



# AutoMerge for MS CRM 2011

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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 [www.mscrm-addons.com](http://www.mscrm-addons.com)

## 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. [Download DCP 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 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

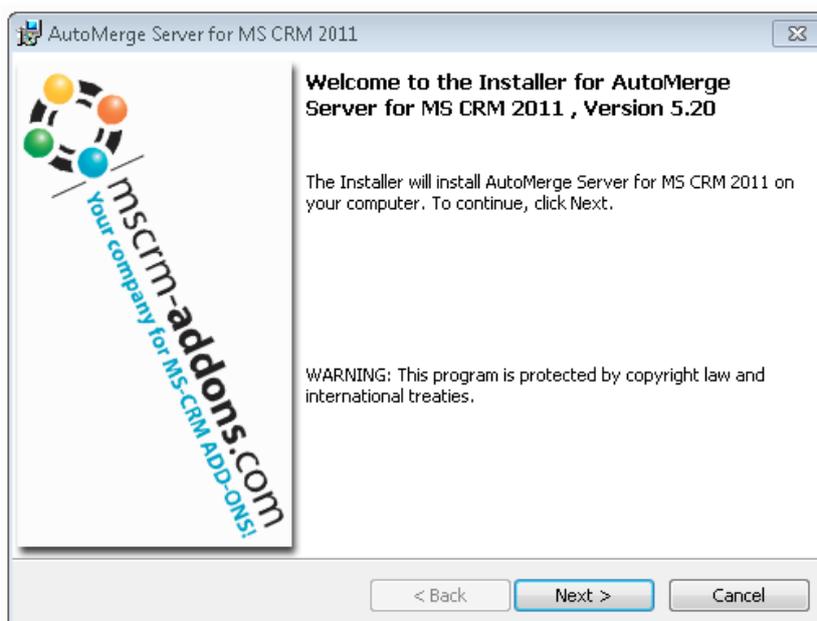
## 4 Installation Server Component

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.

**Attention:** After the installation is completed, you have to run the AutoMerge Configuration as shown in chapter "[7 Configuration](#)". The Configuration will do important settings in CRM. **Otherwise AutoMerge won't work!**

### 4.1 Start of installation

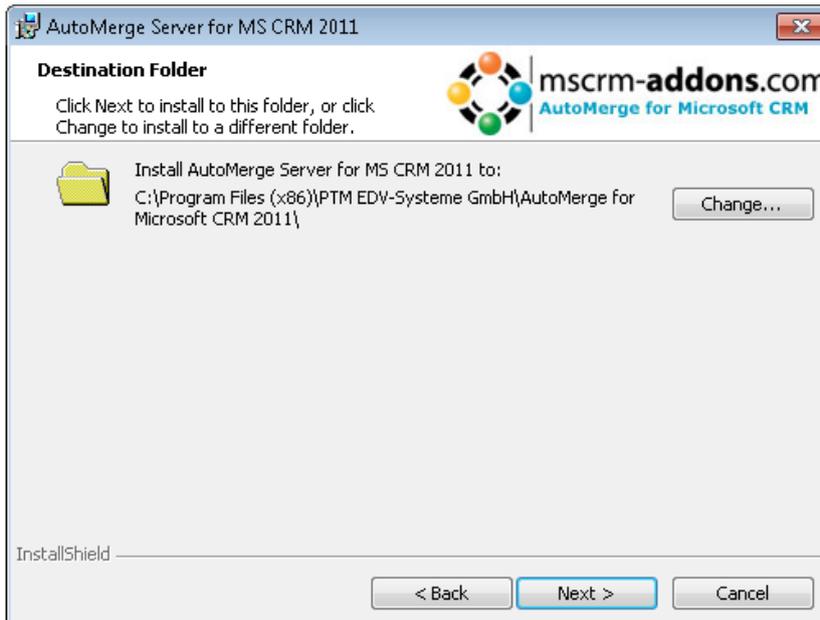
First, you have to download the "AutoMerge for Microsoft CRM 2011.exe" from our homepage: <http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx> . You have to register on or login to our homepage for downloading this setup. After the download, run the setup.



