

# ActivityTools for MS CRM 2013

Version 6.10, March 2014

Installation Guide (How to install/uninstall ActivityTools for MS CRM 2013)

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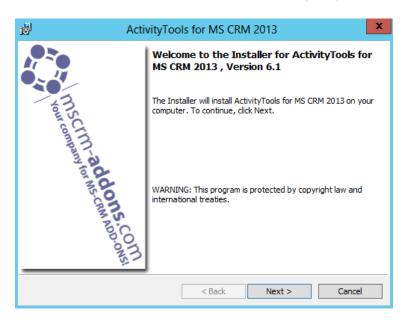
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## 1 ActivityTools Installer

This is the main window for the installation. Click [Next] to continue the installation.



## 2 EULA (End User License Agreement)

Read the license agreement carefully and accept it if you agree to the terms and if you want to continue with the installation. If you do not accept the license agreement, you cannot continue with the installation. There is also a "Print"-button if you want to print the license agreement.

设 ActivityTools for MS CRM 2013 X
License Agreement Please read the following license agreement carefully.
FORM OF END USER LICENSE AGREEMENT
MSCRM-ADDONS.COM SOFTWARE LICENSE AGREEMENT
IMPORTANT: THIS SOFTWARE LICENSE AGREEMENT ("LICENSE AGREEMENT") IS A LEGAL AGREEMENT BETWEEN CLIENT AND MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND CONTAINS WARRANTY INFORMATION, LIABILITY DISCLAIMERS AND
I accept the terms in the license agreement     Print     I do not accept the terms in the license agreement
InstallShield



## 3 Installation

After accepting the EULA click on [Install] to continue with the installation. Click [Next >] to install to this suggested folder, or click [Change...] to install to a different folder.

闄	ActivityTools for MS CRM 2013
Click Ne:	ion Folder xt to install to this folder, or click to install to a different folder.
	Install ActivityTools for MS CRM 2013 to: C:\Program Files (x86)\PTM EDV-Systeme GmbH\ActivityTools for Microsoft CRM 2013\
InstallShield -	< Back Next > Cancel

Click [Install] to start the installation. See next screenshot:

台 ActivityToo	Is for MS CRM 2013
Ready to Install the Program The wizard is ready to begin installation	mscrm-addons.com
Click Install to begin the installation.	
If you want to review or change any of exit the wizard.	your installation settings, click Back. Click Cancel to
InstallShield	
Tustalishielu	< Back Install Cancel



## 4 Security Roles

During installation, you are asked if you want to install the Security Roles.

#### General security roles for all products:

The following security role is required by all our products:

• MSCRM-Addons General Security Role

This security role contains the basic requirements for using the product itself and for being able to perform the license check.

## 5 Logon Information

ActivityTools requires a connection to CRM. To configure your CRM Server, select an existing profile or create a new profile:

		Logon information		
Welcome to yo Please specify your co please contact your sy	onnection details to	connect to CRM. If you do not	know the connection	on details,
CRM Connection Adv	anced Settings   Log			
Existing Profiles			•	Manage
Select your Crm Type				
C Standard (onPre	emise)	C IFD (Hosted)	O Crm	Online
CRM Server-Url:				
http:// 👻				
,				
Authenticated as:				
		ormation to retrieve organizations		
Username	D	omain P	assword	
Organization informa	ition:	Retrieve all Organizations		
Friendly name	Unique name	ServiceURL		
	1			
Reset LiveID Cache			OK	Cancel

Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials to connect as the currently active user. As soon as the organizations are retrieved, select the desired organization and press the [OK]-button. See next screenshot:



		Logon information		
	your CRM Conn r connection details to r system administrator	connect to CRM. If you do no	t know the connecti	on details,
RM Connection	Advanced Settings   Log			
Existing Profiles	[HKLM] crm2013srv1:55	55 - CRM2013	•	Manage
-Select your Crm Ty	/pe			
Standard (o)		C IFD (Hosted)	O Crm	Online
Username Organization info	redential: <b>Integrated Sec</b>	Retrieve all Organizations	Password	
Friendly name	Unique name	ServiceURL		^
🎎 mornigg	mornigg	mornigg		
Standard CRM2013	Standard CRM2013	Standard CRM2013		
Reset LiveID Ca	ache		ОК	Cancel

