

Update Guide – CRM 2013, 2015 and CRM Online

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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 or v11 is installed.
*** IMPORTANT *** Internet Explorer 11 is only supported, if you are using CRM 2013 RU 2 (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 2013 Outlook Client SP 1 Update or higher installed

1.1.2 For CRM Online deployments:

- Microsoft Dynamics CRM Online (6.1.x or 7.1)
- Default languages of your CRM System should be English, German, Spanish, French, Russian, Dutch, Portuguese (Brazil), Chinese, Czech, Danish, or Norwegian

1.1.3 For on-premise deployments:

- Microsoft Dynamics CRM 2013 SP 1 UR 3 (or higher) or Microsoft Dynamics CRM 2015.
- 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
- 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 Create a Backup copy of your customizations (recommended)

When updating an existing system, it is recommended to backup you customizations. Below are some recommended methods to backup your customizations

- Export your default solution as an unmanaged solution.
- Create a snapshot of your virtual server (ensure no one accesses CRM during the Backup Process).
- If you have made any entity customizations to the solution you are upgrading, save your customizations in an unmanaged solution and export it.

You can reimport your saved solution, if your customizations got lost.

If necessary, you can reset the snapshot or delete it after the update.

1.4 Start the import in Microsoft Dynamics CRM

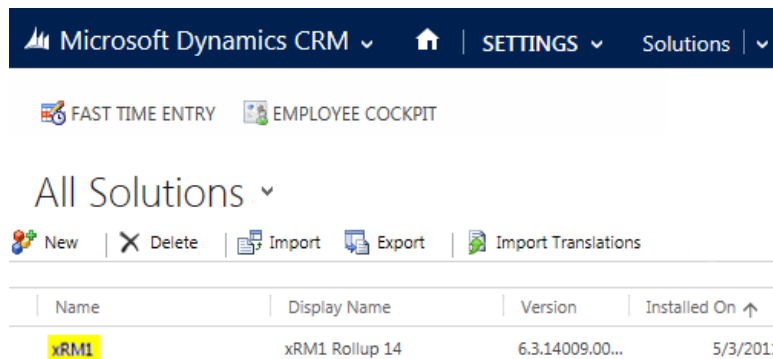
To update your solution to a newer version, just import the updated Solution ZIP-File into you CRM System.

Please ensure that the user that updates the solution is the owner of all included workflows. You can easily recognize them by the “- xRM1”-Suffix in the processname.

IMPORTANT:

It is imperative to choose the correct solution file when upgrading.

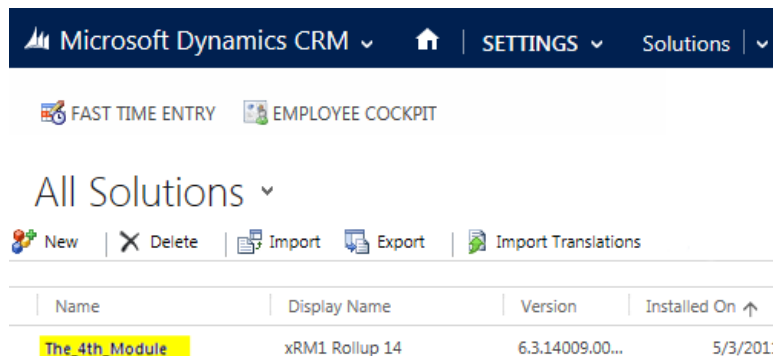
Choose the “xRM1” upgrade solution file if you currently have the “xRM1” solution installed.



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'SETTINGS', and 'Solutions'. Below the navigation bar, there are two solution cards: 'FAST TIME ENTRY' and 'EMPLOYEE COCKPIT'. The main heading is 'All Solutions'. Below the heading, there are action buttons: 'New', 'Delete', 'Import', 'Export', and 'Import Translations'. A table lists the installed solutions:

Name	Display Name	Version	Installed On
xRM1	xRM1 Rollup 14	6.3.14009.00...	5/3/2011

Choose “The_4th_Module” upgrade solution file if you currently have “The_4th_Module” installed.




