

## Dynamics CRM Add-On Activation Guide

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# Step-by-step guide to activate CRM Add-Ons

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This document is intended to be a user-friendly and simple document for Dynamics CRM users with experience in administering Dynamics CRM system. The primary objective of this document is to offer a step-by-step guide on the activation process for trial or paid subscriptions of Dynamics CRM Add-Ons from Soluzione.

Our aim has been to ensure the clarity and accuracy of this document's content. However, given the dynamic nature of software applications, ongoing developments may lead to minor inconsistencies post-documentation. Your feedback on this manual would be greatly valued.

# Install Solution

Before you proceed, install the solution in your Dynamics 365 CRM environment via Microsoft App Source or using the deployment package as received from Soluzione Team.

















The steps below can only be performed by Microsoft Dynamics CRM administrators or by users with administrative privileges for Microsoft Dynamics CRM.

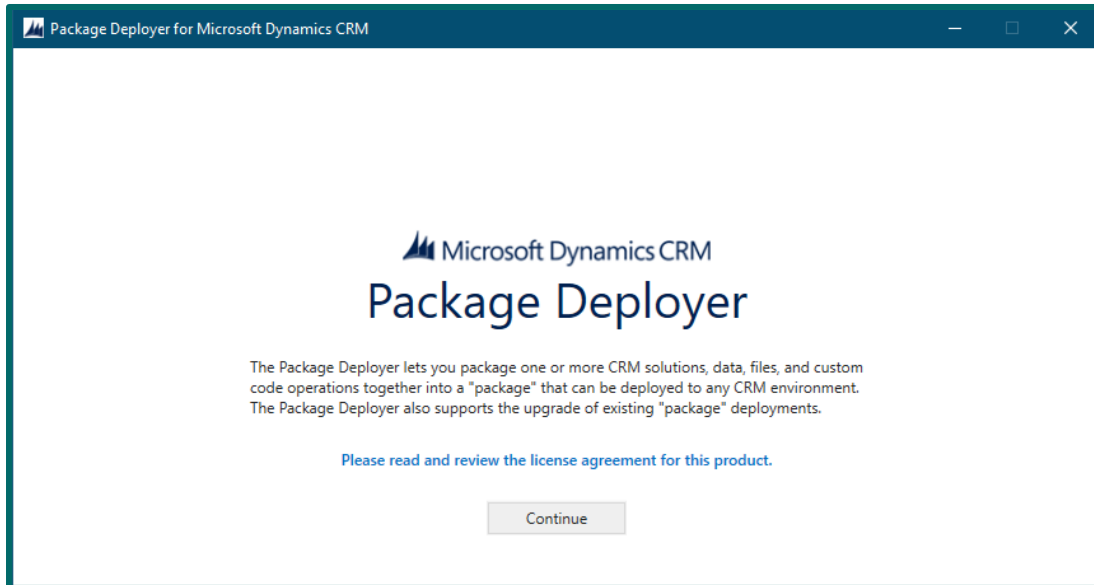
## Install Solution via Package Deployer

**Step 1:** Extract the contents of the add on package deployer zip file to a folder where you have full permissions.

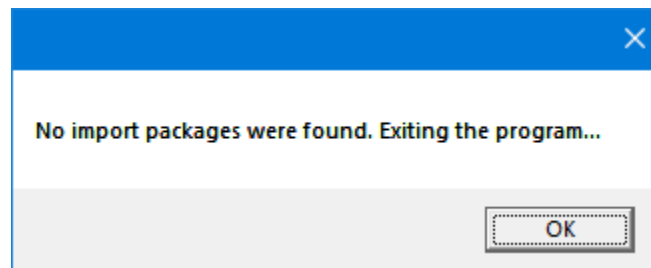
**Step 2:** Go to that file folder and run the file PackageDeployer.exe.

	PackageDeployer.exe.config	7/25/2019 8:48 PM	XML Configuratio...	8 KB
	Microsoft.Xrm.Tooling.Connector.xml	7/25/2019 8:50 PM	XML File	268 KB
	Microsoft.Xrm.Tooling.PackageDeploym...	7/25/2019 8:53 PM	XML File	43 KB
	Microsoft.Xrm.Tooling.PackageDeploym...	7/25/2019 8:53 PM	XML File	148 KB
	Microsoft.Crm.Sdk.Proxy.dll	7/25/2019 8:58 PM	Application exten...	275 KB
	Microsoft.Xrm.Tooling.Connector.dll	7/25/2019 8:59 PM	Application exten...	244 KB
	Microsoft.Xrm.Tooling.PackageDeploym...	7/25/2019 8:59 PM	Application exten...	31 KB
	Microsoft.Xrm.Tooling.Ui.Styles.dll	7/25/2019 8:59 PM	Application exten...	141 KB
	PackageDeployer.exe	7/25/2019 9:00 PM	Application	224 KB
	Microsoft.Xrm.Tooling.CrmConnectCont...	7/25/2019 9:00 PM	Application exten...	1,943 KB
	System.Windows.Interactivity.dll	7/25/2019 9:00 PM	Application exten...	49 KB
	Microsoft.Expression.Interactions.dll	7/25/2019 9:00 PM	Application exten...	99 KB
	Microsoft.Xrm.Tooling.PackageDeploym...	7/25/2019 9:00 PM	Application exten...	217 KB
	Microsoft.Xrm.Sdk.Deployment.dll	7/25/2019 9:02 PM	Application exten...	84 KB





