

Getting Started Guide – CRM 2011

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1 Download and import the solution

1.1 System requirements

1.1.1 Client Prerequisites:

- Microsoft Internet Explorer v9 or v10 is installed.
*** IMPORTANT *** Internet Explorer 11 is only supported, if you are using CRM 2011 RU 17 (or higher);
More information: <http://support.microsoft.com/kb/2669061>
- Microsoft CRM Administrator privileges
- Pop-up blocker is disabled in Microsoft Internet Explorer. Silverlight 5 Runtime is installed (available in Windows Update) For usage of the CRM Outlook components: Microsoft Dynamics CRM 2011 Outlook Client Rollup Update 14 or higher installed.

1.1.2 For online deployments:

Our solution is certainly available for online deployment. For details, please see our “Getting Started Guide – CRM 2013” which can also be downloaded from our website <http://www.xRM1.com>.

1.1.3 For on-premise deployments:

- Microsoft Dynamics CRM 2011 Rollup Update 15 (or higher).
- Default languages of your CRM System should be English, German, Spanish, French, Russian, Dutch, Portuguese (Brazil), Chinese, Czech, Danish, or Norwegian. That you are using SQL server 2008 R2 or higher.

1.1.4 If you are going to use Employee Cockpit functionality:

- For best user experience use Internet Explorer 10 or higher
- *** IMPORTANT *** Internet Explorer 11 is only supported, if you are using CRM 2011 RU 17 (or higher).
More information: <http://support.microsoft.com/kb/2669061>
- That JavaScript is activated in Browser (It is by Default)

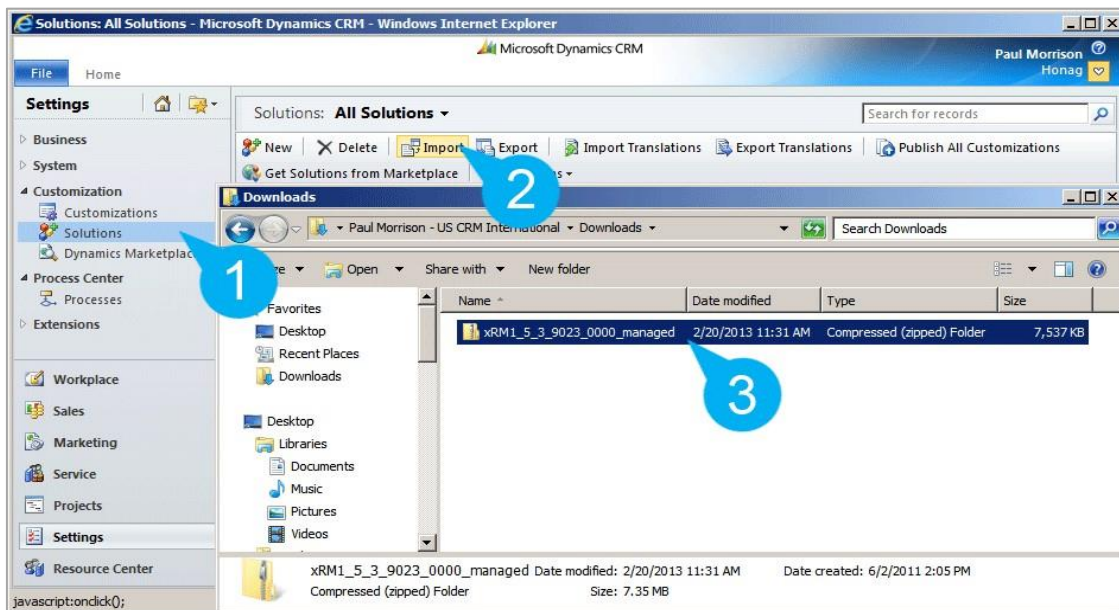
1.2 Download the solution

Make sure that you downloaded the solution file from the xRM1 webpage.

Save this solution ZIP file on your local computer. **Do NOT unzip it.**

1.3 Start import in Microsoft Dynamics CRM

Now, you can add this solution to the list of managed solutions for Microsoft Dynamics CRM.



