Activities Summary

For Dynamics CRM 2013

Installation Guide

Copyright   Copyright © 2013 Dynamics Professional Solutions. All rights reserved. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Dynamics Professional Solutions.

Warranty disclaimer   Dynamics Professional Solutions disclaims any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose

Limitation of liability The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as any type of commitment by Dynamics Professional Solutions. Dynamics Professional Solutions assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual.

License agreement   END USER SOFTWARE LICENSE AGREEMENT - PLEASE READ THIS AGREEMENT CAREFULLY

By installing, copying or otherwise using the SOFTWARE, you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA, the LICENSOR is unwilling to license the SOFTWARE to you. In such event, you may not use or copy the SOFTWARE, and you should promptly contact the LICENSOR for instructions on return of the product.

THIS IS A LICENSE AGREEMENT ("AGREEMENT") BETWEEN DYNAMICS PROFESSIONAL SOLUTIONS LTD ("LICENSOR"), AND YOU ("LICENSEE" OR "YOU") FOR USE OF THE ACCOMPANYING SOFTWARE AND USER DOCUMENTATION (THE "SOFTWARE"). LICENSOR IS WILLING TO GRANT YOU THE LICENSE TO USE THE SOFTWARE ACCORDING ONLY ON THE CONDITION THAT YOU ACCEPTS ALL TERMS IN THIS AGREEMENT.

The SOFTWARE includes computer software, the associated media, any printed materials, and any "online" or electronic documentation.

1. COPYRIGHT. The Software is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. All title and copyrights in and to the Software and any printed or electronic materials accompanying the Software are owned by the Licensor or its suppliers.

2. GRANT OF LICENSE. This EULA grants you the following rights: Software Installation and Use.

3. RESTRICTIONS. You may not delete or obscure any copyright, trademark or other proprietary notice on the Software or accompanying printed materials. You may not decompile, modify, reverse engineer, disassemble or otherwise reproduce the Software. You may not copy, rent, lease, sublicense, distribute, publicly display the Software, create derivative works based on the Software or otherwise commercially exploit the Software. You may not "hack," "crack," or otherwise attempt to circumvent any copy protection, access control, or license-enforcement mechanisms associated with or related to the Software. You may not electronically transmit the Software from one computer, console or other platform to another or over a network. You may not use any backup or archival copy of the Software for any purpose other than to replace the original copy in the event it's destroyed or becomes defective.

4. TERMINATION. This Agreement is effective until terminated. You may terminate this Agreement at any time by destroying the Software. This Agreement will terminate automatically without notice from Licensor if you fail to comply with any provision of this Agreement. Upon notice of termination, you agree to promptly destroy all of your copies of the Software. All provisions of this Agreement as to warranties, limitation of liability, remedies and damages will survive termination.

5. LIMITED WARRANTY

THIS SOFTWARE IS LICENSED "AS IS." THE COMPANY MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY OF FITNESS FOR A PARTICULAR PURPOSE, REGARDING THE SOFTWARE. THE COMPANY DOES NOT WARRANT, GUARANTEE OR MAKE ANY REPRESENTATIONS REGARDING THE USE OR THE RESULTS OF THE USE OF THE SOFTWARE IN TERMS OF ITS CORRECTNESS, ACCURACY, RELIABILITY, CURRENTNESS OR OTHERWISE. THE ENTIRE RISK AS TO RESULTS AND PERFORMANCE OF THE SOFTWARE, AND ITS INTERACTION WITH OTHER EQUIPMENT OR SOFTWARE OWNED OR USED BY YOU, IS ASSUMED BY YOU. SOME TERRITORIES DO NOT PERMIT THE EXCLUSION OF IMPLIED WARRANTIES. THE ABOVE EXCLUSION MAY NOT APPLY TO YOU.

IN NO EVENT WILL THE COMPANY, AND ITS DIRECTORS, OFFICERS OR AGENTS (COLLECTIVELY THE COMPANY) BE LIABLE TO YOU FOR ANY CONSEQUENTIAL, INCIDENTAL OR INDIRECT DAMAGES (INCLUDING DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, AND THE LIKE) ARISING OUT OF THE USE OR THE INABILITY TO USE THE SOFTWARE EVEN IF THE COMPANY INC. HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. BECAUSE SOME STATES DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY FOR CONSEQUENTIAL DAMAGES, THE ABOVE LIMITATIONS MAY NOT APPLY TO YOU.

