



Installation and Configuration Manual

Activities Summary

for Microsoft Dynamics CRM 2011

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What's in this manual

This manual provides guidelines for installing and setting up DPS Activities Summary module for Microsoft Dynamics CRM version 2011. It lists system requirements, contains a step-by-step guide through the installation process, gives tips on troubleshooting and describes post installation configuration procedures.

The manual is divided into the following sections:

➤ **Introduction**

In this chapter you can find basic information about Activities Summary, its licensing and compatibility with Dynamics CRM.

➤ **Installation**

In this chapter you can find information about system requirements, how to install and uninstall Activities Summary. It also contains information about post installation configuration procedures.

Introduction

This section contains a list of the supported databases and operating environments for Activities Summary module, as well as the recommended system requirements for servers and client computers.

Activities Summary Overview

Activities Summary is a complete view of customer history. It allows you to view completed, cancelled and open activities in one screen. Viewing all relevant information in one place helps to perform daily tasks even more quickly and efficiently. Setup preferences are kept per user to allow each person to display information according to their needs.

Activities Summary view is available for the following entities: account, contact, leads, case, contract, opportunity, quote, order and invoice.

Product Licensing

This product is licensed per Organization.

Evaluation Licenses

You can request a 14 day evaluation license that will allow testing our product on your production company. Visit our web site at <http://www.dynamics-pros.com/Products/RequestEvaluationLicenses/tabid/252/Default.aspx> and fill a "Request Evaluation Licenses". You will need to provide your CRM organization name in order to receive a valid registration key by email.

Compatibility

Activities Summary is compatible with Microsoft Dynamics CRM version 2011, and all installation types (on-premises, live, hosted).

Installation Instruction

In this chapter you can find information about system requirements, how to install and uninstall Activities Summary on your Microsoft Dynamics CRM server. It also contains information about post installation configuration procedures.

System Requirements

This chapter contains a list of the supported databases and operating systems, as well as components that must be installed on a server before you can start Activities Summary installation process.

➤ **Supported client operating systems**

Windows 8
Windows 7
Windows Vista
Microsoft Windows XP SP3

➤ **Supported browsers***

Internet Explorer 8.0 or newer (Windows)
Latest version of Chrome (Windows)
Latest version of Firefox (Windows)
Latest version of Safari (Mac OSX)

**) Make sure you that have disabled popup blocker in your browser for the CRM domain (please refer to your browser documentation).*

➤ **Required components**

Silverlight 4.0 (it should install automatically, but can be also installed manually from <http://www.microsoft.com/getsilverlight>).

Installation

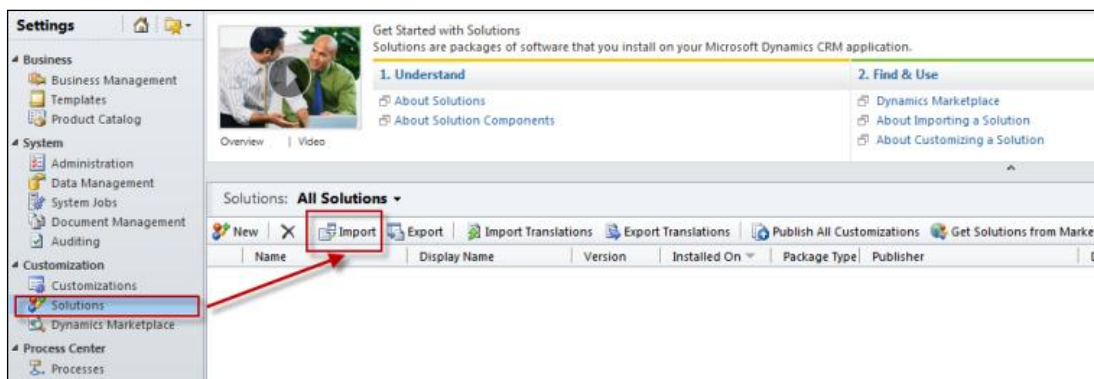
To use Activities Summary no client or server side installation is needed. Product is packaged as managed solution so you only need to import two compressed (zip) files into you Dynamics CRM deployment. You must have administrator privileges in Dynamics CRM in order to add this solution.

