Installation and Configuration Manual

Copy Tool

for Microsoft Dynamics CRM 2011

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Table of Contents

What's in this manual

This manual provides guidelines for installing and setting up DPS Copy Tool product 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 Copy Tool, its licensing and compatibility with Dynamics CRM.

➢ **Installation**

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

Introduction

This section contains a list of the supported databases and operating environments for Copy Tool product, as well as the recommended system requirements for servers and client computers.

Copy Tool Overview

Copy Tool simplifies creation of sales documents in Dynamics CRM. Create a new sales document by copying information from an existing one. When using a copy function user can specify what information should be copied to new record.

Copy Tool is available for the following entities: Product, Opportunity, Quote, Order and Invoice

Product Licensing

Copy Tool 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

Copy Tool is compatible with Microsoft Dynamics CRM version 2011, 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 Copy Tool 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 Copy Tool 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 Copy Tool 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.
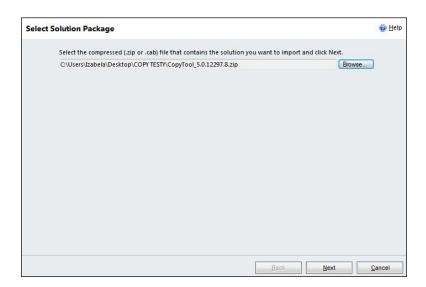
1. Obtain required files

    a. 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 Copy Tool 2011 (CopyTool_2011.zip).

    c. Unzip CopyTool_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. CopyTool_5.0.xxxxx.x.zip (import second)

2. Import managed Solution

    a. Login to Dynamics CRM and go to the Solutions in Settings Area. Click "Import" option in the toolbar.
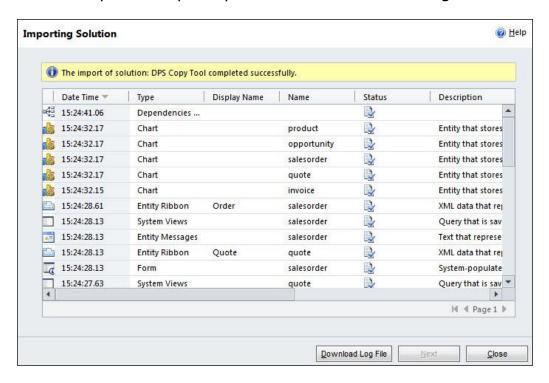
b. In the Select Solution Package screen select the **Shared_5.xxxxx.x.zip** file you have downloaded in previous step. Click "Next".
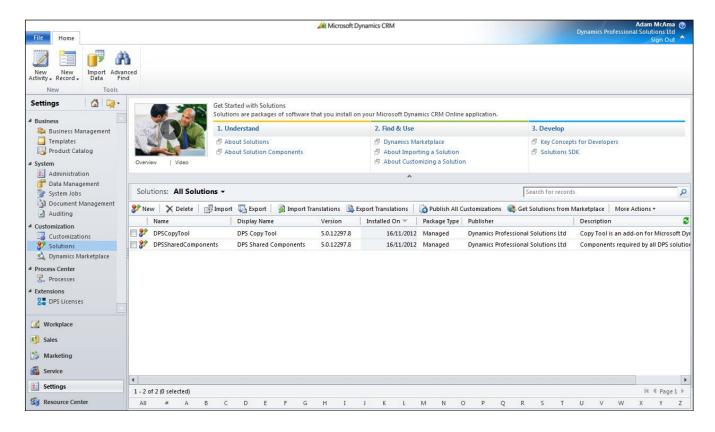

c. Importing Solution screen will open and progress can be monitored. It may take some time to complete the import.

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

e. Repeat above steps and import **CopyTool_5.xxxxx.x.zip** file.

f. After that step you should have 2 managed solutions from Dynamics Professional Solutions Ltd publisher.