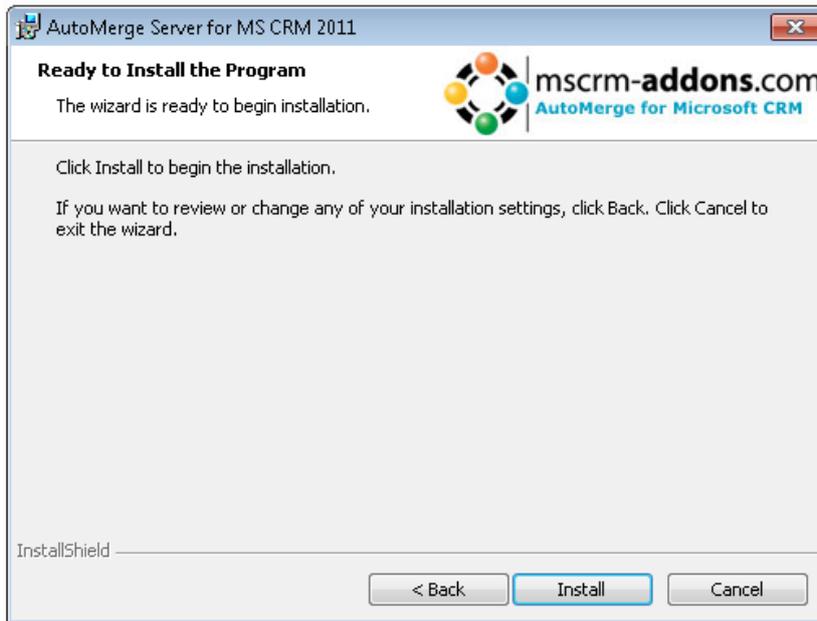
Click "Next" to start the installation for AutoMerge.



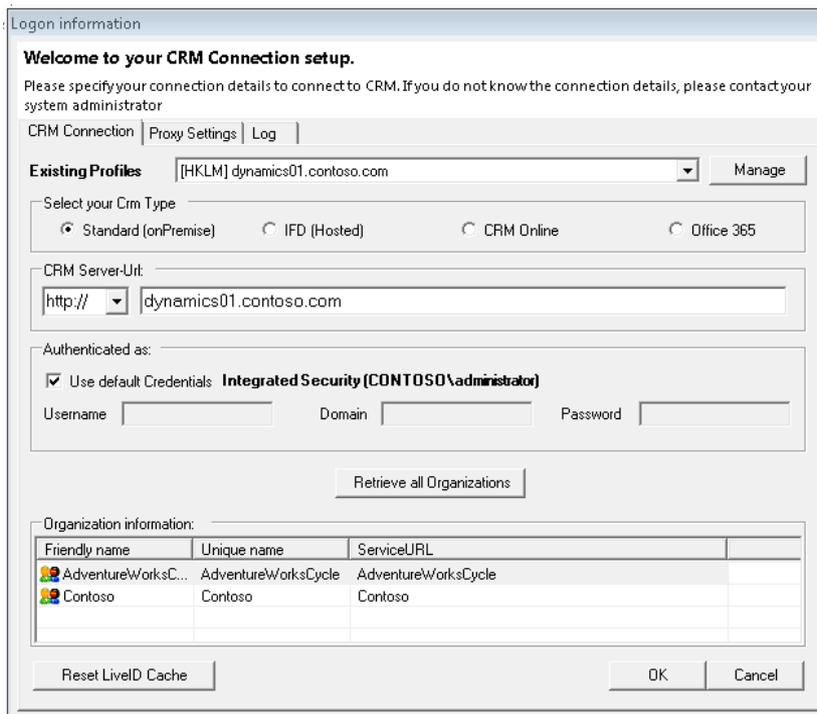
You have to accept the End User License Agreement to continue with the installation. Click "Next" to continue.



