RecordCounter for MS CRM 2011

Version 5.0

Installation Guide
(How to install/uninstall RecordCounter for MS CRM 2011)

Table of Contents

1   Common Information

Before installing RecordCounter Server 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 RecordCounter Server for MS CRM 2011.
- Configuring RecordCounter

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   Supported CRM Versions

- Microsoft Dynamics CRM 2011 RTM On Premise
- Microsoft Dynamics CRM 2011 RTM Online
- Microsoft Dynamics CRM 2011 Hosted (IFD)

3.3   User rights

The user with whom you are running the installation needs following user rights:

- System administrator security role in CRM

3.4   Windows Identity Foundation

Will be installed as part of the RecordCounter Server Setup.

3.5   Supported Operating Systems

- Windows 7 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit

4   Installation Server Component

You can install RecordCounter Server for Microsoft Dynamics CRM 2011 on every supported operating system which is able to connect to your CRM 2011 Server.
During the installation you have to specify at least one organization in which RecordCounter Server will be installed.

Possible Installation Scenarios

1. *Installing directly on a CRM 2011 On Premise Server*
   You can install RC Server directly on a CRM 2011 On Premise installation. When you specify an On Premise Connection Profile you have to run the setup on the CRM Server.

2. *Installing for CRM Online*
   If you are using CRM Online, you need to install RC on every supported operating system. You will have to specify a valid CRM Online profile.

Attention: After the setup has completed, you need to start the RecordCounter Server Configuration in the Windows Start Menu to install and configure RecordCounter Server into other CRM Organizations.

4.1   Introduction

Run the RecordCounter Server for MS CRM 2011 Setup file.
The following window will appear:
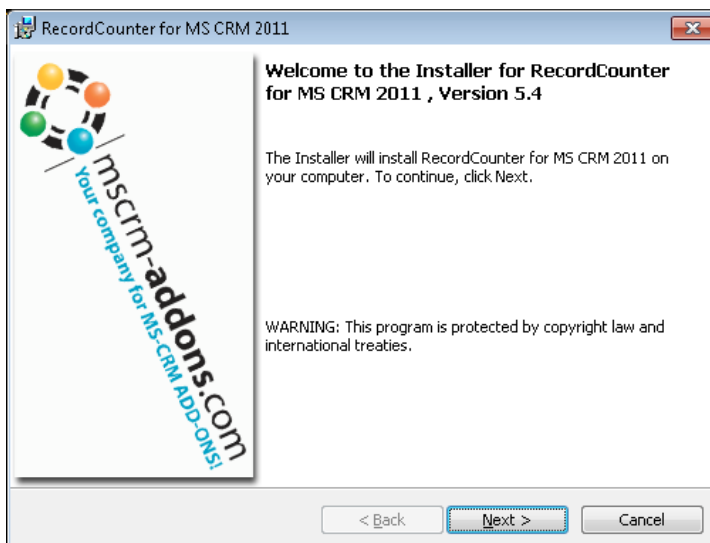
Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to chapter 4.4 directly after accepting the EULA [0]
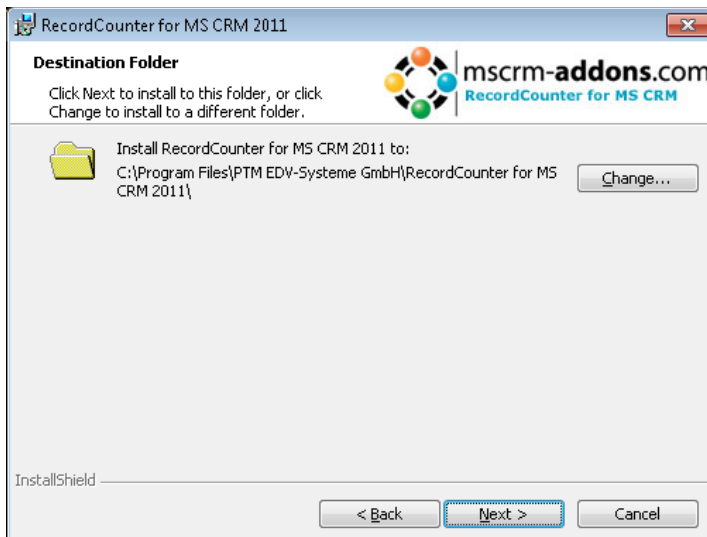
4.2 EULA (End User License Agreement)

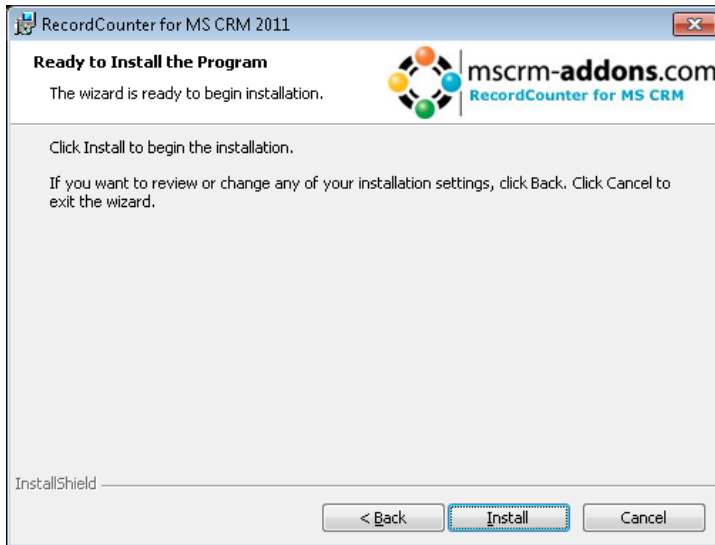Click [Next] to proceed.

4.3 Folder Selection

Here it's possible to set the installation directory

Click [Change] to specify a different installation path.
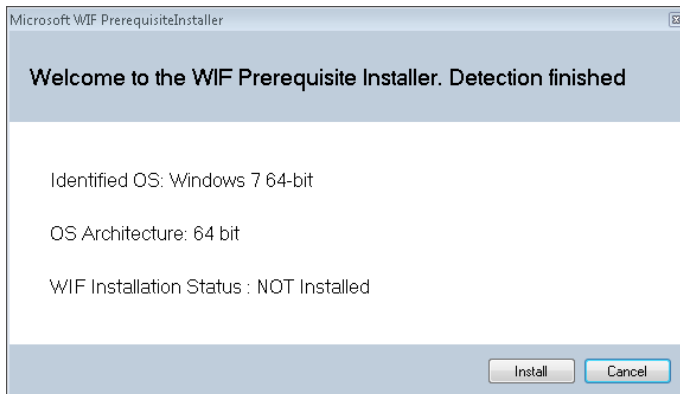Click [Next] to proceed.