Table Of Contents

What's In This Manual

This manual provides guidelines for installing and configuring the Activities Summary add-on for Microsoft Dynamics CRM 2013. It specifies system requirements, contains step-by-step installation guide, 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 on your Microsoft Dynamics CRM server. 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 https://www.dynamics-pros.com/evaluation-license-request/ 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 2013, and all installation types (on-premises live, etc).

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 (64-bit and 32-bit versions)
Windows 7 (64-bit and 32-bit versions)
Windows Vista SP2 (6-bit and 32-bit versions)

> ➢ **Supported browsers***

Internet Explorer 10 (Windows)
Internet Explorer 9 (Windows)
Internet Explorer 8 (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 5.0 (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 your Dynamics CRM deployment. You must have administrator privileges in the Dynamics CRM in order to install this solution.

1. **Obtain required files**

    a. Go 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 2013 (ActivitiesSummary_2013.zip).

    c. Unzip ActivitiesSummary_2013.zip. It contains two more zip files (these are the files that you will be importing into Dynamics CRM 2013):

        i. Shared_6.0.xxxx.x.zip (import first)

        ii. ActivitiesSummary_6.0.xxxxx.x.zip (import second)
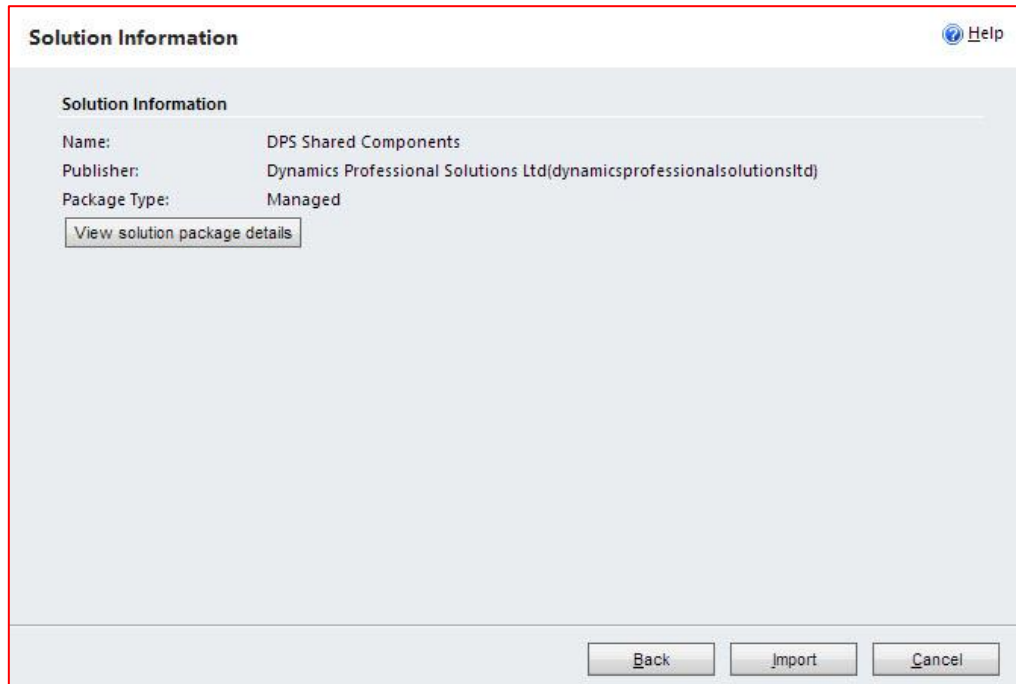
2. **Import managed solution**