Post Installation Configuration

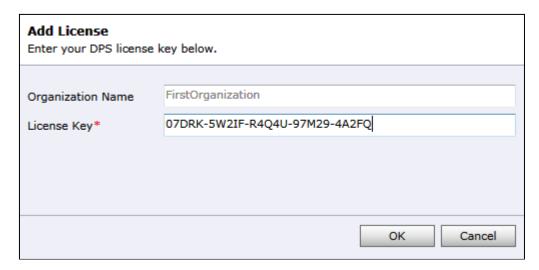If you have purchased Copy Tool product follow below steps to register your product.

1. **Login to Dynamics CRM and access Settings Area.**
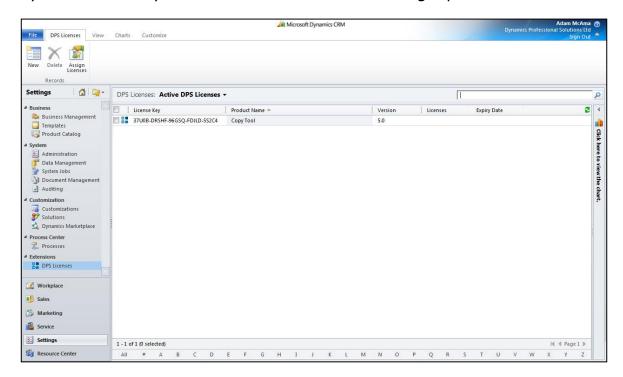   Select DPS Licenses option from the Extensions section.

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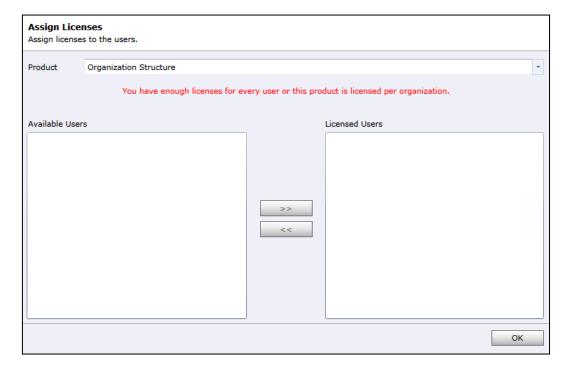
3. Verify Licences

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. It may be more than one line for a single product.

4. Assign Licenses to users

There is no need to assign Licenses to individual users as Copy Tool is licensed per Organization.
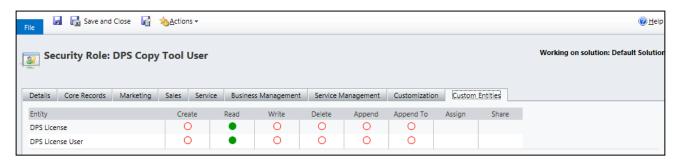
Copy Tool

Permissions

After installing Copt Tool solution two new security roles will be available in your Organization.

- DPS Copt Tool Administrator

- DPS Copt Tool User

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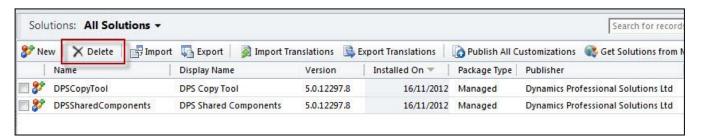
Uninstall

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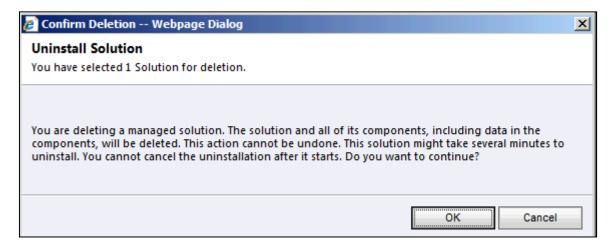
1. **Login to Dynamics CRM and go to the Solutions in Settings Area.**

   Mark the solution you wish to uninstall and click delete button. Note that you will have to delete DPS Copy Tool 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.

http://support.dynamics-pros.com

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