



CRM Sales PDF Productivity Pack Installation Guide

Microsoft Dynamics CRM 4.0

CRM Addins
www.crmaddins.co.uk
info@crmaddins.co.uk



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Introduction

Document Overview.

This document details the steps required to install and configure CRM Sales PDF Productivity Pack for Microsoft Dynamics CRM 4.

Version Compatibility.

CRM Sales PDF Productivity Pack is designed to be run within a Microsoft Dynamics CRM 4 environment and this document assumes that a CRM 4 environment is being used. For details on other version compatibility please email info@crmaddins.co.uk.

Full support of all versions of MSCRM 4 (Workgroup/Professional and Enterprise), both 32 and 64 bit deployments.

CRM Sales PDF Productivity Pack can be installed in both On Premise and Hosted environments, in a hosted environment you may need assistance from your provider to carry out the installation.

CRM Sales PDF Productivity Pack for Microsoft Dynamics CRM 4.0.

PDF Creation. CRM Sales PDF Productivity Pack is an integrated Addin module that allows you to easily produce, print and email quotes, orders and invoice documents from within Microsoft Dynamics CRM.

- You can quickly preview what you PDF document will look like
- You can save time by printing directly from the document preview
- You can email documents directly to a client using templates and have a record of the email automatically saved in CRM



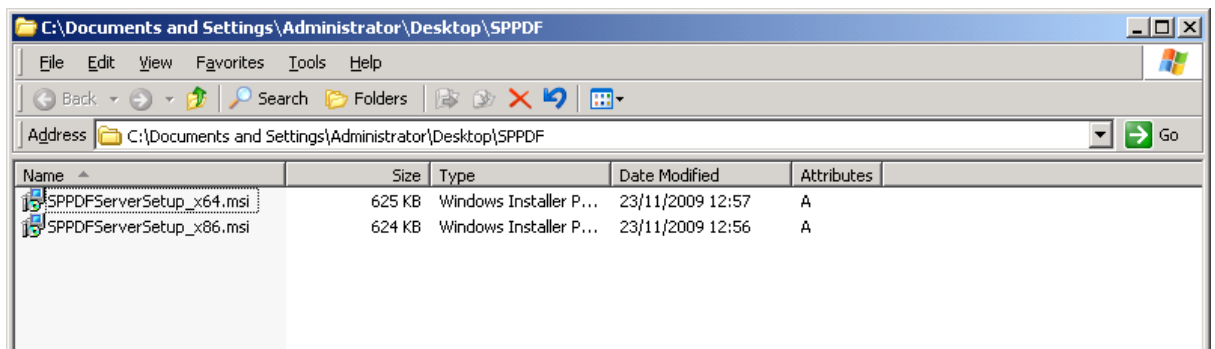
Installing CRM Sales PDF Productivity Pack

Pre-requisites.

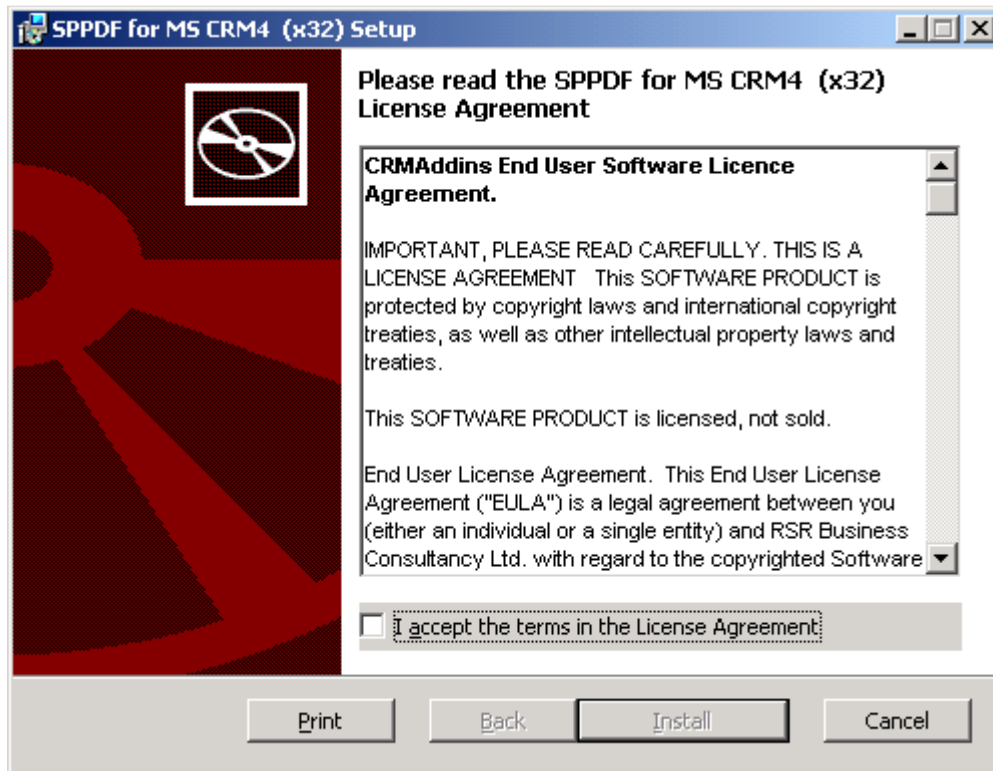
- Installation is carried on the CRM server.
- The installation is run from the server console.
- The installing user must be the CRM system administrator.
- Installation is carried out by running the CRM Sales PDF Productivity Pack “MSI” installation file.
- Users must not be using the CRM application during the installation, which can take between 10 and 60 minutes depending upon the exact CRM installation environment.

Installation steps.

1. Save the Self extracting file to an appropriate folder on the MSCRM server, this can be on the desk top or in the My Documents area and extract the installation files. Before you do this please ensure that have taken security backups of your CRM system and databases as a security precaution.

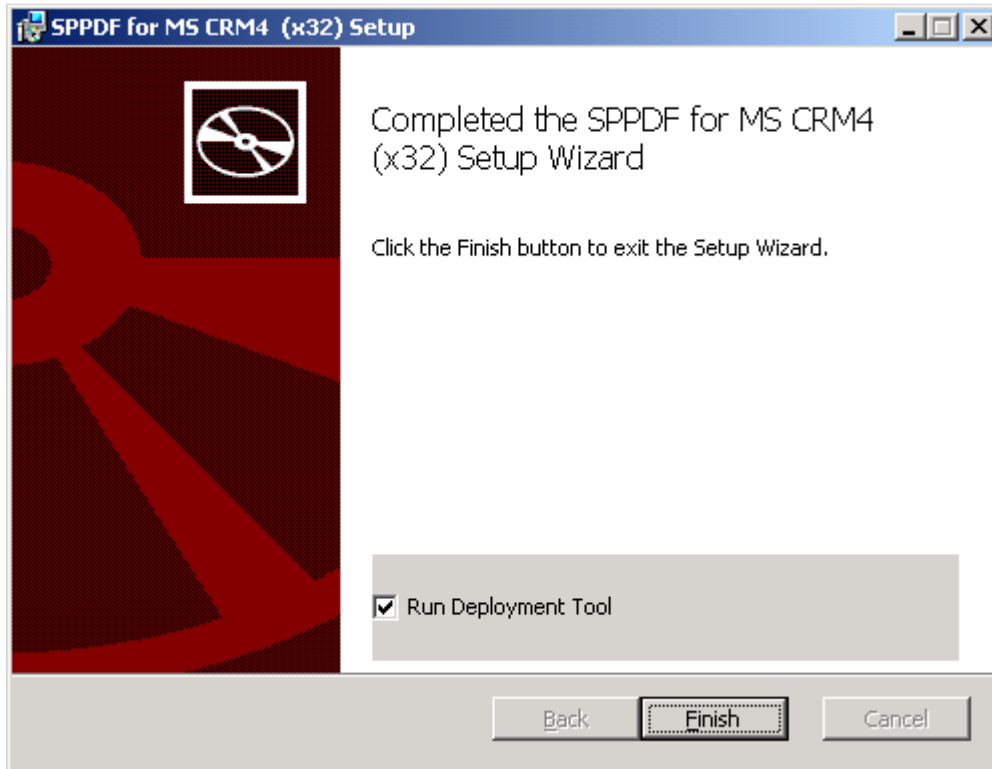


2. Double click on the relevant MSI file (x86 or x64) or select run from the start menu and enter the path name for the MSI file, you will see the following screen, where you will then be presented with the license agreement, if you do not accept the licence agreement, select cancel to cancel the installation, if you accept the license agreement, select the tick box and click on the Install button to continue and the installation will proceed.

