



Donaubauer CRM to Online

User manual

CRM to Online – for Microsoft Dynamics 365

Version 9.4.0

Table of contents

| | | |
|-------|--|----|
| 1 | Introduction | 3 |
| 1.1 | Supply sources | 4 |
| 1.1.1 | Getting solution and executable from our website | 4 |
| 1.1.2 | Solution from Microsoft AppSource | 4 |
| 2 | Installation and Configuration | 5 |
| 2.1 | Installation manual..... | 5 |
| 2.1.1 | Manual import of the solution | 5 |
| 2.1.2 | Automatic import via AppSource | 9 |
| 2.2 | Configuration manual | 11 |
| 2.2.1 | Check for update | 11 |
| 2.2.2 | Request a license | 12 |
| 2.2.3 | Importing a license key..... | 13 |
| 2.2.4 | Download of the application | 16 |
| 3 | Deinstallation | 20 |

1 Introduction

Thank you for choosing our Donaubauer CRM to Online solution.

You now have the opportunity to upload your CRMs information to Dynamics 365 with ease. In the transfer process, all connections and relation will be sustained. That means for example correctly associating all quote to the right employees.

On the following pages, you will find the detailed manual to use the Donaubauer tool CRM to Online for Microsoft Dynamics 365.

1.1 Supply sources

“CRM to Online” consists of 2 parts.

First is the importable solution for your Dynamics 365 and second is the executable for the data transfer.

1.1.1 Getting solution and executable from our website

The most recent Donaubauer CRM to Online solution is always available for download under

<http://www.donaubauer.com/de/#!/CrmToOnline>

1.1.2 Solution from Microsoft AppSource

Microsoft AppSource is a Platform to easily access the most recent version of the [Donaubauer CRM to Online solution](#).

You can find Microsoft AppSource under <https://appsource.microsoft.com>. After the login, the following page is displayed:



You are now able to search for the Donaubauer CRM to Online solution via the given search field. To restrict your search by the given categories please mark “IT and administration” or “operative service and supply chain”.



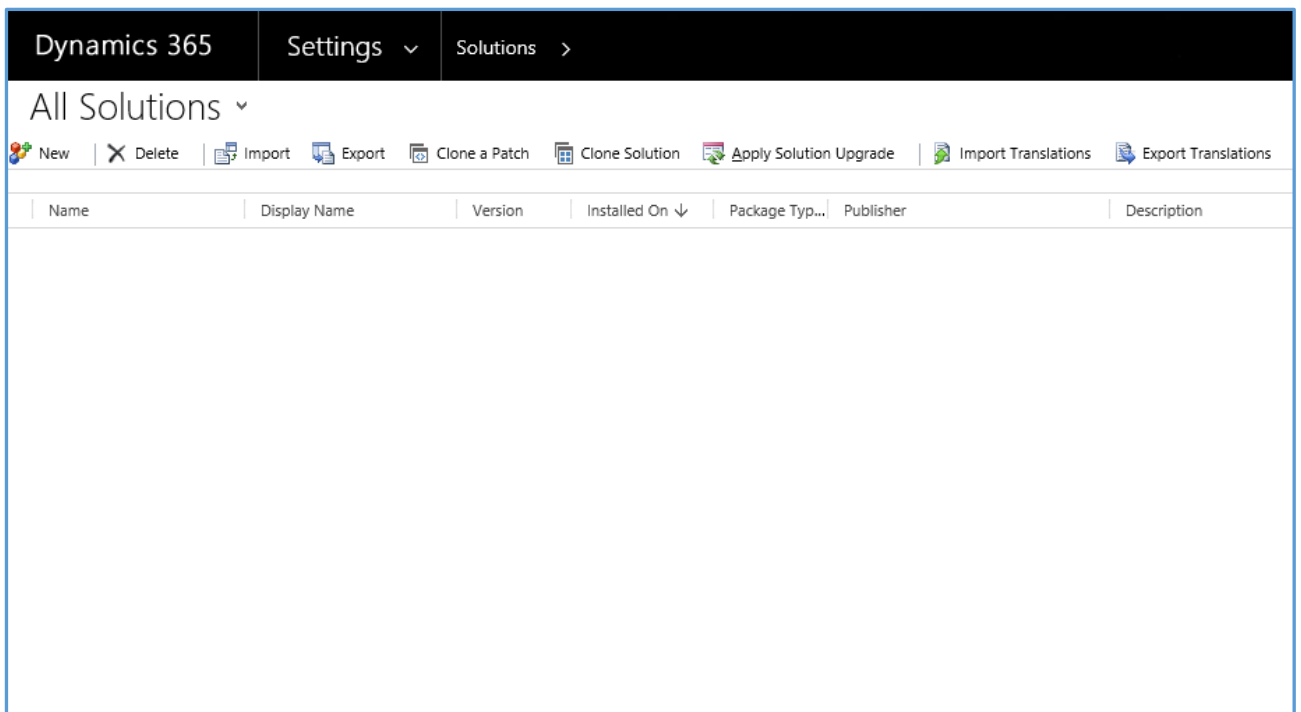
2 Installation and Configuration

2.1 Installation manual

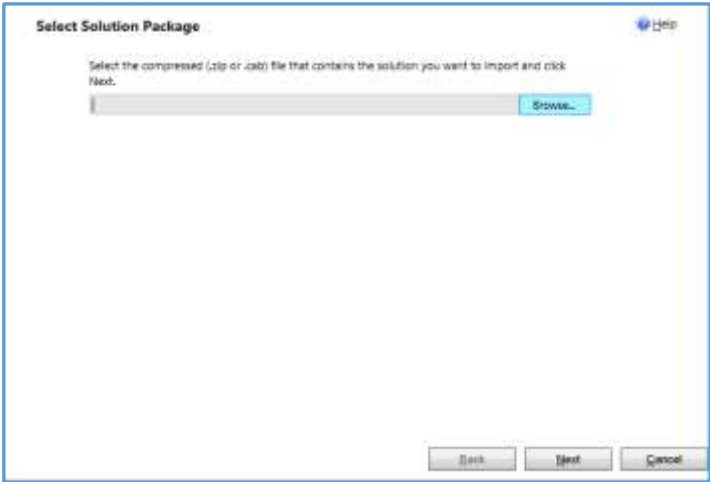
2.1.1 Manual import of the solution

The most recent version of the [Donaubauer CRM to Online solution](#) can be found through the link www.crmtonline.com

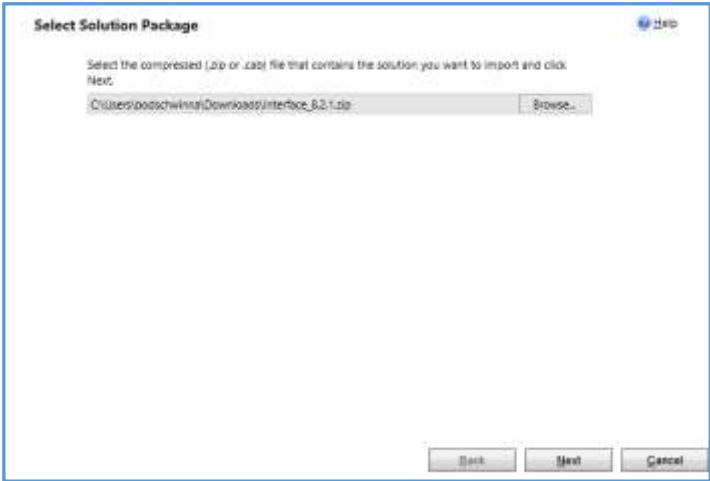
Click “Settings” in the navigation area and choose the “Solutions” site to see all imported and created solutions.