4.4 Confirm Installation

To start the installation, click on [Install].
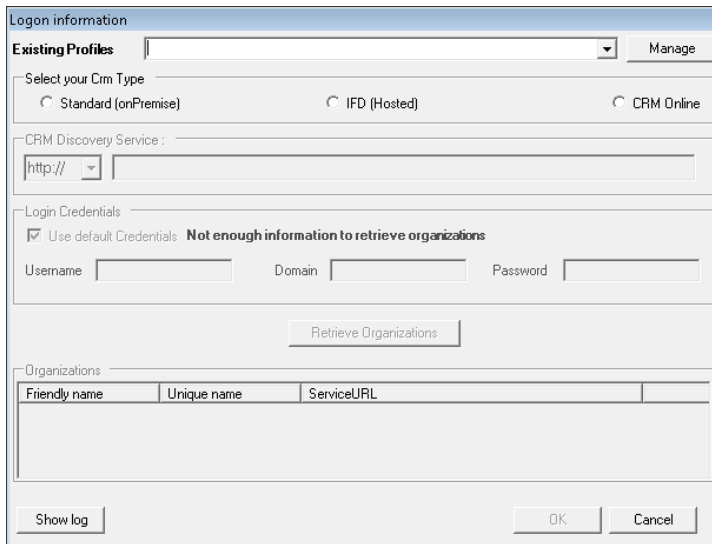To change the settings, click on [Back].

4.5 Install Windows Identity Foundation

To use RecordCounter Server for MS CRM 2011 you have to install the Windows Identity Foundation. This window will only pop up when the Windows Identity Foundation is not installed.

4.6   Configure CRM Server

To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type:
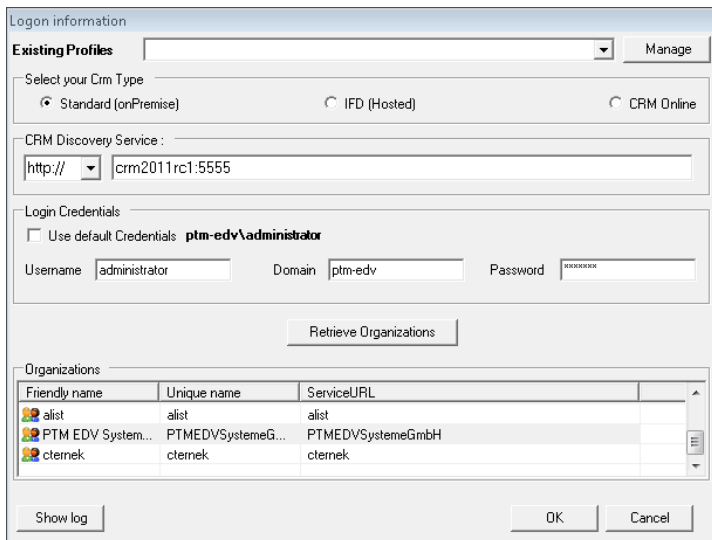
Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. As soon as the Organizations are retrieved, select one and press the "OK"-button.

4.7 How to activate debugging for RecordCounter

How you can activate debugging for RecordCounter for CRM 2011. It also shows how you can access the log files.

Activate Debugging
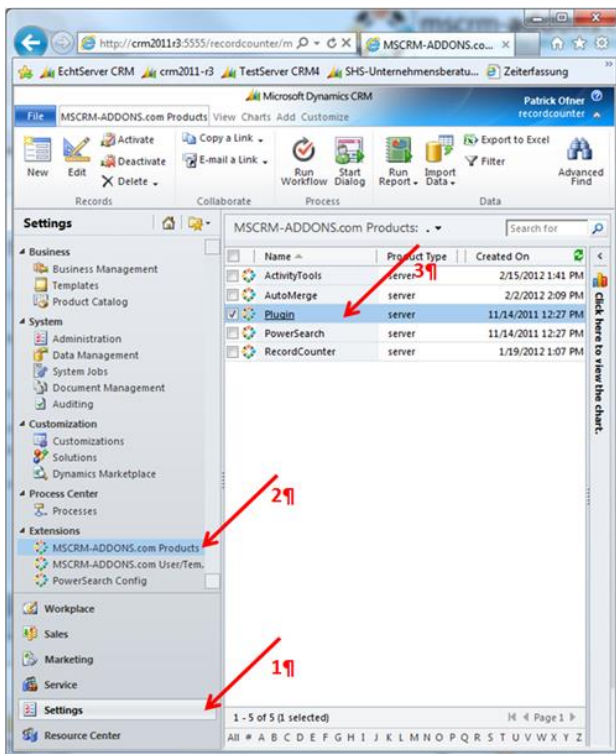
Within CRM navigate to "Settings" [1] -> "MSCRM-ADDONS.com Products" [2].
Open the "Plugin"-record [3].
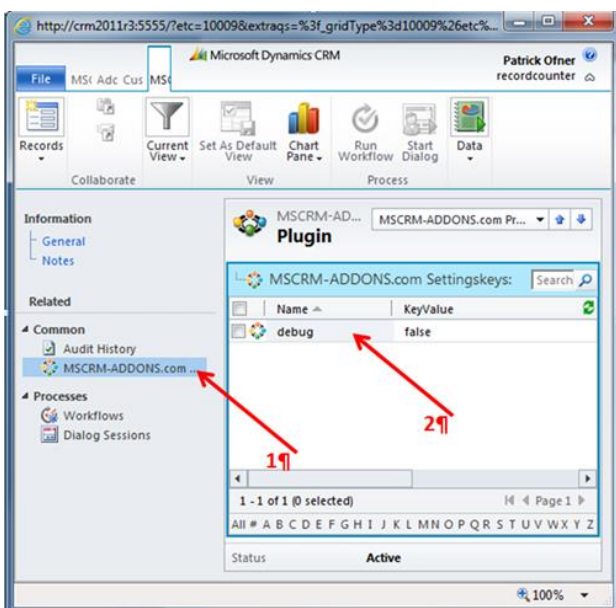
Select "MSCRM-ADDONS.com Settingskeys" [1] and open the "debug"-setting [2].
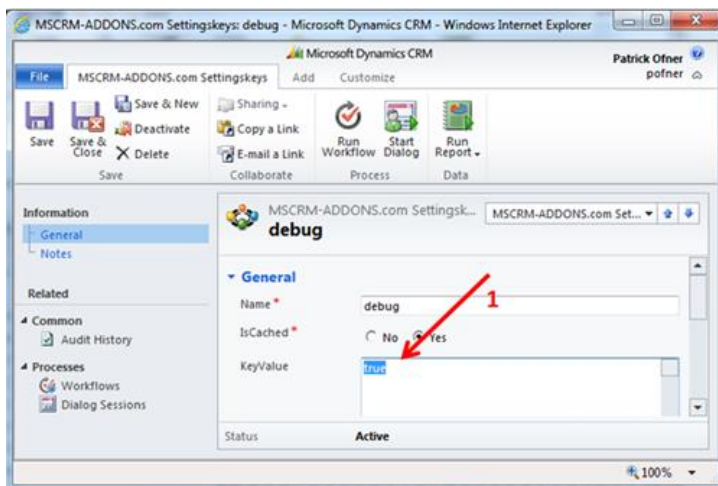
Set the "KeyValue" to "true" [1] and hit "Save".
From now on debugging is activated.

