

AutoMerge for MS CRM 2011

Version 5.0, August 2013

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

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1 General 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 subsequent steps: Follow each of them 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 <u>www.mscrm-addons.com</u>

3 Prerequisites

3.1 Microsoft .NET Framework 4.0 RTM

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

3.2 DocumentsCorePack Server

The DocumentsCorePack Server (version 5.21 or higher) is required for the installation of AutoMerge.

If you haven't installed the DocumentsCorePack Server or if you have a version older than v5.21, please install or update to the latest version. <u>Download DCP Server</u>

Before you install the DocumentsCorePack Server, we recommend reading the install guide: <u>DCP Install Guide</u>

3.3 User rights

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

- System administrator security role in CRM
- Deployment administrator (can be set with CRM 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)
- Microsoft Dynamics CRM 2011 Online

4 Installation Server Component

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

<u>Attention</u>: After the installation is completed, you have to run the AutoMerge Configuration as shown in chapter "<u>7 Configuration</u>". The Configuration will do important settings in CRM. **Otherwise AutoMerge won't work!**

4.1 Start of installation

First, you have to download the "AutoMerge for Microsoft CRM 2011.exe" from our homepage: <u>http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx</u> . You have to register on or login to our homepage for downloading this setup. After the download, run the setup.



Click "Next" to start the installation for AutoMerge.



License Agreement Please read the following license agreement carefully.	COM
FORM OF END USER LICENSE AGREEMENT	
MSCRM-ADDONS.COM SOFTWARE LICENSE AGREEMENT	
IMPORTANT: THIS SOFTWARE LICENSE AGREEMENT ("LICENSE AGREEMENT") IS A LEGAL AGREEMENT BETWEEN CLIENT AND MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND CONTAINS WARRANTY INFORMATION, LIABILITY DISCLAIMERS AND	
I accept the terms in the license agreement I do not accept the terms in the license agreement	
nstallShield < Back Cancel	

You have to accept the End User License Agreement to continue with the installation. Click "Next" to continue.

😸 AutoMer	rge Server for MS CRM 2011		x
Destinati Click Nex Change	ion Folder ext to install to this folder, or click to install to a different folder.	MSCIM-a	dons.com
	Install AutoMerge Server for MS CRM 201 C:\Program Files (x86)\PTM EDV-Systeme Microsoft CRM 2011\	1 to: GmbH\AutoMerge for	Change
InstallShield -	< Bad	< Next >	Cancel

Click "Change..." to change the path for the installation. After you have chosen the destination click "Next" to continue.





Click "Install" to continue or "Back" to change your settings.

elcome to your CR	M Connection setup	p.				
Pease specify your connection details to connect to CRM. If you do not know the connection details, please contact you system administrator						
RM Connection Proxy	Settings Log					
xisting Profiles	HKLM] dynamics01.conto	so.com	✓ Manage			
Select your Crm Type						
 Standard (onPrer 	nise) C IFD (Host	ed) C CRM Online	C Office 365			
CRM Server-Url:						
http://	mics01 contoso com					
Inttp://						
Authenticated as:						
Authenticated as: Use default Creder Username	tials Integrated Securi	ity (CONTOSO\administrator) nain Passu	word			
Authenticated as:	tials Integrated Securi	ity (CONTOSO\administrator) nain Passu Retrieve all Organizations	word			
Authenticated as: Use default Creder Username Organization information Friendly name	tials Integrated Securi Dom	ity (CONTOSO \administrator) nain Passu Retrieve all Organizations	word			
Authenticated as: Use default Creder Username Organization information Friendly name AdventureWorksC	tials Integrated Securi Dom γ. Unique name AdventureWorksCycle	ity (CONTOSO \administrator) nain Passy Retrieve all Organizations ServiceURL AdventureWorksCycle	word			
Authenticated as: Use default Creder Username Organization information Friendly name AdventureWorksC	tials Integrated Securi Dom Unique name AdventureWorksCycle Contoso	Ity (CONTOSO \administrator) nain Passu Retrieve all Organizations ServiceURL AdventureWorksCycle Contoso	word			

During the installation the CRM Connection setup dialog will pop up. Choose an existing profile or create a new connection-profile. Choose the organization on which you want to install AutoMerge.



