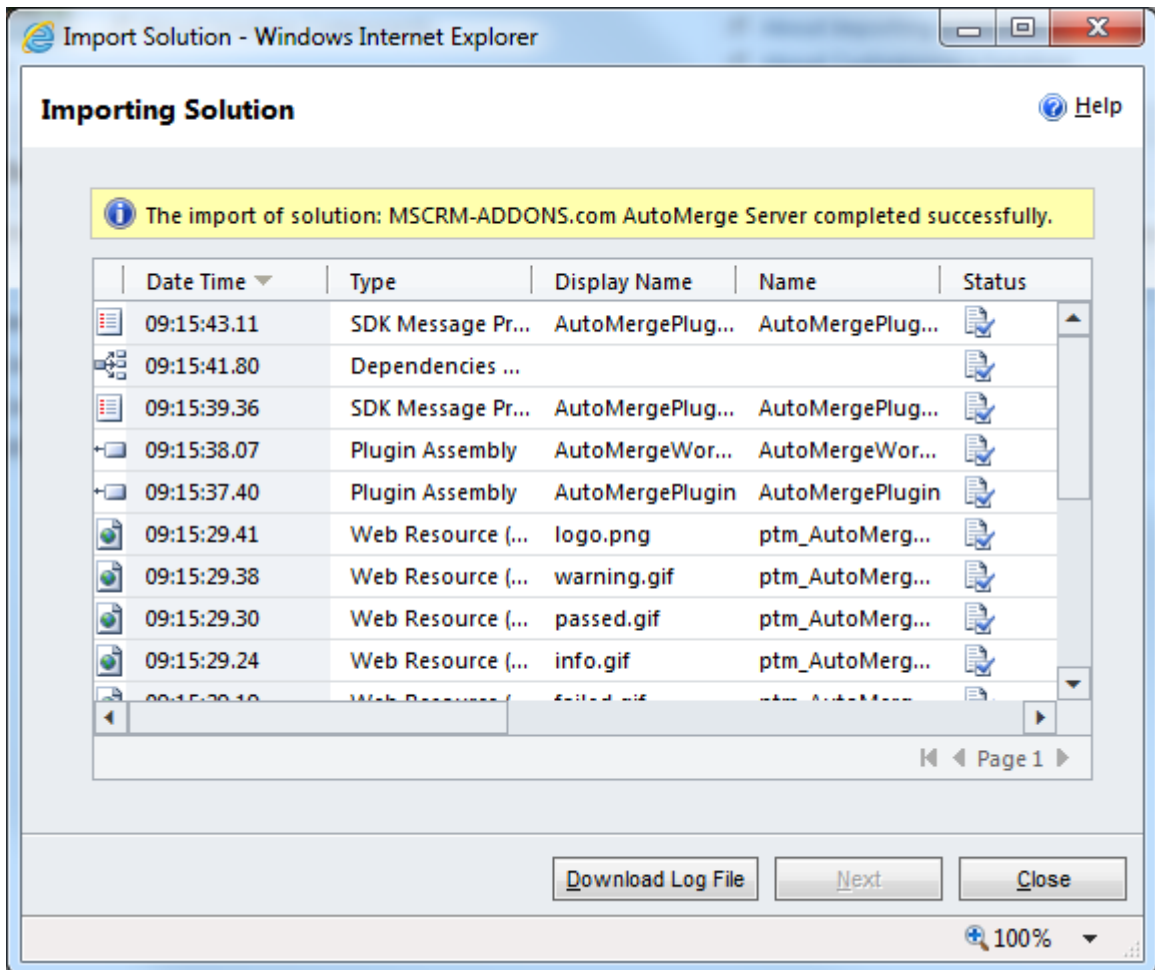
After that the following dialog will appear:

Click [Next] to proceed.
In the next dialog please enable the checkbox to activate the step for the AutoMerge Plugin.
Then hit [Next] to start the solution import.

After the import has been completed successfully, you will see this dialog:

Hit [Close] to proceed.