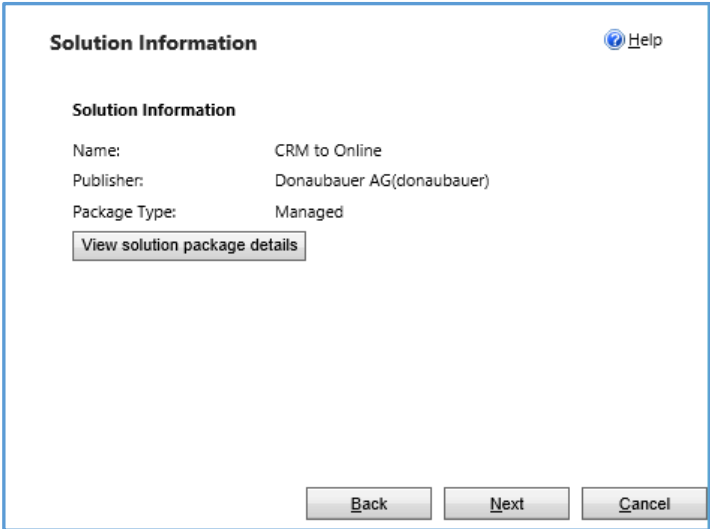
Click the button “Import” in the menu to open the import assistant.



Search with the button “Browse” for the solution on your hard drive.



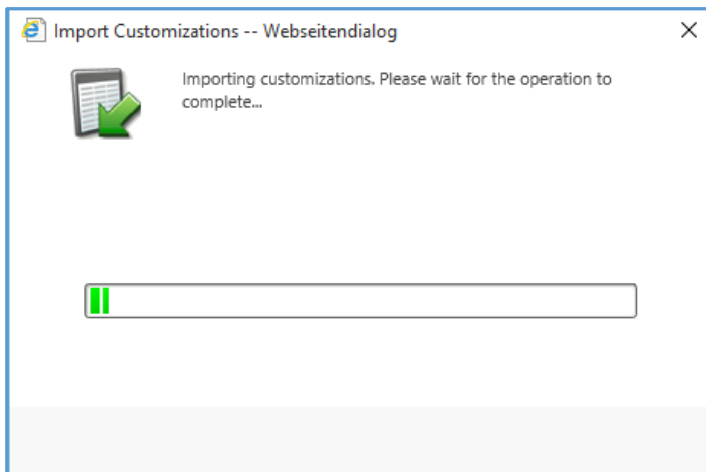
A click on the button “next” progresses the import



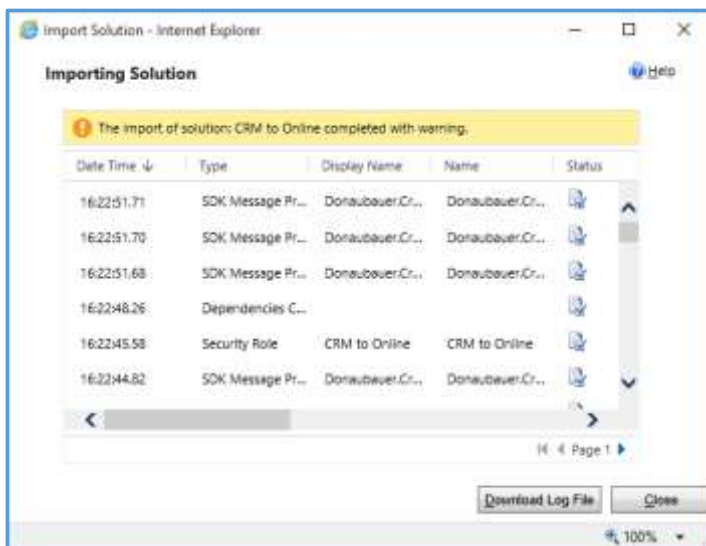
Now the solution information is shown in the assistant.



It is necessary to check the box in the next panel to activate all imported steps

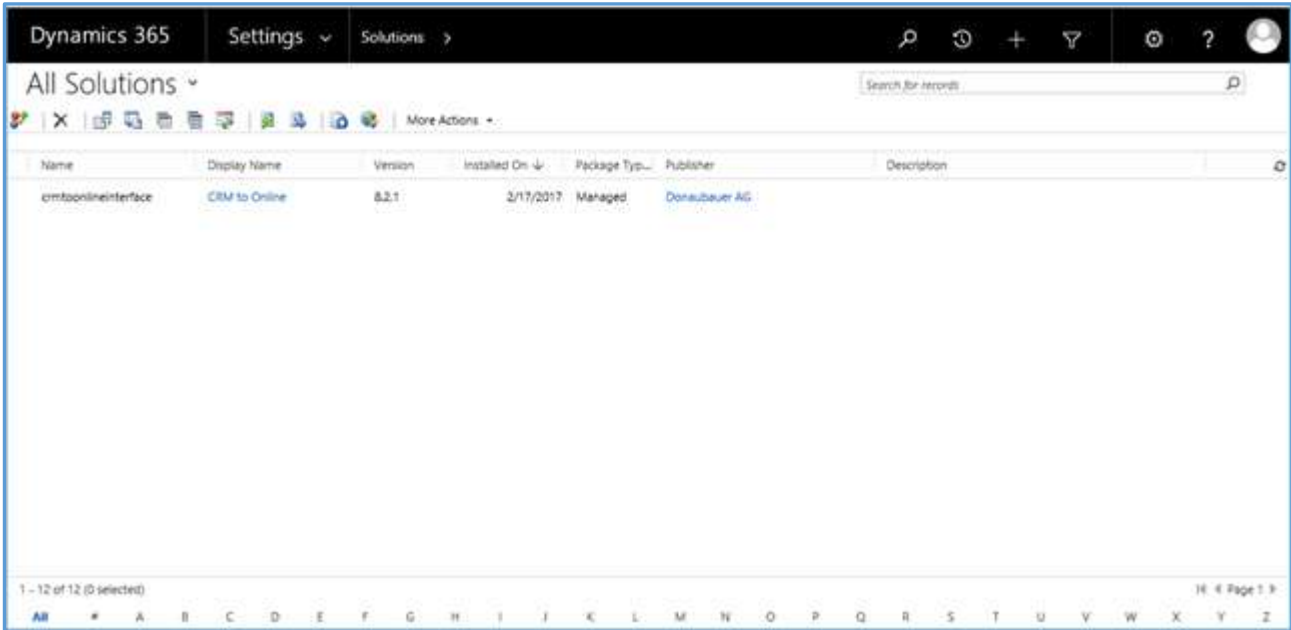


After the import which may take a while,...