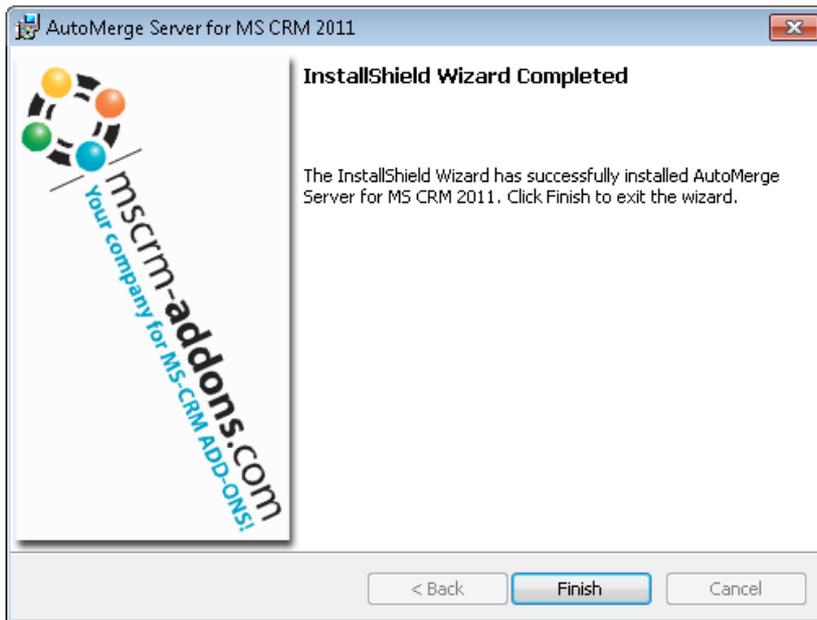
Click "Change..." to change the path for the installation. After you have chosen the destination click "Next" to continue.



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



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.

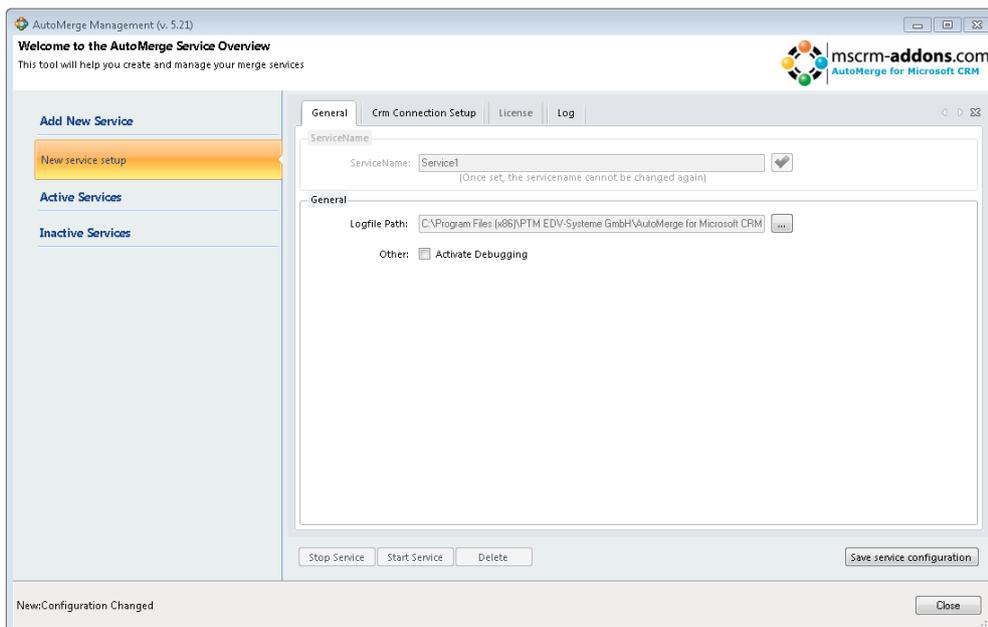


Click "Finish" to finish the installation and to exit the setup.

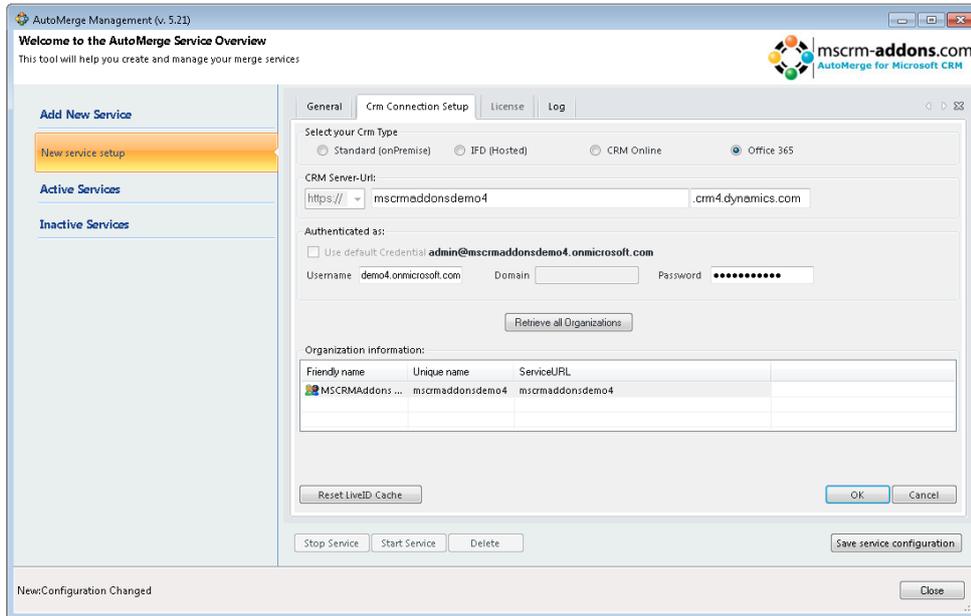
The final step of the installation is the AutoMerge configuration. Run the configuration as shown in chapter "[7 Configuration](#)". The configuration will do necessary settings in CRM. **Otherwise AutoMerge won't work!**