The final step of the installation is to run the AutoMerge Configuration once like shown in chapter "7 Configuration".
The Config will write all necessary settings into CRM.
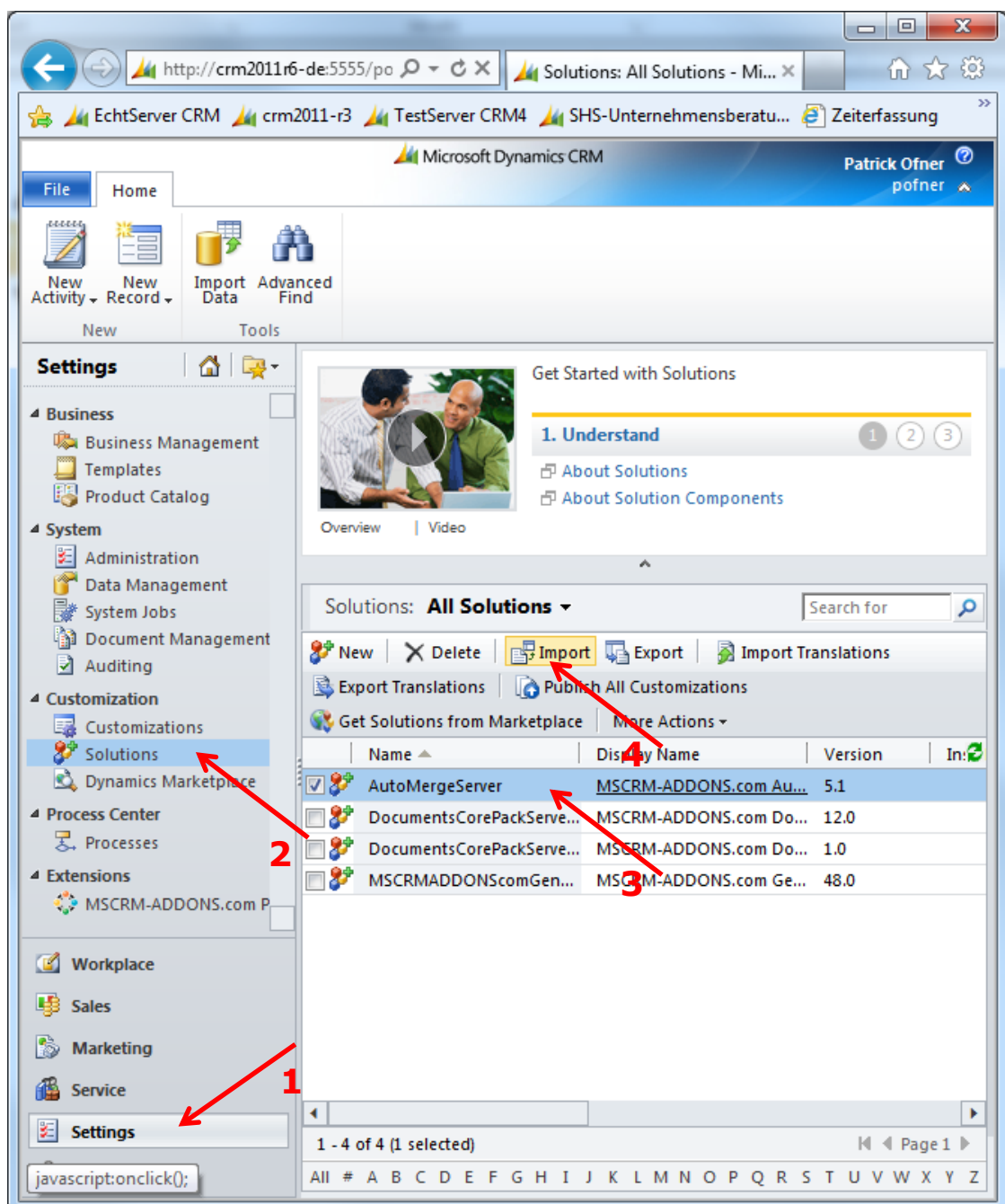**Otherwise AutoMerge won't work!**

5 Upgrade

If you have already installed AutoMerge and want to upgrade to a later version, please go through this chapter.

There is no need to uninstall the current AutoMerge version and reinstall the new one. You only have to overwrite the "AutoMergeServer"-solution. How this can be done is shown in the next steps.