Access the log files

The log files will be stored in the "MSCRM-ADDONS-com Debug "-entity.
The easiest way to access it, is by using the advanced find:
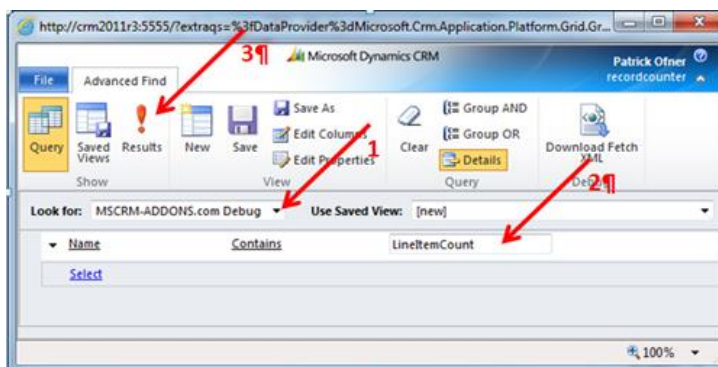
Select the "MSCRM-ADDONS-com Debug "-entity [1] and include the following condition:
"Name" must "Contain" "LineItemCount" [2]. It ensures that only log files of the
RecordCounter will be retrieved. Then hit "Results" [3]:
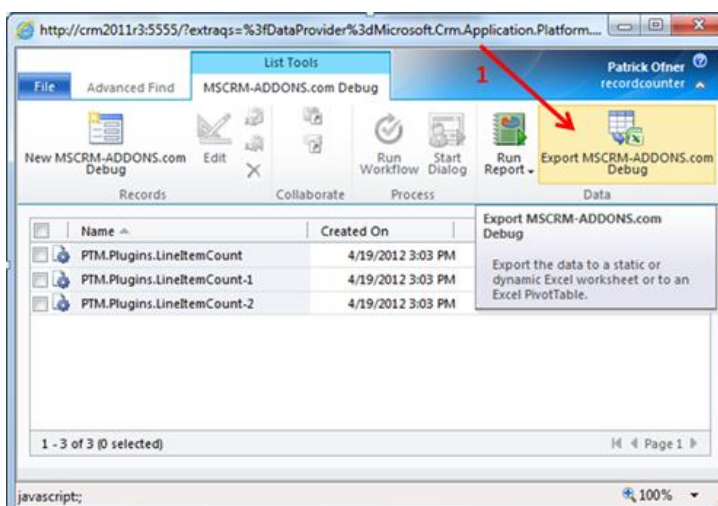
Next delete all retrieved debug records. Then reproduce the error and refresh the result list of this advanced find. This ensures that you only have the latest and relevant log files.

Select all records and hit "Export MSCRM-ADDONS.com Debug" [1]. The following dialog will open:
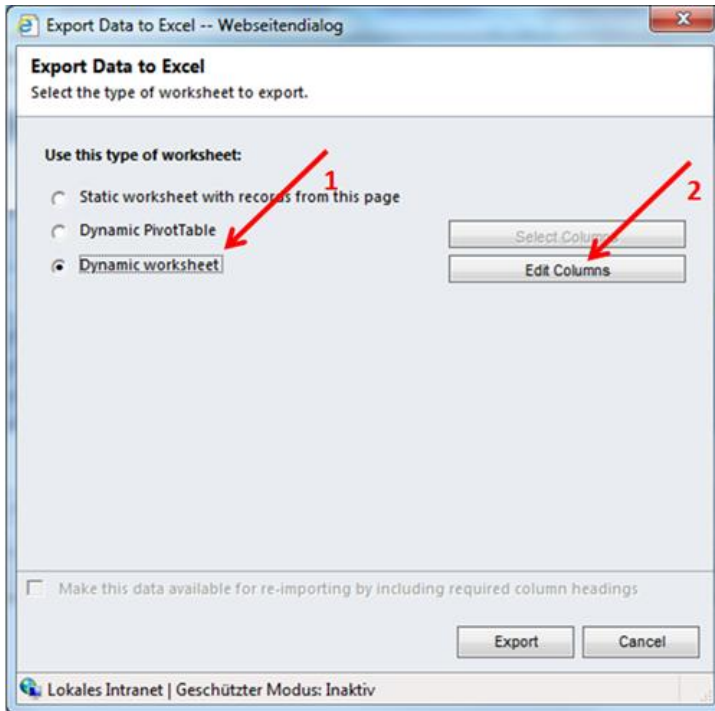
Check "Dynamic worksheet" [1] and hit "Edit Columns" [2].
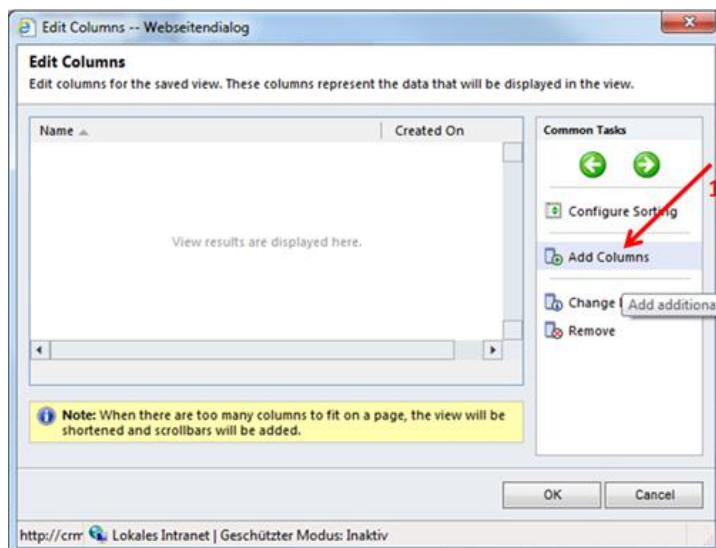
Use the "Add Columns" functionality [1] of this dialog to add the "ptm_message"-field to the grid. Next hit "OK" to close the dialog.