閿	ActivityTools for MS CRM 2013
-	ActivityTools for M5 CRM 2013 ram features you selected are being
1 <del>1</del> 1	Please wait while the InstallShield Wizard installs ActivityTools for MS CRM 2013. This may take several minutes.
	Status:
InstallShield -	
n io canol liciti –	< Back Next > Cancel



## 6 ActivityTools Configuration

The ActivityTools for MS CRM 2013 Configuration allows you to specify the ActivityTools-Settings.

ActivityTools for Microsoft CRM 2013 - Configuration
ActivityTools Setup options to configure ActivityTools
Workplace Configuration
Display EmailPreview in Sitemap Advanced Labels
Display ActivityPreview in Sitemap
Entity Configuration
Enable email preview in entity details Select Entities
Enable activity view in entity details Select Entities
Entity Configuration
Activate Searchoption as intext search Crm defaults to a search where the searchterm has to start with the defined term unless you define a Wilcard(*) before your search term. Enabling this option will always include the leading wildcard in the search
Change Connection OK Cancel

#### 1 Workplace Configuration

Display EmailPreview in Sitemap:

Check this option if you want to display "EmailPreview" in the CRM-Sitemap.

Display ActivityPreview in Sitemap:

Check this option if you want to display "ActivityPreview" in the CRM-Sitemap.



#### Advanced Labels:

The Advanced Labels button allows you to modify the default ribbon and navigation bar icons and labels supplied by ActivityTools server. Note: the Image ressources must be available as webressources in CRM to be able to use. Click on the refresh button on each control to reload the list of available ressources. See screenshots below:

		Edit Ribbon & Navigationbar ressources	
	tor allov Please n	to the Ribbon & Navigationbar Ressource editor ows you to modify the default ribbon and navigation bar icons and labels supplied by Activity note that image ressources must be available as webressources in CRM to be able to use. Us n on each control to reload the list of available ressources	
lcons Ribbo	Labels onlcons		
16x16	0	▼ 2 Def	fault
32x32		V Def	fault
			Close

		& Navigationbar Ressource editor he default ribbon and navigation bar icons and labels supplied by ActivityTools ssources must be available as webressources in CRM to be able to use. Use the		
Labels				
	I	SpellChecker		
LCID	Language	Label		
1033	English (United	SpellCheck		
1031	German (Germa	Rechtschreibung		
		EmailPreview		
LCID	Language	Label		
1033	English (United	EmailPreview		
1031	German (Germa	Email Übersicht		
		A distributions		
LCID	Lennuere	ActivityPreview Label		
1033	Language English (United	ActivityPreview		
1033	German (Germa	Aktivitäten Übersicht		
IVST German (German: Aktivitaten Obersicht				
My Activities				
LCID Language Label				
1033	English (United	My Activities		
1031	German (Germa	Meine Aktivitäten		
	1.	My Emails		
LCID	Language	Label		
1033	English (United	My Emails		
1031	German (Germa	Meine Emails		



#### 2 Entity Configuration

Enable the email preview/ activity preview in entity details:

Here you can specify which entities should display the email or activity preview in the entity details. Following window will appear. Check your entities:

Entity	<ul> <li>Toolbar</li> </ul>	Forms	
	Information	Information	
	Account	Account	
Address	Information	Information	ľ
	Campaign	Campaign	
Campaign	Information	Information	
Committee Autouto	Campaign Activity	Campaign Activity	
Campaign Activity	Information	Information	
	Information	Information	
Campaign Response	Campaign Respons	se 🔄 Campaign Response	
Case	Case	Case	
Case	Information	Information	
Chat	Informationen	Informationen	
	Information	Information	
Competitor	Competitor	Competitor	
Connection	Information	Information	
	Information	Information	
Contact	Contact	Contact	
Contract	Contract	Contract	
* Entities with a red background are unma either need to be manually configured or			
Blog article for Customization			

#### Activate the search-option as index search:

CRM defaults to a search where the search-term has to start with the defined term unless you define a wildcard (\*) before your search term. Enabling this option will always include the leading wildcard in the search.