## 4.2 Service Setup for CRM Online

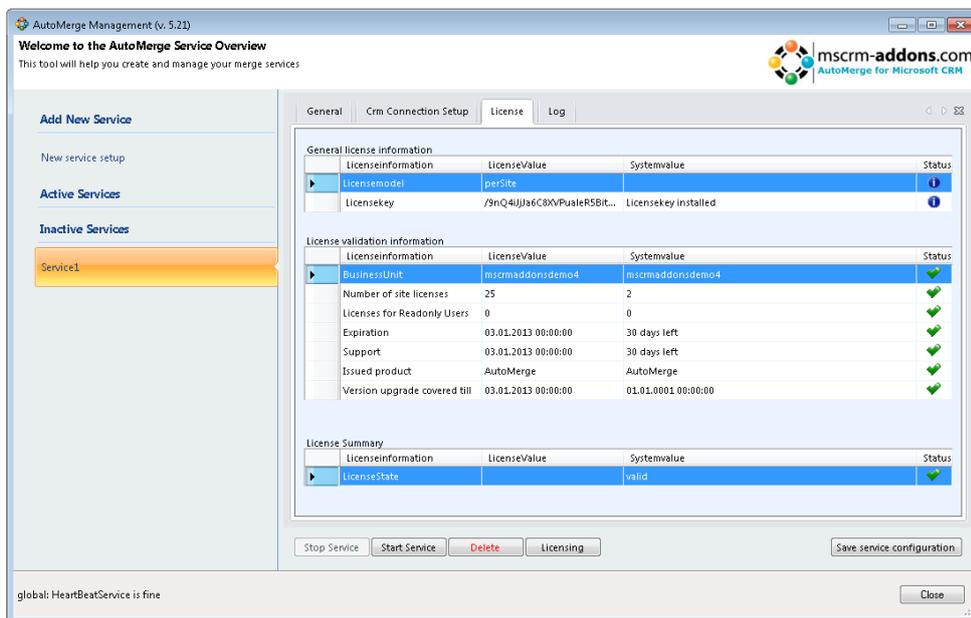
Search for "AutoMergeServiceConfiguration" in the Windows start-menu and run this application. This is only necessary if you want to use AutoMerge for CRM Online.



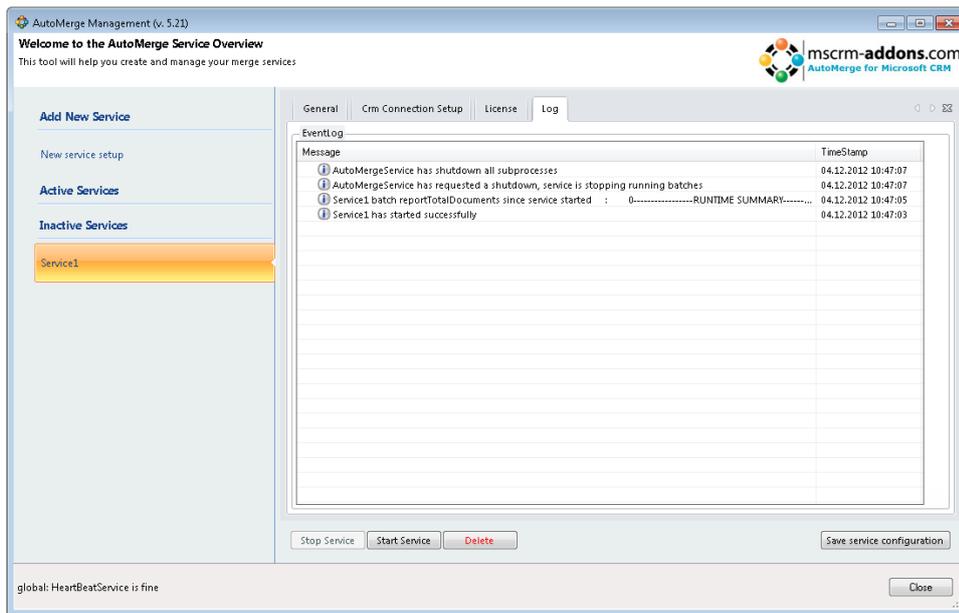
Within the "General"-tab, you are able to put a name for your service and to specify the logfile-path. You are also able to activate debugging if there is a problem with your service.