Then hit "Export", save the Excel file locally and send it with an error description to our support address (support@mscrm-addons.com).

4.8   Finish

The RecordCounter Server Configuration will automatically start for the organization you selected during the setup.

5   Security Roles

General security roles for all products:

The following security role is required by all our products:
"MSCRM-Addons General Security Role"

This security role contains the basic requirements for using the product itself and to be able to perform the license check.

RecordCounter does not require a product specific security role.

6   Uninstall Server Component

To uninstall RecordCounter Server for MS CRM 2011 select Programs in Control Panel.
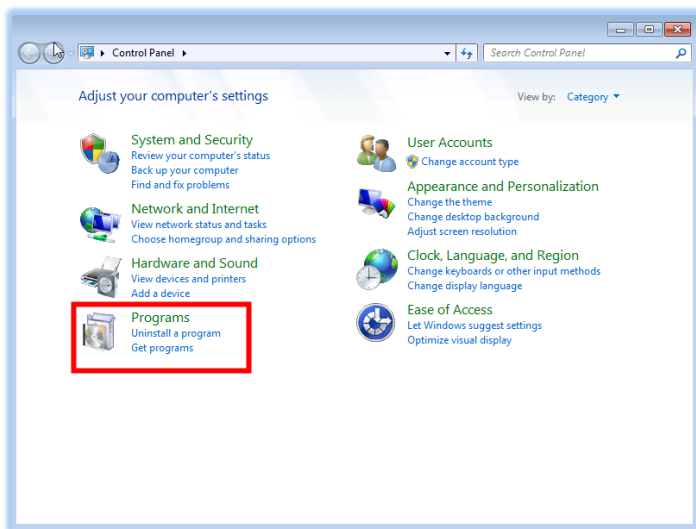
Search for RecordCounter Server CRM 2011 in "Uninstall or change a program" to uninstall RecordCounter Server. Follow the instructions to uninstall RecordCounter Server.
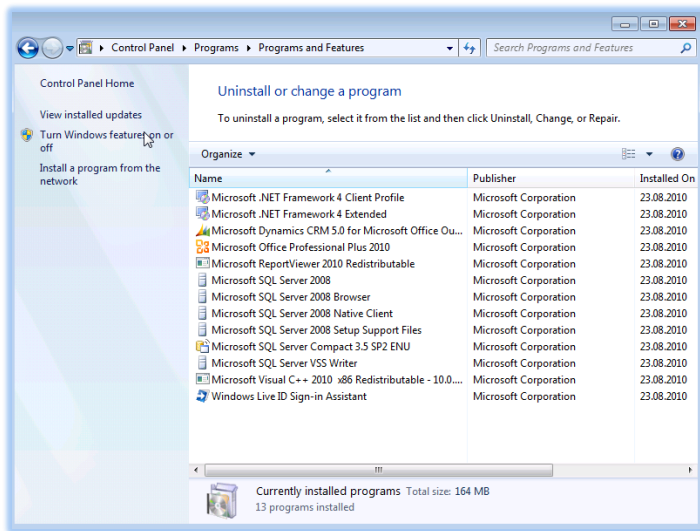
7   Configuration

The RecordCounter Server for MS CRM 2011 Configuration allows you to specify RecordCounter -Settings. E.g.: configure for which entities RC should be enabled.

You will find it under Start ➔ All Programs ➔ www.mscrm-addons.com ➔ RecordCounter for MS CRM 2011 ➔ Configuration – RecordCounter for MSCRM 2011.

A few moments after you have started the config, you'll see the connection dialog:
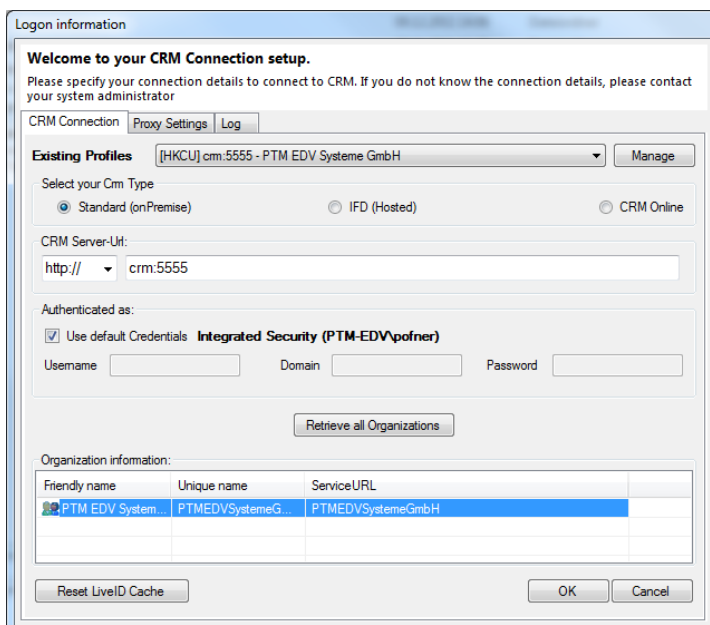
Use it to connect to your CRM-system. After hitting the OK-button, the next window will appear:
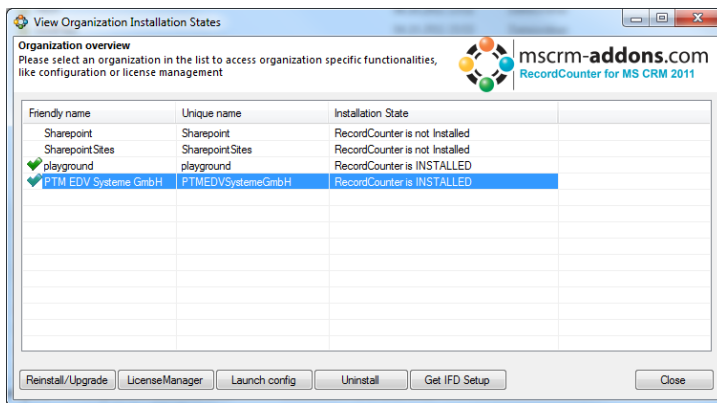
Select the organization on which you have installed the RecordCounter and hit "Launch config". The RecordCounter Server Config will be started. You can immediately start to configure RC.