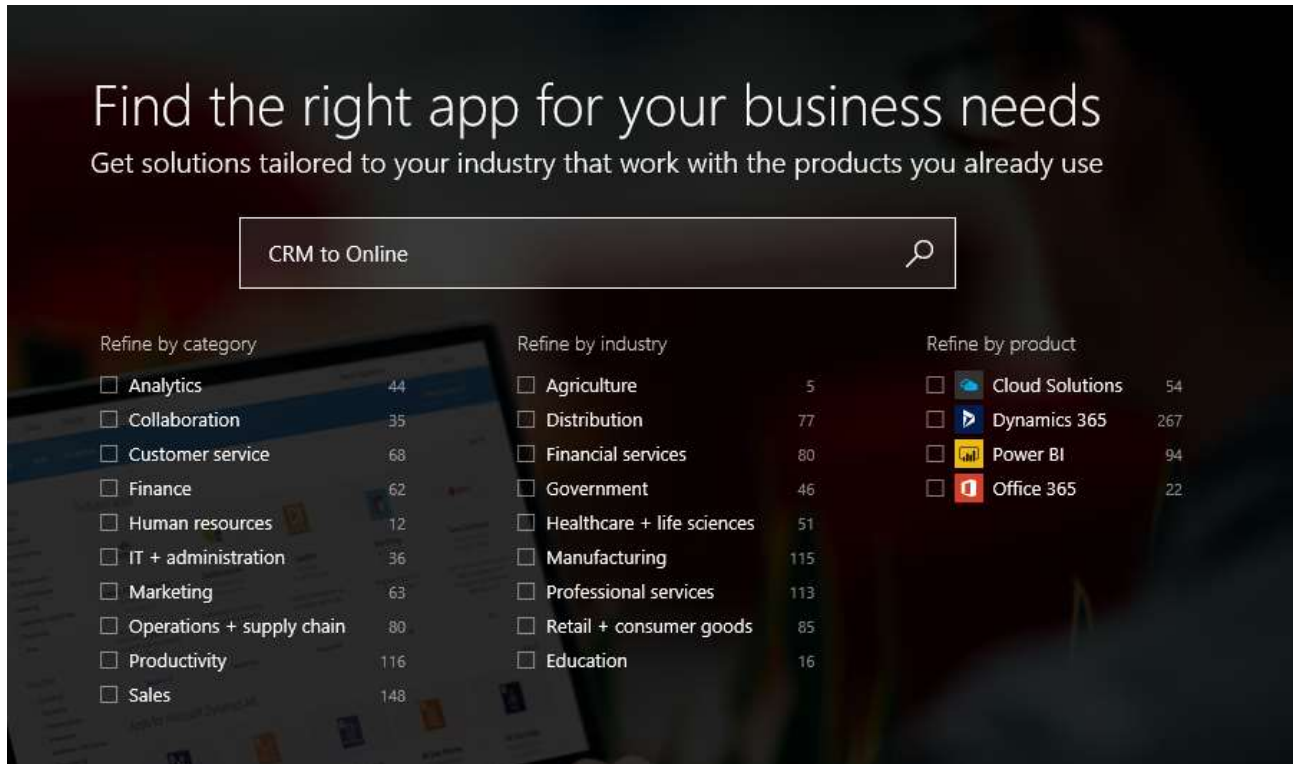
...the process is finished with a protocol

In the CRM under the site "Solutions" there is now an entry for "CRM to Online" (display name: CRM to Online).

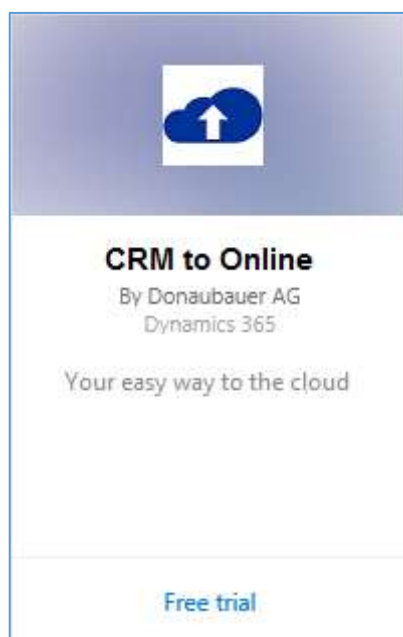


After the successful import, you may continue to point “2.2 Configuration manual” on page 11.

2.1.2 Automatic import via AppSource

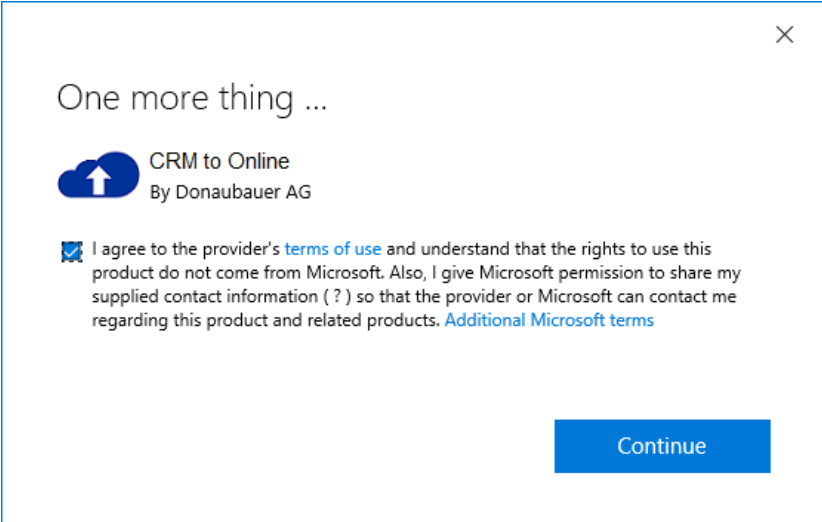


You can find “CRM to Online” in AppSource by entering the name in the search field. The found apps will be shown below.