5.1 Start of Upgrade

To start the upgrade process open your CRM root site in the Internet Explorer and navigate to "Settings" [1] -> "Solutions" [2].
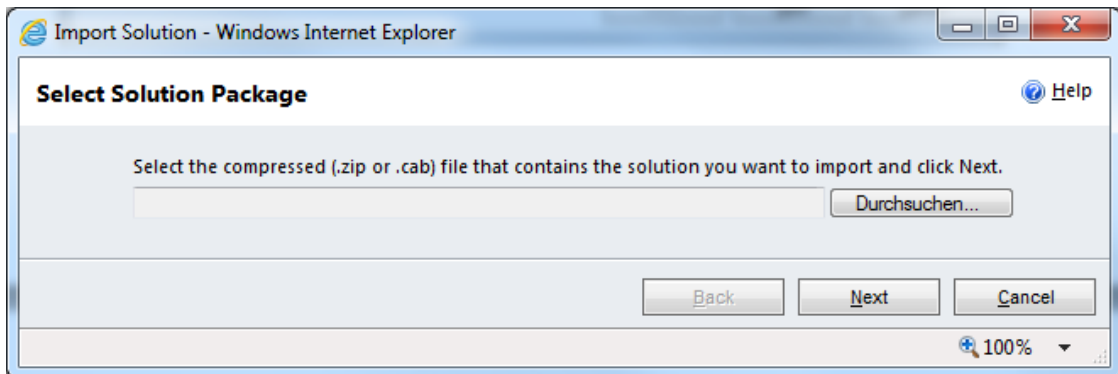
On this screenshot you can see that AutoMerge [3] is already installed.

Hit the "Import"-button [4] and the following dialog will appear:

Select the new "AutoMergeServer.zip" – solution that was downloaded from our homepage.
Then click [Next] to continue.

After that the following dialog will appear:
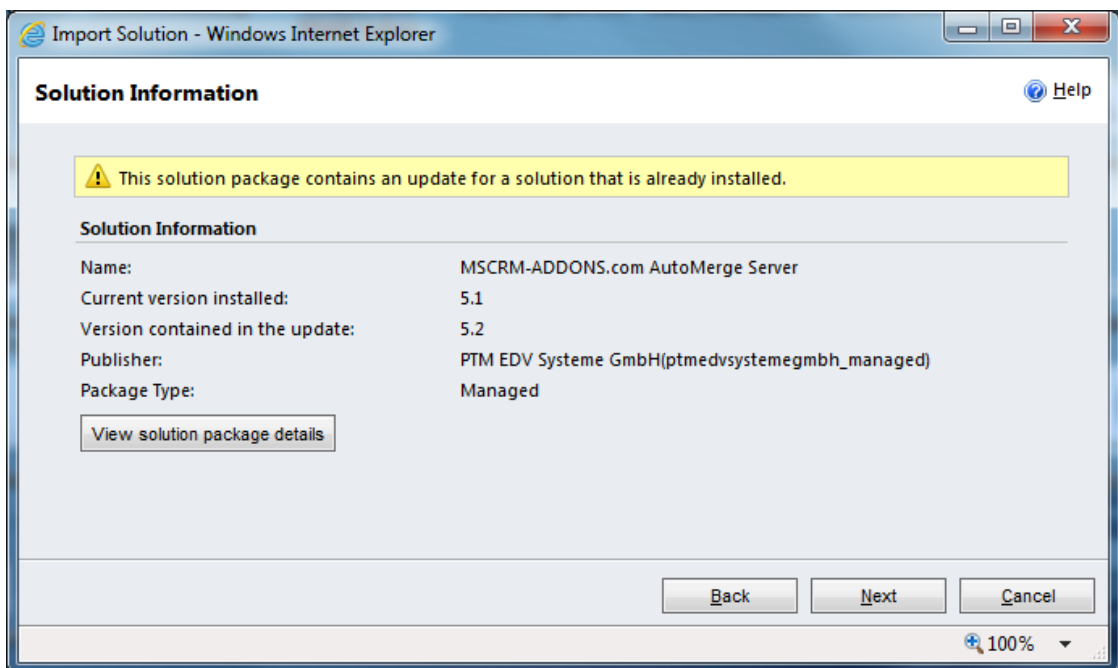
Click [Next] to proceed.

In the next dialog it is **important to select "Overwrite customizations"**.
Please enable the checkbox to activate the step for the AutoMerge Plugin as well.

