

mscrm-addons.com
AutoMerge for MS CRM 2013

AutoMerge Online Service Configuration for MS CRM 2013

Version 2013.3, December 2013

Online Service Configuration Guide
(How to configure AutoMerge Online Service for MS CRM 2013)

The content of this document is subject to change without notice.

"Microsoft" and "Microsoft CRM" are registered trademarks of Microsoft Inc.
All other product- and company names mentioned are trademarks of their respectful owners.

Table of Contents

- 1 GENERAL INFORMATION.....3
- 2 INTRODUCTION3
 - 2.1 Prerequisites.....3
- 3 HOW TO START AUTOMERGE ONLINE SERVICE CONFIGURATION4
 - 3.1 First Step: CRM Connection Setup.....4
 - 3.1.1 CRM Connection Setup – Settings.....4
 -4
 - 3.2 Second Step: Service Configuration7
 - 3.2.1 Service Configuration - Settings.....7
 -7
 - 3.3 Third Step: Google Cloud Print (optional).....13
 - 3.3.1 Google Cloud Print Overview.....13
- 4 CONTACT16

1 General Information

Before installing **AutoMerge Online Service Configuration for MS CRM 2013**, please read this document and follow the steps carefully.

2 Introduction

AutoMerge Online Service Configuration allows setting up your Server Installation online on www.mscrm-addons.com.

This new features main advantages:

- A local server is not required any more
- Precious storage space on your local server is saved
- All AutoMerge features (e.g. CreateDocument, AutoMerge Printing ...) are available, for more information, please [download](#) our AutoMerge User Guide
- The service is hosted and updated by our support-team

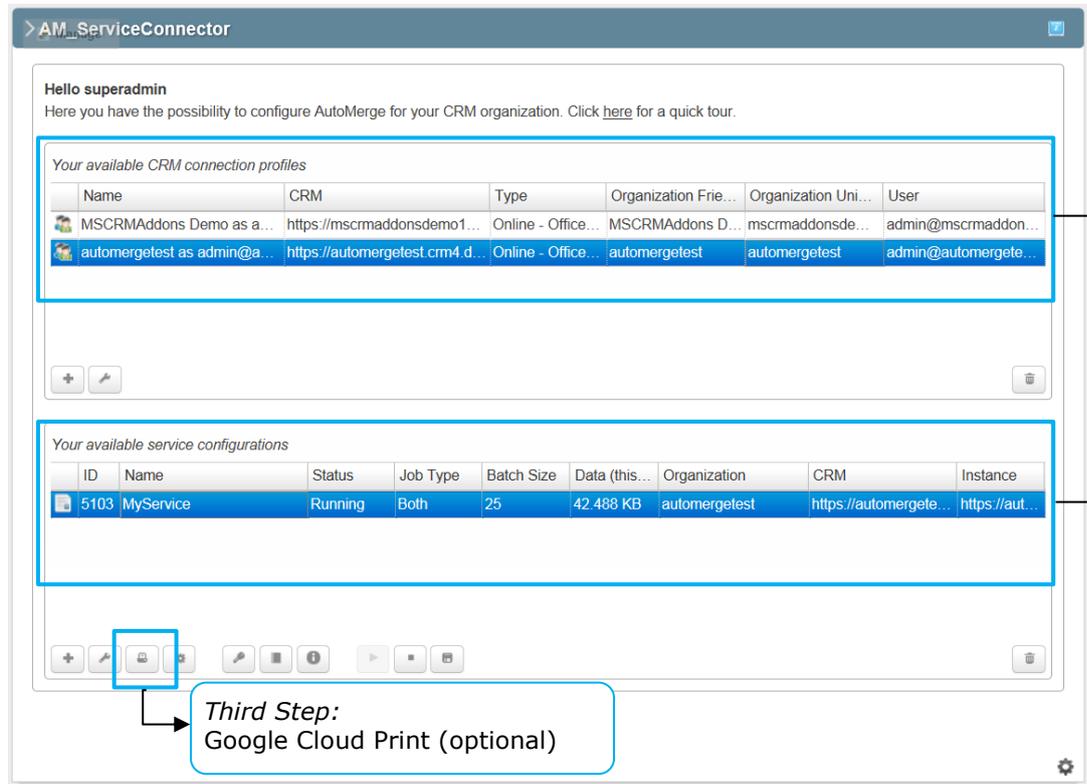
NOTE: If you already installed AutoMerge locally, please stop or uninstall the program in order to use AutoMerge Online Service appropriately. For more information, please read our [AutoMerge Installation Guide](#).

2.1 Prerequisites

Before starting to configure AutoMerge Online Service Configuration, please make sure that you have a valid AutoMerge support- and license contract. For more information please consult our [support team](#).

3 How to start AutoMerge Online Service Configuration

To get to the new AutoMerge Online Service Configuration, please click [here](#). The "AutoMerge Online Configuration" window appears:



The screenshot shows the 'AM_ServiceConnector' window. It contains two main sections: 'Your available CRM connection profiles' and 'Your available service configurations'. The 'CRM connection profiles' table has columns for Name, CRM, Type, Organization Frie..., Organization Uni..., and User. The 'service configurations' table has columns for ID, Name, Status, Job Type, Batch Size, Data (this...), Organization, CRM, and Instance. A 'Third Step' callout points to a button in the bottom toolbar labeled 'Google Cloud Print (optional)'.

First Step: Define CRM connection profile(s).