HautoMerge Server for MS CRM 2011					
	InstallShield Wizard Completed				
Inscr	The InstallShield Wizard has successfully installed AutoMerge Server for MS CRM 2011. Click Finish to exit the wizard.				
n-adde					
Canna Anno Contra					
	< Back Finish Cancel				

Click "Finish" to finish the installation and to exit the setup.

The final step of the installation is the AutoMerge configuration. Run the configuration as shown in chapter "<u>7 Configuration</u>". The configuration will do necessary settings in CRM. **Otherwise AutoMerge won't work!**

4.2 Service Setup for CRM Online

Search for "AutoMergeServiceConfiguration" in the Windows start-menu and run this application. This is only necessary if you want to use AutoMerge for CRM Online.

AutoMerge Management (v. 5.21) Welcome to the AutoMerge Service Overview This tool will help you create and manage your merge s	enrices	mscrm-addons.com
Add New Service New service setup Active Services Inactive Services	General Crim Connection Setup License Log ServiceName ServiceName ServiceName ServiceName General Conce set, the servicename cannot be changed again) ServiceName General Logfile Path: CVProgram Files (x86)/PTM EDV-Systeme GmbHVAutoMerge for Microsoft CRM Other: Activate Debugging	
	Stop Service Start Service Delete	Save service configuration



Within the "General"-tab, you are able to put a name for your service and to specify the logfile-path. You are also able to activate debugging if there is a problem with your service.

AutoMerge Management (v. 5.21)		
Welcome to the AutoMerge Service Overview This tool will help you create and manage your merge ser	Mices Simple AutoMerge	addons.com
Add New Service	General Crm Connection Setup License Log	83 G D
New service setup	Select your Crm Type Standard (onPremise) IFD (Hosted) CRM Online Office 365	
Active Services	CRM Server-Urk https:// v mscrmaddonsdemp4 .crm4.dynamics.com	
Inactive Services	Authenticated as:	
	Use default Credential admin@mscrmaddonsdemo4.onmicrosoft.com Username demo4.onmicrosoft.com Domain Password ••••••••••• Retrieve all Organizations	
	Organization information:	
	Friendy name Urique name ServiceURL MSCRMAddons mscrmaddonsdemo4	
	Reset LivelD Cache OK Stop Service Start Service Delete Save service	Cancel
New:Configuration Changed		Close

Again, you have to specify your CRM-connection in the CRM Connection Setup.

dd New Service	Gene	ral Crm Connection Setup	License Log		٥
law remine return	Gene	ral license information			
en service semp		Licenseinformation	LicenseValue	Systemvalue	Stat
tive Services	•	Licensemodel	perSite		0
tive dervices		Licensekey	/9nQ4UJJa6C8XVPualeR5Bit	Licensekey installed	0
ctive Services					
	Licen:	licenseinformation	License\/alue	Systemvalue	Stat
ice1		BusinessUnit	mscrmaddonsdemo4	mscrmaddonsdemo4	
		Number of site licenses	75	3	
		Licenses for Readonly Users	0	0	
		Encenses for Reducing Osers	0	0 30 days left	
		Cupration	03.01.2013 00:00:00	30 days left	
		support	03.01.2013 00:00:00	So days lerc	
		Issued product	AutoMerge	AutoMerge	
		Version upgrade covered till	03.01.2013 00:00:00	01.01.0001 00:00:00	· · · · · · · · · · · · · · · · · · ·
	Licen	se Summary Licenseinformation	LicenseValue	Systemvalue	Stat
		LicenseState		valid	*
	Stop S	envice Start Service D	elete		Save service configurati

In the "License"-tab, you are able to see the information about your license.



ome to the AutoMerge Service Ov	/erview 🥠	mscrm-addons
ol will help you create and manage you	r merge services	AutoMerge for Microsoft (
dd New Service	General Crm Connection Setup License Log	
	EventLog	
ew service setup	Message	TimeStamp
	AutoMergeService has shutdown all subprocesses	04.12.2012 10:47:07
tive Services	AutoMergeService has requested a shutdown, service is stopping running batches	04.12.2012 10:47:07
	O Service1 batch reportTotalDocuments since service started : 0RUNTIME SUMMARY	
active Services	Service1 has started successfully	04.12.2012 10:47:03
rvice1		
	Stop Service Start Service Delete	Save service configuration
		configuration of the second se

In the "Log"-tab, you are able to see the latest events.