7.1   Main Settings

Use this user interface to configure main settings.
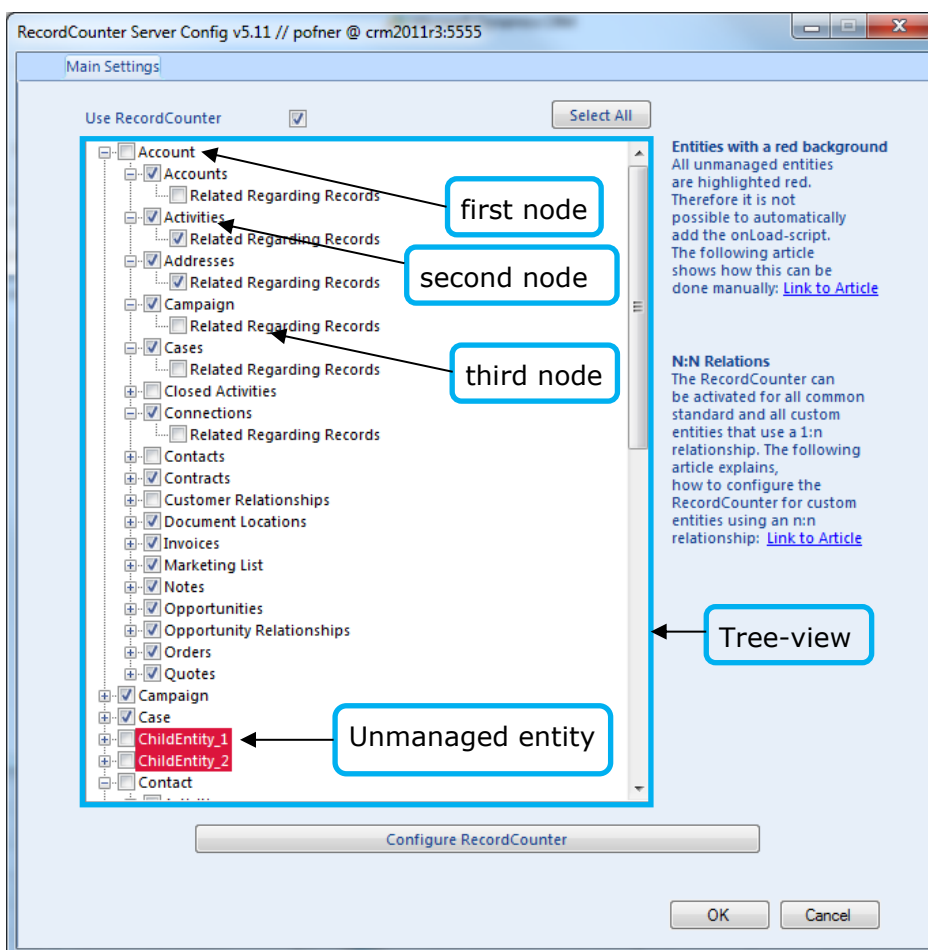
In this example you can see how the entity account is configured. RecordCounter is enabled for all CRM-entries except for Closed Activities, Contacts and Customer

Relationship. Only the Activities and Addresses include "Related Regarding records". I.e.: A contact has an activity and this contact is related to an account. If "Related Regarding Records" is enabled the activity will be counted in the account's activities.

- **„Use RecordCounter":** This checkbox is used to enable or disable the whole RecordCounter. If unchecked, the tree view is minimized and all checkboxes are deactivated **(All settings will be lost)**.

- **„Select All":** By clicking on this button, all the checkboxes of the tree view will be checked. The RecordCounter will be activated for all possible entities and entries.

- **TreeView:** Includes all entities for which you can enable RecordCounter. It is subdivided into three levels.

  - First node (highest level): The name of the node represents the same-named entity. If such a node is checked, RecordCounter for all menu entries of this entity will be executed.
  - Second node (second level): The name of these nodes represents the same-named menu entry on the left side of an entity. This node-type is used to set more detailed settings. Activate a checkbox to enable RecordCounter for this entry.
  - Third node (third level): Should this kind of checkbox be enabled, RecordCounter will add up all records of the entry. Otherwise only the direct-related ones are counted.
  - Unmanaged entities: All unmanaged entities are highlighted red. It is not possible to automatically add the OnLoad-script to them. How this can be done manually is described in the "Configure unmanaged entities"-section.

- **„Configure RecordCounter":** A click on this button will open a new window. This is described in the "RecordCounter-Configuration Tool"-section.

7.2 Configure unmanaged entities

To successfully enable RecordCounter for unmanaged entities, please follow these instructions:

First enable RC for the custom entity. This can be done by enabling the checkbox in the tree view of the RecordCounter Server Config.

Then open CRM, navigate to "Settings" and click on "Customizations".
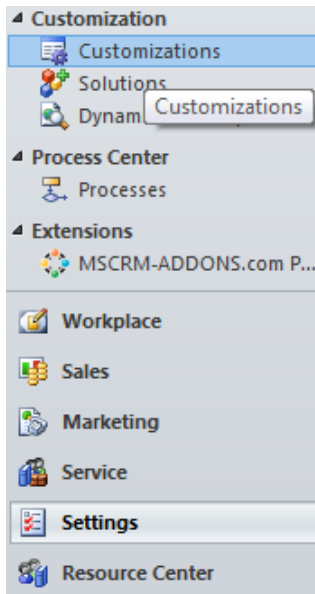
Then click on "Customize the System". Select your custom entity in the tree view and open the "Main"-Form of it. This example is for the entity Account.
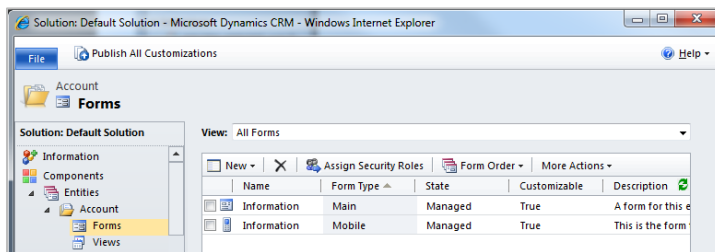
Click on the "Form Properties"- Button then the following window will appear:
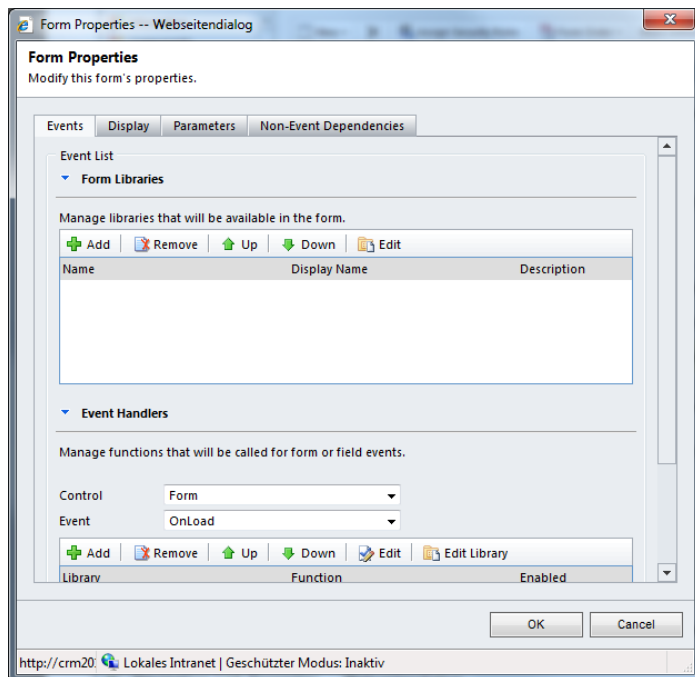
First you have to add the RecordCounter library in the "Form Libraries"-section. This can be done by clicking on the "add"-Button and selecting the "ptm_LineItemCountOnload" – web resource.