Second Step: Set up AutoMerge Service Configuration

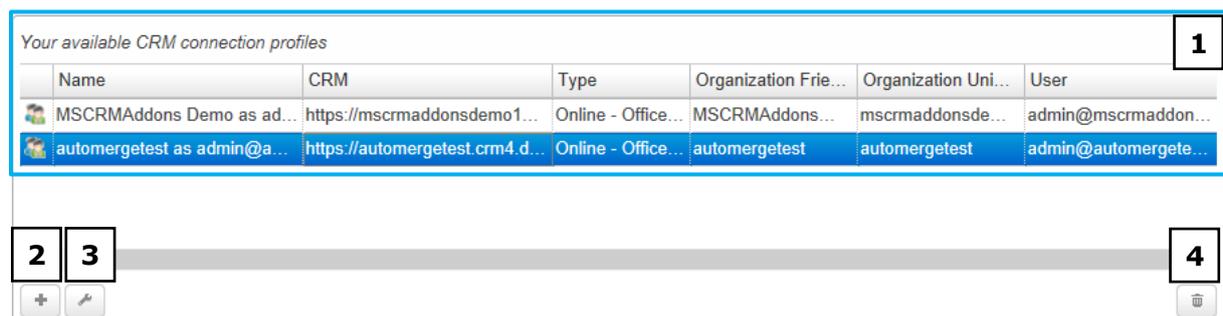
Third Step: Google Cloud Print (optional)

3.1 First Step: CRM Connection Setup

In the first step one or several CRM organization(s) have to be defined. This CRM connection profile is required to connect to your CRM organization and set up AutoMerge Service. You have to define a service for each user. (See screenshot above [First Step]).

NOTE: The user with which you are connecting must be in the system administrator role to set up AutoMerge.

3.1.1 CRM Connection Setup – Settings



This screenshot shows a close-up of the 'Your available CRM connection profiles' table. The table has columns: Name, CRM, Type, Organization Frie..., Organization Uni..., and User. The second row is highlighted in blue. Numbered callouts are present: '1' points to the table header, '2' and '3' point to the '+' and edit icons in the toolbar, and '4' points to the trash icon.

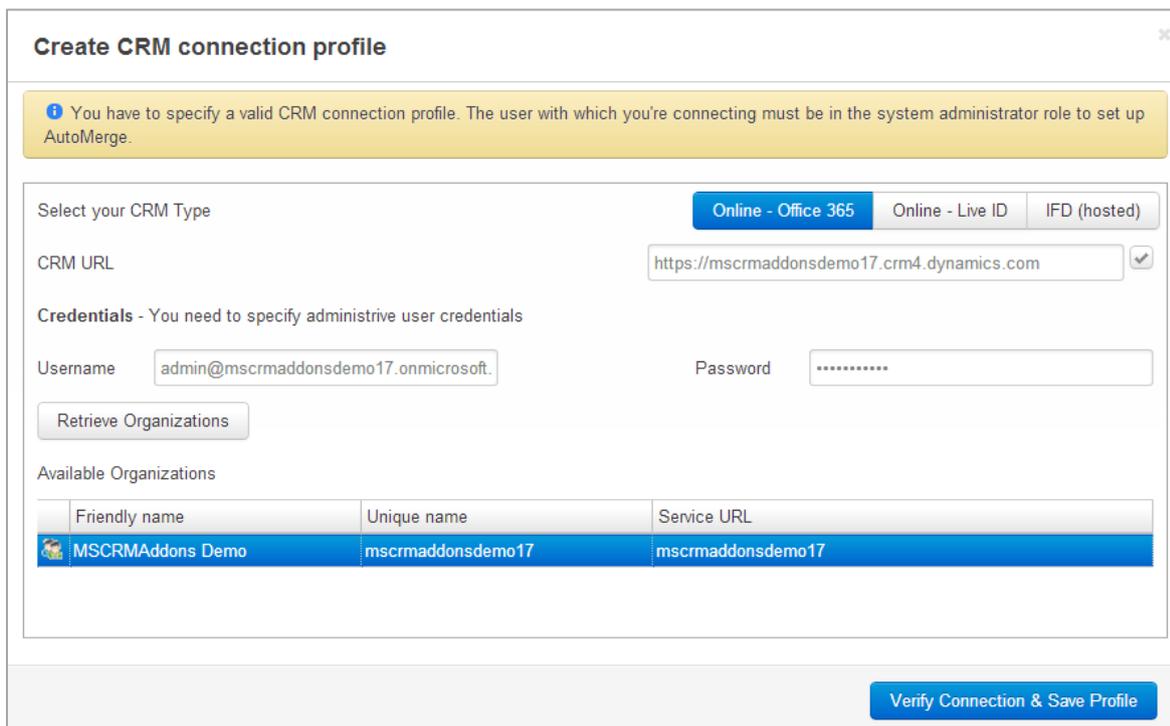
Name	CRM	Type	Organization Frie...	Organization Uni...	User
MSCRMAddons Demo as ad...	https://mscrmaddonsdemo1...	Online - Office...	MSCRMAddons...	mscrmaddonsde...	admin@mscrmaddon...
automergetest as admin@a...	https://automergetest.crm4.d...	Online - Office...	automergetest	automergetest	admin@automergete...

[1] CRM connection profiles

Here you have an overview of your available CRM connection profiles. With a double-click on the profile you could edit your connection. If a profile is currently in use by an AutoMerge Service Configuration, you are only able to change the user credentials. You also have to select the same organization.