**Step 3:** This will launch CRM package deployer wizard. Click on Continue to move ahead.



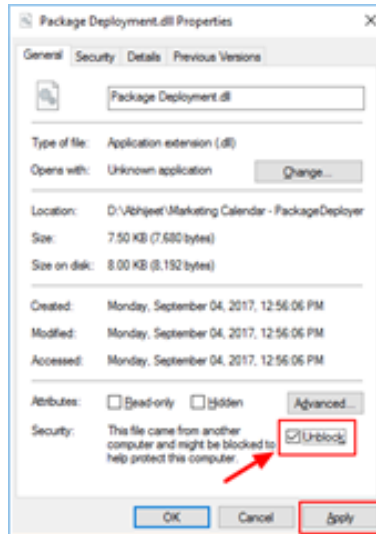
In case you receive an error “No Import Packages were found” like below then follow step 4 or else move to step 5



**Step 4:** Find the Addon specific assembly (for example report scheduler addon is **SolzITAddOns.ReportScheduler.dll**) in the folder where you extracted the deployment zip file.

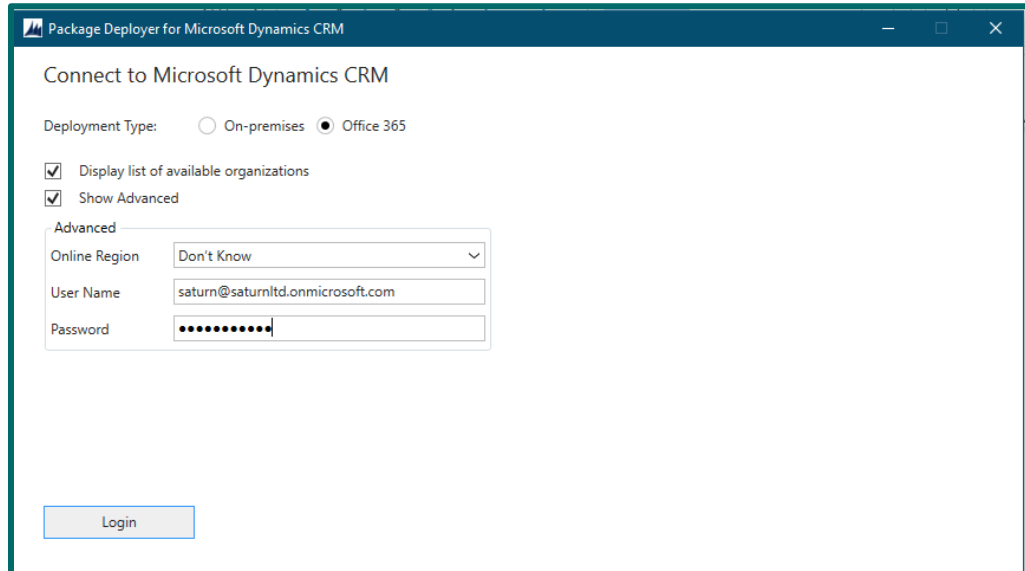
	SolzITAddOns.ReportScheduler.dll	24-03-2021 20:30	Application exten...	6 KB
	SolzITAddOns.ReportScheduler.dll.config	20-03-2020 17:07	XML Configuratio...	1 KB
	SolzITAddOns.ReportScheduler.pdb	24-03-2021 20:30	Program Debug D...	16 KB
	System.IdentityModel.dll	12-10-2017 19:53	Application exten...	526 KB

Right click on the file to go to properties. Click on unblock checkbox.



Now try to again run “PackageDeployer.exe” as in **Step 2**.

**Step 5:** Select Office 365 for Dynamics CRM Online and provide CRM credentials with administrative privileges. Click Login.