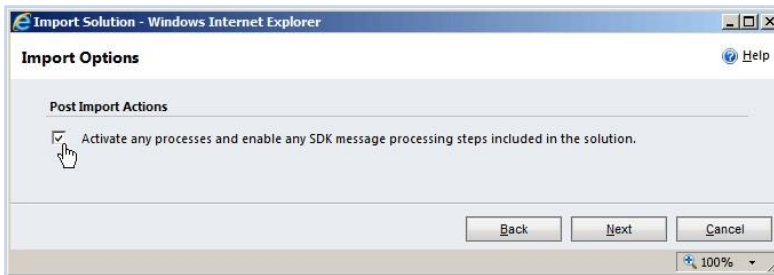
1. *Open Microsoft CRM in Internet Explorer with Admin privileges*
2. *Click 'Settings' in the menu*
3. *Make sure the 'Customization' section is open in the left menu bar*
4. *Click 'Solutions' in the menu*
5. *Click 'Import' in the horizontal menu*
6. *Select and upload the ZIP file of the previously downloaded solution*
7. *Follow the instructions*

NOTES:

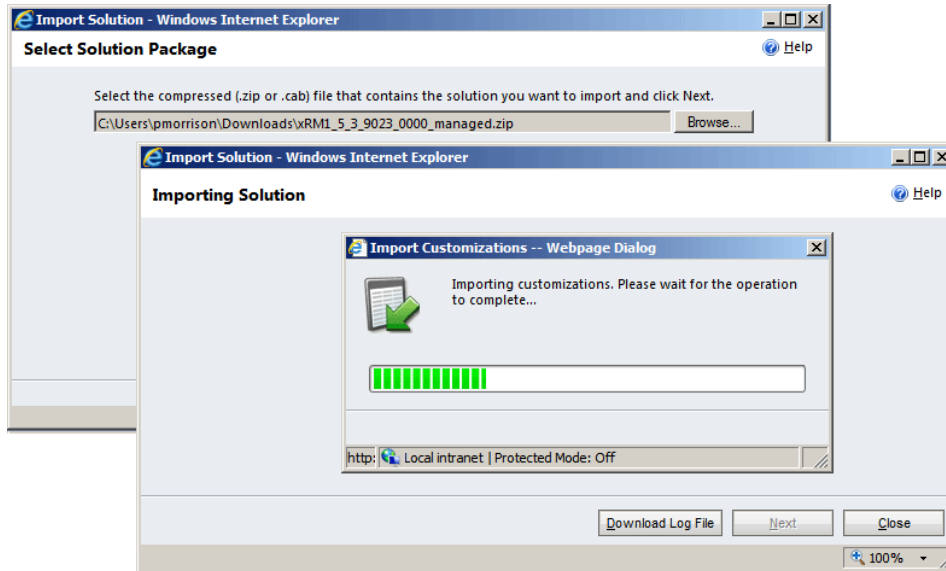
1. If you don't see the import option, you're probably not signed in as Administrator, or the activated interface language does not correspond to the standard language of your Microsoft Dynamics CRM Online subscription. You can adjust language settings through the main Options menu.
2. Once you import the solution, all Microsoft settings such as values, views, and other customizations will be set to default, as documented in the Microsoft SDK. If you would like to keep your individual settings and values, especially recommended if you've changed the default values, you backup your customizations to an unmanaged solution. For details check our FAQs on the website: <http://www.xrm1.com/en/e-learning.htm>

1.4 Import loading

Make sure to select the checkbox located under 'Post Import Actions', located in the pop-up window depicted below. Then select 'Next'.