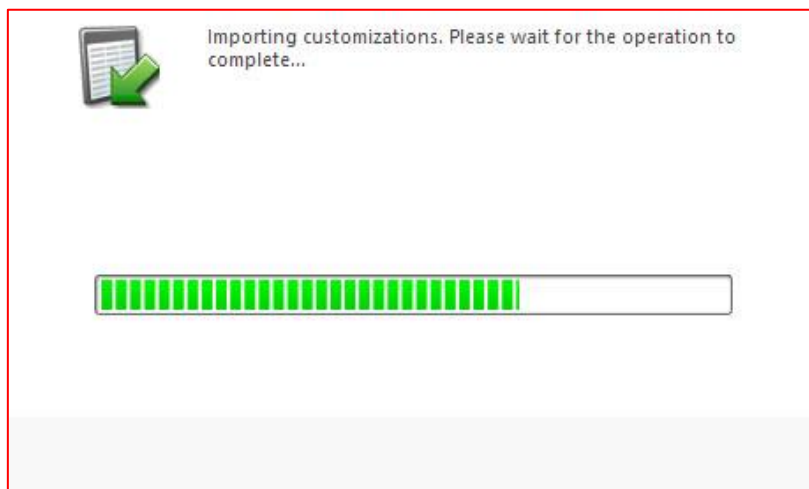   a. Login to your Dynamics CRM and go to Solutions in the Settings Area. Click "Import" option in the toolbar.
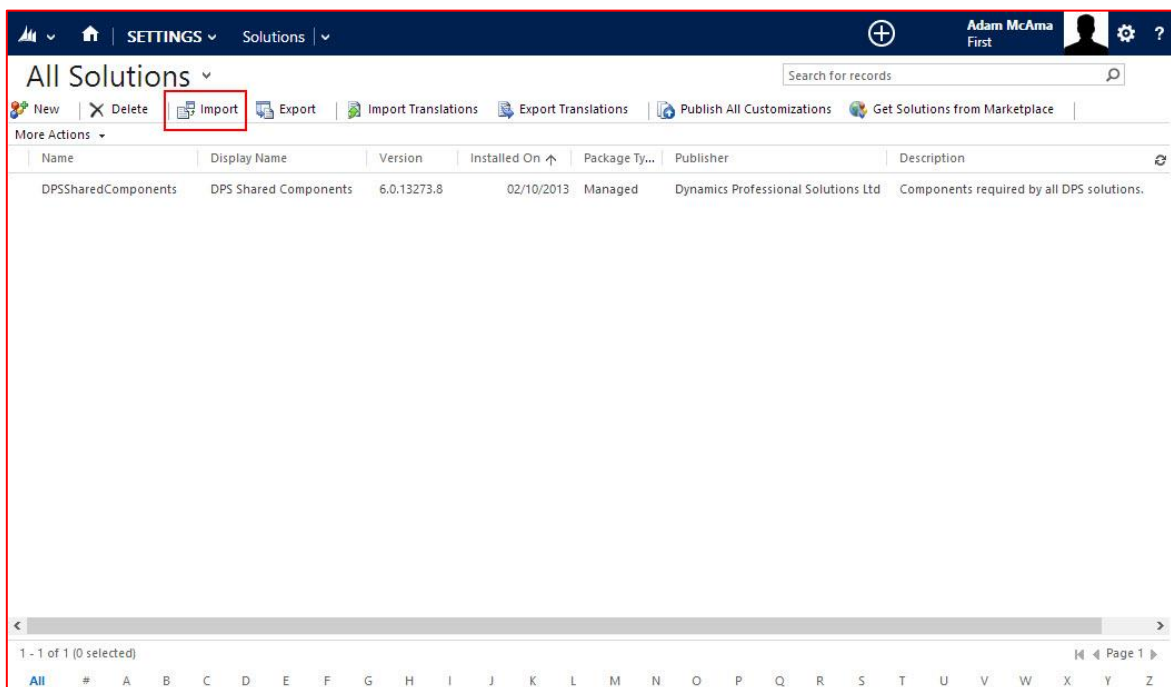
b. In the Select Solution Package screen select the **Shared_6.0.xxxx.x.zip** file you have downloaded in the previous step. Click "Next".


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.
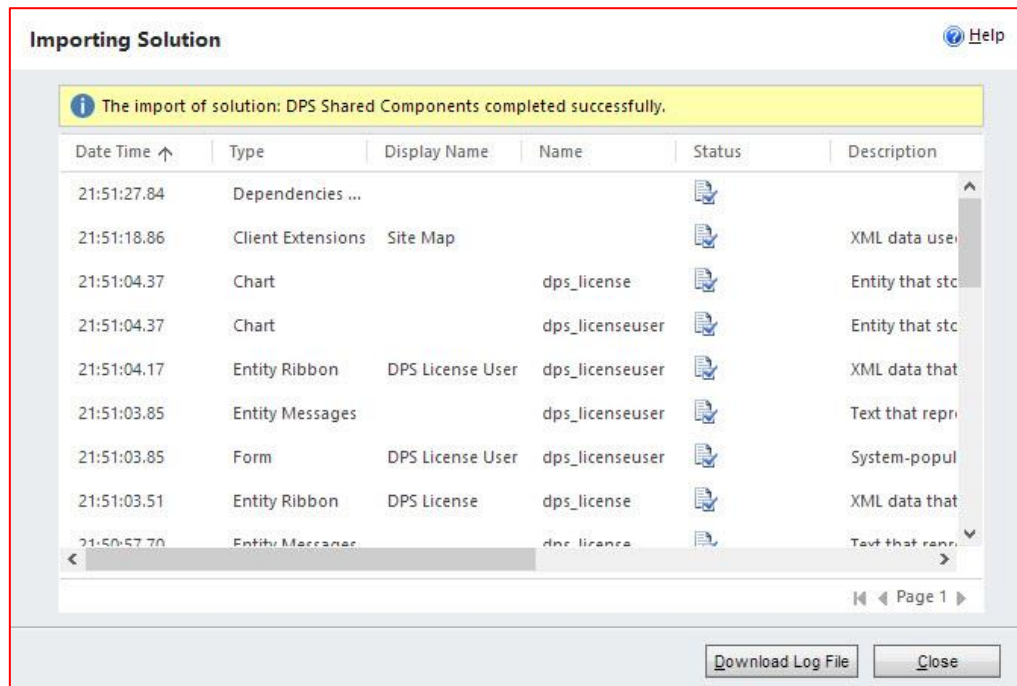
e. Repeat above steps and import **ActivitiesSummary_6.0.xxxxx.x.zip** file.