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



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

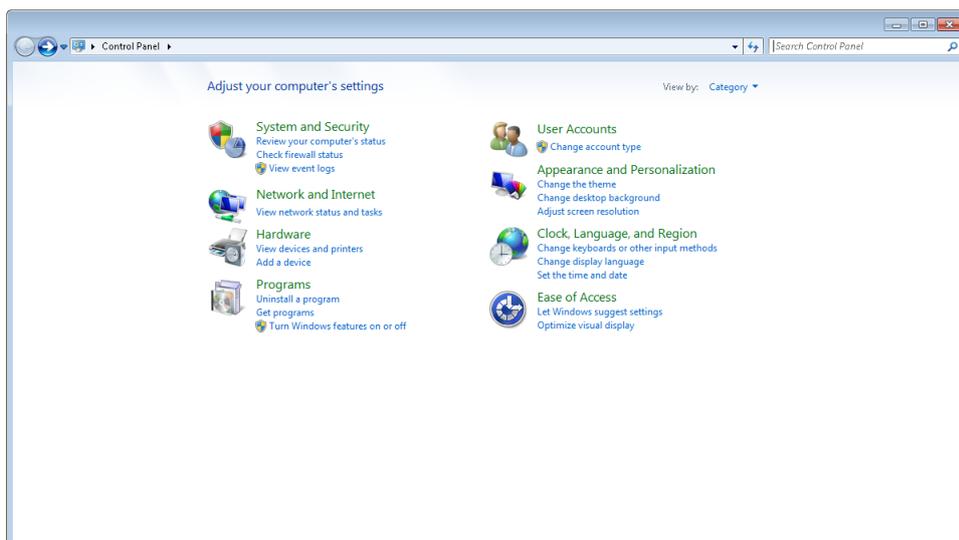


In the "Log"-tab, you are able to see the latest events.

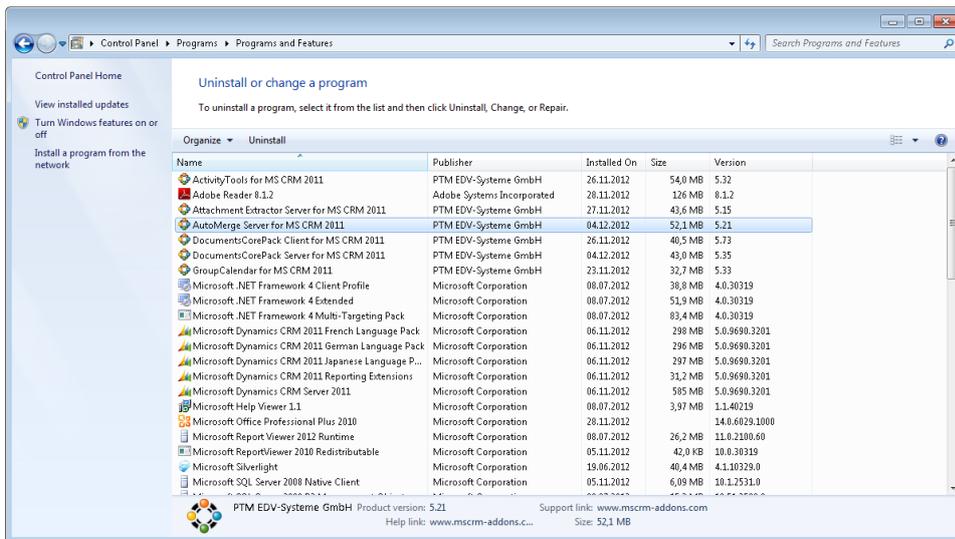
## 5 Upgrade

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 "[7 Configuration](#)". **The configuration is necessary to upgrade AutoMerge properly!**