[2] Add a new CRM connection profile

You have to specify a valid CRM connection profile. Click on the '+'-sign to add a new CRM connection profile. See screenshot below:



Create CRM connection profile

! You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up AutoMerge.

Select your CRM Type: Online - Office 365 Online - Live ID IFD (hosted)

CRM URL:

Credentials - You need to specify administrative user credentials

Username: Password:

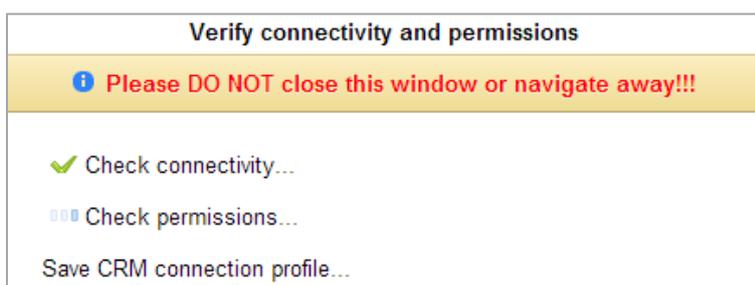
Available Organizations

Friendly name	Unique name	Service URL
 MSCRMAddons Demo	mscrmaddonsdemo17	mscrmaddonsdemo17

Within this window you can:

- select your CRM Type – [Online – Office 365], [Online – Live ID] or [IFD (hosted)]
- type in your CRM URL
- and specify the administrative user credentials (username and password)

Click on [Retrieve Organizations] and confirm with [Verify Connection & Save Profile]. Following window appears:



Verify connectivity and permissions

! Please DO NOT close this window or navigate away!!!

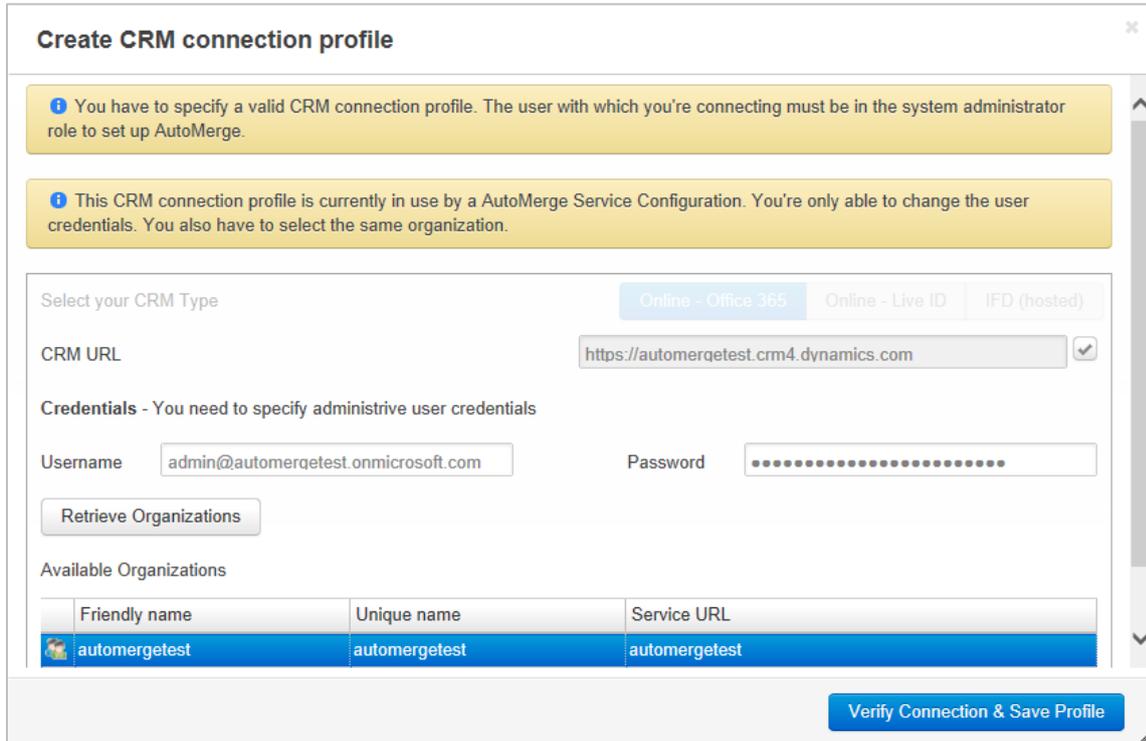
✔ Check connectivity...

▢ Check permissions...

Save CRM connection profile...

[3] Modify the CRM connection profile

Click here to modify the CRM connection profile. You could also double-click the profile you would like to modify.



Create CRM connection profile

! You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up AutoMerge.

! This CRM connection profile is currently in use by a AutoMerge Service Configuration. You're only able to change the user credentials. You also have to select the same organization.

Select your CRM Type: Online - Office 365 Online - Live ID IFD (hosted)

CRM URL: ✓

Credentials - You need to specify administrative user credentials

Username: Password:

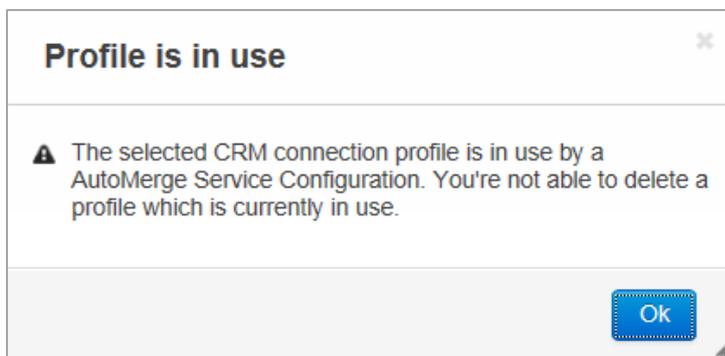
Available Organizations

Friendly name	Unique name	Service URL
 automergetest	automergetest	automergetest

If a connection profile is currently in use by an AutoMerge Service Configuration, you are only able to change the user credentials. You also have to select the same organization.