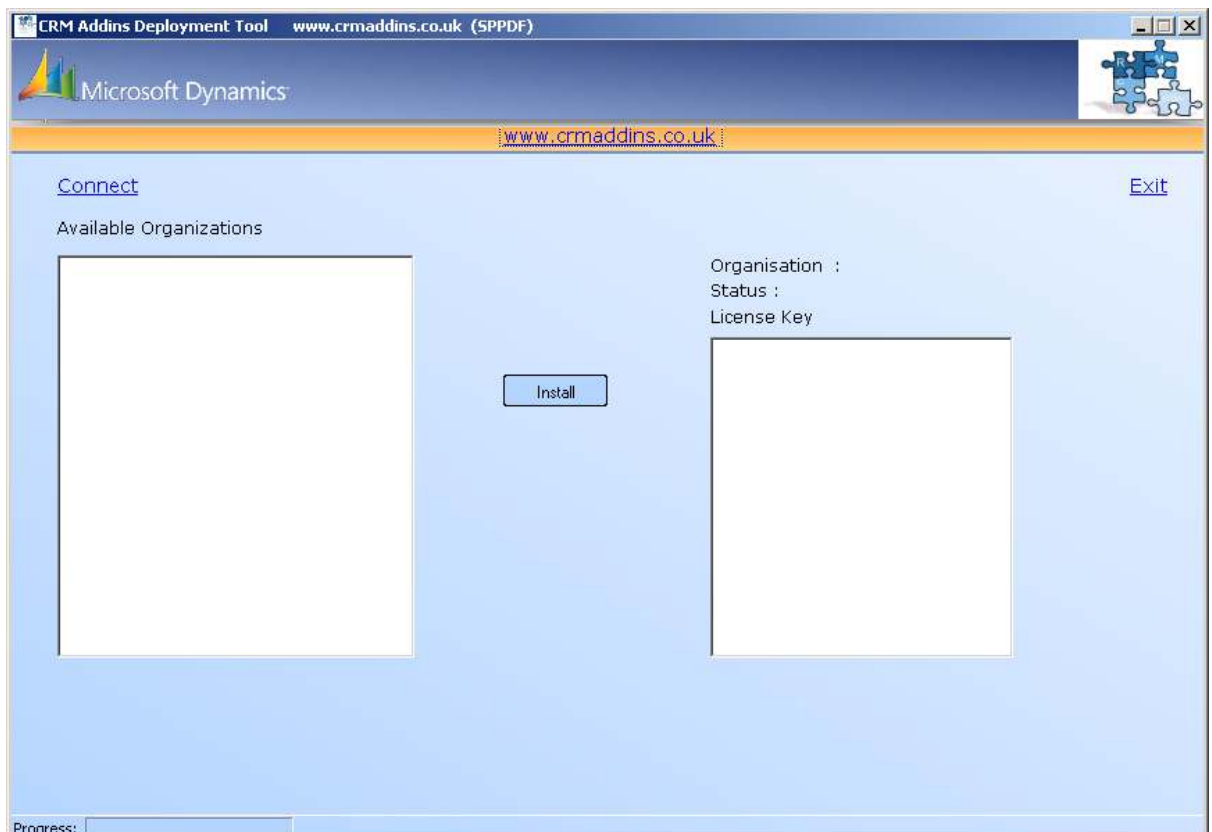


3. When the installation has completed you will be presented with a screen that will allow you to activate CRM Sales PDF Productivity Pack by selecting your CRM organisation and entering your license key.

Select Finish running the deployment tool to activate CRM Sales PDF Productivity Pack.



4. The deployment tool screen allows you to select the CRM organisation that and enter your license key to active CRM Sales PDF Productivity Pack.





5. Select the connect option to connect to the CRM server.

The screenshot shows a 'Login' dialog box with a blue header and a close button (X) in the top right corner. The dialog contains the following fields and controls:

- URL:
- User Name:
- Password:
- Domain:
- Default Credentials:
- OK button
- Cancel button

6. If you are logged on as the user that installed CRM Select the tick box to use the default user id and password to access the CRM system, otherwise enter the username, password and domain details and select OK.

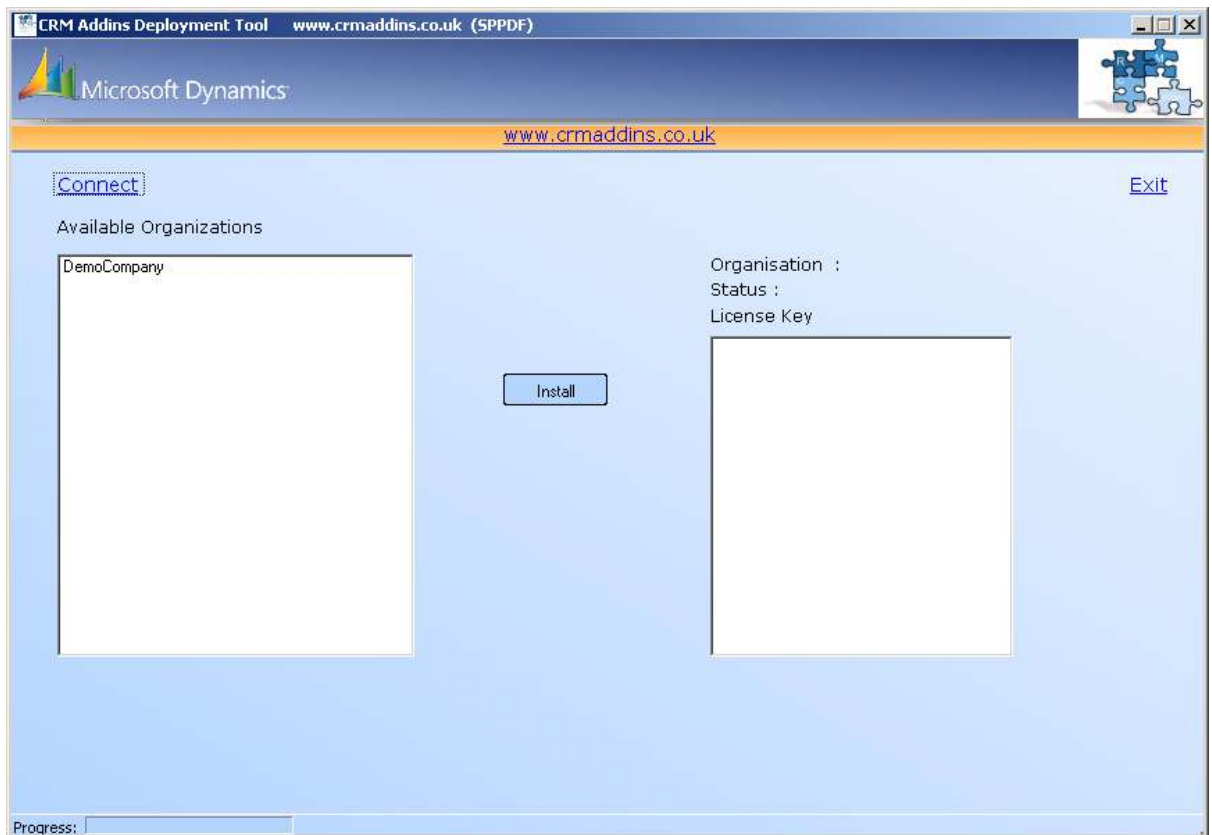
The screenshot shows the same 'Login' dialog box as above, but with the following changes:

- URL:
- User Name:
- Password:
- Domain:
- Default Credentials:
- OK button
- Cancel button

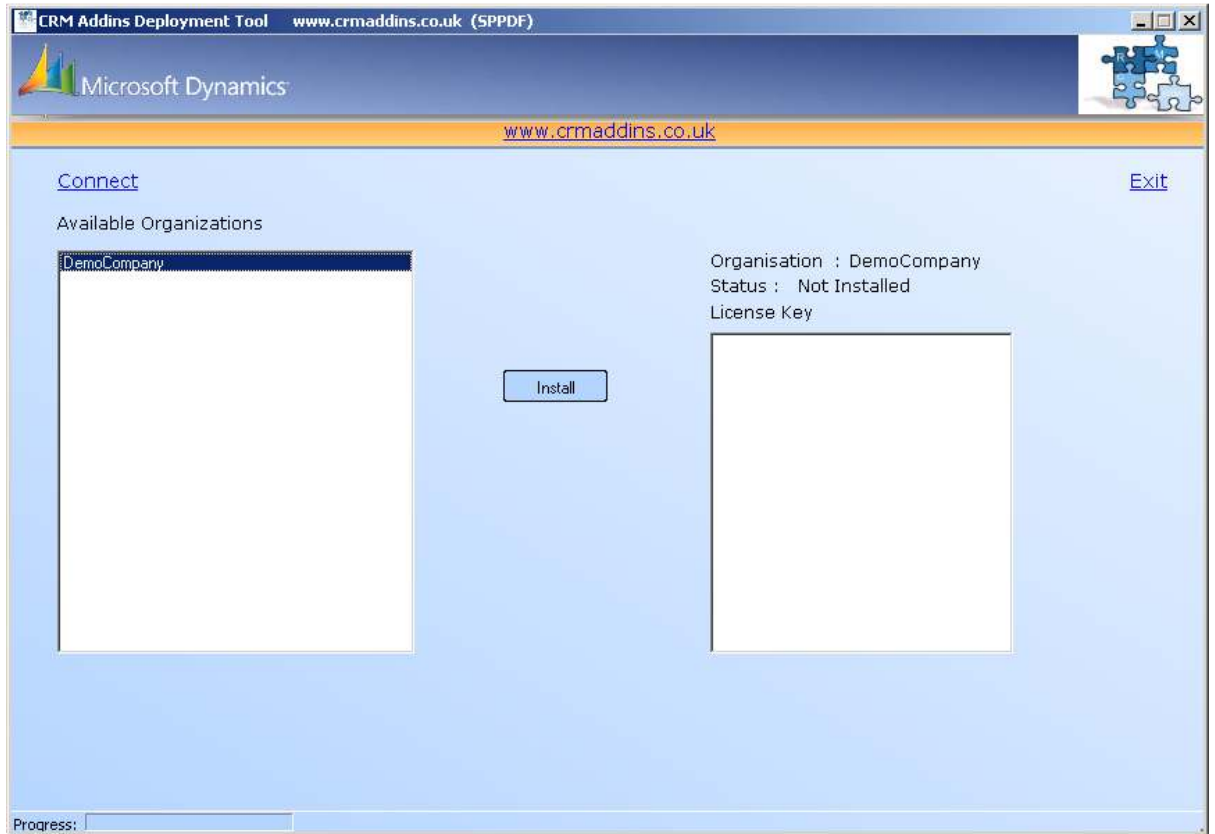
7. You will see the available organisation that can CRM Sales PDF Productivity Pack installed, select your organisation and copy and paste the license key that you will have been sent by email into the license key are. The organisation and status fields will automatically be

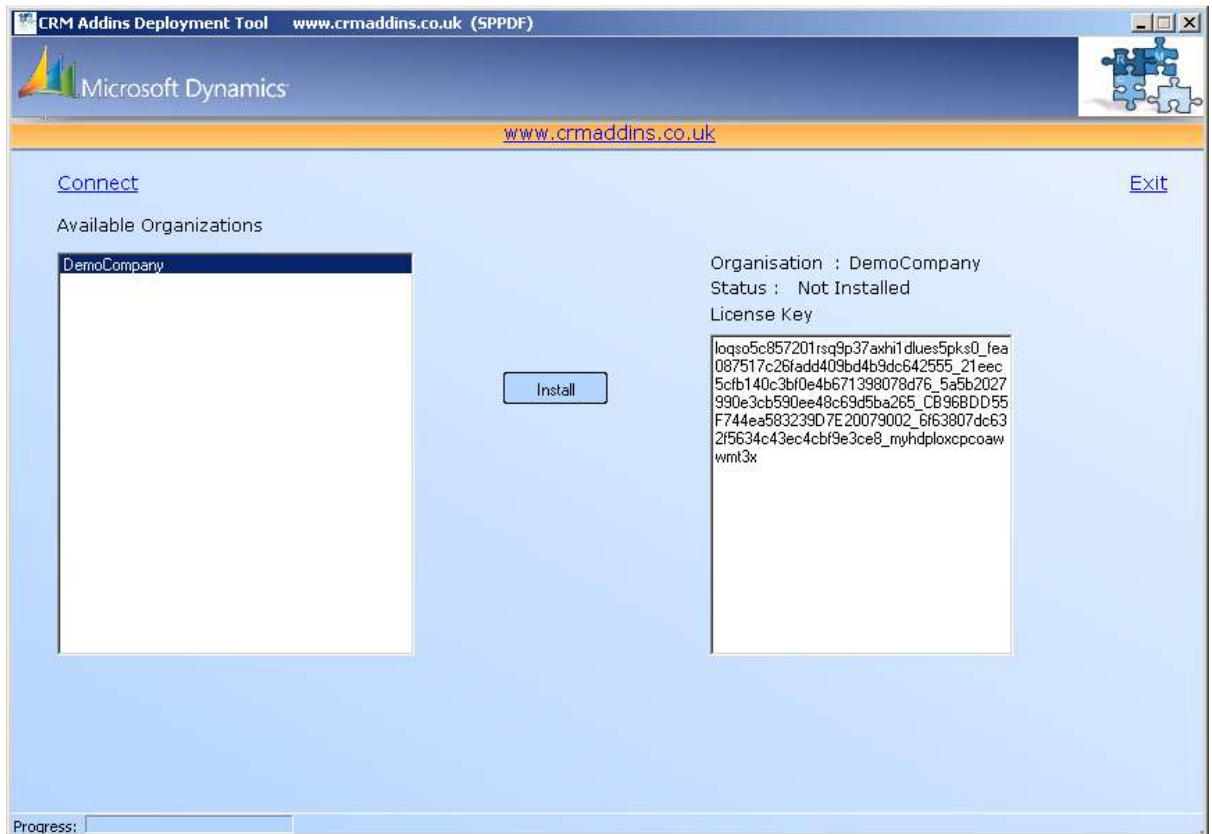


updated.

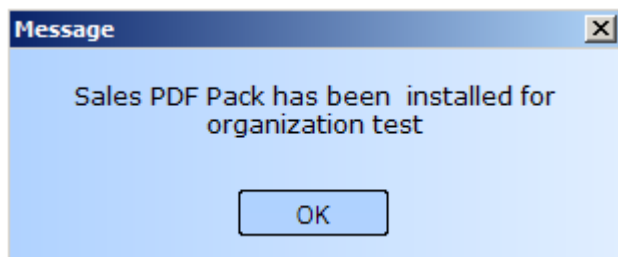


8. Select install to validate and Activate CRM Sales PDF Productivity Pack, this make a moment or two to complete, once the installation have completed select OK to continue.