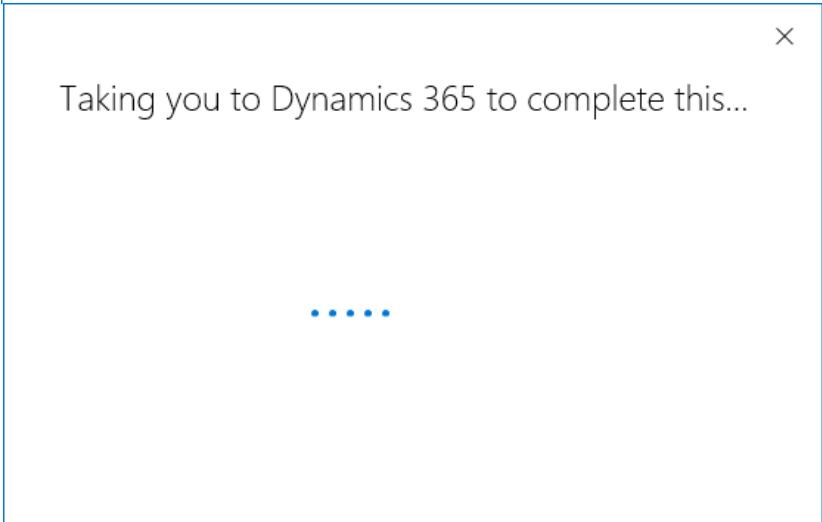


The button “Free Trial” lets you access a free trial of the app.

A click on the app symbol reveals additional information to the app.



On checking the box in this window, you agree to the terms of use from Microsoft. This is necessary to advance to the next screen



During your login, your screen will look like this.

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365
Organization to add the application to: CRM2Online (crm2online) ▼

- Agree to Microsoft's Legal Terms and Privacy Statement
- Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365



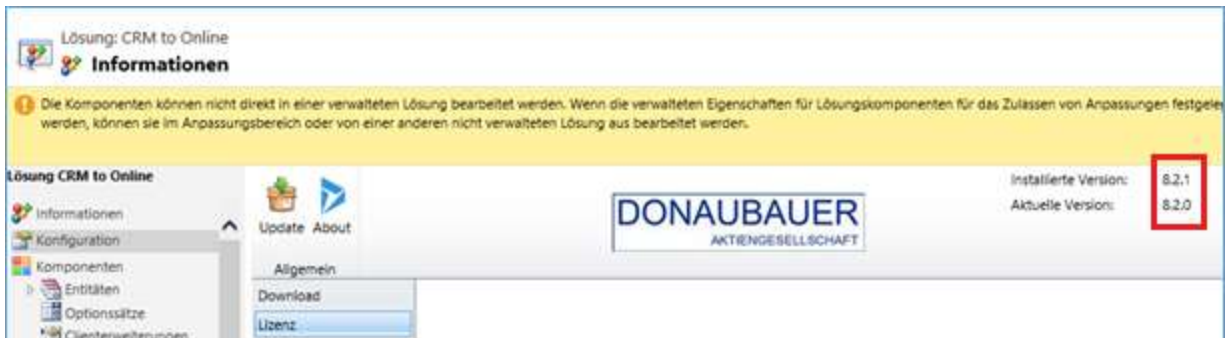
After a few second you can login to your Dynamics 365 Area.

By checking the next two boxes you agree to the legal terms and privacy statements of both parties. Then you can click on the blue "Agree" button to install the solution to the chosen organization.

2.2 Configuration manual

2.2.1 Check for update

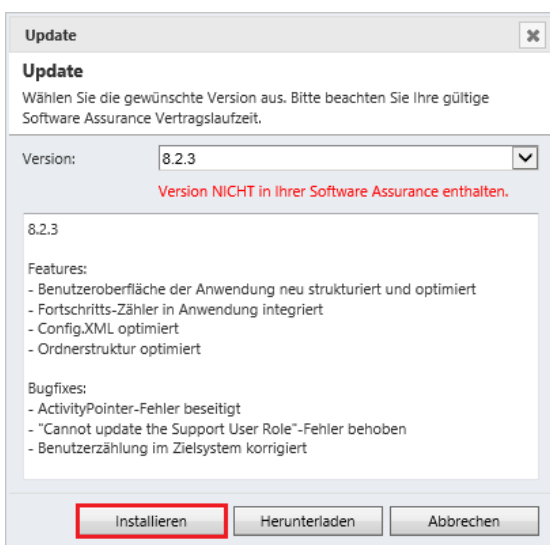
Before starting the configuration, you need to verify whether a newer solution is available. To check whether an update is available for the addon, the solution must be opened. As you can see in the following picture, the installed version as well as the latest version are located in the top right corner.



If the current version has a higher number than the installed version, the "Update" button has to be clicked.



The following dialog opens, which, by clicking "Install", downloads and installs the latest version.

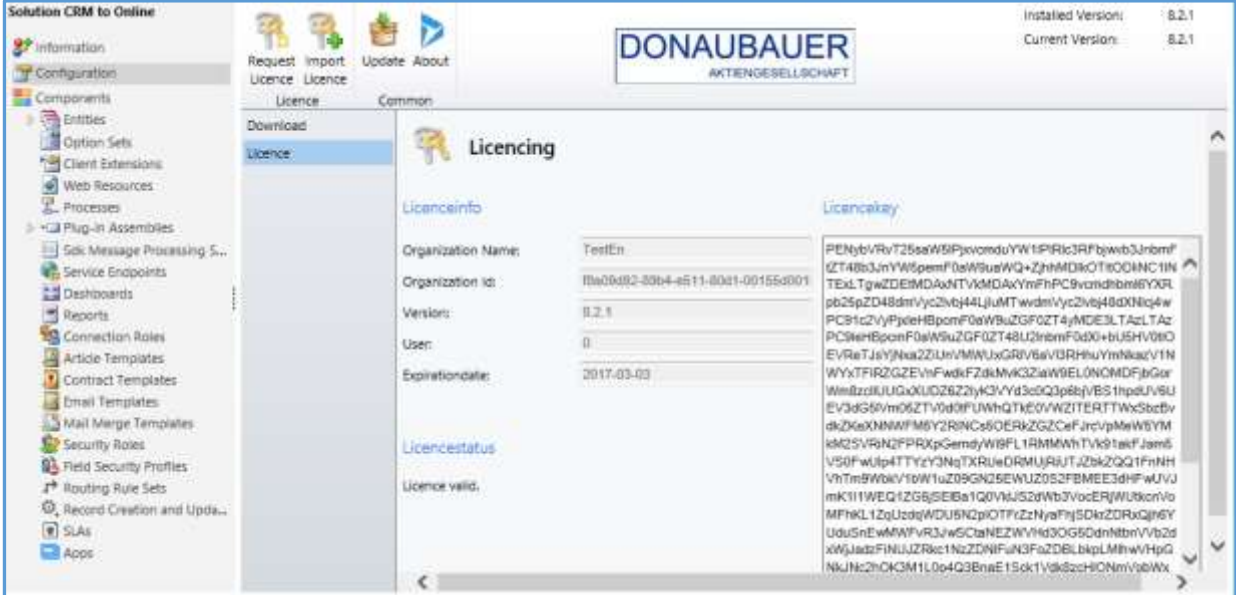


2.2.2 Request a license

To request a license, you must first open the solution. When the solution was successfully installed, the configuration page is shown. You will see a sidebar on the left of the page, there you click on the point named "license".