## 6 Uninstall



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

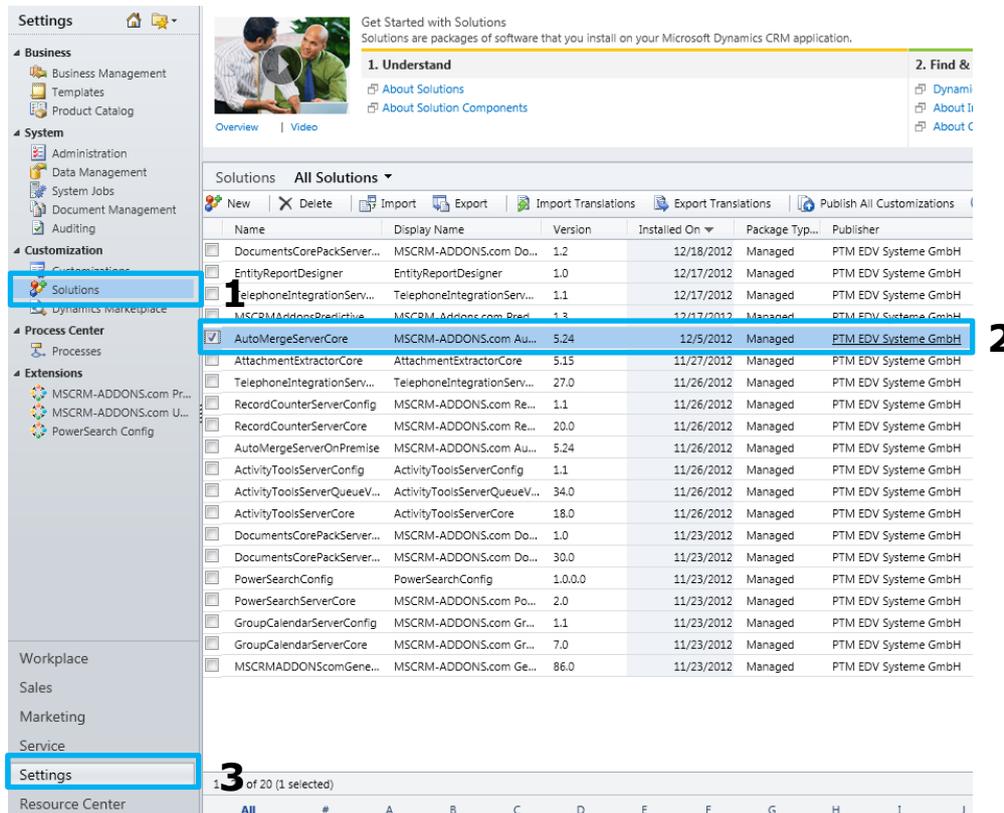


Select AutoMerge and click “Uninstall” within the right-mouseclick-menu. Follow the setup to uninstall AutoMerge.