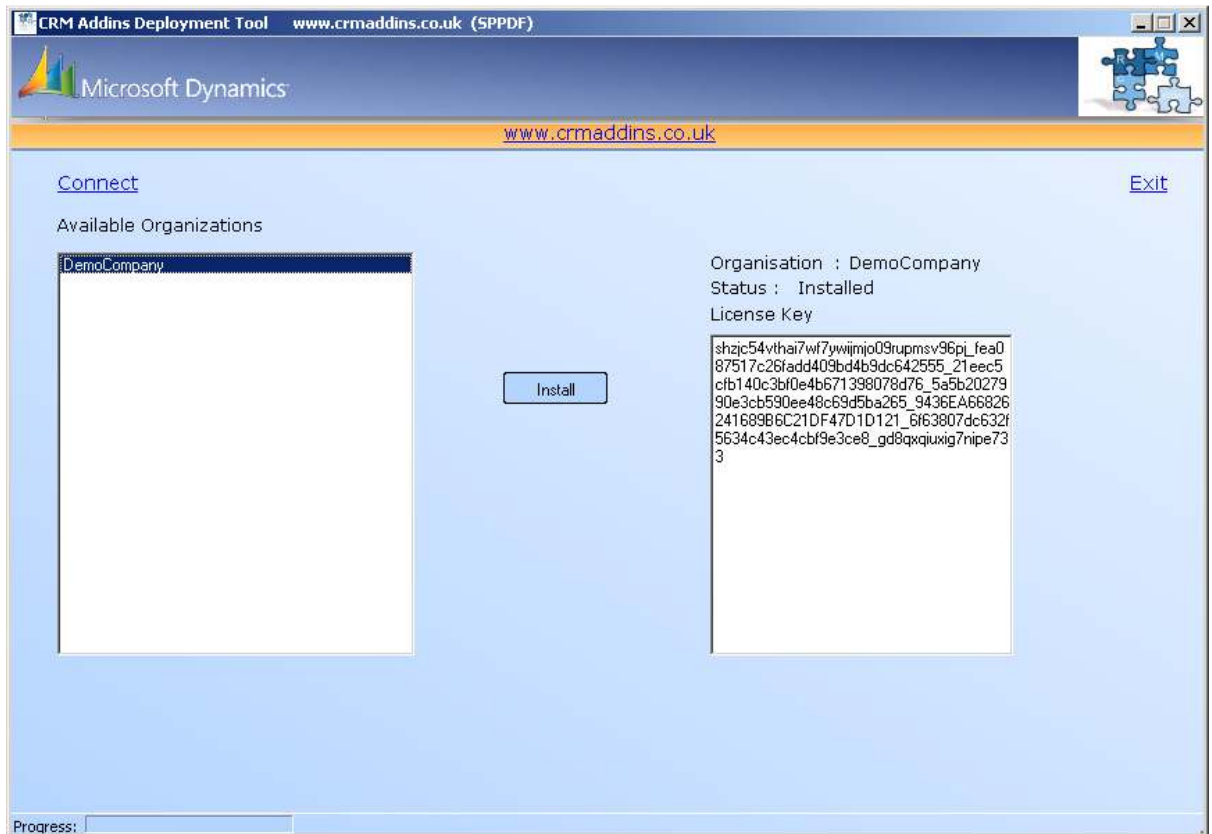




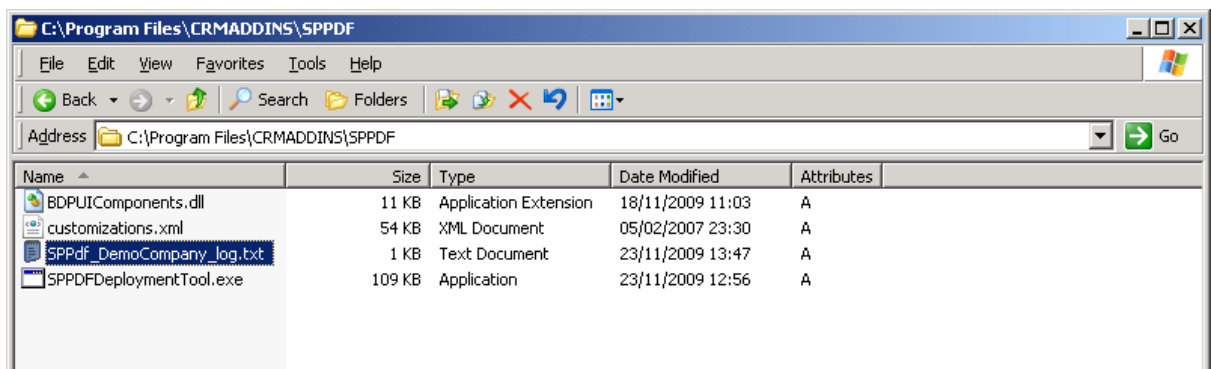
- When the installation has completed you will be presented with a confirmation box, click OK to continue.



- The status will be updated to installed and you can exit the deployment tool by selecting Exit in the top right of the deployment tool screen.



11. CRM Sales PDF Productivity Pack is installed.
12. A log file of the actions during the installation can be found in the directory that the installation was run from, to review the installation, open the file "installationlog.txt" in C:\Program Files\CRMADDINS\SPPDF to see the details, as shown below.



Example screen shot of the installation log file.



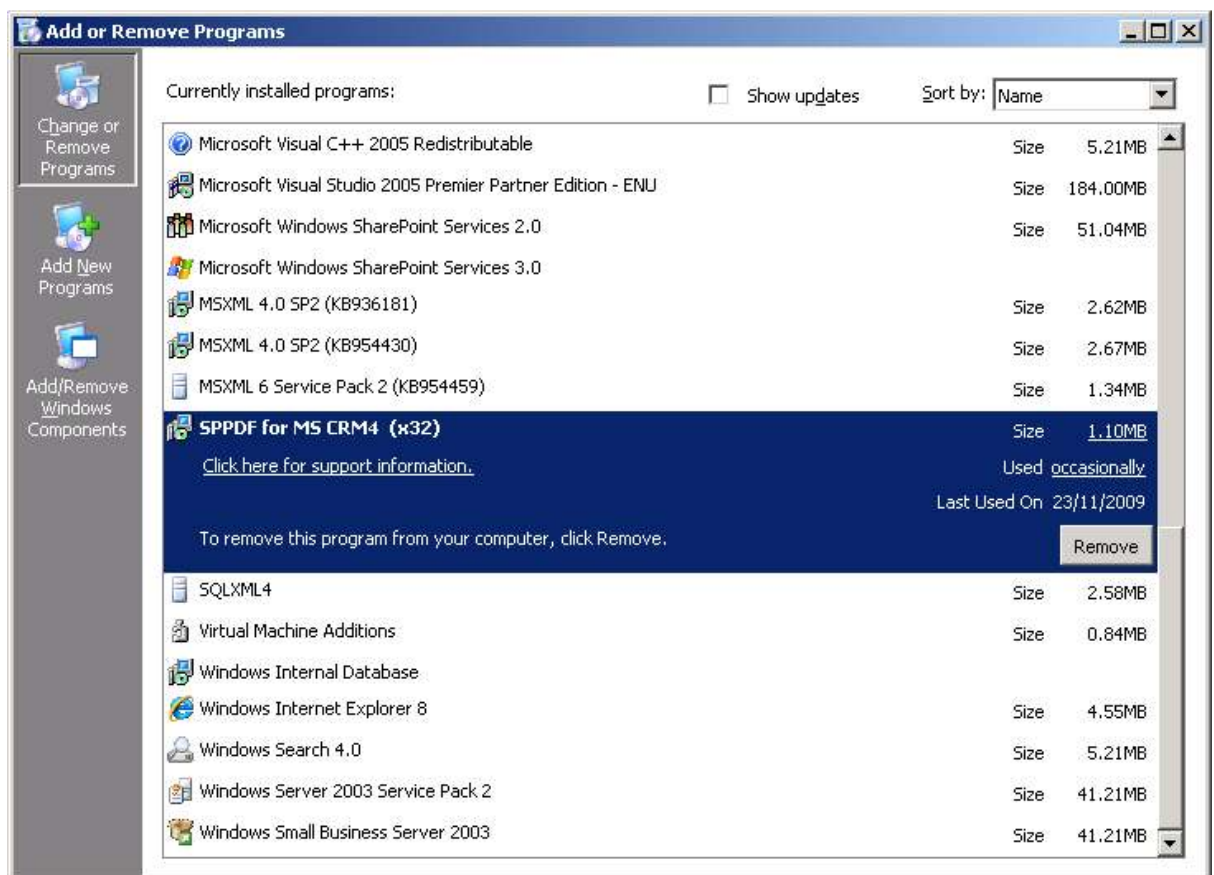
```
SPPdf_DemoCompany_Log.txt - Notepad
File Edit Format View Help
Installation process started
Organization DemoCompany
Webappmeta /LM/W3SVC/5
Webapppath C:\Program Files\Microsoft Dynamics CRM\CRMweb
IISMetaAddress localhost/W3SVC/5
Creating subsite IIS://localhost/W3SVC/5/Root-ISV/RSR/SPPDF-C:\Program Files\Microsoft Dynamics CRM\CRMweb\ISV\RSR
Message vdir
```