In the license area, you can click the button request license to access the following dialog.





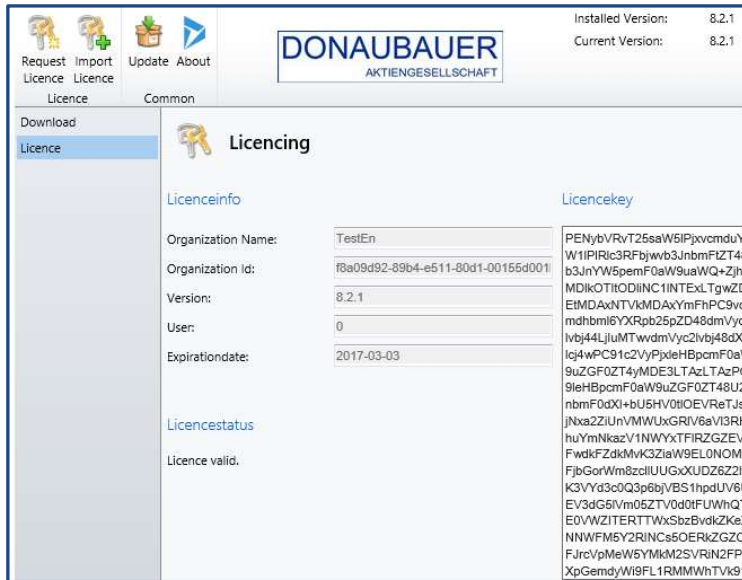
The input of an email address is required. You should read the end user license agreement and agree to them by checking the box located below.

If you do not want to agree to the end user license agreement, you can cancel the whole process by clicking on the button “cancel” in the bottom right corner of the dialog. You should remove the solution after that as to not overload your CRM with unnecessary items.

2.2.3 Importing a license key



By clicking “next” on the previous window your CRM will contact our license server once to retrieve a license key for your system.



The import of a license key may take a few seconds. The data is automatically filled on the configuration page.

After a successful import of the license key, the following information is shown in the configuration page:

- Organization name:** The name of the organization using the interface
- Organization ID:** ID of the organization using the interface
- Version:** Version number of the interface
- User in target system:** Maximum number of active users in the target system (Dynamics 365)
- Expiration date:** Expiration date of the license. A value in this field only appears only using a demo license.

If you cannot connect to the internet from your CRM a different dialog will appear.

Please send us the information appearing in the dialog by email to lizenzen@donaubauer.com.



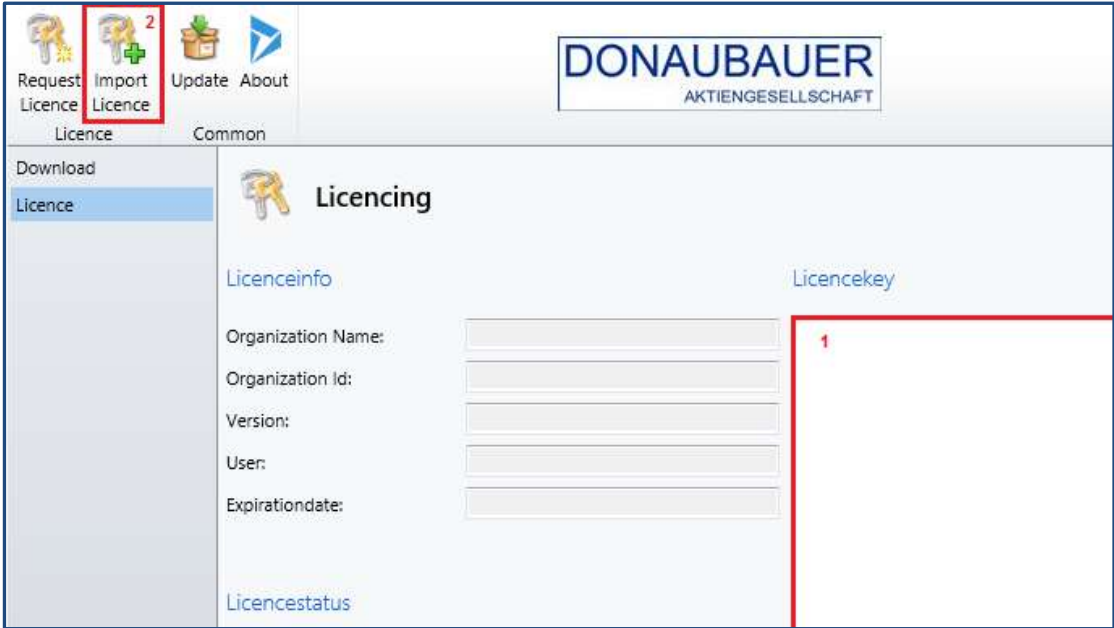
With this information, we will manually create a license for your CRM and send it back to you.

Caution:

To ensure that no delay or unnecessary question occur, please copy the given information in to an email instead of taking a screen shot.

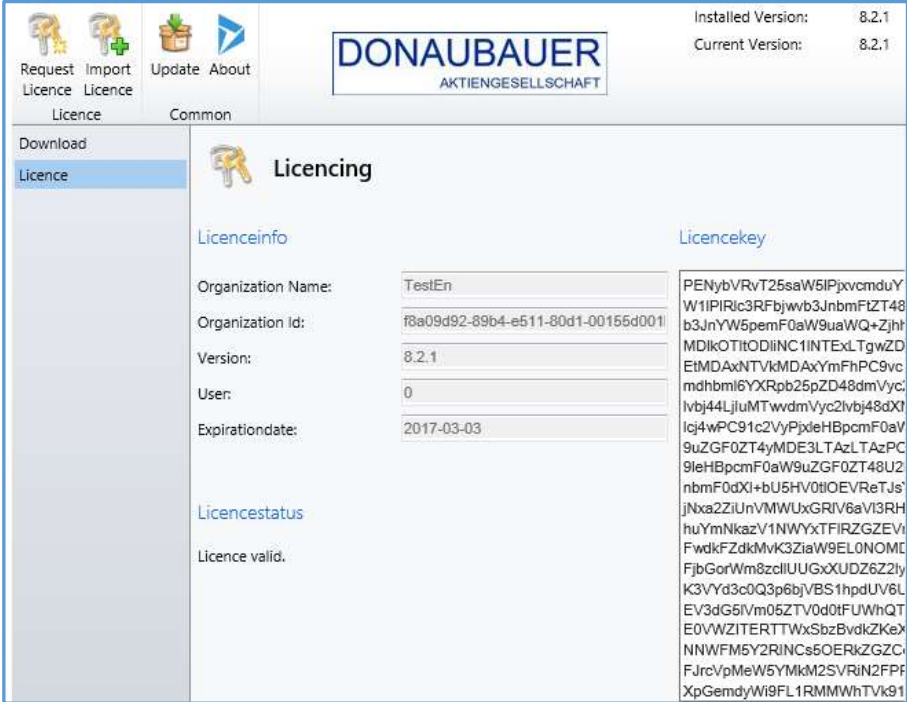
The license key will be send via email.