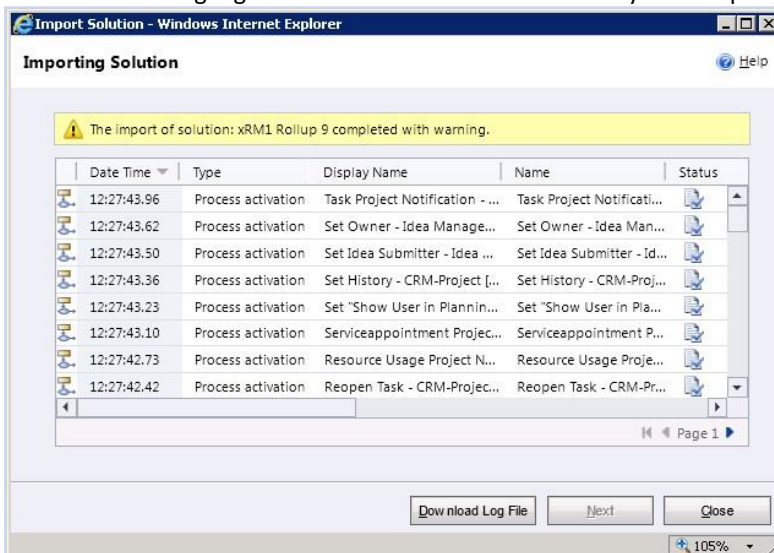


Wait until the import has finished. Depending on your system, the import can take several minutes.



Never interrupt import loading.

The import will end with a status report. Depending on your language settings, this report will most likely include a warning message. This message usually appears when the xRM1 Business Solutions contain label translations in languages which have not been enabled in your company's CRM. This will not affect anything.



To finish the import, select 'Close'. xRM1 Business Solutions will be displayed in the list of installed solutions. At this point we suggest you either refresh your Internet Explorer browser (F5) or, log out of Microsoft Dynamics CRM and in again.

[Congratulations! You have imported your xRM1 Business Solutions](#)

2 Activate and configure the solution

NOTE:

After the installation, you will need to activate your xRM1 Business Solutions. For this, we recommend you use the Activation Wizard, which will help you activate your solutions within a few minutes.

2.1 Starting your activation and configuration

Begin by starting the Wizard:

1. *Open Microsoft CRM in Internet Explorer, with Admin privileges*
2. *Click 'Settings' located in the menu*
3. *Make sure the 'Extensions' section is open, in the menu*
4. *Click 'xRM1 License Assignments' in the menu*
5. *From the shown options, select 'xRM1 Activation Wizard'*
6. *Follow the instructions*

In just a few steps the wizard will prepare your solution.

NOTE:

By using the wizard, you have the option to automatically create basic settings and data. For details, please check our website:

Basic settings: <http://www.xrm1.com/en/support/solution-base-settings.htm>

Base data: <http://www.xrm1.com/en/support/solution-base-data.htm>

IMPORTANT:

Please be aware that the basic settings are necessary for the solution to function properly in your system. If you choose not to create the basic settings with the wizard, it will be necessary to enter these basic settings manually through the xRM1 solution configuration page. For further details, please check out our product manuals, located on the website: <http://www.xrm1.com/en/e-learning.htm>

2.2 Configure additional users

At this point the Wizard has configured all settings for the user that is currently logged in. If you would like to enable other users to use the xRM1 solutions, you have to assign them a license as well.

1. *Open Microsoft CRM in Internet Explorer, with admin privileges*
2. *Select 'Settings', located in the menu*
3. *Make sure the 'Extensions' section is open in the menu*
4. *Select 'xRM1 License Assignments' in the menu*
5. *Click 'New' in the horizontal menu*

[Congratulations! You can now start using your xRM1 Business Solutions](#)

3 Further information and Troubleshooting

For more information about “xRM1 Business Solutions” or advanced configurations (similar to your specific requirements), we recommend taking a look at our standard xRM1 User Manuals, located on the website: <http://www.xrm1.com/en/e-learning.htm>

Select the desired product. You will find the related user manual in the download section.

Additionally, check our FAQs: <http://www.xrm1.com/en/support/support-faq.htm>

If you are still facing problems, please contact our xRM1 Support: <http://www.xrm1.com/en/support/index.htm>