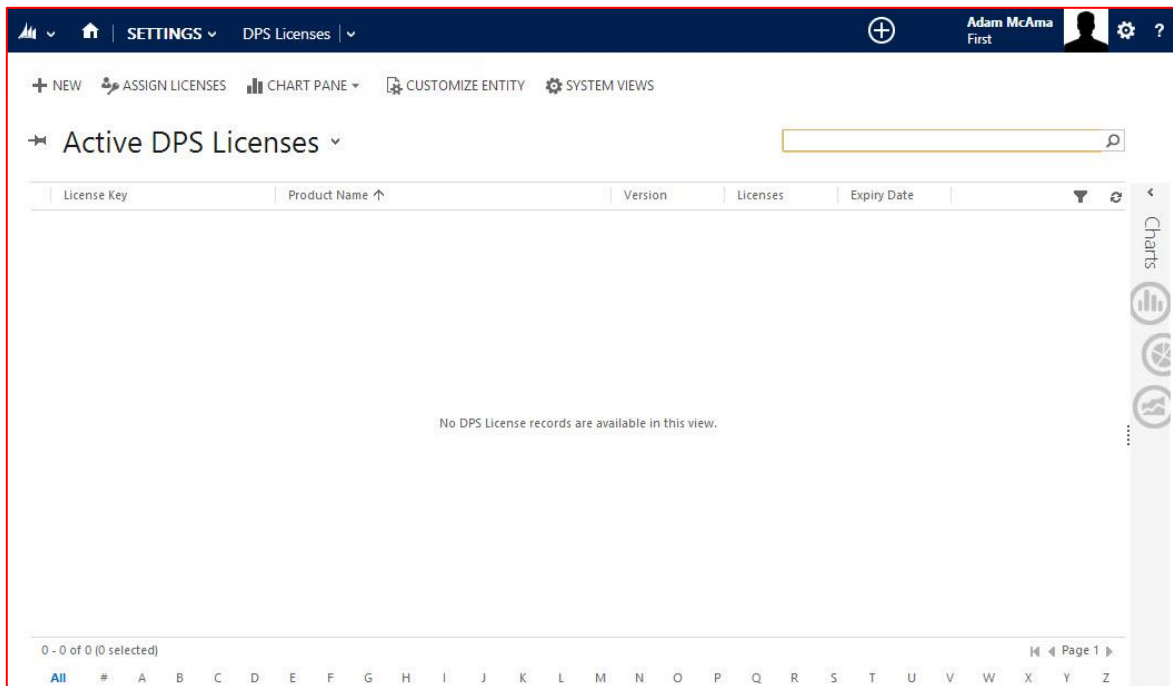f. After that step you should have two managed solutions from Dynamics Professional Solutions Ltd publisher.
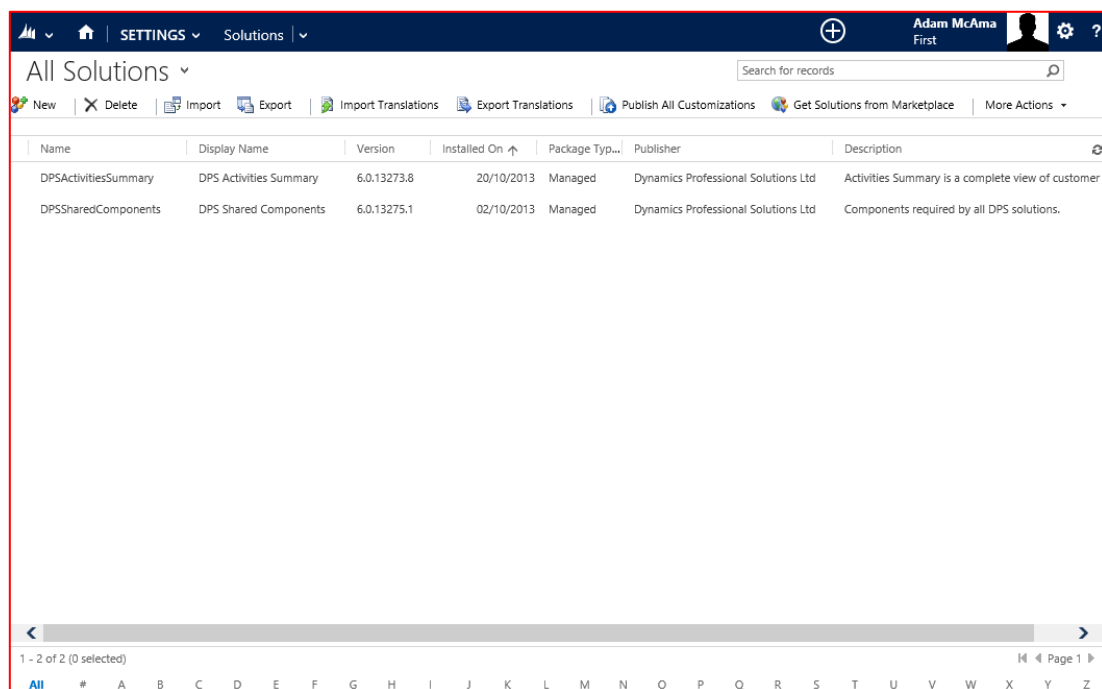
If you have purchased Activities Summary product follow below steps to register your product. Follow the same steps to evaluate our product.