1. Obtain required files

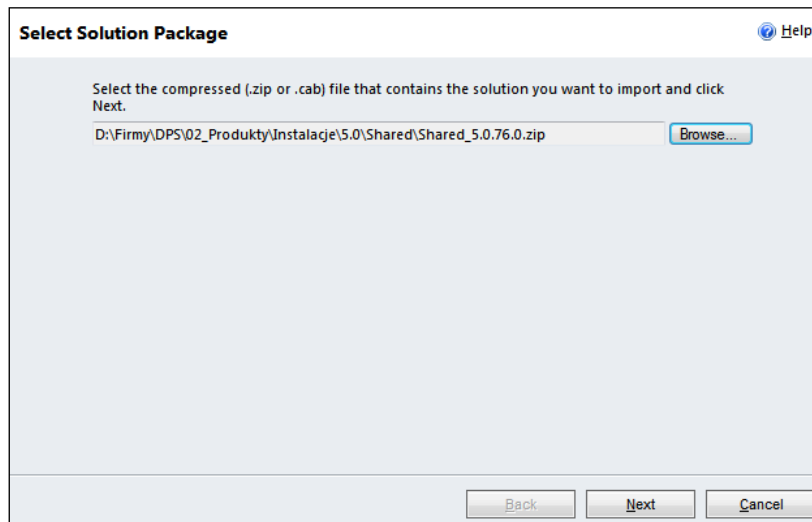
- a. Log in to <http://downloads.dynamics-pros.com>
- b. Click on "Download trial versions of our products link" (login will be required) and download the latest version of the Activities Summary 2011 (ActivitiesSummary_2011.zip).
- c. Unzip ActivitiesSummary_2011.zip. It contains two more zip files (these are the files that you will be importing into Dynamics CRM 2011):
 - i. Shared_5.0.xxxx.x.zip (import first)
 - ii. ActivitiesSummary_5.0.xxxxx.x.zip (import second)

2. Import managed Solution

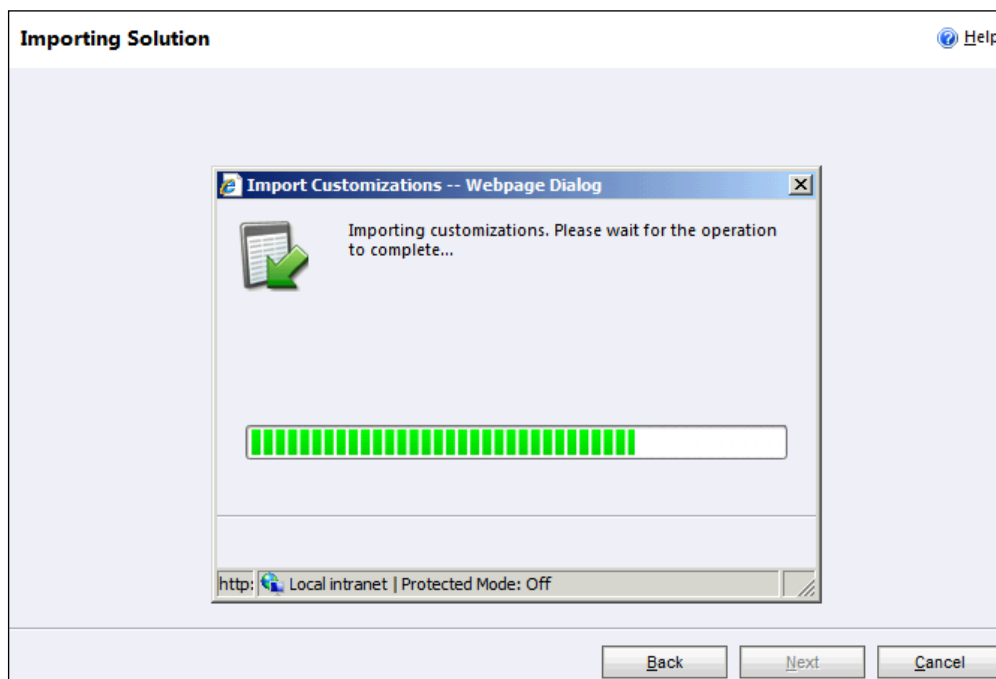
- a. Login to Dynamics CRM and go to Solutions in Settings Area. Click "Import" option in the toolbar.