Then hit [Next] to start the solution import.
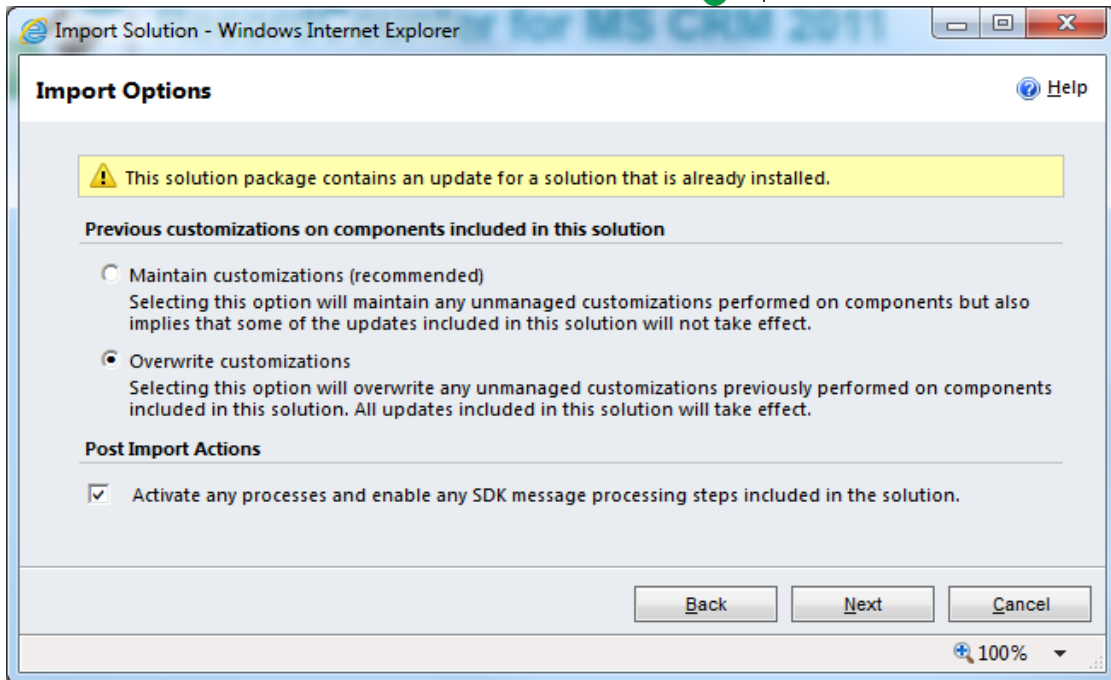
After the import has been completed successfully, you will see this dialog:
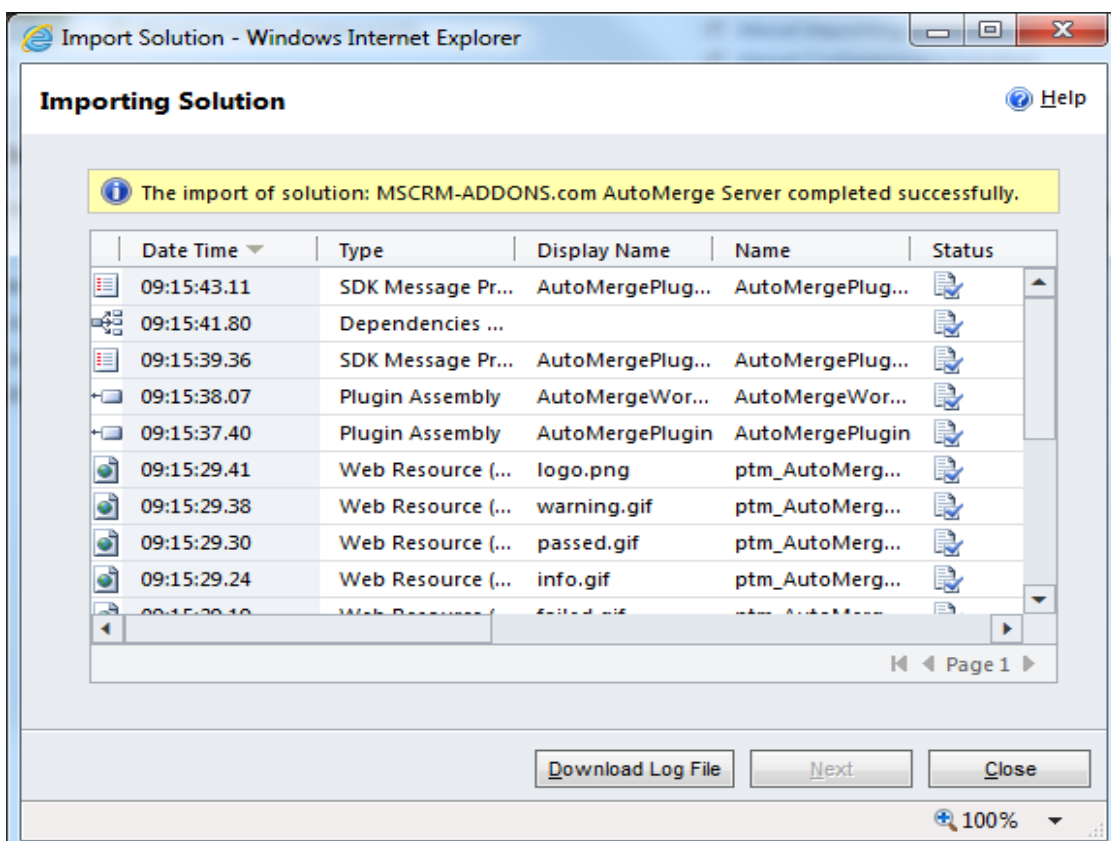
Hit [Close].