1. **Login to Dynamics CRM and access Settings Area.**

   Select DPS Licenses option from the Extensions section.

2. **Select New from Command Bar to add Dynamics Professional License.**

   In the Add License screen verify that your Organization Name is displayed correctly and enter the license key that was emailed to you.
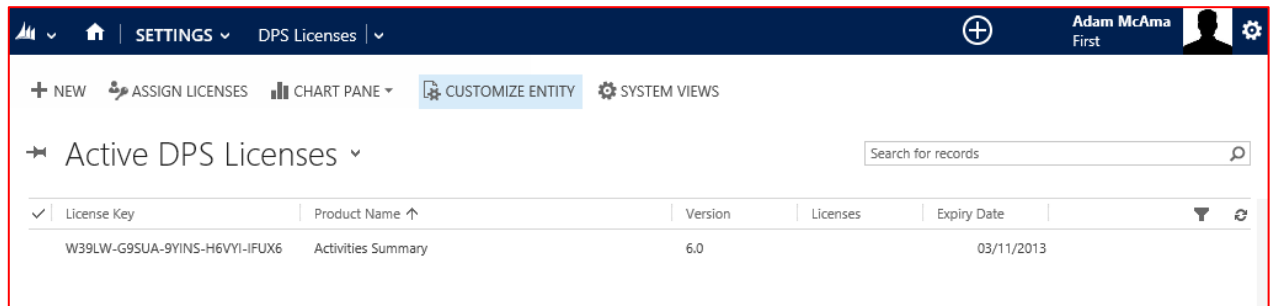
3. **Verify Licences**

    After entering a valid set of license keys verify information displayed in "Licenses" screen. You should see version and licence number for each product that you own.

Permissions

After installing Activities Summary solution two new security roles will be available in your Organization.

- DPS Activities Summary Administrator

- DPS Activities Summary User

Assign appropriate roles to your Dynamics CRM users or amend their existing security roles by adding privileges included in ours.


