## Copy Tool For Dynamics CRM 2013

### Installation Guide

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This manual provides guidelines for installing and configuring the Copy Tool 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 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 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 Copy Tool module, 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 <u>https://www.dynamics-pros.com/evaluation-license-request/</u> 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 2013, and all installation types (onpremises live, etc). 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 (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 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. 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 Copy Tool 2013 (CopyTool 2013.zip).
- c. Unzip CopyTool\_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.zip (import first)
  - ii. CopyTool\_6.o.xxxxx.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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More Actions +	Import 🚮 Export 🛛	import iransiat	ions 📑 Export Tra	nsiations	Publish All Customizati	ons 🤹 Ge	t Solutions from Marketplace	
Name	Display Name	Version	Installed On 小	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	
<								
1 - 1 of 1 (0 selected)								😽 🔌 Page 1 🕨
All # A B	C D E F	G H I	I K I	M N	O P O	R S	T U V W	x y 7

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".

Solution Information	on	@ <u>H</u> elp
Solution Informatio	n	
Name:	DPS Shared Components	
Publisher:	Dynamics Professional Solutions Ltd(dynamicsprofessionalsolutionsltd)	
Package Type:	Managed	
View solution packs	age details	
	<u>B</u> ack Import	Cancel

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
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21-50-57 70 ≮	Entity Macronae		dne licanea	D.	Tavt that rank.
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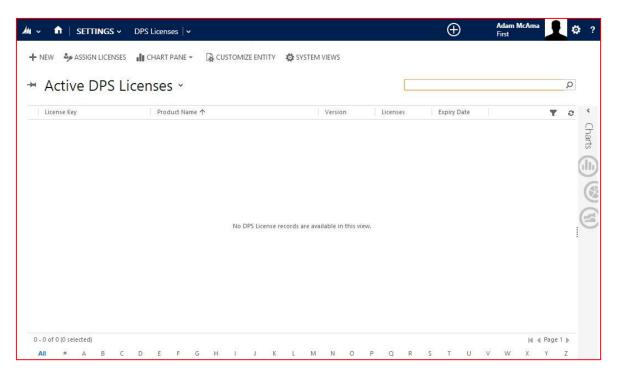
- e. Repeat above steps and import **CopyTool\_6.0.xxxxx.x.zip** file.
- f. After that step you should have two managed solutions from Dynamics Professional Solutions Ltd publisher.

Il Solutions	¥			Search for I	ecords		Q
1- 13	Import 🖫 Export   📓	Import Translations	Export Translations	Publish All Customizations	🚯 Get Solu	utions from Market;	place
e Actions 👻 Name	Display Name	Version	nstalled On 🛧 🛛 Package	Typ Publisher		Description	
DPSCopyTool	DPS Copy Tool	6.0.13276.1	24/10/2013 Manage		olutions Ltd	Copy Tool is an a	dd-on for Micros
DPSSharedComponents	DPS Shared Components	6.0.13275.1	02/10/2013 Manage			Components req	
				-			

If you have purchased Copy Tool 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.

Add License Enter your DPS license	e key below.				
Organization Name	First				
License Key*	52LGG-SY3UX-UYFHM-65SU9-FI97X				
			1		
.0.13273.8		ок	Cancel		

#### 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.

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~	License Key	Product Name 🖌	r	Version	Licenses	Expiry Date		T	C	<
~	02AMK-QNFL0-Q7R9J-WKGH4-4Z0JF	Copy Tool		6.0		07/11/2	013			Charts
										h

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

- DPS Copy Tool Administrator
- DPS Copy Tool User

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

File 🔀 🏹 Save and Close 🔓	<u> ∱A</u> ctions <del>+</del>								@ <u>H</u> elp ▼
Security Role: DPS Cop	oy Tool Admin	istrato	r						Working on solution: Default Solution
Details Core Records Marketing	Sales Service	Busine	ess Management	Service	Management	Customization	Custom	Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
DPS License	•	٠	•	•	٠	٠			
DPS License User	•	٠	•	•	٠	٠			
Filter	0	0	0	0	0	0	0	0	
Post Configuration	0	0	0	0	0	0			
Post Rule Configuration	0	0	0	0	0	0			
Profile Album	0	0	0	0	0	0	0	0	
Wall View	0	0	0	0	0	0			
File	<u>∕hA</u> ctions <del>-</del>								@ <u>H</u> elp ▼
Security Role: DPS Co	oy Tool User								Working on solution: Default Solution
Details Core Records Marketing	Sales Service	Busine	ess Management	Service	Management	Customization	Custom	Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
DPS License	0	٠	0	0	0	0			
DPS License User	0	٠	0	0	0	0			
Filter	0	0	0	0	0	0	0	0	
Post Configuration	0	0	0	0	0	0			
Post Rule Configuration	0	0	0	0	0	0			
Profile Album	0	0	0	0	0	0	0	0	
Wall View	0	0	0	0	0	0			

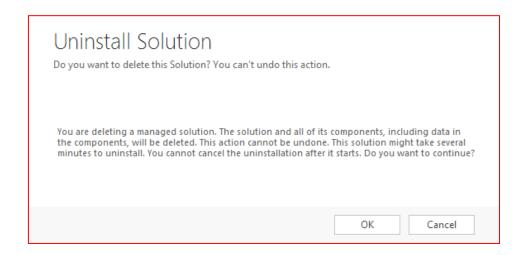
#### 1. Login to Dynamics CRM and go to the Solutions in Settings Area.

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.

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All Solutions	~				Search for re	ecords		Q
New 🗙 Delete	🖟 Import 🛛 📮 Export	📓 Import Translatio	ons 📑 Export Trans	ations 🛛 🚺	Publish All Customizations	🚯 Get So	lutions from Market	tplace
re Actions 👻 Name	Display Name	Version	Installed On 🛧	Package Typ	Publisher		Description	
DPSCopyTool	DPS Copy Tool	6.0.13276.1	24/10/2013	Managed	Dynamics Professional Se	olutions Ltd	Copy Tool is an	add-on for Microso
DPSSharedComponents	DPS Shared Componer	nts 6.0.13275.1	02/10/2013	Managed	Dynamics Professional Se	olutions Ltd	Components rec	quired by all DPS sol
								>
2 of 2 (0 selected)								I III III Page 1

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

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