Please paste the license key in the marked text box (1) and press the “import license” button(2).



As already described in the explanation about the automatic import, it is also necessary to agree to the end user license agreement in the dialog and press “next” to import.

If you do not want to agree to the end user license agreement, you can cancel the whole process by clicking “cancel” in the bottom right corner of the dialog. You should remove the solution after that as to not overload your CRM with unnecessary items.



After the import, all information fields will be filled with the information encoded in the license.







2.2.4 Download of the application

To start the process it is necessary to download an additional tool from www.crmtoonline.com.

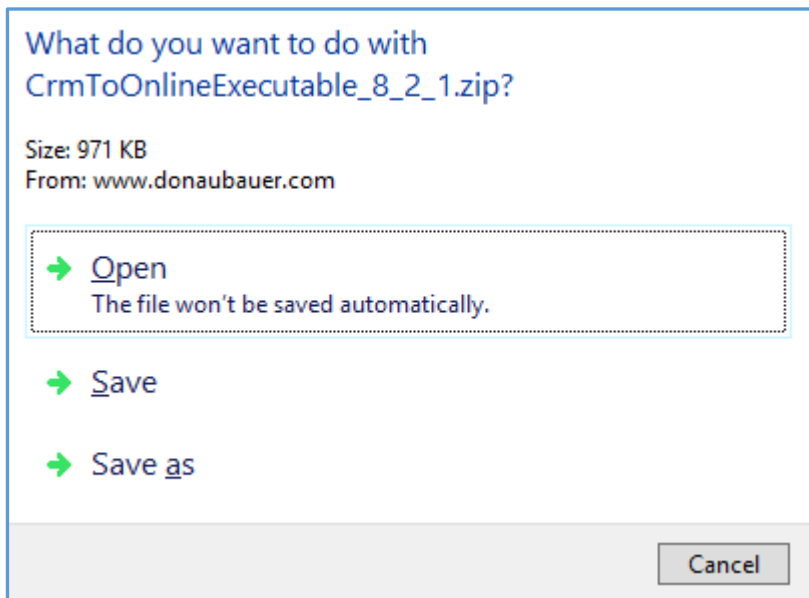
The additional files are:

- Application
- User manual for the application

You must visit "www.crmtoonline.com" and click the link to download the executable file.

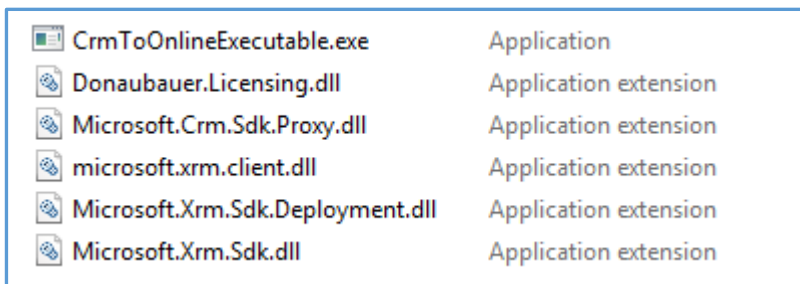
| CRM to Online - Version 8.2.1 | | | |
|---|-------|------------|---------|
| Download | Size | Date | Version |
|  Importable solution | 258KB | 2017-02-15 | 8.2.1 |
|  User manual - solution | 257KB | 2017-01-24 | 1.0.0.3 |
|  Executable | 884MB | 2017-02-15 | 8.2.1 |
|  User manual - executable | 257KB | 2017-01-24 | 1.0.0.5 |
|  List of currently transferable entities | 297KB | 2017-01-24 | |
|  Flyer | 347KB | 2017-01-24 | |

After clicking on the link a window similar to this one will appear



Now you should choose a suitable place to save the application.

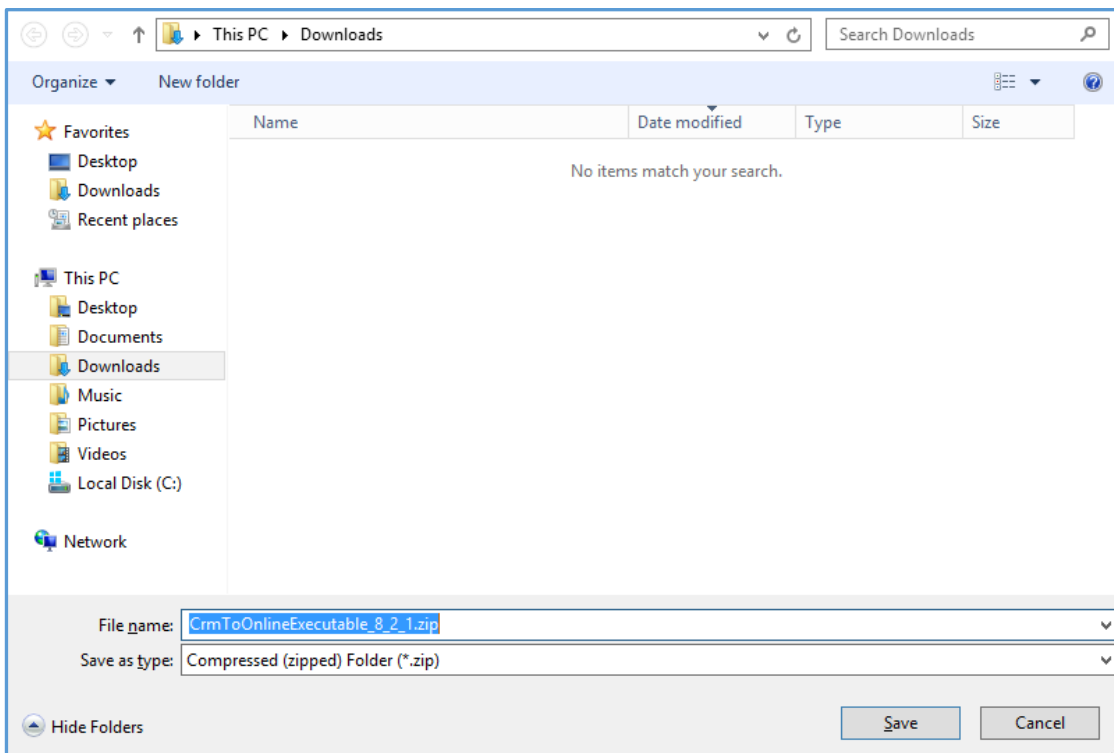
On choosing open will show the contents of the application-folder



These files are all necessary for the execution of the tool.