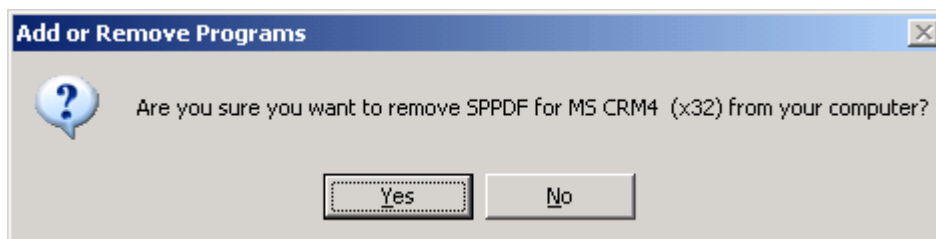
Removing a CRM Sales PDF Productivity Pack Installation.

Removing CRM Sales PDF Productivity Pack from the Control panel.

1. To remove CRM Sales PDF Productivity Pack go to the Control Panel, select Add/Remove Program, select SPPDF for MSCRM4 and select remove.

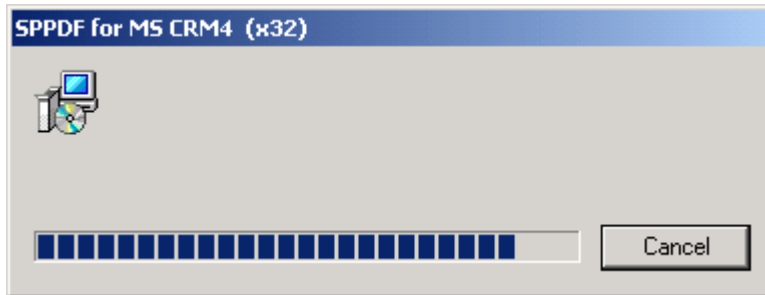


2. You will be prompted to confirm removal, select No to abandon the removal process or Yes to remove.

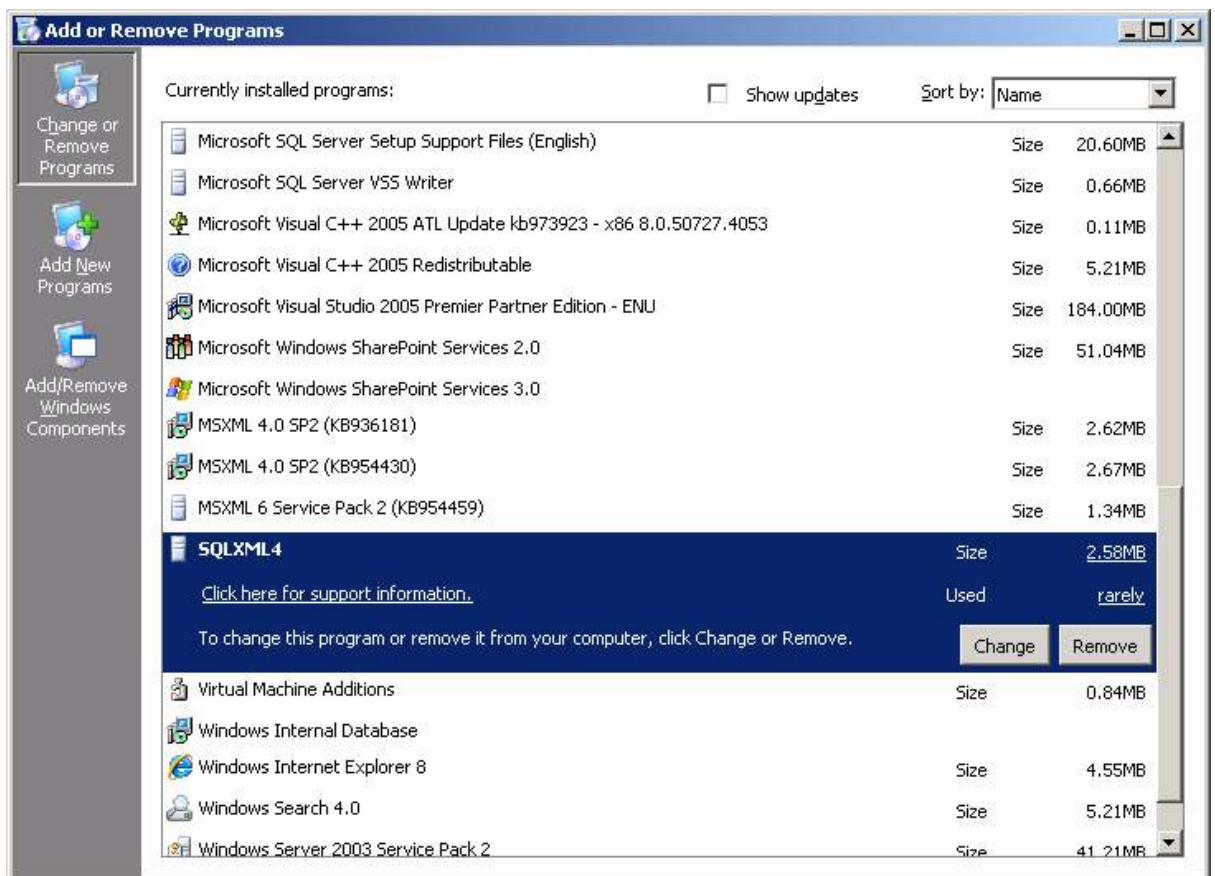




3. Progress will be displayed.



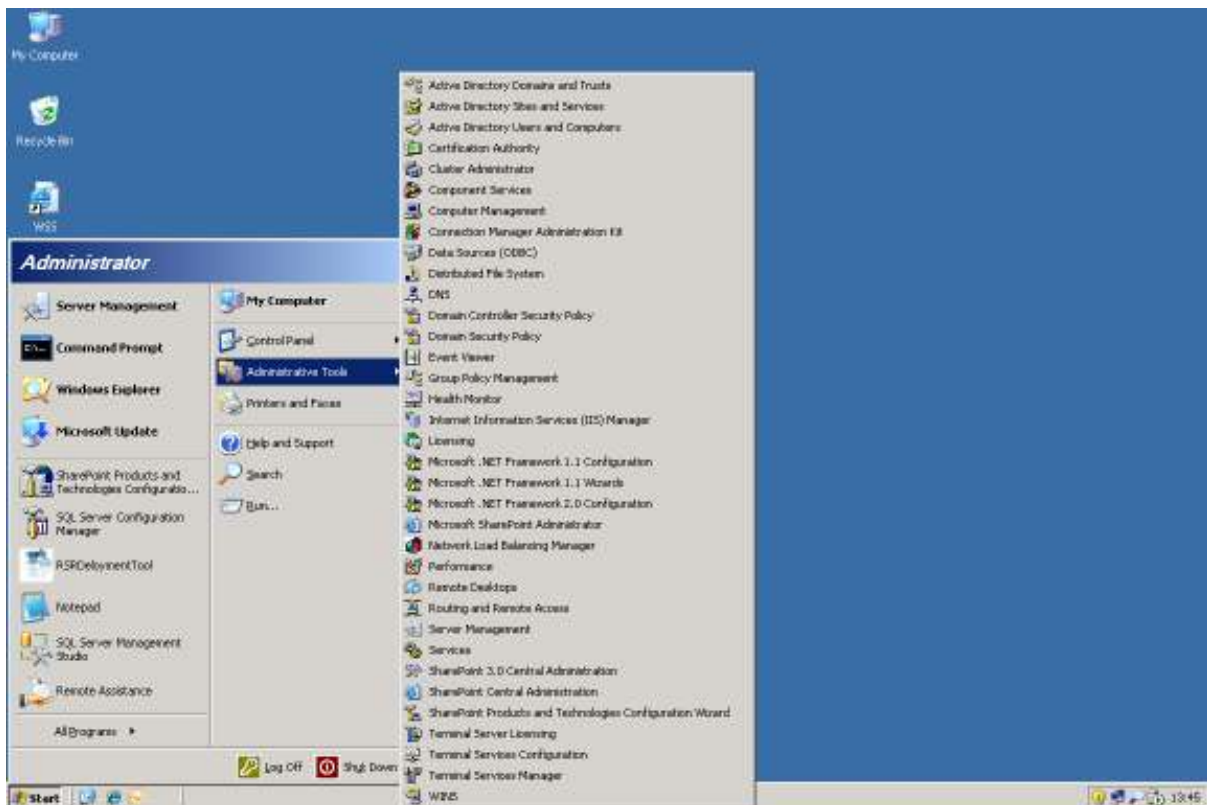
4. When removal is complete the SPPDF will no longer be shown in the program files listing.