#### 3 Change Connection

Click here to change your CRM-connection details. Please enter your system administrator if you don't know the connection details.

Welcome to your CRM Connection setup.         Please specify your connection details to connect to CRM. If you do not know the conned details, please contact your system administrator         CRM Connection Advanced Settings Log         Existing Profiles [HKLM] cm2013srv1:5555 - CRM2013         Select your Crm Type	
Existing Profiles       [HKLM] crm2013srv1:5555 - CRM2013         Select your Crm Type <ul> <li>Standard (onPremise)</li> <li>IFD (Hosted)</li> <li>Crm</li> </ul> CRM Server-Uri: <ul> <li>http:// v</li> <li>crm2013srv1:5555</li> <li>Authenticated as:</li> <li>v</li> <li>Use default Credential Integrated Security (PTM-EDV\Administrator)</li> <li>Username</li> <li>Domain</li> <li>Password</li> </ul> Proganization information:	ction
Select your Crm Type  Select your Crm Type  Standard (onPremise)  IFD (Hosted)  CRM Server-Uri:  http:// v crm2013srv1:5555  Authenticated as:  V Use default Credential Integrated Security (PTM-EDVAdministrator)  Username Domain Password  Retrieve all Organizations  Organization information:	
Standard (onPremise)     IFD (Hosted)     Crm  CRM Server-Urt:     http:// v crm2013srv1:5555  Authenticated as:     V Use default Credential Integrated Security (PTM-EDVAdministrator) Username     Domain     Password      Retrieve all Organizations  Organization information:	Manage
CRM Server-Url:     [http:// v] crm2013srv1:5555       Authenticated as:       Image:	
http://       v       crm2013srv1:5555         Authenticated as:       v         Use default Credential Integrated Security (PTM-EDVAdministrator)         Username       Domain         Password         Retrieve all Organizations	Online
Organization information:	
Friendly name Unique name ServiceURL	
	^
😹 alist alist	=
👷 pofner pofner pofner	
👷 pkorosec pkorosec pkorosec	~
Compression morning morning	



## 7 Complete the installation

The installation was successful. Click on [Finish] to finish the installation and to exit the installer.

岁 Acti	ActivityTools for MS CRM 2013						
Maur company for MS-CAM ADD-ONSI	InstallShield Wizard Completed The InstallShield Wizard has successfully installed ActivityTools for MS CRM 2013. Click Finish to exit the wizard.						
	< Back Finish Cancel						

### 8 Uninstall

To uninstall ActivityTools select Programs in Control Panel.





Search for ActivityTools CRM 2013 in "Uninstall or change a program" to uninstall ActivityTools. Follow the instructions to uninstall the addon. See screenshots below:

3	Programs and Features		- 🗆 🗙
🔄 🔄 🔻 🕇 🛃 « All Contr	ol Panel Items	✓ C Search Programs and	Features 🔎
Control Panel Home View installed updates	Uninstall or change a program To uninstall a program, select it from the list and then	click Uninstall, Change, or Repair	r.
Turn Windows features on or off	Organize 🕶 Uninstall		)== <b>-</b> 🔞
Install a program from the network	Name A	Publisher	Installed (
HEWOIK	CRM 2013	PTM EDV-Systeme GmbH	02.10.201
	Adobe Reader XI (11.0.05) - Deutsch	Adobe Systems Incorporated	16.10.201
	AutoMerge Server for MS CRM 2013	PTM EDV-Systeme GmbH	23.10.201
	DocumentsCorePack Client for MS CRM 2013	PTM EDV-Systeme GmbH	22.10.201
	DocumentsCorePack Server for MS CRM 2013	PTM EDV-Systeme GmbH	23.10.201
	Fiddler	Telerik	16.10.201
	💿 Google Chrome	Google Inc.	15.10.201
	GroupCalendar for MS CRM 2013	PTM EDV-Systeme GmbH	11.10.201
	Microsoft Dynamics CRM 2013 German Language Pack	Microsoft Corporation	16.10.201
	Microsoft Dynamics CRM Server 2013	Microsoft Corporation	25.09.201
	🚺 Microsoft Office Professional Plus 2013	Microsoft Corporation	16.10.201
	Microsoft ReportViewer 2010 Redistributable	Microsoft Corporation	11.09.201
	🥪 Microsoft Silverlight	Microsoft Corporation	16.10.201
	Microsoft SQL Server 2008 Native Client	Microsoft Corporation	11.09.201
	Microsoft SOL Server 2012 Management Objects (x64)	Microsoft Corporation	11.09.201
	PTM EDV-Systeme GmbH Product version. Help link:	6.1 www.mscrm-addons.com	

Click on [Yes] to uninstall ActivityTools for MS CRM 2013.

Programs and Features
Are you sure you want to uninstall ActivityTools for MS CRM 2013?
In the future, do not show me this dialog box Yes No



## 8 How to install ActivityTools in an IFD/Claims-Based-Environment

This chapter will walk you through the required steps to install ActivityTools in an IFD/Claims-Based-Environment.

You need to have the following downloads present to successfully setup the Addon:

- 1. IFD-Tool -> <u>Download Link</u>, you need to have a login on our web site
- 2. For installing ActivityTools you need at least version 5.13 from our <u>Download Section</u>

Before you start installing, MS CRM is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with MS CRM.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" <u>Download</u>.

The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide. ActivityTools has to be configured with an http AND an https port.

Internal Url used to access Microsoft Dynamics CRM: https://internalcrm.rclifd.ptm-edv.at

External Url used to access Microsoft Dynamics CRM: https://[orgname].rclifd.ptm-edv.at

AD FS Server: https://win2008domain.ptm-edv.at

The Addon itself also requires a dns name: https://activitytoolsserver.rc1ifd.ptm-edv.at

#### **Basic installation/configuration of our Add-On:**

- 1. Install the Addon on the CRM Server.
- 2. You will be asked for the Logon Information. Fill in the internal IFD name of your CRM. In our case, it is internalcrm.rc1ifd.ptm-edv.at. Select the organization on which you want to install the Addon and click on OK. See next screenshot:



		Logon information	
		nection setup. to connect to CRM. If you do ministrator	not know the connection
RM Connection Ad	dvanced Settings   Log		
Existing Profiles	[HKLM] crm2013srv1:5	555 - CRM2013	✓ Manage
- Select your Crm Typ			
<ul> <li>Standard (or</li> </ul>		O IFD (Hosted)	O Crm Online
CRM Server-Url:			
http:// v	2013srv1:5555		<b>₽</b>
Authenticated as: -	-	curity (PTM-EDV\Administrator) Domain	Password
-Organization infor	mation:	Retrieve all Organizations	
Friendly name	Unique name	ServiceURL	^
👷 alist	alist	alist	=
🎥 pofner	pofner	pofner	
👷 pkorosec	pkorosec	pkorosec	~
Ca morniaa	morning	morning	¥
Reset LiveID Cac	he		OK Cancel

3. After the installation is finished, you have to open the IIS (inetmgr.exe) and to go to Sites-> the Addon web site. Right click the ActivityToolsserver – web site and select "Edit Bindings..."