## 7 Configuration

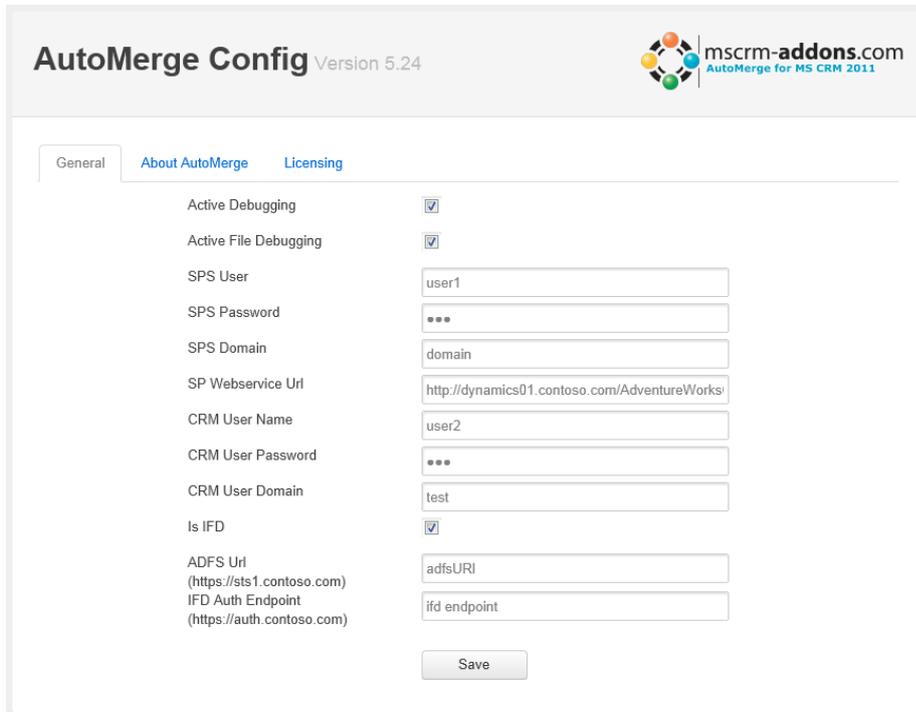
The AutoMerge for MS CRM 2011 configuration does necessary settings in CRM. It also allows to specify basic settings and to install the license key.

To start the configuration open CRM and navigate to “Settings” [1] and then to → “Solutions” [2].



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

## 7.1 "General" - tab



**AutoMerge Config** Version 5.24

mscrm-addons.com  
AutoMerge for MS CRM 2011

General About AutoMerge Licensing

Active Debugging

Active File Debugging

SPS User

SPS Password

SPS Domain

SP Webservice Url

CRM User Name

CRM User Password

CRM User Domain

Is IFD

ADFS Uri  
(https://sts1.contoso.com)

IFD Auth Endpoint  
(https://auth.contoso.com)

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.

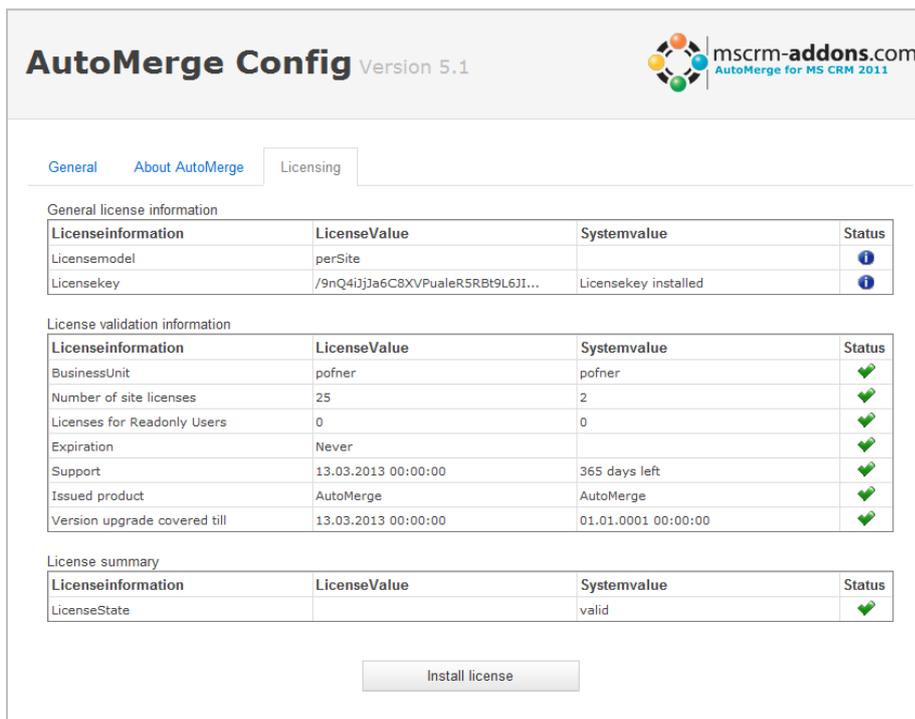
**"Save"** - button: Use this button to save your settings.