Security Role: DPS Activities Summary Administrator — Working on solution: Default Solution

Tabs: Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Custom Entities

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
DPS Activities Summary Settings	●	●	●	●	●	●	●	●
DPS License	●	●	●	●	●	●		
DPS License User	●	●	●	●	●	●		
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Wall View	○	○	○	○	○	○		

Security Role: DPS Activities Summary User — Working on solution: Default Solution

Tabs: Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Custom Entities

| Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
DPS Activities Summary Settings	●	●	●	●	○	○	○	○
DPS License	○	●	○	○	○	○		
DPS License User	○	●	○	○	○	○		
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Wall View	○	○	○	○	○	○		

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

   Mark the solution you wish to uninstall and click delete button. Note that you will have to delete DPS Activities Summary first. You will not be able to delete DPS Shared Components if there is at least one DPS product still installed.
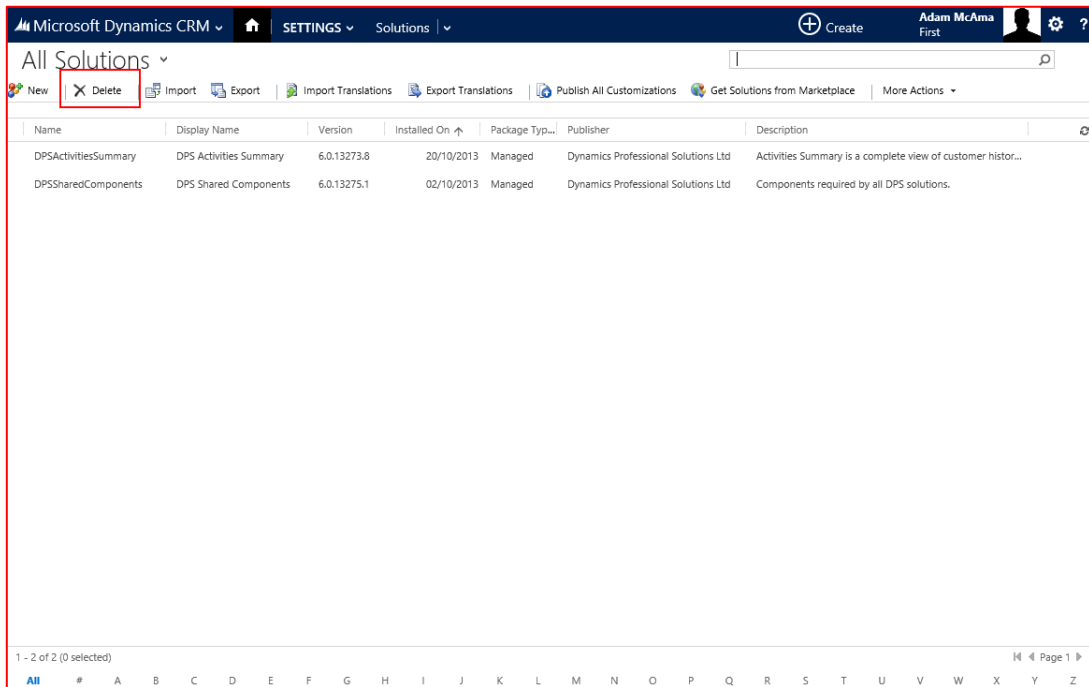
2. **Confirm Deletion**

Confirm deletion screen will open. Click OK button to delete the solution.
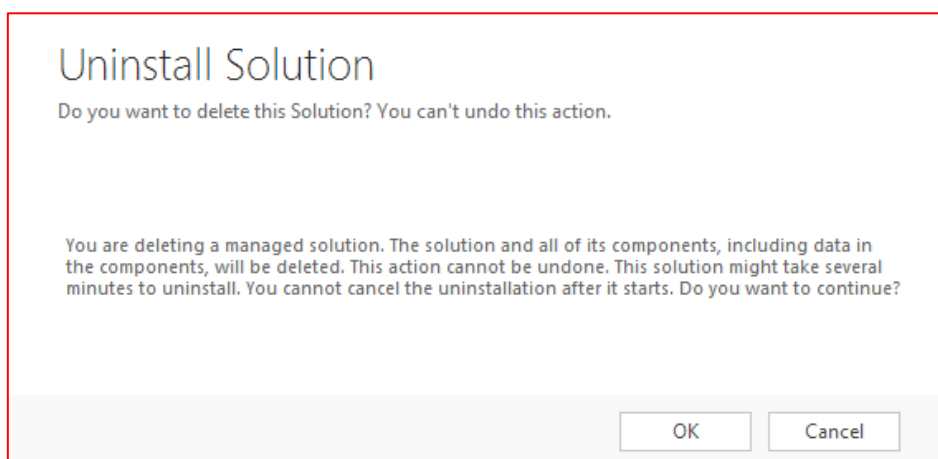
Support

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.

Support:	http://www.dynamics-pros.com/support
Download:	http://www.dynamics-pros.com/downloads

DYNAMICS
PROFESSIONAL SOLUTIONS