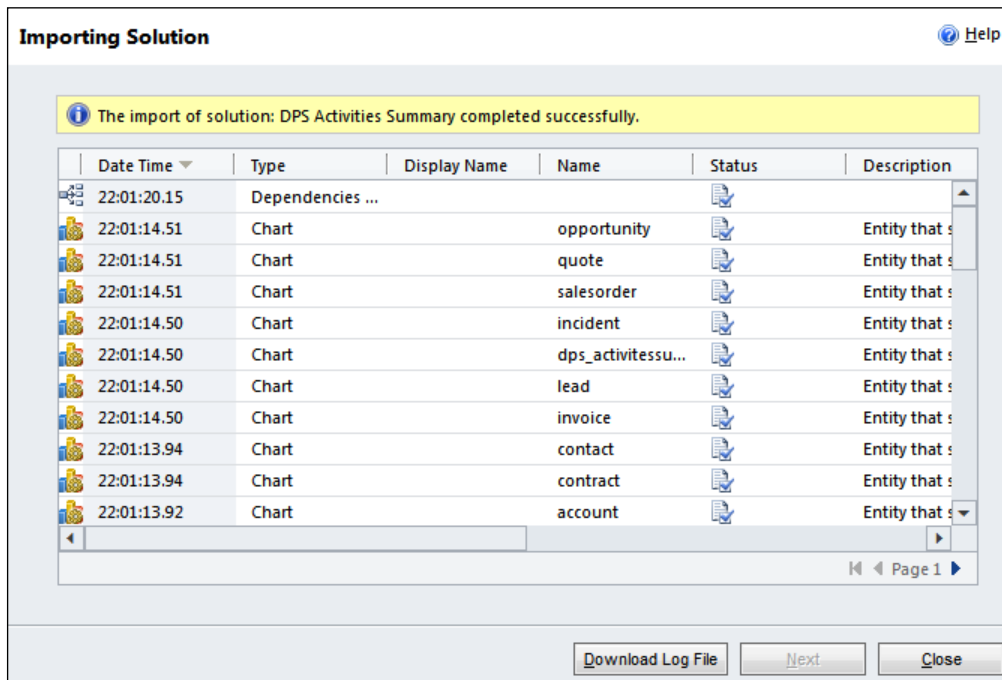
- b. In the Select Solution Package screen select the **Shared_5.xxxxx.x.zip** file you have downloaded in previous step. Click "Next".