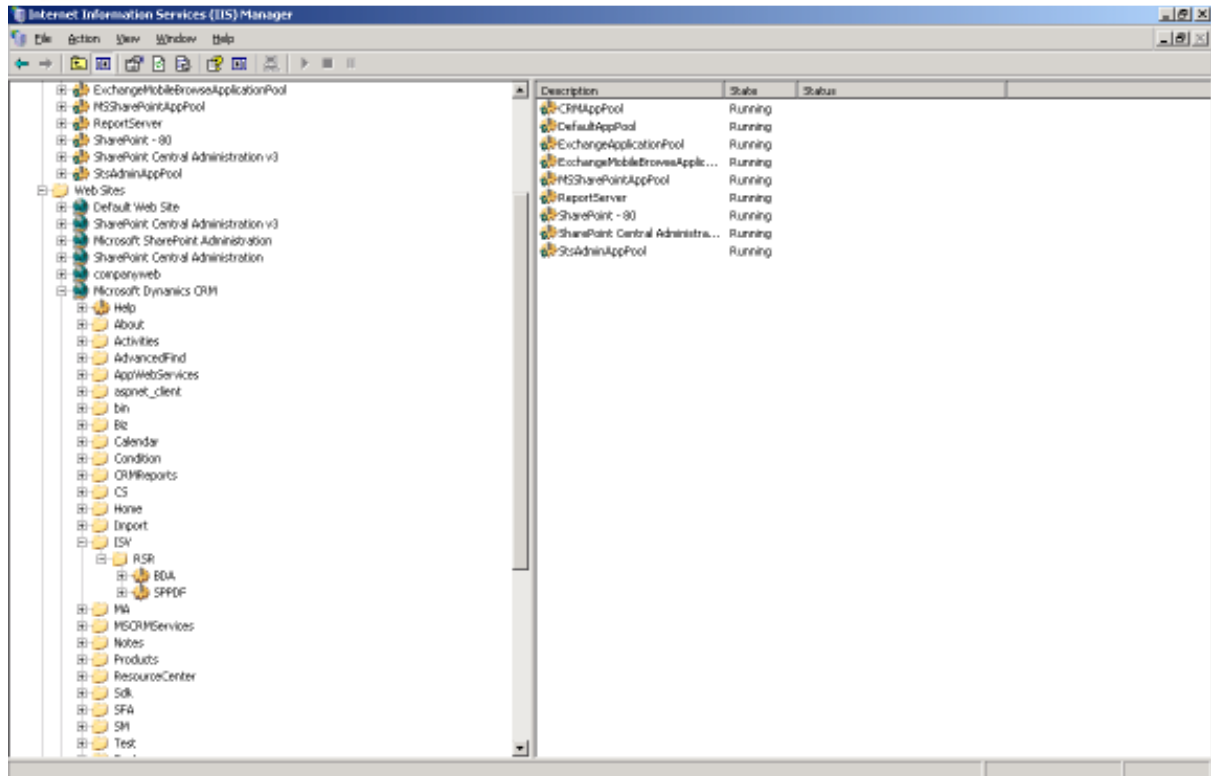


Common Elements to Complete Removal of CRM Sales PDF Productivity Pack, CRM Customisations and Web Services.

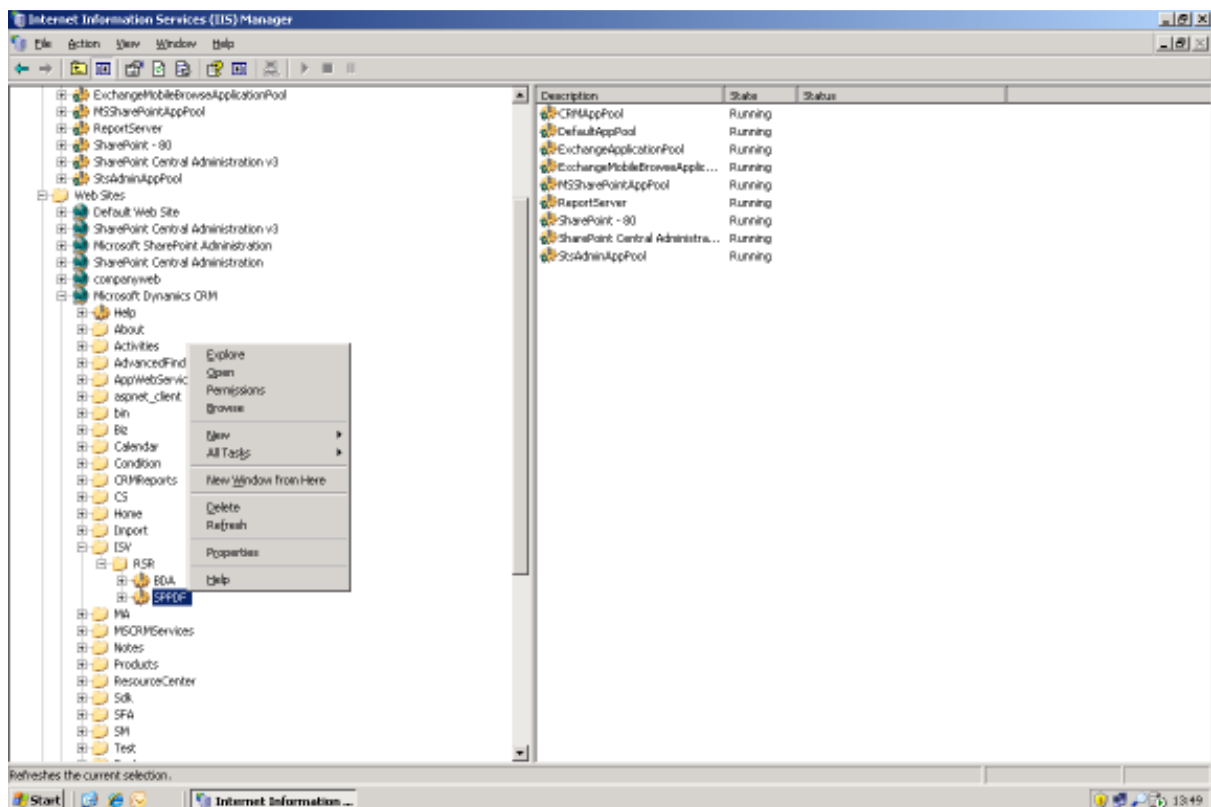
From the Administration tools run the Internet Information Service Manager application.



Expand the Microsoft Dynamics CRM web site to show a similar list to the one shown below.