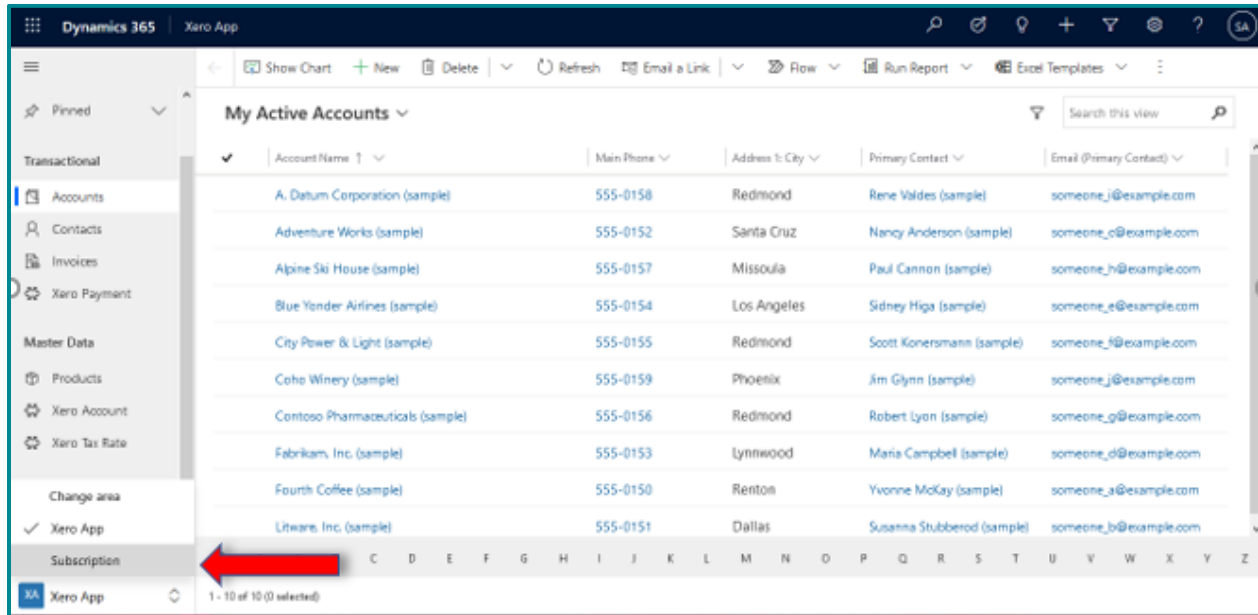


**Step 6:** If there are multiple organizations then select the organization where you want to deploy the solution.

**Step 7:** Click “Next” to almost all screens to initiate the installation process. At the end you will see the Installation Complete screen. Click finish to end the setup.

# Activate Trial

**Step 1:** Login to your Dynamics CRM and navigate to Add-On App. Each CRM Addon from Soluzione has their dedicated app. In the App switch to Subscription area from the left menu at the very bottom.



**Step 2:** Click on Addon Subscription menu item. This will display the Subscription form.

The screenshot shows the 'Xero Connector' form in Dynamics 365. The form is titled 'Xero Connector' and contains a description: 'The XERO connector add-on for Dynamics 365 CRM is a secure, robust and reliable cloud-hosted service to synchronize master data and link customer records, invoices, and payments between Dynamics 365 CRM and XERO.' The form has several input fields and buttons.

**App Code**  **Skip Subscription Validation** ☐

**Subscription Start Date**  **Subscription End Date**

**Trial End Date**  **Last Billing Date**

**CRM Organization Id**  **License Key**

**Activate Trial** **Activate Subscription**

**Step 3:** Click on button “Activate Trial”. This will open free trial sign-up screen as depicted below:

The screenshot shows a web application window titled "Activate Trial Subscription". The main heading is "Sign up for a 30-day free trial" with a sub-note "No credit card required". The form contains several input fields: "Company" (with a building icon), "First Name" (with a person icon), "Last Name" (with a person icon), "Mobile Number" (with a phone icon), "Email" (with an envelope icon), "Organization Id" (with a location pin icon), and "Environment" (with two buttons: "Production" and "Sandbox"). The "Email" field is pre-filled with "admin@CRM060497.OnMicrosoft.". The "Organization Id" field is pre-filled with "311515C6-0503-41B6-8E2A-0DC52".

**Step 5:** Some of the details will be pre-filled such as Organization Id and email. Fill in other details and click on Submit.

**Step 6:** This action will activate your free trial for the CRM Add-On and you will be redirected back.

The screenshot shows a form with two columns of fields. The left column contains: "App Code" (pre-filled with "SOLZ\_CRMADDON\_XERO\_CONNECTOR"), "Subscription Start Date" (pre-filled with "24 March 2021"), "Trial End Date" (pre-filled with "23 April 2021"), and "CRM Organization Id" (pre-filled with "311515C6-0503-41B6-8E2A-0DC529B0B093"). The right column contains: "Skip Subscription Validation" (pre-filled with "No"), "Subscription End Date" (empty), "Last Billing Date" (empty), and "License Key" (pre-filled with "loqKln50N5xbvB052yM++dOsCNEud8oLx/6Ab2SHwyLg6a"). At the bottom right, there are two buttons: "Activate Subscription" (green) and "Refresh Subscription" (blue).

**Step 7:** Once your trial is activated, you will see following details on the new page:

- AddOn App Code
- Organization Id
- Trial End Date
- License Key

**Step 8:** That's it! The trial has been activated. Now follow the specific CRM Add-On user manual for configuring the same.

## Activate Paid Subscription

You can activate paid subscription at any time during or after the trial. To activate paid subscription contact us on [info@solzit.com](mailto:info@solzit.com) or [support@solzit.com](mailto:support@solzit.com) with your production CRM organization Id and billing details.

## Refresh Subscription

You can click on the refresh button to fetch the latest subscription details for you Add-On.

## Contact Us

Feel free to contact us on [info@solzit.com](mailto:info@solzit.com) or [support@solzit.com](mailto:support@solzit.com) if you face any issues or if you have any queries.