5 Upgrade

For upgrading your AutoMerge version, just rerun the setup. The final step of the upgrade is to execute the AutoMerge Configuration as shown in chapter "<u>7 Configuration</u>". **The configuration is necessary to upgrade AutoMerge properly!**

6 Uninstall



For uninstalling AutoMerge, navigate to the control panel and click "Uninstall a program".



Control Panel Home	Uninstall or change a program						
View installed updates	To uninstall a program, select it from the list and then	click Uninstall Change or Repair.					
Turn Windows features on or							
off	Organize T Uninstall					8=	-
Install a program from the	A A A A A A A A A A A A A A A A A A A						
network	Name	Publisher	Installed On	Size	Version		
	ActivityTools for MS CRM 2011	PTM EDV-Systeme GmbH	26.11.2012	54,0 MB	5.32		
	Adobe Reader 8.1.2	Adobe Systems Incorporated	28.11.2012	126 MB	8.1.2		
	Attachment Extractor Server for MS CRM 2011	PTM EDV-Systeme GmbH	27.11.2012	43,6 MB	5.15		
	AutoMerge Server for MS CRM 2011	PTM EDV-Systeme GmbH	04.12.2012	52,1 MB	5.21		
	DocumentsCorePack Client for MS CRM 2011	PTM EDV-Systeme GmbH	26.11.2012	40,5 MB	5.73		
	OcumentsCorePack Server for MS CRM 2011	PTM EDV-Systeme GmbH	04.12.2012	43,0 MB	5.35		
	GroupCalendar for MS CRM 2011	PTM EDV-Systeme GmbH	23.11.2012	32,7 MB	5.33		
	5 Microsoft .NET Framework 4 Client Profile	Microsoft Corporation	08.07.2012	38,8 MB	4.0.30319		
	5 Microsoft .NET Framework 4 Extended	Microsoft Corporation	08.07.2012	51,9 MB	4.0.30319		
	Microsoft .NET Framework 4 Multi-Targeting Pack	Microsoft Corporation	08.07.2012	83,4 MB	4.0.30319		
	Microsoft Dynamics CRM 2011 French Language Pack	Microsoft Corporation	06.11.2012	298 MB	5.0.9690.3201		
	🕍 Microsoft Dynamics CRM 2011 German Language Pack	Microsoft Corporation	06.11.2012	296 MB	5.0.9690.3201		
	🚧 Microsoft Dynamics CRM 2011 Japanese Language P	Microsoft Corporation	06.11.2012	297 MB	5.0.9690.3201		
	Microsoft Dynamics CRM 2011 Reporting Extensions	Microsoft Corporation	06.11.2012	31,2 MB	5.0.9690.3201		
	Microsoft Dynamics CRM Server 2011	Microsoft Corporation	06.11.2012	585 MB	5.0.9690.3201		
	😼 Microsoft Help Viewer 1.1	Microsoft Corporation	08.07.2012	3,97 MB	1.1.40219		
	Sa Microsoft Office Professional Plus 2010	Microsoft Corporation	28.11.2012		14.0.6029.1000		
	Microsoft Report Viewer 2012 Runtime	Microsoft Corporation	08.07.2012	26,2 MB	11.0.2100.60		
	Microsoft ReportViewer 2010 Redistributable	Microsoft Corporation	05.11.2012	42,0 KB	10.0.30319		
	🥪 Microsoft Silverlight	Microsoft Corporation	19.06.2012	40,4 MB	4.1.10329.0		
	📋 Microsoft SQL Server 2008 Native Client	Microsoft Corporation	05.11.2012	6,09 MB	10.1.2531.0		

Select AutoMerge and click "Uninstall" within the right-mouseclick-menu. Follow the setup to uninstall AutoMerge.