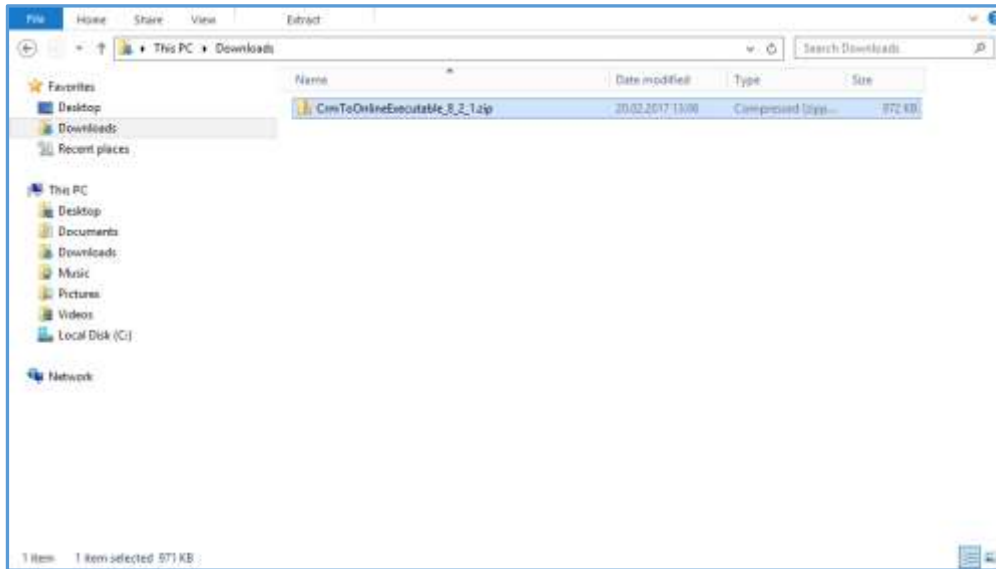
A full description and manual of the process can be found in the PDF file “User manual for the application”.

If you choose “Save as” you can put the file anywhere on your computer or in your network utilizing the following dialog.

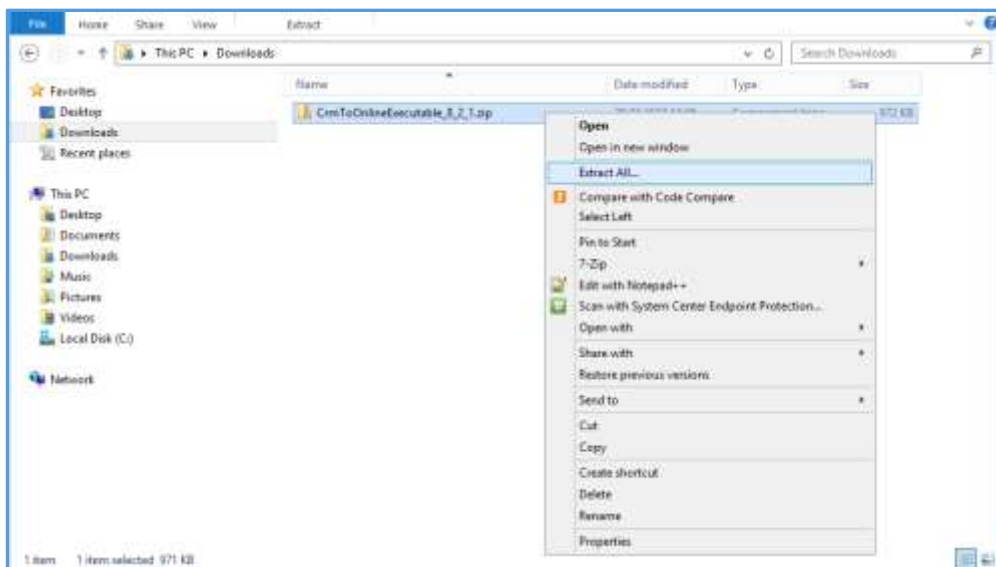


By pressing “Save” the file is stored in the chosen location.

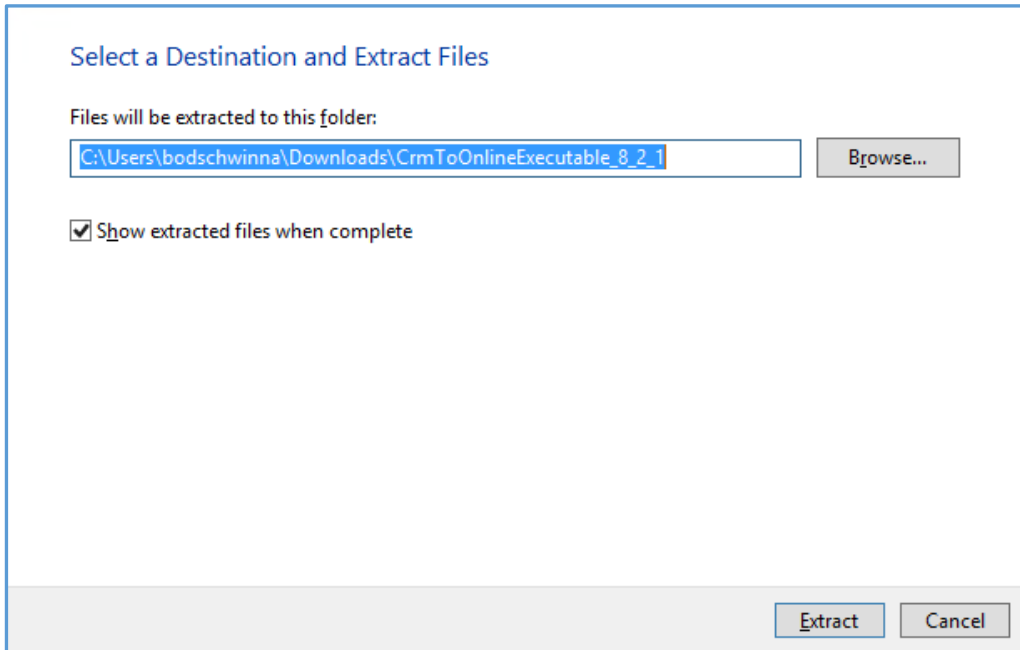
Afterwards you should open the location to view the contents.



