

Activities Summary

For Dynamics CRM 2013

Installation Guide

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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.

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).

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).

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.o.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.

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New 🗙 Delete	Import 🖏 Export 🛛 🐊	Import Translat	ions 🛛 🔯 Export Tra	nslations	Publish All Customizati	ons 🛛 🚳 Ge	t Solutions from	n Marketplace	6	
re Actions 👻	Diselas Nama			Dealerson Tax	Bole Balance		Descriptions			
Name	Display Name	Version	Installed On 🛧	Package Ty	Publisher		Description			
DPSSharedComponents	DPS Shared Components	6.0.13273.8	02/10/2013	Managed	Dynamics Professional S	olutions Ltd	Components	required by all	DPS solution	ns.

b. In the Select Solution Package screen select the **Shared_6.o.xxxx.x.zip** file you have downloaded in the previous step. Click "Next".

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Solution Informatio	on	
Name:	DPS Shared Components	
Publisher:	Dynamics Professional Solutions Ltd(dynamicsprofessionalsolutionsltd)	
Package Type:	Managed	

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

Importing customizations. Please wait for the operation to complete

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

1 The import o	f solution: DPS Shared	Components comp	leted successfully.		
Date Time 🛧	Туре	Display Name	Name	Status	Description
21:51:27.84	Dependencies			2	
21:51:18.86	Client Extensions	Site Map			XML data use
21:51:04.37	Chart		dps_license		Entity that stc
21:51:04.37	Chart		dps_licenseuser		Entity that stc
21:51:04.17	Entity Ribbon	DPS License User	dps_licenseuser		XML data that
21:51:03.85	Entity Messages		dps_licenseuser		Text that repr
21:51:03.85	Form	DPS License User	dps_licenseuser		System-popul
21:51:03.51	Entity Ribbon	DPS License	dps_license		XML data that
21·50·57 70 ≮	Entity Macroager		dne licanea	D.	Tavt that rank
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- e. Repeat above steps and import **ActivitiesSummary_6.o.xxxxx.x.zip** file.
- f. After that step you should have two managed solutions from Dynamics Professional Solutions Ltd publisher.

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New 🛛 🗙 Delete 🛛 📑	Import 🖫 Export 👼	Import Translation	ns 📑 Export Trans	ations 🛛 🚺 🖡	Publish All Customizations	📢 Get Sol	lutions from Marketplace	More Actions 👻
Name	Display Name	Version	Installed On 🛧	Package Typ	Publisher		Description	
DPSActivitiesSummary	DPS Activities Summary	6.0.13273.8	20/10/2013	Managed	Dynamics Professional S	olutions Ltd	Activities Summary is a	complete view of custo
DPSSharedComponents	DPS Shared Components	6.0.13275.1	02/10/2013	Managed	Dynamics Professional S	olutions Ltd	Components required	by all DPS solutions.

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.

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✤ Active DPS L	icenses ×						D
License Key	Product Name 🛧	Version	Licenses	Expiry Date		Ŧ	a <
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	No DPS Lice	ense records are available in this view.					e
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				c			

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.

Add License Enter your DPS license	e key below.		
Organization Name	First		
License Key*	52LGG-SY3UX-UYFI	HM-65SU9-FI97X	
		ок	Cancel
.0.13273.8		L	

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.

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🕂 NEW 🤌 ASSIGN LICENSES 👖	CHART PANE -	CUSTOMIZE ENTITY	SYSTEM VIEWS				
➡ Active DPS Licen	ses ×				Search for records		Q
✓ License Key	Product Name 🛧		Version	Licenses	Expiry Date		▼ 0
W39LW-G9SUA-9YINS-H6VYI-IFUX6	Activities Summary		6.0		03/11/2013		

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.

ile 🛃 🔛 Save and Close 🧣	h <u>A</u> ctions →								@ <u>H</u> e
Security Role: DPS Act	tivities Sumn	ary Adm	ninistrator						Working on solution: Default Solut
Details Core Records Marketing	g Sales Servi	ce Busine	ss Management	Service N	/anagement	Customization	Custom	Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
DPS Activities Summary Settings	٠	٠	٠	٠	٠	•	•	٠	
OPS License	•	•	•	•	•	•			
DPS License User	٠	•	•	•	•	•			
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ost Configuration	0	0	0	0	0	0			
ost Rule Configuration	0	0	0	0	0	0			
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Security Role: DPS Act	tivities Summ			Service N Delete	Management Append	Customization Append To	Custom Assign	Entities	
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Security Role: DPS Act etails Core Records Marketing ntity PS Activities Summary Settings IPS License PS License PS License User	tivities Summ a Sales Servi Create	ce Busines	ss Management Write	Delete	Append	Append To	Assign	Share	
Security Role: DPS Act etails Core Records Marketing ntity IPS Activities Summary Settings IPS License IPS License User liter	tivities Summ Sales Servi Create	Read	write	Delete	Append O O	Append To O O	Assign	Share O	
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Security Role: DPS Act	tivities Summ Sales Servi Create	Read	ss Management Write O O O O	Delete Delete	Append O O O O	Append To O O O O	Assign	Share O	@ 브

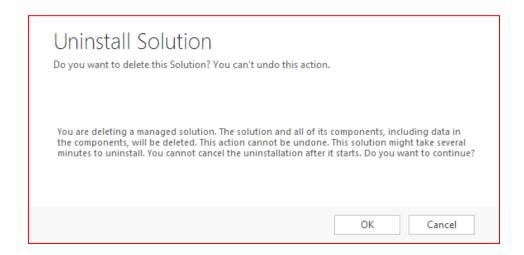
1. Login to Dynamics CRM and go to the Solutions in Settings Area.

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.

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All Solutions		_	_			Q
New 🛛 🗙 Delete 🛛	🖫 Import 🛛 🖓 Export 🛛	Minport Translations 🛛 🔍 Exp	ort Translations 👔 👔 Publish All	ustomizations 🔃 Get Solutions fi	rom Marketplace More Actions 👻	
Name	Display Name	Version Installed O	n 🛧 Package Typ Publisher	Desc	ription	
DPSActivitiesSummary	DPS Activities Summary	6.0.13273.8 20/	0/2013 Managed Dynamic	Professional Solutions Ltd Activ	ities Summary is a complete view of customer	histor
DPSSharedComponents	DPS Shared Components	6.0.13275.1 02/	10/2013 Managed Dynamic	Professional Solutions Ltd Com	ponents required by all DPS solutions.	
2 of 2 (0 selected)						I4 ◀ Page

2. Confirm Deletion

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



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/supportDownload:http://www.dynamics-pros.com/downloads

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