7 Configuration

The AutoMerge for MS CRM 2011 configuration does necessary settings in CRM. It also allows to specify basic settings and to install the license key.

To start the configuration open CRM and navigate to "Settings" [1] and then to \rightarrow "Solutions" [2].

Settings 🚮 🙀 -	Ge	et Started with Solutions			color CDM evenin		
Business By Runinger Management		. Understand	triat you install o	n your microsoft Dyn	annies erkin applie	2. Find &	
Templates		P About Solutions P About Solution Components				라 Dynami 라 About Is	i a
System Administration Cate Management System Jobs Document Management	Overview Video Solutions All Solutions * New X Delete	s ▼ Import 🛺 Export 👰 I	mport Translatio	ns 🗟 Export Trans	lations 👔	Publish All Customizations	:
Auditing	Name	Display Name	Version	Installed On 🔻	Package Typ	Publisher	
	DocumentsCorePackServer.	MSCRM-ADDONS.com Do	1.2	12/18/2012	Managed	PTM EDV Systeme GmbH	
Customizations	EntityReportDesigner	EntityReportDesigner	1.0	12/17/2012	Managed	PTM EDV Systeme GmbH	
🐉 Solutions	ielephoneIntegrationServ	TelephoneIntegrationServ	1.1	12/17/2012	Managed	PTM EDV Systeme GmbH	
Dynamics Marketplace	MSCRMAddonsPredictive	MSCRM_Addons.com.Pred	13	12/17/2012	Managed	PTM EDV Systeme GmbH	
Process Center	AutoMergeServerCore	MSCRM-ADDONS.com Au	5.24	12/5/2012	Managed	PTM EDV Systeme GmbH	2
S. Processes	AttachmentExtractorCore	AttachmentExtractorCore	5.15	11/27/2012	Managed	PTM EDV Systeme GmbH	. –
MECRM ADDONE com Dr	TelephoneIntegrationServ	TelephoneIntegrationServ	27.0	11/26/2012	Managed	PTM EDV Systeme GmbH	
MSCRM-ADDONS.com H	RecordCounterServerConfig	MSCRM-ADDONS.com Re	1.1	11/26/2012	Managed	PTM EDV Systeme GmbH	
PowerSearch Config	RecordCounterServerCore	MSCRM-ADDONS.com Re	20.0	11/26/2012	Managed	PTM EDV Systeme GmbH	
· · · · · · · · · · · · · · · · · · ·	AutoMergeServerOnPremis	e MSCRM-ADDONS.com Au	5.24	11/26/2012	Managed	PTM EDV Systeme GmbH	
	ActivityToolsServerConfig	ActivityToolsServerConfig	1.1	11/26/2012	Managed	PTM EDV Systeme GmbH	
	ActivityToolsServerQueueV.	ActivityToolsServerQueueV	34.0	11/26/2012	Managed	PTM EDV Systeme GmbH	
	ActivityToolsServerCore	ActivityToolsServerCore	18.0	11/26/2012	Managed	PTM EDV Systeme GmbH	
	DocumentsCorePackServer.	MSCRM-ADDONS.com Do	1.0	11/23/2012	Managed	PTM EDV Systeme GmbH	
	DocumentsCorePackServer.	MSCRM-ADDONS.com Do	30.0	11/23/2012	Managed	PTM EDV Systeme GmbH	
	PowerSearchConfig	PowerSearchConfig	1.0.0.0	11/23/2012	Managed	PTM EDV Systeme GmbH	
	PowerSearchServerCore	MSCRM-ADDONS.com Po	2.0	11/23/2012	Managed	PTM EDV Systeme GmbH	
	GroupCalendarServerConfig	MSCRM-ADDONS.com Gr	1.1	11/23/2012	Managed	PTM EDV Systeme GmbH	
	GroupCalendarServerCore	MSCRM-ADDONS.com Gr	7.0	11/23/2012	Managed	PTM EDV Systeme GmbH	
Workplace	MSCRMADDONScomGene.	MSCRM-ADDONS.com Ge	86.0	11/23/2012	Managed	PTM EDV Systeme GmbH	
Sales							
Marketing							
Markeung							
Service							
Settings	1 3 of 20 (1 selected)						
Resource Center	All #	A B C	D	E F	G	H I J	