The next step is to focus the "Event Handler"-section. Ensure that the "Control"-list box is set to "Form" and "Event" to "OnLoad". Then click on the add button. The following window will appear:
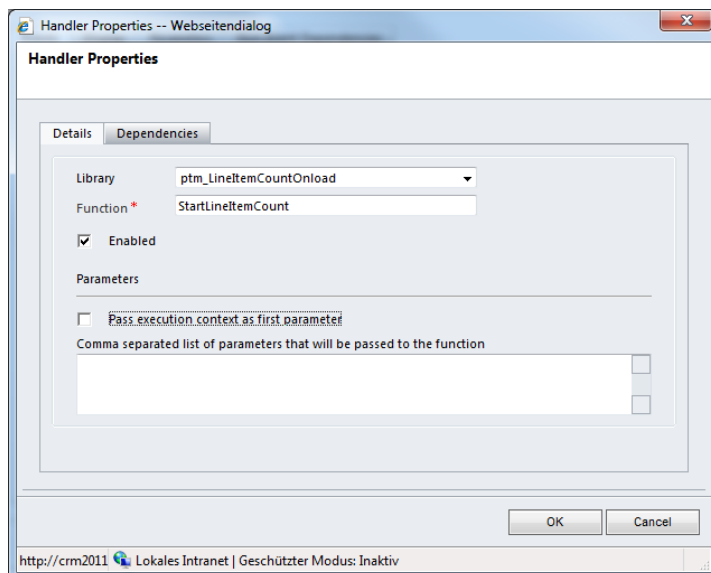
Here select the "ptm_LineItemCountOnLoad"-library. And fill in "StartLineItemCount" in the textbox next to "Function". Ensure that "Enabled" is checked. Now you have nearly finished. You only have to click on the "OK"-button. Hit the "Save"-button and publish the customization. **NOTE**: When you choose to uninstall the product, those links have to beremoved manually as well. They do not harm the CRM, but will redirect to dead links, if you leave them in place.

7.3 RecordCounter – Configuration Tool

RecordCounter can be activated for all common standard and all custom entities that use a 1:N relationship. All custom entities using a N:N-relationships will have to be configured manually. This tool was developed for exactly that reason. Our tool can also be used to change existing RecordCounter-settings of all your entities.

Important: Before you can use the tool, at least one entity has to be checked and the RecordCounter Server Config has to be saved once.
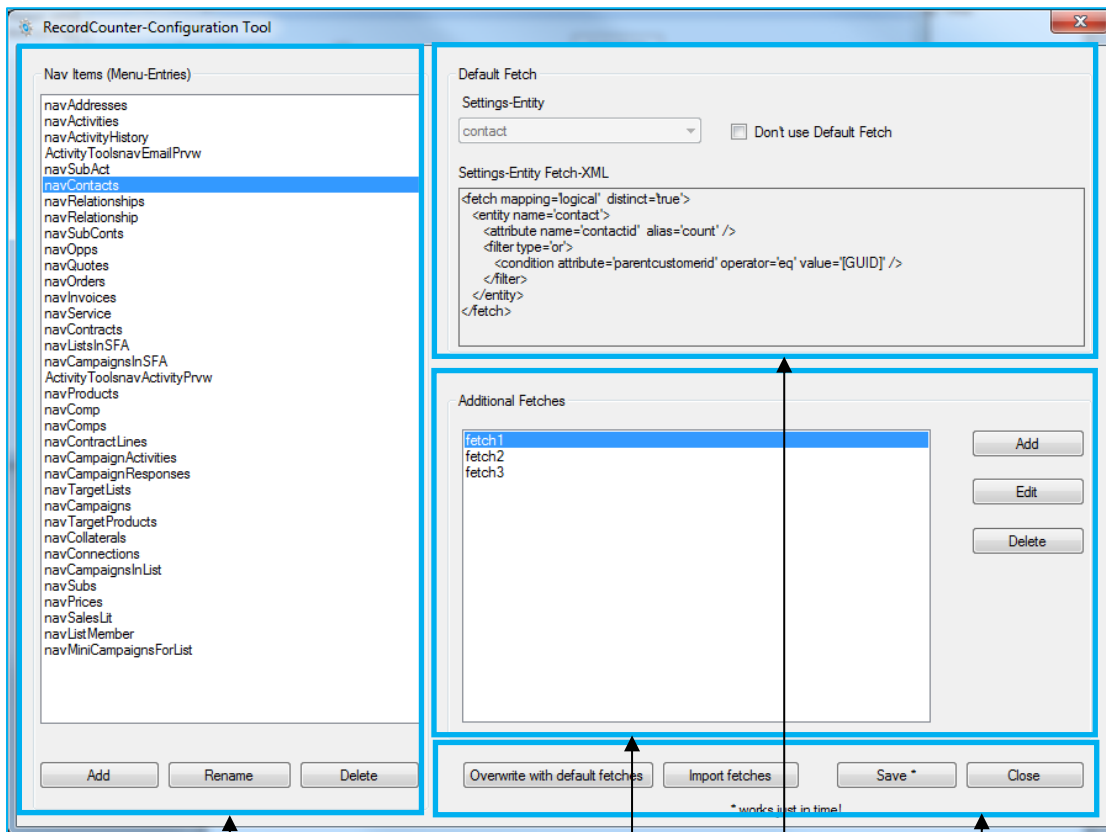
1) **Nav Items:** This area manages the navigation items (menu items in CRM). The list includes the html-IDs of all menu items for which RecordCounter is configured. For Example the list-entry "navQuotes" represents the entity "quote".

   Buttons:

   - Add: Adds a new entry to the list.
   - Rename: Used to modify existing entries.
   - Delete: Deletes the selected entry.

   Important: By clicking these buttons, actions are performed immediately without a warning window. However, the changes are not saved until the button "Save" in the "general area" is pressed.

2) **Default Fetch:** In this area the default-fetch of the selected navigation-entry is shown. It counts all records which are directly related with the calling entity. It is not possible to delete or edit the default-fetch. But you can disable it by checking the "Don't use Default Fetch"-checkbox.