[4] Delete the CRM connection profile

In case you don't need your CRM connection profile anymore click here to delete it. If you try to delete a profile which is in use by an AutoMerge Service following window appears:



Profile is in use

! The selected CRM connection profile is in use by a AutoMerge Service Configuration. You're not able to delete a profile which is currently in use.

3.2 Second Step: Service Configuration

In the second step, the configured CRM connection profile can be used to set up the AutoMerge Service. This service will generate your documents and or print those through Google Cloud Print.

3.2.1 Service Configuration - Settings

Your available service configurations 1

ID	Name	Status	Job Type	Batch Size	Data (this...)	Organization	CRM	Instance
5103	MyService	Running	Both	25	0 B	automergetest	https://automergete...	https://aut...

2 3 4 5 6 7 8 9 10 11

[1] Service Configuration

Here you have an overview of your configured AutoMerge Services. With a double-click on the configuration you could edit the service.

[2] Add a new AutoMerge Service

Click here to create a new AutoMerge Service. Please note that one user can be added to one service. E.g.: if user A has a service for one organization than user B cannot be added to the same organization. See screenshot below:

Create new AutoMerge Service ✕

Service Name (could not be changed)

Select your CRM connection profile

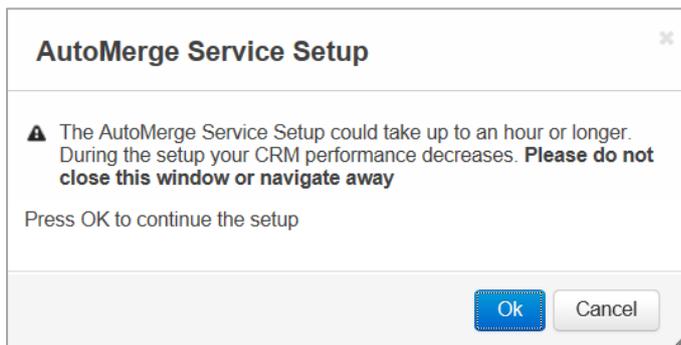
Batch Size ?

Category ?

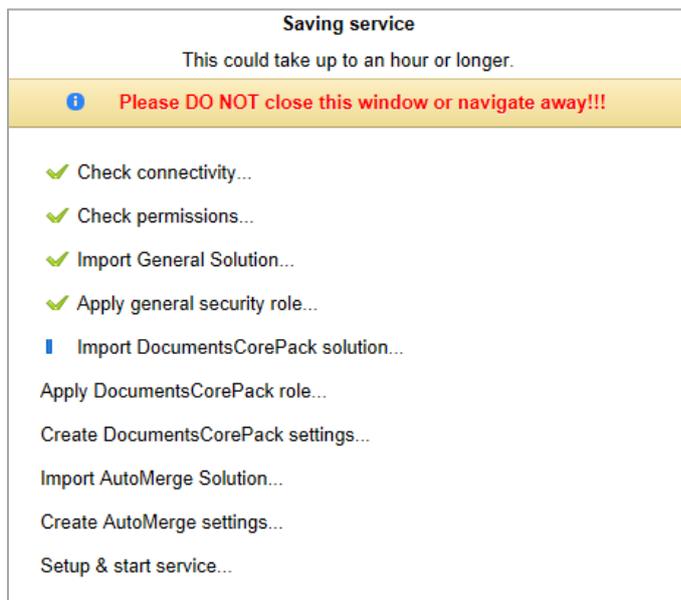
Job Type ?

Use CRM integrated SharePoint ?

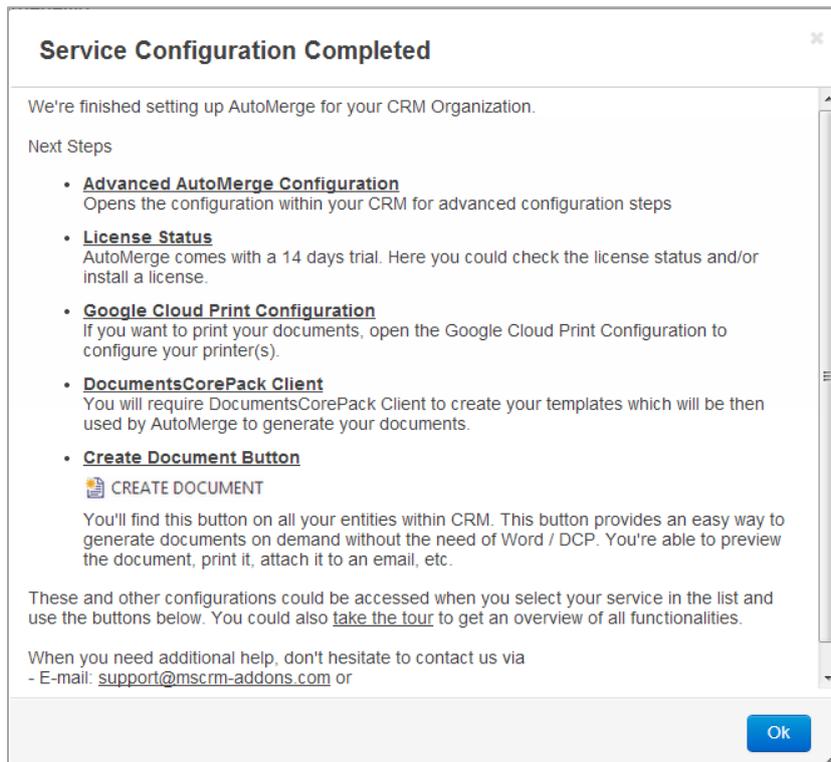
- **Batch Size:** Count of service runs, before entering idle loop to limit CPU load.
- **Category:** Number category for prioritization. Required when using multiple services. Default is 0.
- **Job Type:** Here you can specify which jobs should be processed by the service. 'Print Jobs' or 'Document Generation' or both.
- **Use CRM integrated SharePoint:** Enable this setting when the documents should be stored in the CRM Integrated SharePoint. Otherwise the documents will be stored as note attachments. Type in your SharePoint Credentials and click on [Save Service]. Following window appears:



While the service setup is running following window appears:



Once finishing service configuration, following window appears:



Click on [Ok] to continue.

[3] Modify the AutoMerge Service

Click here to modify the AutoMerge Service Settings. You could also double-click the service you would like to modify.

[4] Google Cloud Printing (optional)

When you have created your CRM Connection Profile, you could create your Google Cloud Print AutoMerge Configurations to print the generated documents. Please ensure that you have already configured your Google Cloud Printers in the [Google Portal](#). For more information see [chapter 3.3](#).

[5] Open the advanced AutoMerge Configuration within CRM

Click here to open the advanced AutoMerge Configuration within your CRM. Or open the AutoMergeServerCoreSolution within your CRM.

[6] View & Install the license

Here you could view and install the license for AutoMerge and DocumentsCorePack for MS CRM 2013. For installing the license please switch to the required tab (AutoMerge or DocumentsCorePack). AutoMerge comes with an unlimited 14 days trial license. The DocumentsCorePack trial is valid as long as the AutoMerge trial is valid. General information about licensing can be found on www.mscrm-addons.com. See next screenshot:

License

AutoMerge
DocumentsCorePack

Licenseinfo for AutoMerge for MS CRM 2013

Licenseinformation	Systemvalue	Status
Licensemodel		i
Licensekey (Trial)		i

Licenseinformation	Systemvalue	Status
BusinessUnit	automergedemo	✔
Number of site licenses	1	✔
Licenses for Readonly Users	0	✔
Expiration	12/17/2013 12:06:50 PM (13 days left)	i
Support		✔
Issued product	AutoMerge	✔
Version upgrade covered till	1/1/0001 12:00:00 AM	✔

Install License
Close

Screenshot above: The license key for AutoMerge will be installed and activated by our support-team. The license key for DocumentsCorePack can be installed when switching to the DocumentsCorePack-tab.

[7] View service logs

With a click here, you could see the service logs, and the processed documents and failures. When the service could not be started, you will find the reason within these logs. With a double-click in the row you can see the service log details. See next screenshot.

Service Logs

Here you could see the latest 250 event log entries of your service **MyService**. Double-click the row to see details

Time	Message
2013-09-18 00:09	2_MyService batch report TotalDocuments since service started : 0 ProcessedBytes since service started : 0
2013-09-18 00:09	2_MyService entering idle loop
2013-09-17 12:09	2_MyService batch report TotalDocuments since service started : 0 ProcessedBytes since service started : 0
2013-09-17 12:09	2_MyService entering idle loop

Service Log Detail

2_MyService batch report

TotalDocuments since service started : 0
ProcessedBytes since service started : 0

-----RUNTIME SUMMARY-----

BatchRunTimes :
Document Batch: 1 items, min: 6516ms , max: 6516ms , avg : 6516ms
TotalRuntime: 6516.6582

QueryRuntimes :
Retrieve Documents to generate: 1 items, min: 6516ms , max: 6516ms , avg : 6516ms
TotalRuntime: 6516.6582

DocumentRuntimes :
TotalRuntime: 0

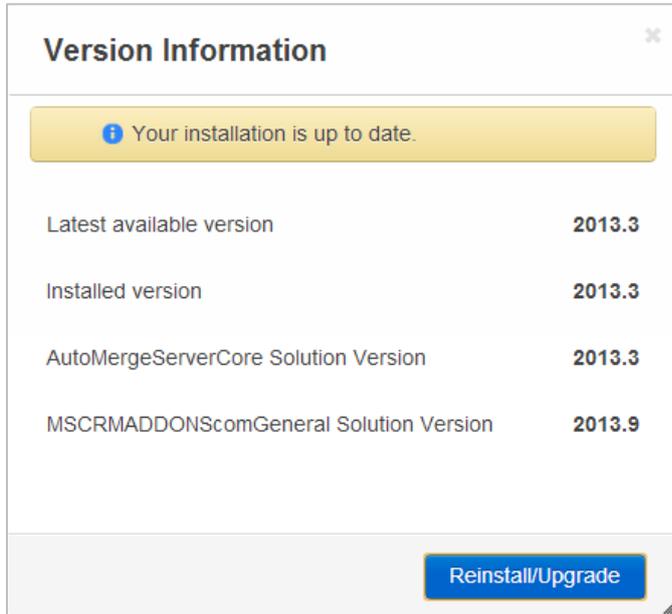
Document Success Runtimes :
TotalRuntime: 0

Document Error Runtimes :
TotalRuntime: 0

Close

[8] View version information

Here you will see the current version information. See if you are up to date and if not, update if you want. See screenshot below:



Version Information

Your installation is up to date.