The final step of the upgrade is to execute the AutoMerge Configuration once like shown in chapter "7 Configuration". **Only then your upgrade will take effect!**

6 Uninstall

Important: Before you can uninstall AutoMerge, you have to delete all processes which contain AutoMerge steps!

To uninstall AutoMerge for MS CRM, open CRM, navigate to "Settings" [1] -> "Solutions" [2].
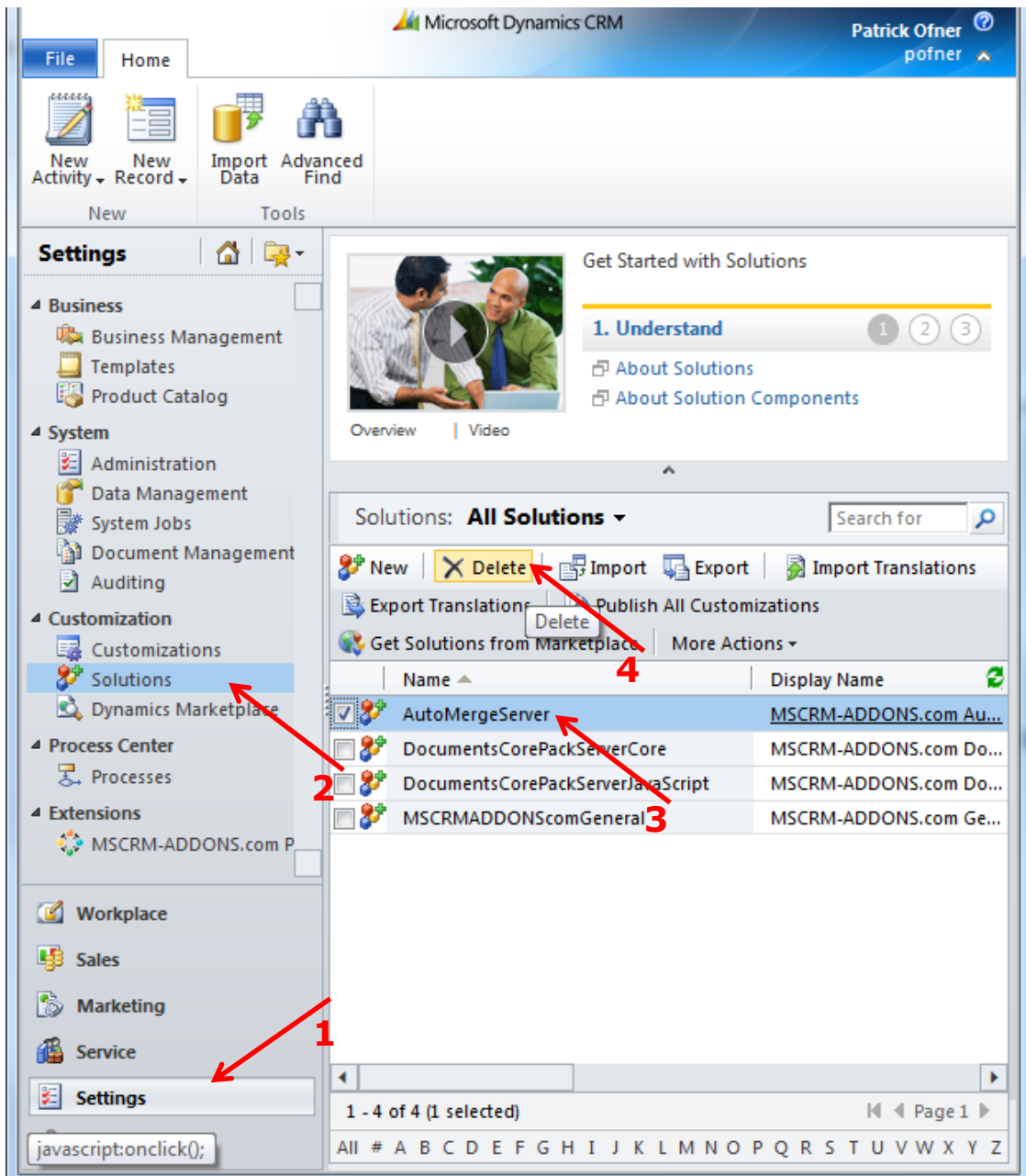
Select the "AutoMergeServer"-solution [3] and hit the "Delete"-button [4].