## 7.2 “About AutoMerge” – tab



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

## 7.3 “Licensing” – tab



This tab is important for the following two reasons:

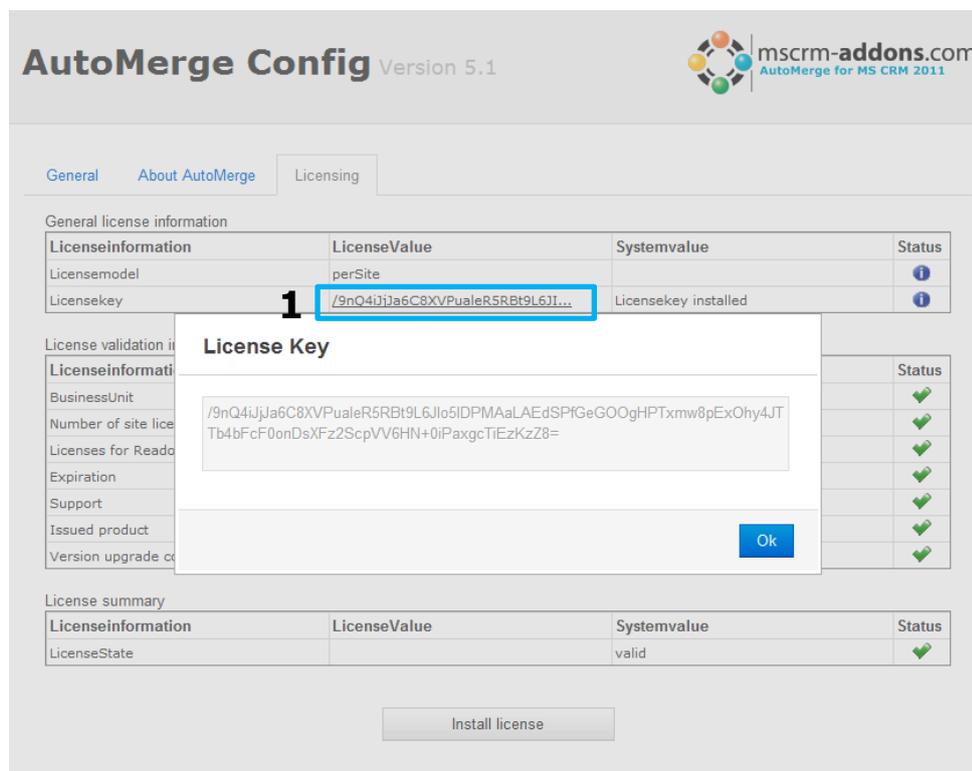
### 7.3.1 Show license Info

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.



The screenshot shows the 'AutoMerge Config Version 5.1' interface. The 'Licensing' tab is active. A table titled 'General license information' displays license details. A blue box highlights the 'Licensekey' value, with a '1' next to it. A 'License Key' dialog box is open, showing the full license key: `/9nQ4ijJa6C8XVPualeR5RBt9L6Jlo5IDPMAaLAEdSPfGeGOOgHPTxmw8pExOhy4JTb4bFcF0onDsXFz2ScpVV6HN+0iPaxgcTIEzKzZ8=`. The dialog has an 'Ok' button. Below the dialog, a 'License summary' table shows the 'LicenseState' as 'valid' with a green checkmark. An 'Install license' button is at the bottom.

Licenseinformation	LicenseValue	Systemvalue	Status
Licensemodel	perSite		
Licensekey	/9nQ4ijJa6C8XVPualeR5RBt9L6Jl...	Licensekey installed	

Licenseinformation	LicenseValue	Systemvalue	Status
LicenseState		valid	

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 click 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 and 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](mailto: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:	<b>/9nQ4ijJJa6C8XVPualeR7WQTdgSQqMjNIRBCDStfvyuWjA31Wy8YZV4drqjuYM0LGc/2uZq5Fkp9HZvdvj4rutjUQwEit6YnFzutoxg=</b>

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](http://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](mailto: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/mscramaddons](http://www.twitter.com/mscramaddons)

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 click 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 and paste it into the following box:  

`/9nQ4iJjJa6C8XVPualeR7WQTdgSQqMjNIRBCDStlfyyuYWjA31WY8YZV4drqjluY  
M0LGc/2uZq5Fkp9HZvdyj4rutjUQwEit6YnFzutoxg=`
2. To finish the installation please hit the "Install"-button.

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 [support@mscrm-addons.com](mailto:support@mscrm-addons.com)  
or visit our blog  
<http://blogs.mscrm-addons.com>

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[www.mscrm-addons.com](http://www.mscrm-addons.com)