The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'SETTINGS', and 'Solutions'. Below the navigation bar, there are two solution cards: 'FAST TIME ENTRY' and 'EMPLOYEE COCKPIT'. The main heading is 'All Solutions'. Below the heading, there are action buttons: 'New', 'Delete', 'Import', 'Export', and 'Import Translations'. A table lists the installed solutions:

Name	Display Name	Version	Installed On
The_4th_Module	xRM1 Rollup 14	6.3.14009.00...	5/3/2011

The system recognizes that a previous version already exists and you will be asked how the update should be performed.

Import Options
[Help](#)

 This solution package contains an update for a solution that is already installed.

Previous customizations on components included in this solution

Maintain customizations (recommended)
 Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.

Overwrite customizations
 Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.

Post Import Actions

Activate any processes and enable any SDK message processing steps included in the solution.

To ensure that you get all updated functions and customizations, please select the “Overwrite customizations” option.

IMPORTANT:

Selecting the “Overwrite customizations” option will overwrite all previously configured entity customizations inside this solution. Please use the backup you created in step 1.3 to merge your old customizations into the upgraded solution.

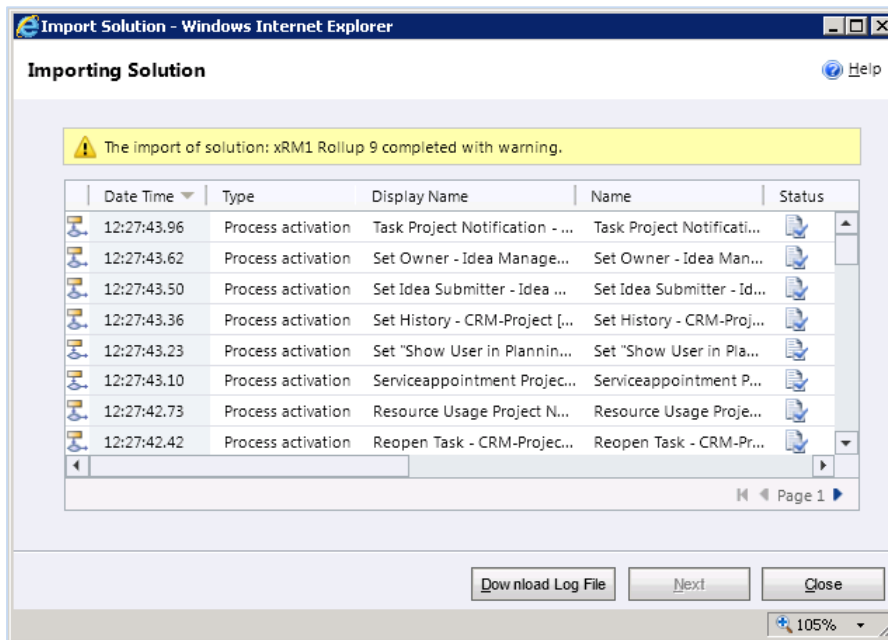
Please check the checkbox “Activate any processes and enable any SDK message processing steps included in the solution” when importing the Solution in order to automatically activate all Plugins and Workflows which come with the Solution.

1.5 Import loading

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 activated languages, this report will most likely include a warning message. This message usually appears when your CRM system does not have all the languages that are included the xRM1 Business Solutions enabled. 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 that you either refresh your Internet Explore browser (F5) or, log out of Microsoft Dynamics CRM and in again.

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

2 Activate your solution

After the import is successfully completed, please run the activation wizard again.

2.1 Starting your activation and configuration

Name	Display Name	Version	Installed On	Package Typ...	Publisher
xRM1	xRM1 Rollup 16	6.3.16014.00...	5/3/2011	Managed	xRM1 Business Solutions

Begin by starting the Wizard:

1. [Open Microsoft CRM in Internet Explorer, with Admin privileges](#)
2. [Click 'Settings' located in the menu](#)
3. [Click 'Solution' in the menu](#)
4. [From the shown options, select 'xRM1 Activation Wizard'](#)
5. [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/solution-base-settings.htm>

Base data: <http://www.xrm1.com/en/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/products.htm>

[Congratulations! You have now updated 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/products.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/faq.htm>

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