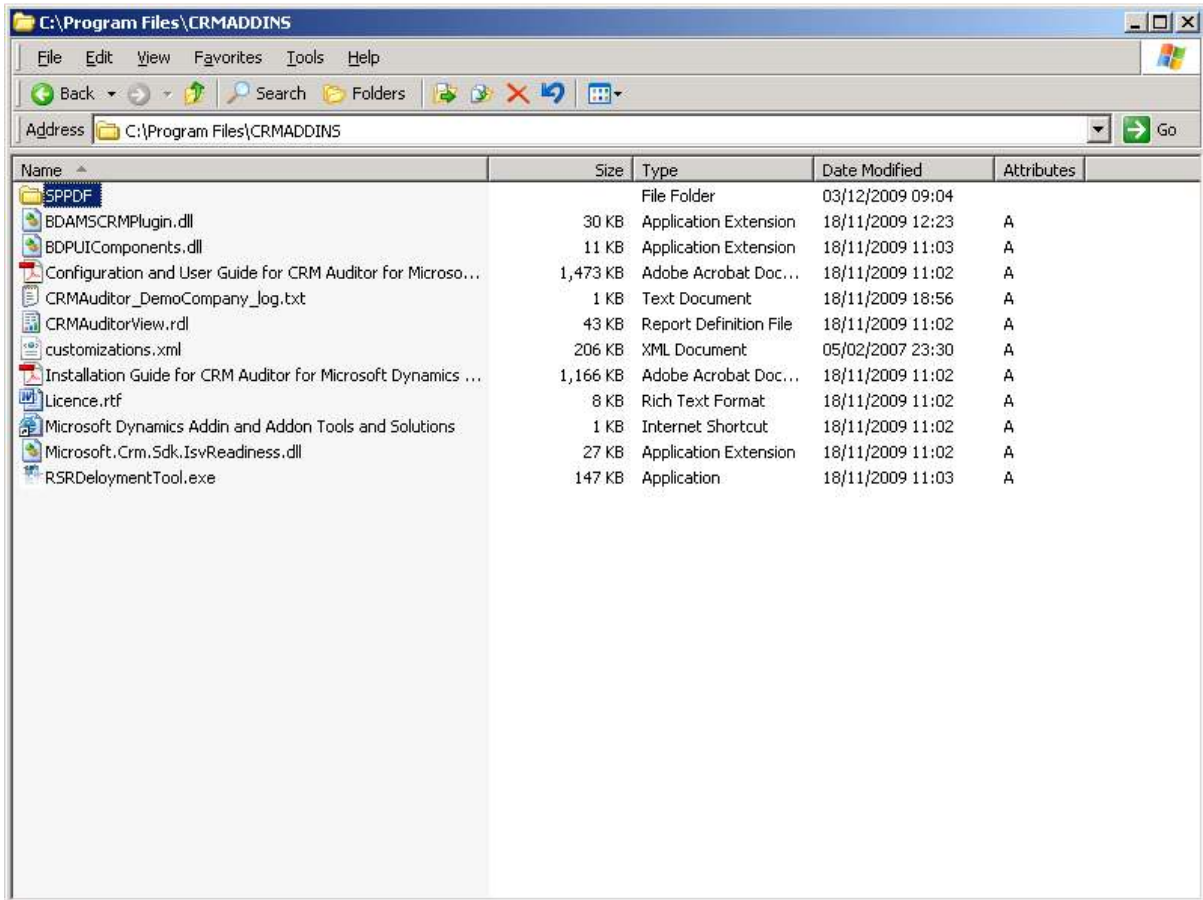
Select the SPPDF application that is beneath the CRMAppPool and delete it.



Confirm deletion and close the IIS Manager Window.



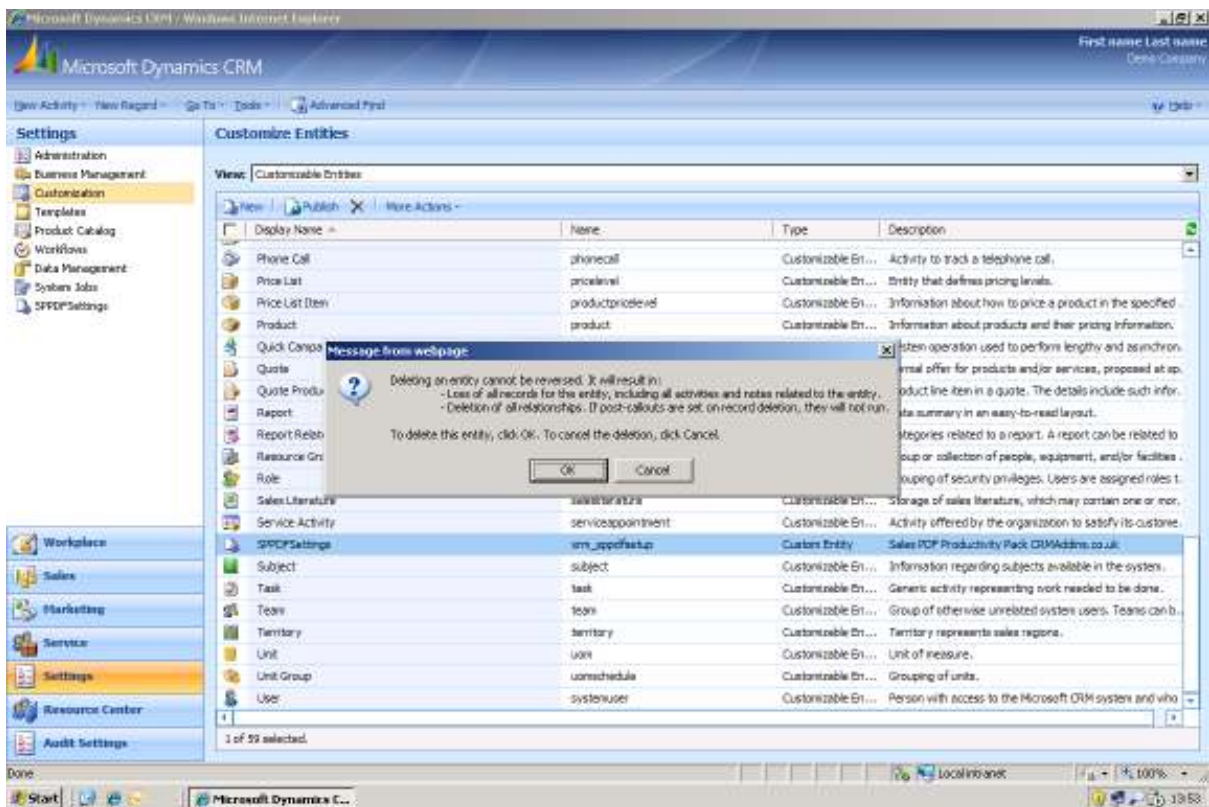
Check that the SPPDF files have been removed from C:\Program Files\CRMADDINS. If the directory SPPDF is present delete it.



Start CRM and navigate to Settings and Customisations.