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

7.1 "General" – tab

AutoM	erge Config Version 8	5.24 mscrm-addons.com
General	About AutoMerge Licensing	
	Active Debugging	V
	Active File Debugging	V
	SPS User	user1
	SPS Password	
	SPS Domain	domain
	SP Webservice Url	http://dynamics01.contoso.com/AdventureWorks
	CRM User Name	user2
	CRM User Password	000
	CRM User Domain	test
	Is IFD	
	ADFS Url (https://sts1.contoso.com)	adfsURI
	IFD Auth Endpoint (https://auth.contoso.com)	ifd endpoint
		Save

Use the "General" – tab to adjust the following settings:

- **Activate Debugging**: If you tick 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. This needs to be edited manually only in special cases.
- **"Save"** button: Use this button to save your settings.



7.2 "About AutoMerge" – tab

AutoMerge Co	nfig Version 5.24	AutoMerge for MS CRM 2011	
General About AutoMerge	Licensing		
AutoMe Version Copyrig	ge for MS CRM 2011 5.24 It (c) 2011 PTM EDV Systeme GmbH		

This tab does not contain any settings. It only displays information about the current version and the copyright.

7.3 "Licensing" – tab

General About AutoMerge	Licensing		
General license information			
Licenseinformation	LicenseValue	Systemvalue	Statu
Licensemodel	perSite		0
Licensekey	/9nQ4iJjJa6C8XVPualeR5RBt9L6JI	Licensekey installed	0
License validation information	LicenseValue	Systemvalue	Statu
BusinessI Init	pofner	nofner	Julu.
Number of site licenses	25	2	· · · · · · · · · · · · · · · · · · ·
Licenses for Readonly Users	0	0	· ·
Expiration	Never		*
Support	13.03.2013 00:00:00	365 days left	*
Issued product	AutoMerge	AutoMerge	*
Version upgrade covered till	13.03.2013 00:00:00	01.01.0001 00:00:00	*
icense summany			
Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	*

This tab is important for the following two reasons:



7.3.1 Show license Info

All information about your AutoMerge license and system values are displayed.

The first column of the table determines the information-type, the second contains the license-key values and the third the system-values. Here is a short description of the information-types:

- Licensemodel: the type of the licensing (per site or per user)
- Licensekey: shows the 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 expiration-date of the license (by default: never)
- **Support:** the expiration-date of your support contract
- **Issued product:** the name of the current product
- Version upgrade covered till: the date to which you can install the latest version by downloading it from our homepage (Upgrades are provided till the expiration-date of your support contract.)
- LicenseState: shows the status of your license key

Maybe you have noticed that the license key is not fully displayed in the table. If you would like to see the full license key, click on it [1]. Then, a new dialog with the entire key will open.

General About A	AutoMerge Lice	ensing		
General license inforr	nation			
Licenseinformation	1	LicenseValue	Systemvalue	Statu
Licensemodel		perSite		0
Licensekey	1	/9nQ4iJjJa6C8XVPualeR5RBt9L6JI	Licensekey installed	0
Number of site lice Licenses for Reado Expiration Support Issued product Version upgrade co	/9nQ4iJjJa6C8X\ Tb4bFcF0onDsX	/PualeR5RBt9L6Jlo5IDPMAaLAEdSPfGe Fz2ScpVV6HN+0iPaxgcTiEzKzZ8=	GOOgHPTxmw8pExOhy4JT	* * * *
icense summary		L'anna Malua	Containing lan	C1-1
I icenseinformation	1	Licensevalue	Systemvalue	Status

Hit "Ok" to close this dialog.



7.3.2 Install a new license key.

For installing a new license key, open the install license key-dialog. To do so, click on "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:			
 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 <u>support@mscrm-addons.com</u> including the license key. The email will look like this:



Copy the whole license key (as 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:		
 Please open the email with the license key. Copy the key an paste it into the following box: 		
/9nQ4iJjJa6C8XVPualeR7WQTdgSQqMjNIRBCDStlfvyuYWjA31Wy8YZV4drqjluY 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 configuration will install the license and updates the table with the new license information.

8 Contact

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

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