3) **Additional Fetches:** These fetches, count all records which are not directly related to the entity (like recursive relations and so on). Here you can also add user-defined fetches.
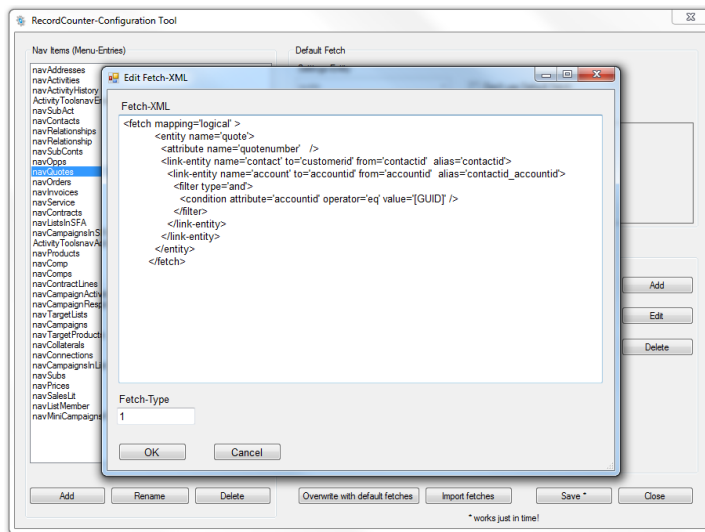
   Buttons:

   - Add: Opens a blank screen to add a new fetch to the selected entry. Use the text area under "Fetch-XML" to place the new fetch. In the text field underneath "Fetch-Type" fill in the entitytypecodes (unique number of the entity) of the entities for which the fetch should be used. If you don't insert a number, the fetch will be executed for all possible entities. To add the fetch to the list click on the "ok"-button.
   - Edit: Opens the selected fetch in a new window to be modified.
   - Delete: Deletes the selected fetch.

   Wrong fetches will be ignored!

   In the following example the navigation-entry "navQuotes" (html-name for quotes) receives a new fetch. The fetch will count all quotes which are related to a contact, and the calling account.

   If the field "Fetch-Type" was blank, the fetch would be executed for all possible quote-menu items (quote is available in account, contact, opportunity and so on). But due to the fact that the text field includes "1" (entity-type-code for account) the fetch will be executed for the quote-navigation entry in account's menu bar.

4) **General Area:** All buttons in this area are effective for the entire window.

Buttons:

- „Overwrite with default fetches": Default Values will be restored. You have the chance to save the current configuration before it is overwritten.
- "Import fetches": imports an optional NavigationItems-XML-file (settings file) and overwrites the current one.
- "Save": Saves all settings of the entire Configuration Tool.
- "Close": Closes the configuration tool (after confirmation).

7.3.1 Set up RecordCounter for custom entities

Only related entities can be shown in the menu of another entity. If the relation type between them is 1:N (or N:1) choose "the 1:n-option". Otherwise if the entities are linked by a N:N-relationship, follow the instructions of the "N:N-option".

1:n-Option: Start „RecordCounter Server Config". You'll find your custom entity as a sub-note of the main-entity. After checking it, the RecordCounter for the entity will be configured by itself.

On the next start of "RecordCounter Server Config" you can use the Configuration Tool to add additional fetches to your custom-entity. The navigation-entry-name is made up of "nav_" + the relation name of the two entities.

N:N-Option: It's not possible to set up custom n:n-relations by using the tree view! Instead you have to use the Configuration Tool. First, add a new navigation-item to the

list in the Navig Item-area. To find out the right name for the entry, just follow these instructions:

Open a CRM-record in the menu in which the related entity appears.
By pressing the F12-button (or Extras ➜ Developer Tools) the Developer Tool will appear.

Click on the cursor in the upper left area of the tool. After that, switch back to CRM and click on the menu item (for which RecordCounter should be configured). The html-code of that menu item will be highlighted and displayed in the Developer Tool.

Now you only have to search through the highlighted selector for the attribute "id". The value of the "id" is the name of the new config entry. Furthermore select this entry and add your own fetches in the "Additional Fetches"-area. By clicking the "save"-button, all settings will be saved and the configuration is completed.
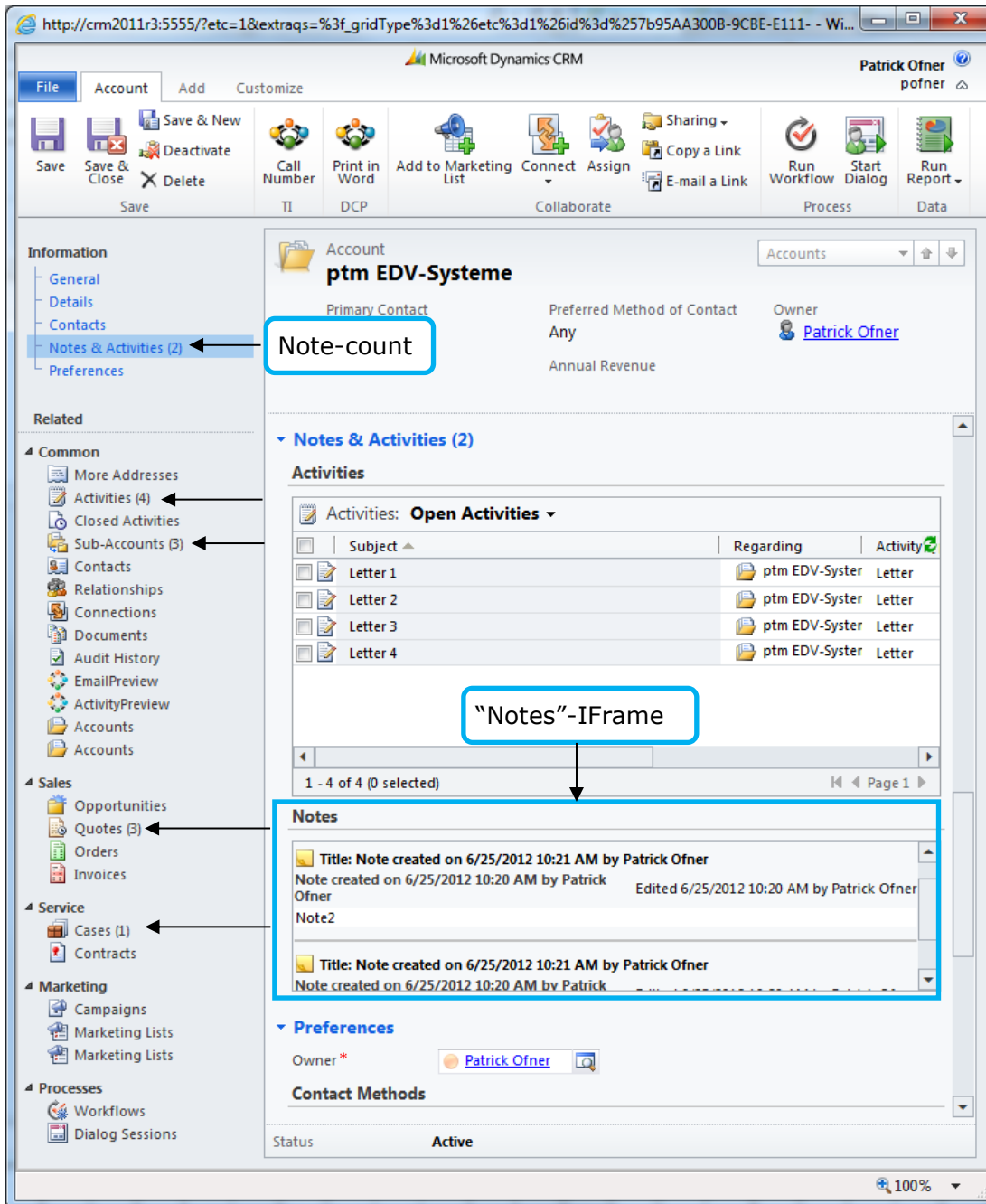
Important: If you add custom fetches, make sure that these include the attribute id. For example, if you want to expand the account entity, "attribute name='accountid'" must be included.