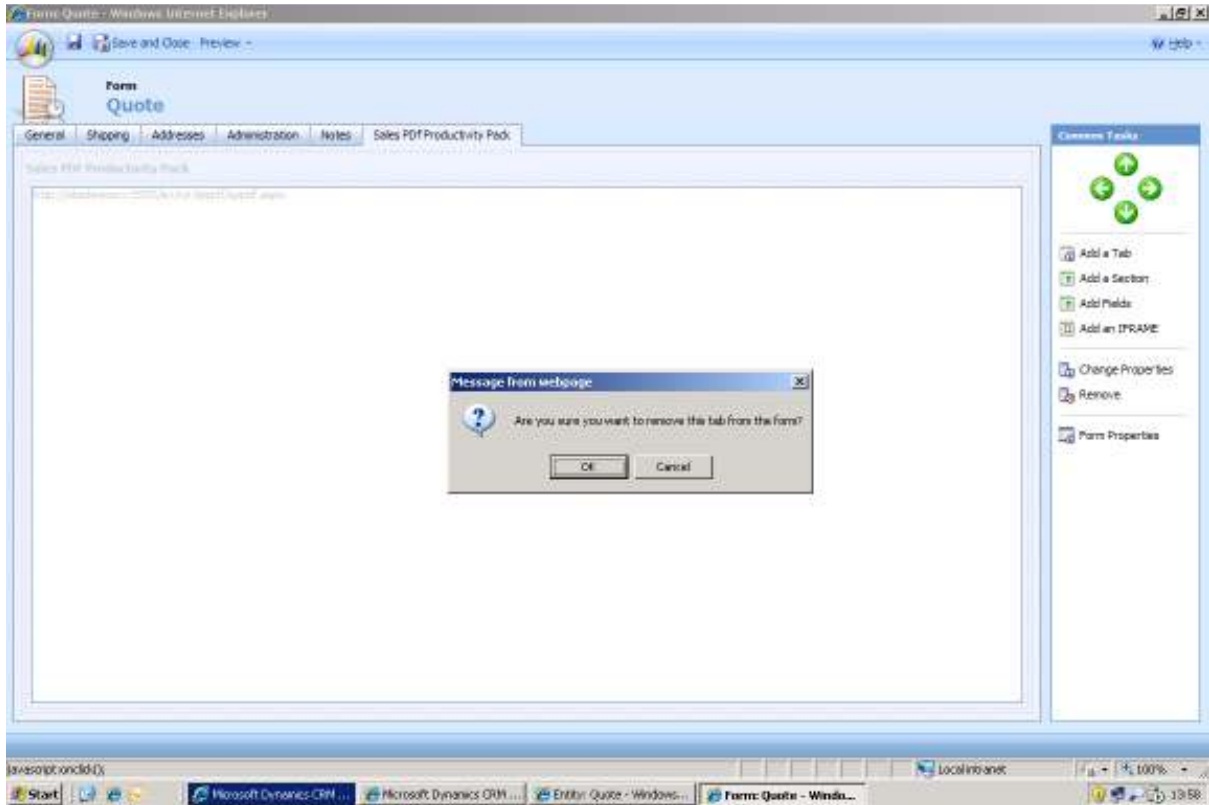


Select Customise Entities and scroll down to SPPDFSettings, select the custom entity and select delete, when prompted select OK.

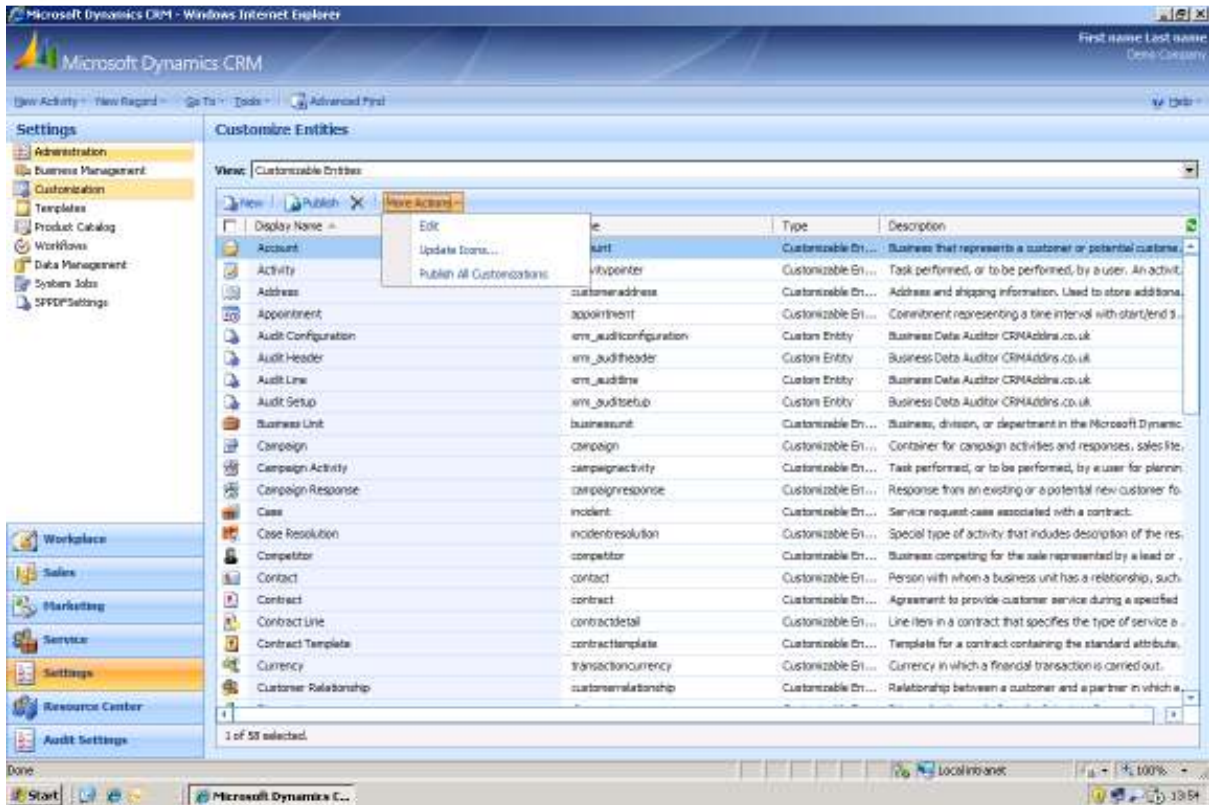




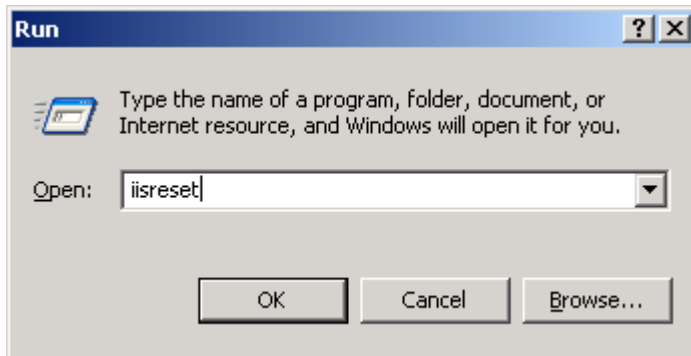
Go to each entity that has been configured to work with the Sales PDF Productivity Pack and remove the custom Tab, see example below, after removal save and close each entity.



Select More Actions and publish all Customisations.



Exit CRM, select start and run and reset IIS by typing iisreset and selecting OK.



When the window below closes with no errors.



```
C:\WINDOWS\system32\iisreset.exe
Attempting stop...
Internet services successfully stopped
Attempting start...
_
```

Removal of the CRM Sales PDF Productivity Pack is complete.



Additional Configuration

The additional configuration steps are to activate the CRM Sales PDF Productivity Pack and to configure it into the Quotes/Orders and Invoice sections of your CRM system; these steps are covered in the Configuration and User Guide for Sales PDF Productivity Pack for Microsoft Dynamics CRM 4 document.

Licensing

Your CRM Sales PDF Productivity Pack will be delivered ready licensed for your CRM deployment.

If in the future you plan to upgrade your deployment please contact info@crmaddins.co.uk to obtain an updated installation file.

If you are adding an additional organisation to an enterprise deployment please contact info@crmaddins.co.uk to obtain an updated installation file.

Trial Versions.

A free trial version is available for use with the Microsoft demonstration company 'Adventure Works Cycle', please send an email to info@crmaddins.co.uk requesting your trial for the demonstration company and we will contact you to get your trial set up.

15 day trails can be requested for use on your own system, please send an email to info@crmaddins.co.uk requesting your trial and we will contact you get your trial set up.



Additional Organisations

These steps are primarily aimed at clients running multiple organisations as part of an enterprise deployment.

Installing an additional Organisation

1. Save and run the new installation file that you have been sent.
2. Continue the installation as normal.

Removing an Organisation

1. Run the installation file for the organisation that you wish to remove.
2. Select the organisation to remove in the right hand list box and move them to the left hand list box.
3. Continue the installation as normal.