Latest available version	2013.3
Installed version	2013.3
AutoMergeServerCore Solution Version	2013.3
MSCRMADDONScomGeneral Solution Version	2013.9

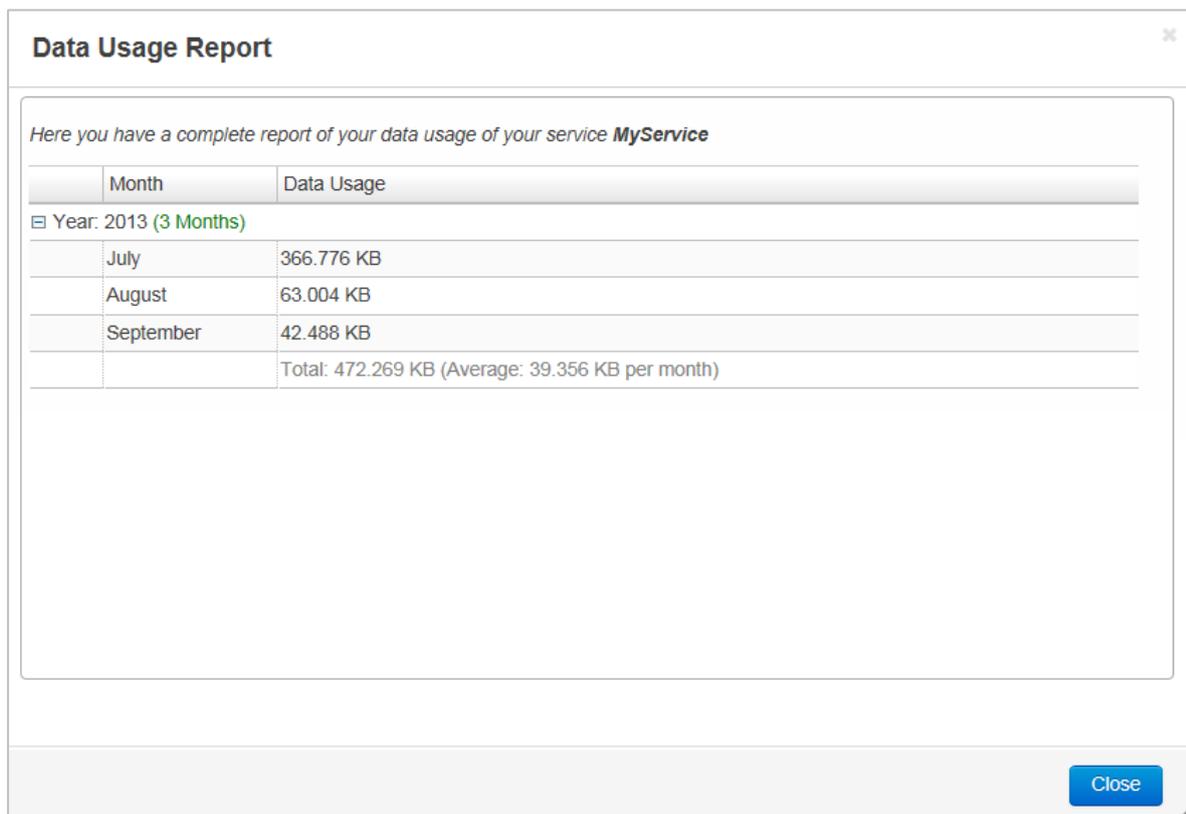
Reinstall/Upgrade

[9] Start & Stop the service

You could start and stop the service here.

[10] Open Data Usage Report

Here you could see a report of your monthly used data volume. See screenshot below:



Data Usage Report

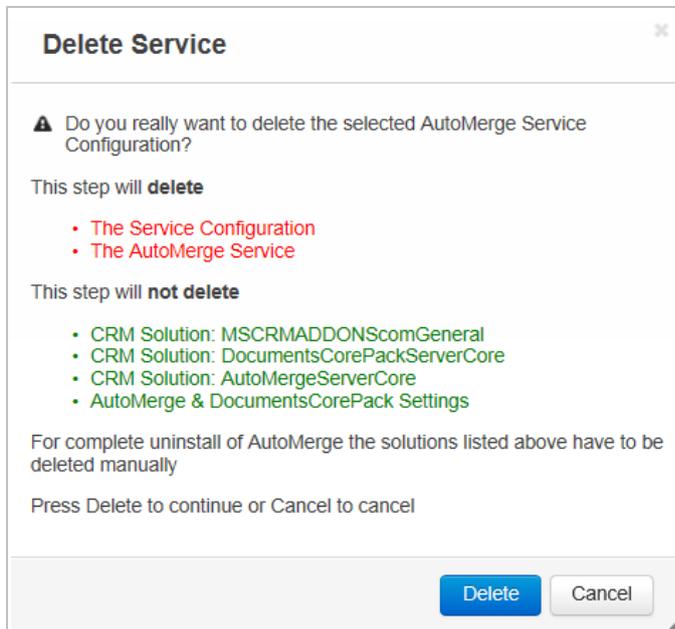
Here you have a complete report of your data usage of your service **MyService**

Month	Data Usage
Year: 2013 (3 Months)	
July	366.776 KB
August	63.004 KB
September	42.488 KB
Total: 472.269 KB (Average: 39.356 KB per month)	

Close

[11] Delete the AutoMerge Service

Click here in case you want to delete your service. Following window appears:



This step will **delete the Service Configuration and the AutoMerge Service**. This step will **not delete**:

- CRM Solution: MSCRMADDONScomGeneral
- CRM Solution: DocumentsCorePackServerCore
- CRM Solution: AutoMergeServerCore
- AutoMerge & DocumentsCorePack Settings

For complete uninstall of AutoMerge the solutions listed above have to be deleted manually. Press [Delete] to continue or [Cancel] to cancel.