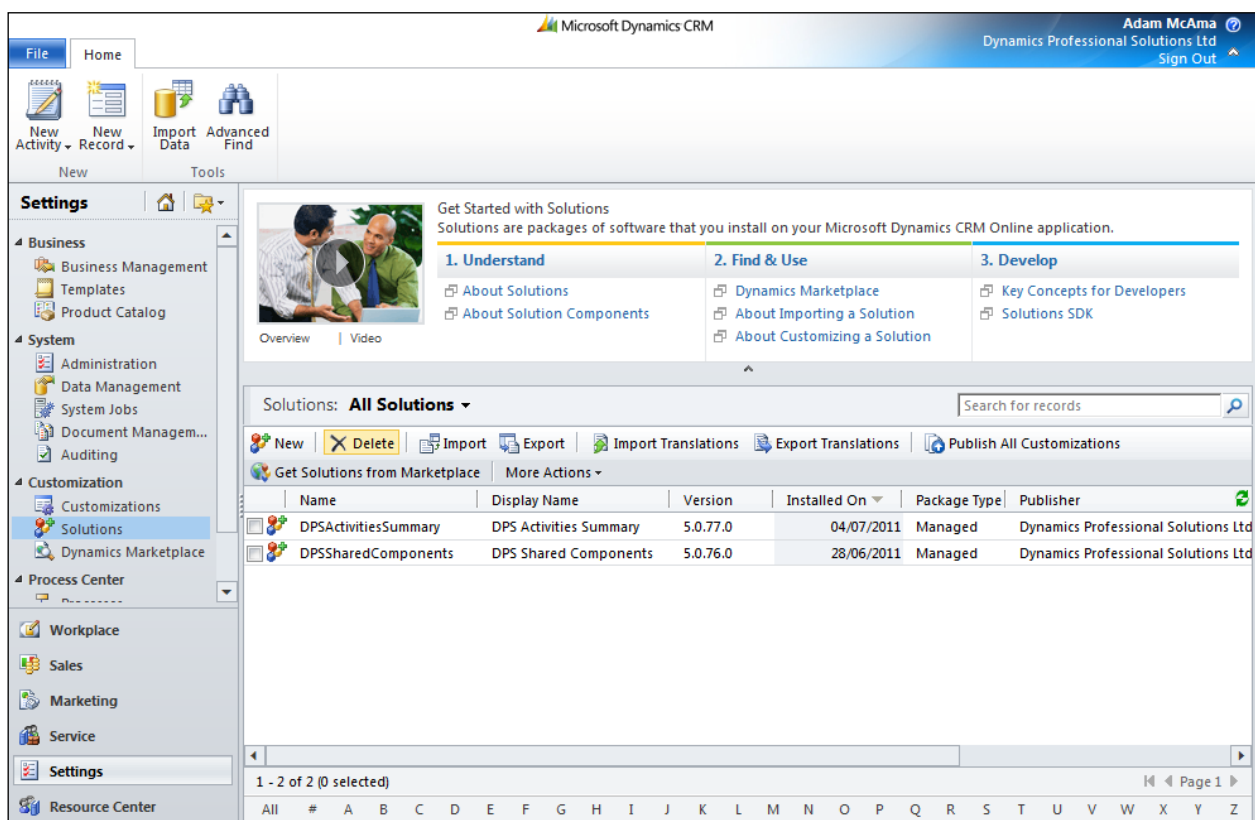
- c. Importing Solution screen will open and progress can be monitored. It may take some time to complete the import.



- d. When system finishes review that process was completed successfully. At this point you can also download a log file.



- e. Repeat steps to import **ActivitiesSummary_5.0.xx.0.zip** file.
- f. After that step you should have 2 solutions from Dynamics Professional Solutions Ltd Publisher.
- g.