Uninstall Solution -- Webseitendialog

Uninstall Solution
You have selected 1 Solution for deletion.

You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?

OK   Cancel

http:/ Lokales Intranet | Geschützter Modus: Inaktiv

On this dialog click [OK] to confirm the deletion.

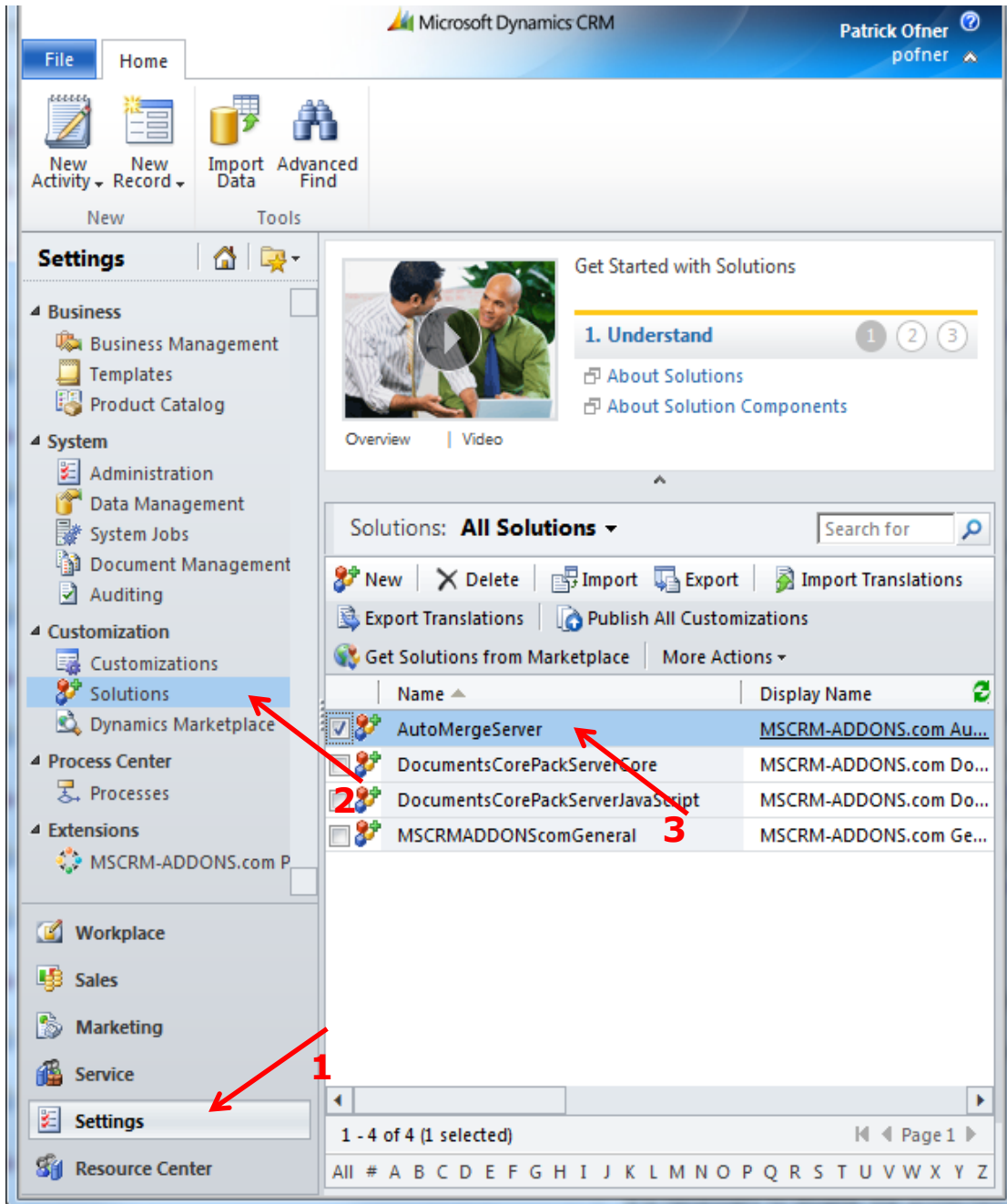## 7   Configuration

The AutoMerge for MS CRM 2011 Configuration writes necessary settings into CRM. It also allows you to specify the basic settings and install the license key.