3.3 Third Step: Google Cloud Print (optional)

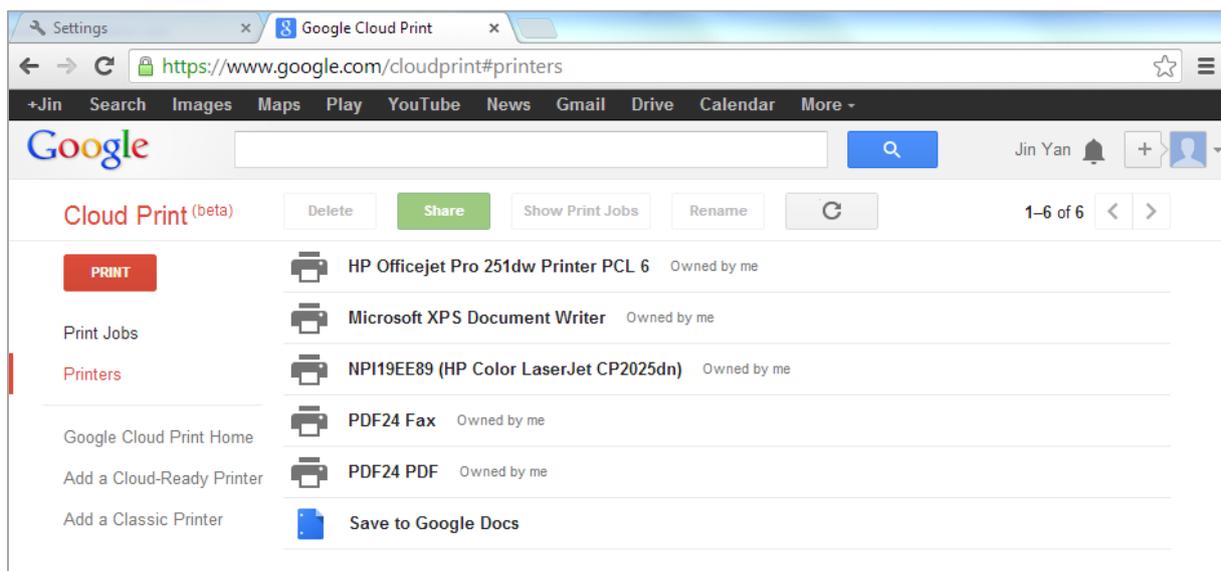
When you have created your CRM Connection Profile, you could create your Google Cloud Print AutoMerge Configurations to print the generated documents.

Before you can use this feature you have to add and configure printers to your google-account. You can connect any number of printers that you like to Google Cloud Print. Please read detailed information about Google Cloud Print before using AutoMerge Online Service Configuration.

<http://www.google.at/cloudprint/learn/>
<https://developers.google.com/cloud-print/>

3.3.1 Google Cloud Print Overview

The screenshot below shows an overview of available printers, added to a Google Cloud Print account. First you have to add printers to your Google account. (See screenshot below).



After added successfully Printers to your Google account (see screenshot above) you can start with the configuration.

Configure Google Cloud Printer Configuration

Configuration Name

Google Account

Username

In this window Google Cloud Printers can be added to your account. Type in your credentials and click on [Get available printers]. This action will open following window:



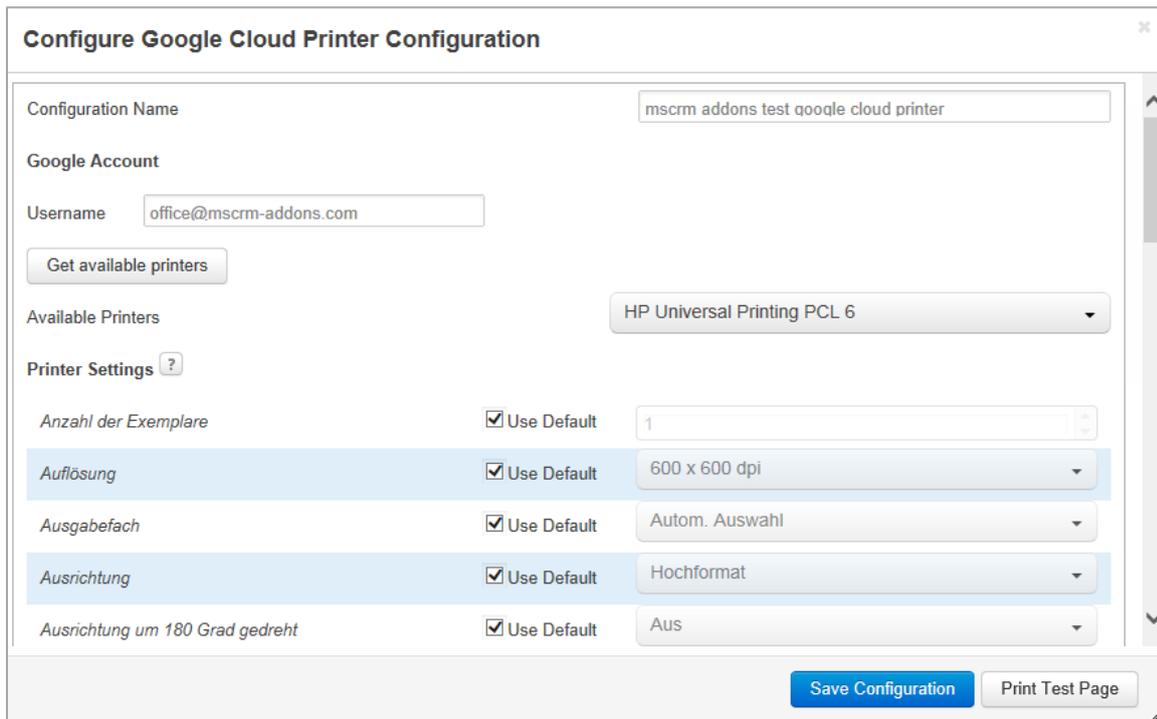
AutoMerge for MS CRM

This app would like to:

-  Manage your printers 
-  View your email address 
-  View basic information about your account 

AutoMerge for MS CRM and Google will use this information in accordance with their respective terms of service and privacy policies.

Click on [Accept] to continue. See screenshot below:



Configure Google Cloud Printer Configuration

Configuration Name: mscrm addons test qoogle cloud printer

Google Account

Username: office@mscrm-addons.com

Get available printers

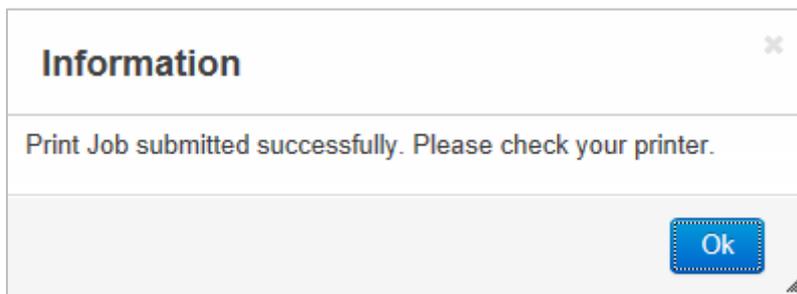
Available Printers: HP Universal Printing PCL 6

Printer Settings

Anzahl der Exemplare	<input checked="" type="checkbox"/> Use Default	1
Auflösung	<input checked="" type="checkbox"/> Use Default	600 x 600 dpi
Ausgabefach	<input checked="" type="checkbox"/> Use Default	Autom. Auswahl
Ausrichtung	<input checked="" type="checkbox"/> Use Default	Hochformat
Ausrichtung um 180 Grad gedreht	<input checked="" type="checkbox"/> Use Default	Aus

Save Configuration | Print Test Page

Within this window the printer settings can be defined. Print a test page to verify that your settings are correct. If your test print was successful, following window appears:

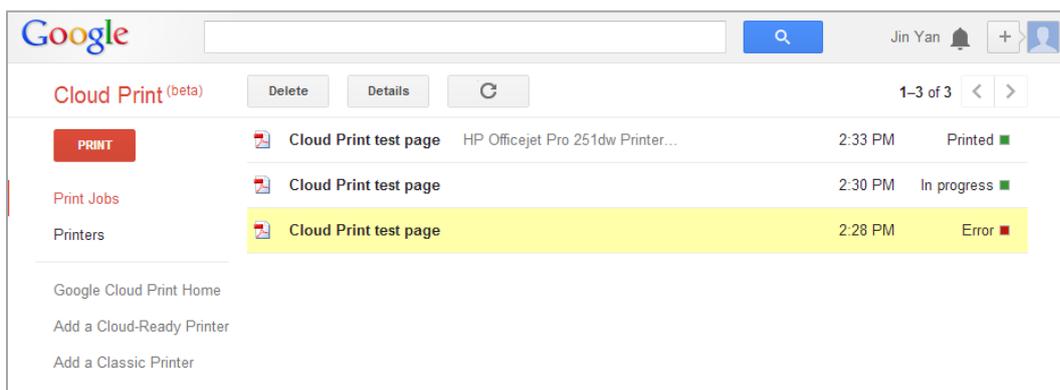


Information

Print Job submitted successfully. Please check your printer.

Ok

If no test page is printed out, please open your Google Cloud Print account, go to "Print Jobs" and check the print status. See next screenshot:



Google Cloud Print (beta)

1-3 of 3

Print Jobs	Printer	Time	Status
Cloud Print test page	HP Officejet Pro 251dw Printer...	2:33 PM	Printed
Cloud Print test page		2:30 PM	In progress
Cloud Print test page		2:28 PM	Error

Google Cloud Print Home
Add a Cloud-Ready Printer
Add a Classic Printer

4 Contact

If you have questions to the product send an email to

support@mscrm-addons.com

or visit our blog

<http://blogs.mscrm-addons.com>

PTM EDV-Systeme GmbH

Bahnhofgürtel 59

A-8020 Graz, Austria

Tel US +1 404.720.6066

Tel Austria +43 316 680-880-0

Fax +43 316 680-880-25

www.ptm-edv.at

www.mscrm-addons.com