7.4   System requirements

JavaScript must be enabled in the Web-Browser.

7.5 Result

After you have enabled RecordCounter for the entity account, your result could look like this:

This example Account has 4 Activities, 3 Sub-Accounts, 3 Quotes and 1 Case assigned.

Furthermore, the Note-count shows us that the "Notes"-IFrame in the "Notes & Activities"-section contains 2 related notes. If this IFrame, for example was added to the "Details"-section, the Note-count would be shown there.
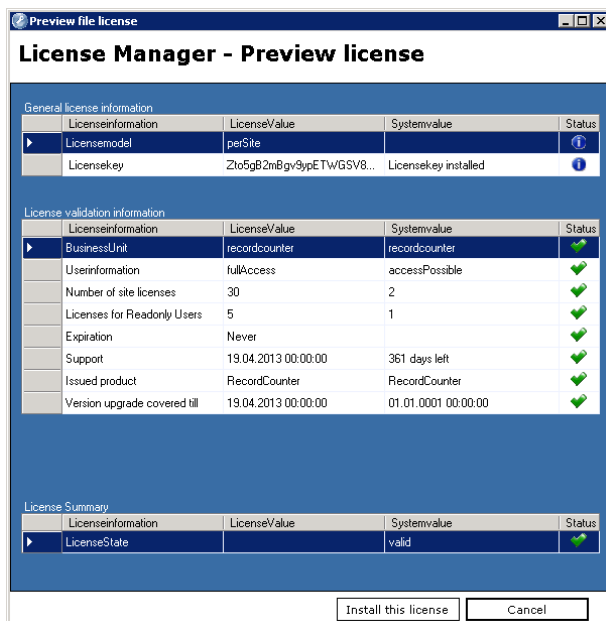
8 License Management

8.1 License Manager

Use the License Manager to install a license.

Open "License Manager – RecordCounter" from the start menu ("www.mscrm-addons.com" -> RecordCounter for MS CRM 2011) and choose the connection (Usually you just need to hit OK).
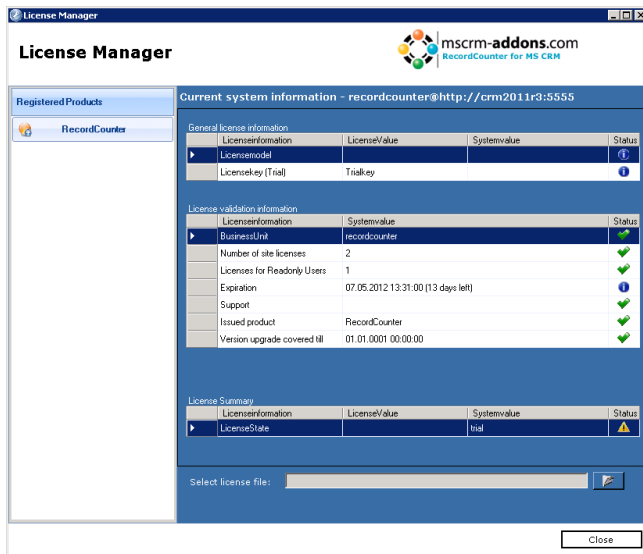
While the Trial version is enabled you will see the above screen.

To install a license select the "Open"-Button (Folder Icon) and you will be prompted to select the license file. **Important:** Do not select the zip-file. Extract it first and select the text file. Opening the license file will display the following dialog:

The selected license is valid and contains a support contract for further 361 days.

Then hit "Install this license" to complete the installation process.

After installing the LicenseManager will display the license as shown in the next picture:
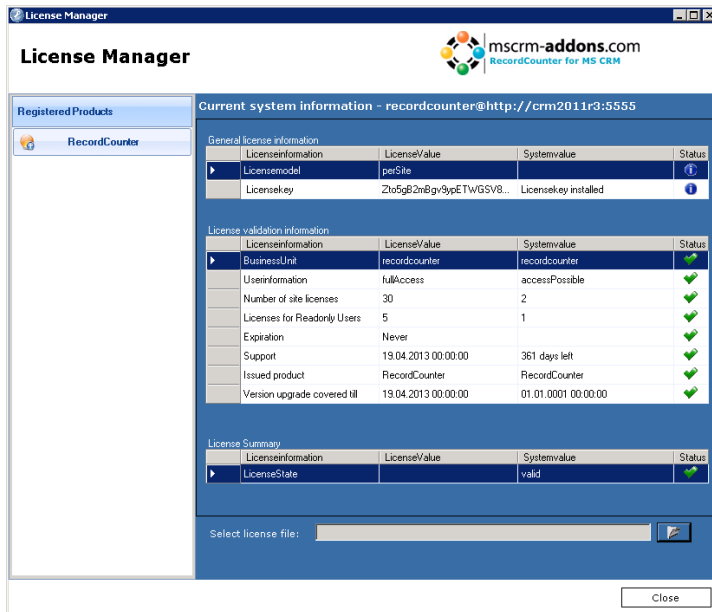
In this example you can see a valid license.

The installation is complete.

9   Contact

If you have questions to the product send an Email to
support@mscrm-addons.com
or visit our blog
http://blogs.mscrm-addons.com

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz, Austria

Tel US +1 404.720.6066
Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25
www.ptm-edv.at
www.mscrm-addons.com