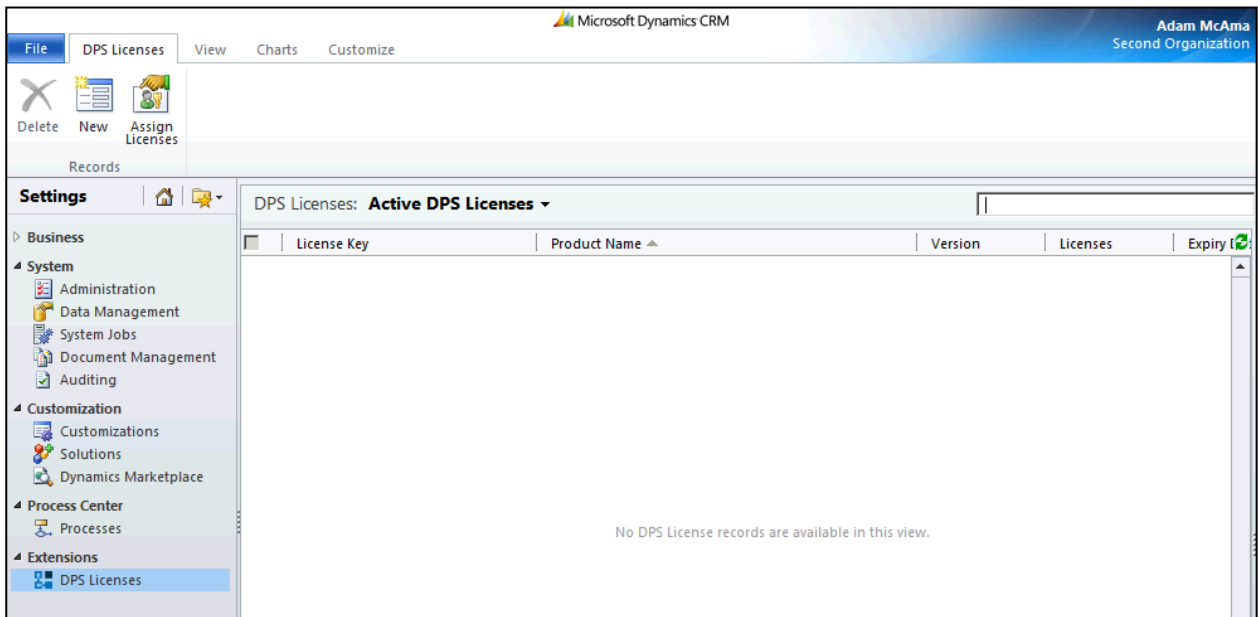


Post Installation Configuration

If you have purchased Activities Summary product follow below steps to register your product. Follow the same steps to evaluate our product.

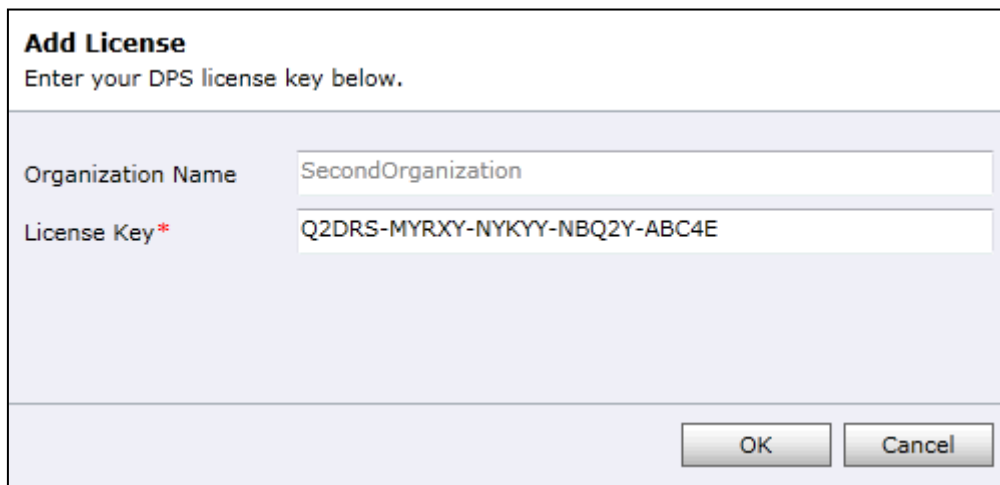
1. Login to Dynamics CRM and access Settings Area.

Select DPS Licenses option from Extensions section.



2. Select New from Ribbon to add Dynamics Professional License.

At the Add License screen verify that your Organization Name is displayed correctly and enter Registration Key that has been send to you.



The 'Add License' dialog box prompts the user to 'Enter your DPS license key below.' It contains two input fields: 'Organization Name' with the value 'SecondOrganization' and 'License Key*' with the value 'Q2DRS-MYRXY-NYKYY-NBQ2Y-ABC4E'. At the bottom right, there are 'OK' and 'Cancel' buttons.

3. Verify Licences

After entering a valid set of license keys verify information displayed in Dynamics Professional Solutions Ltd

“Licenses Screen”. You should see version and licence number for each product that you own. It may be more than one line for a single product.