To start the configuration open CRM and navigate to "Settings" [1] -> "Solutions" [2].

Double click on "AutoMergeServer"–Solution [3] and the AutoMerge configuration site will appear:

7.1 "General" - tab

Use the "General" – tab to set the following settings:
- **Activate Debugging**: If you check this box, debugging will be activated. That means that the AutoMerge Plugin will write log files. Debugging should only be activated if there is a problem with the AM Plugin because it will slow down the whole process.
- **SPS User**: Use this textbox to define the SharePoint user.
- **SPS Password**: Use this textbox to define the password of the SharePoint user.
- **SPS Domain**: Use this textbox to define the domain of the SharePoint user.
- **SP Webservice Url**: Use this textbox to define the documentation web service url. This service is used to generate the documents with the Plugin. The value of this setting will be generated automatically. Only in special cases will this have to be edited manually.

"Save" – button: Use this button to save your settings.

7.2 "About AutoMerge" - tab

This tab is not used to set up anything. It only displays information about the current version and the copyright.

7.3 "Licensing" – tab

The context of this tab serves two purposes:
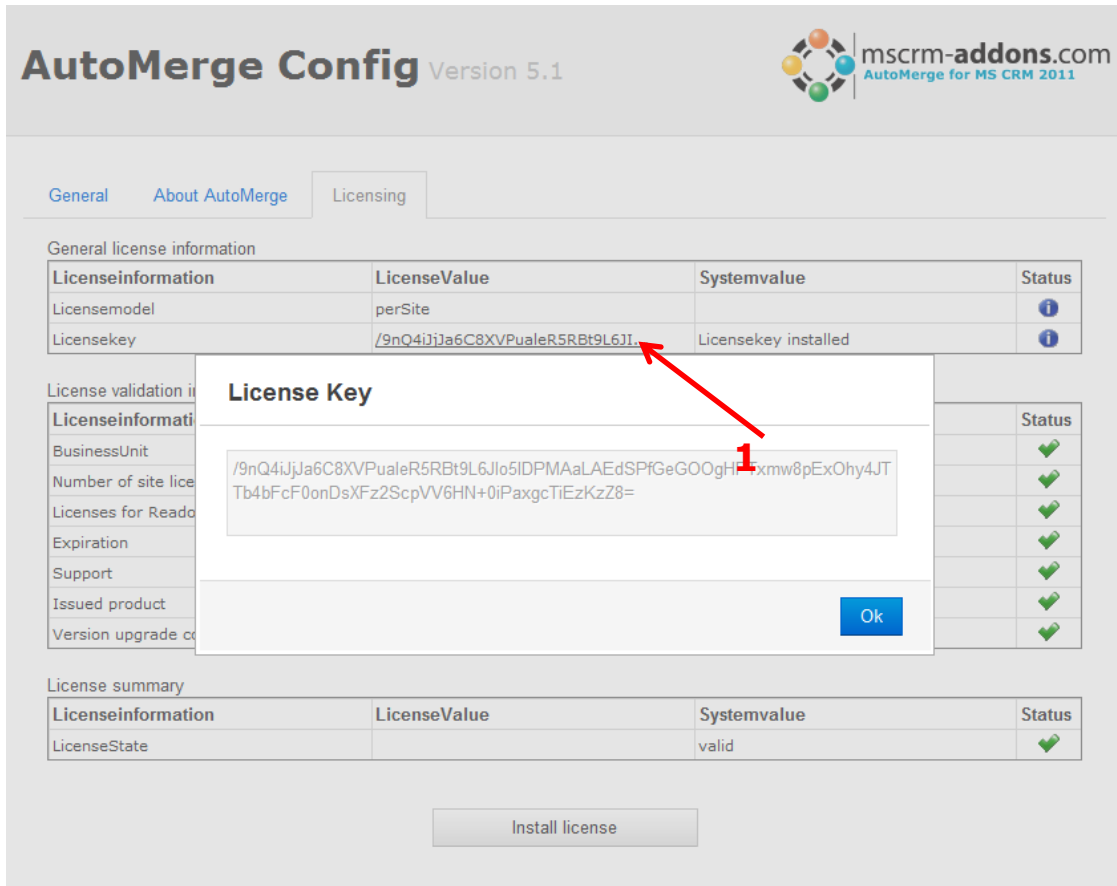
7.3.1 Show license Info

This shows you all the information about your AutoMerge license and system values.