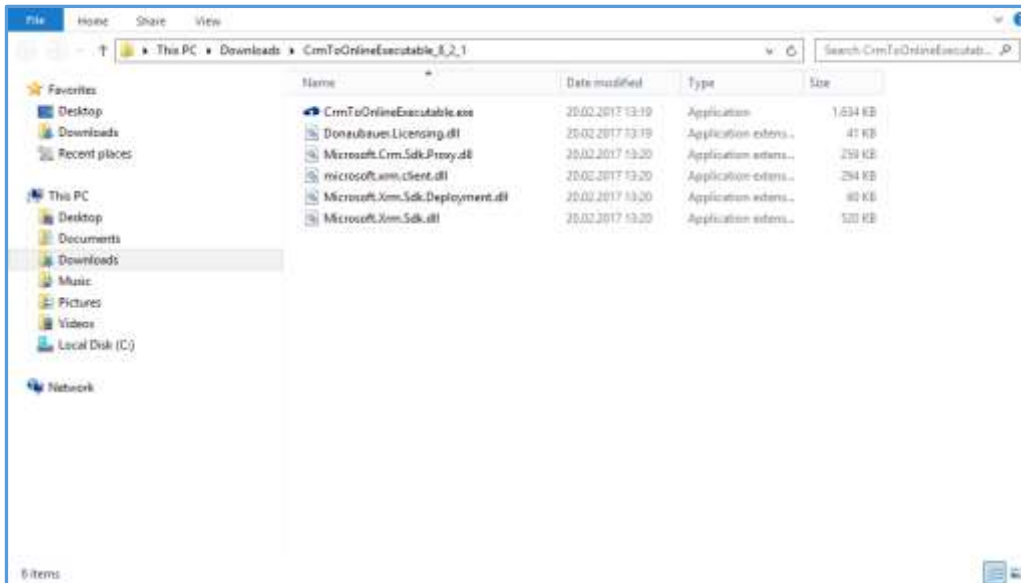
Now unzip the downloaded package in the location.



The following window is displayed afterwards.



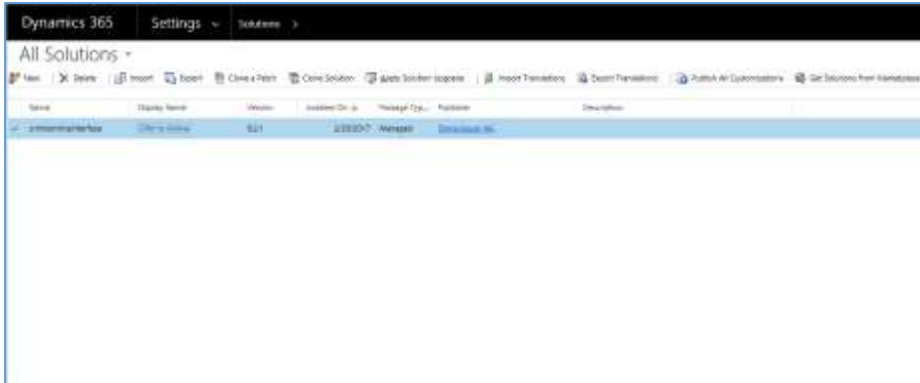
If you click the checkbox “Show data after extraction” the file location will be opened automatically.



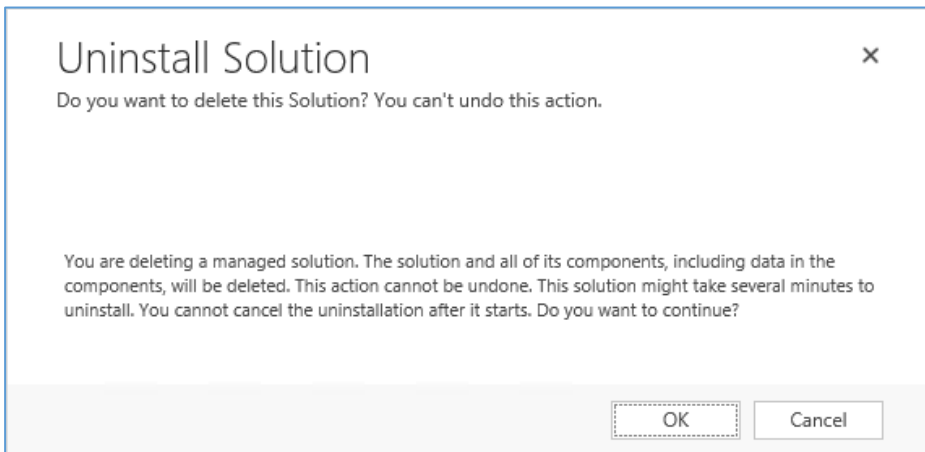
Now you can start the application “CRM to Online” by double-clicking the executable file.

3 Deinstallation

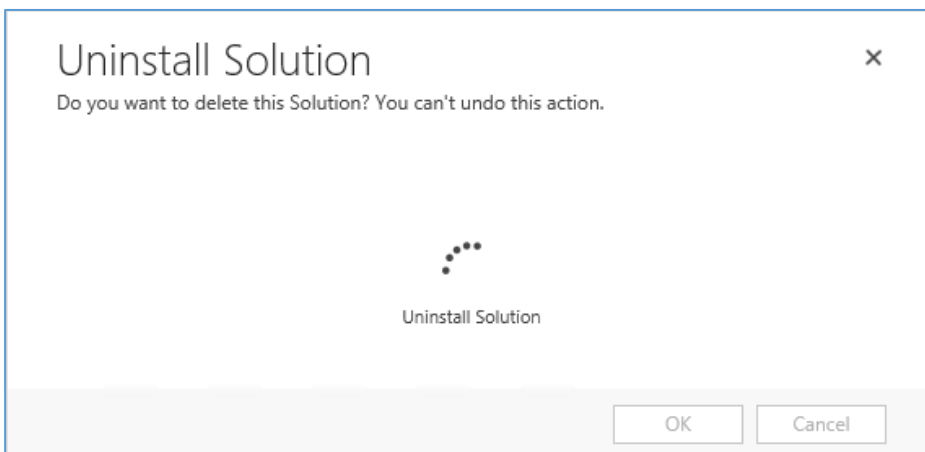
To remove the solution from your CRM you must do as follows.



Open the window “Solutions” in your CRM selectable entry “crmtoonlineinterface” before clicking on the button “remove”.



Press “OK” in the removal dialog.



The solution is now completely removed from your system.

Should there be any further questions regarding our solution or if you are in need of further support, please do not hesitate to contact us.



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