The screenshot shows the Microsoft Dynamics CRM interface for the 'DPS Licenses' entity. The top navigation bar includes 'File', 'DPS Licenses', 'View', 'Charts', and 'Customize'. The user is identified as 'Adam McAma' from 'Dynamics Professional Solutions Ltd'. The main area displays a table of 'Active DPS Licenses' with the following data:

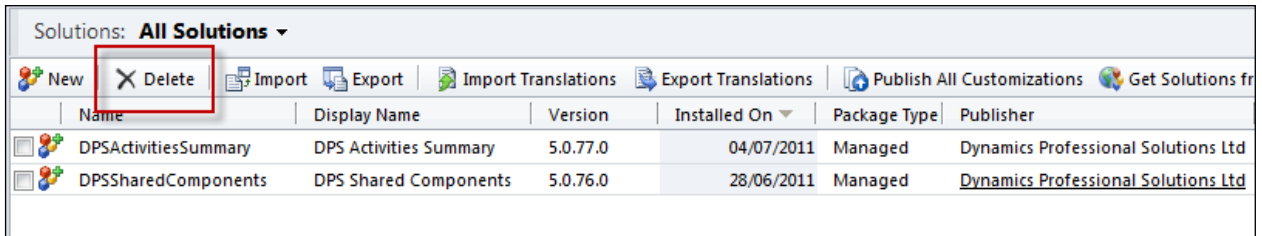
License Key	Product Name	Version	Licenses	Expiry Date
SBFLT-763XM-6SM3S-WK4GN-G3B76	Activities Summary	5.0		18/07/2018

The interface also features a left-hand navigation pane with categories like Business, System, Customization, and Process Center. A status bar at the bottom indicates '1 - 1 of 1 (1 selected)' and provides a keyboard navigation menu.

Uninstall

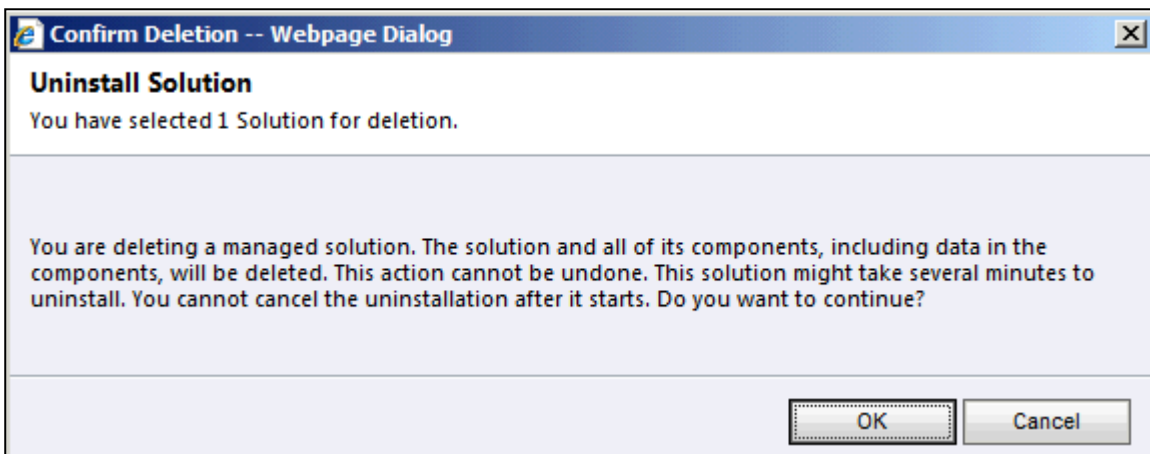
1. Login to Dynamics CRM and go to Solutions in Settings Area.

Mark solution you wish to uninstall and select delete option form Ribbon.



2. Confirm Deletion

Complete deletion screen will open. Use OK button to complete.



Support

If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

<http://support.dynamics-pros.com>



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