The first column of the table represents the name of the information, the second the value of the license key and the third the value of the system. Here is a short description about the meaning of the information.

- **Licensemodel:** The kind of the licensing (Per site or per user).
- **Licensekey:** shows your installed license key.
- **BusinessUnit:** shows the current Business unit.
- **Number of site licenses:** The amount of licensed users.
- **Licenses for Readonly Users:** The amount of licensed read only users.
- **Expiration:** The date when the license expires (normally: never)
- **Support:** The date when the support expires.
- **Issued product:** the name of the current product.
- **Version upgrade covered till:** The date till you can install the latest version from our homepage (depends on whether you have a valid support contract).
- **LicenseState:** Shows the status of your license key.

Maybe you have noticed that license key is displayed truncated in the table. It could be possible that you need to see the whole license key. To achieve this, click directly on the license key [1]. Then a new dialog which presents the entire key will open.

Hit [Ok] to close this dialog again.

7.3.2 Install a new license key.

This context can also be used to install a new license key.

To do this, open the install license key – dialog. This can be done by hitting [Install license]:

Install License

This dialog can be used to install the license for AutoMerge 2011.

If you already have received an email with the license key form "support@mscrm-addons.com" please follow the steps below to install the license.

If you don't have a license yet and want to buy one please klick on Online Shop. It will link you directly to our Online Shop.

Of course you can contact us directly: Email to Support

Install the license:

1. Please open the email with the license key. Copy the key an paste it into the following box:

2. To finish the installation please hit the "Install"-button.

| Install | Cancel |

After you have placed an order for AutoMerge, you will receive an email from support@mscrm-addons.com including the license key. The email will look like this:

Hello andreas list

I attached the AutoMerge SMALL key to this mail!	
CRM Version:	CRM 2011
Organisation Unit:	asdf
License expires:	never
Maintenance expires:	9.3.2013
Licensekey:	/9nQ4iJjJa6C8XVPualeR7WQTdgSQqMjNIRBCDStlfvyuYWjA31Wy8YZV4drqjIuYM0LGc/2uZq5Fkp9HZvdyj4rutjUQwEit6YnFzutoxg=

Following steps are necessary to activate the license

1. Start the license Manager on the CRM Server via Start->All Programs->www.mscrm-addons.com->'product'->License Manager
2. Choose the product you want to activate on the left side
3. Unzip the attached license, upload the *.txt file and press install license

Optional for Per User Licenses:

1. You will be informed that a new attribute will be created. Press yes.
2. The license will appear as valid but with an access denied message.
3. Once the license has been installed, you need to activate the users.
4. Open the user form in CRM and set the perUser attribute to "YES"

If you have troubles or licence is marked as INVALID, please contact Support@mscrm-addons.com

Best regards / Mit freundlichen Gruessen

Support Team – MSCRM-ADDONS | Tel.: +43 (316) 680 880 0
support@mscrm-addons.com | www.mscrm-addons.com
PTM EDV-Systeme GmbH, 8020 Graz, Bahnhofguertel 59, Austria

Your company for Microsoft CRM ADD-ONS !
PTM EDV-Systeme is a Microsoft Gold Certified Partner
Follow us on www.twitter.com/mscrmaddons

Copy the whole license key (highlighted in the example) and paste it into the textbox of the install license – dialog.

Install License

This dialog can be used to install the license for AutoMerge 2011.

If you already have received an email with the license key form "support@mscrm-addons.com" please follow the steps below to install the license.

If you don't have a license yet and want to buy one please klick on Online Shop. It will link you directly to our Online Shop.

Of course you can contact us directly: Email to Support

Install the license:

1. Please open the email with the license key. Copy the key an paste it into the following box:

   /9nQ4iJjJa6C8XVPualeR7WQTdgSQqMjNlRBCDStlfvyuYWjA31Wy8YZV4drqjIuY
   M0LGc/2uZq5Fkp9HZvdyj4rutjUQwEit6YnFzutoxg=

2. To finish the installation please hit the "Install"-button.

[Install] [Cancel]

To start the install process of the license key hit [Install].

The Config will install the license and update the table with the new license information.

8   Contact

If you have problems with the product send an Email to
support@mscrm-addons.com or call +43 316 680 880 0