<b>6</b> ]	Internet Information	Services (IIS) Manager	
CRM201	3SRV1 ► Sites ►		
File View Help			
Connections	Sites	ኛ Go 👒 🙀 Show All 💂	Actions Add Websit Set Website
	Name     ID            •••••••••••••••••••••••••••••	Status         Binc           Started (ht         *:55!           Started (ht         *:80           Started (ht         *:55!           Started (ht         *:55!           Started (ht         *:55!           Started (ht         :555	Help Online Help
	Manage Website   Refresh Remove Rename Switch to Content View		

On the Bindings click on "Add..." and select in the "Add Site Binding" the type "https". You also have to specify the port in our example we use 4446

#### Installation Guide



	Site Bindings							2
Type http	Host Name	Port 5557	IP Address *	Binding Informa			Add	
	Туре:	IP ac	Add Si <sup>.</sup>	te Binding	ort:	?	×	
	http Host name:		Jnassigned		446		e	
	Example: www.	contoso.con	n or marketing.co	ontoso.com				
							-	
				0	к	Cancel		_

- 4. Reselect the Addon website and double click on the "Authentication" item in the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.
- 5. The Addon url needs to be added to your DNS Server. Your DNS-Servers have to resolve the activitytoolsserver.[your-domain] names correctly. This means that they should resolve it with the same ip address as your CRM Server has. IF you are also using an external DNS, make sure that both external and internal DNS are able to resolve the URL.
- 6. Extract the IFD-Tool (zip-File) that you downloaded before and execute the IFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.
- 7. Open your CRM in Internet Explorer and go to "Settings" -> "MSCRM-ADDONS.com Products" -> Open ActivityTools -> within the MSCRM-ADDONS.com Products form, select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.

	DDONS.c    ActivityTools	$\oplus$	First name Last n crm2013
			ή <b>ψ</b>
ISCRM-ADDONS.COM PRODUCTS : INFO	RMATION		
ActivityTools			
earch Results ×		web	
	ISTING MSCRM-A 🖟 BULK DELETE 📲 CHART PANE 🕶	RUN REPORT * ***	
		P KON KEPOKI -	
Name 🛧	Created On		Ŧ
WebApplicationPort	10/24/2013 10:04		
-10f1			H 4 Page
-1ef1 ₩ * A 8 C D	EFGHIJKLM	N O P Q R S	H 4 Page T U V W X Y
	Е F G H I J K L M	4 O P Q R S	

 Open the WebApplicationPort and replace the existing KeyValue with the following: [httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging], e.g.: 4446|5557|true|activitytoolsserver|false

You have finished the configuration of the CRM part and now need to configure the AD FS.



**NOTE**: If you use AD FS you have to perform the IFD wizard again, if the https certificate and/or the TokenSignal certificate expire on AD FS.

- 1. Please logon your AD FS Server and start AD FS 2.0 Management.
- 2. On the Actions menu located in the right column, click Add Relying Party Trust.
- 3. In the Add Relying Party Trust Wizard, click Start.
- 4. On the Select Data Source page, click Import data about the relying party published online or on a local network, and then type the URL to locate the federationmetadata.xml file.

This federation metadata is created with the IFD-Tool on the CRM Server. For example, <u>https://activitytoolsserver.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-</u>06/FederationMetadata.xml

Type this URL in your browser and verify that no certificate-related warnings appear.

- 5. Click Next.
- 6. On the Specify Display Name page, type in a display name, such as ActivityTools IFD, and click on Next.
- 7. On the Choose Issuance Authorization Rules page, leave the "Permit all users to access this relying party"-option selected, and then click Next.
- 8. On the Ready to Add Trust page, click Next, and then click Close.
- 9. If the Rules Editor appears, click Add Rule. Otherwise, in the Relying Party Trusts list, right-click the relying party object that you created, click Edit Claims Rules, and then click Add Rule. Important: Be sure the Issuance Transform Rules tab is selected.
- 10. In the Claim rule template list, select the Pass Through or Filter an Incoming Claim template, and then click Next.
- 11. Create the following rule:
  - Claim rule name: Pass Through UPN (or something descriptive)
  - Add the following mapping:
  - i. Incoming claim type: UPN
  - ii. Pass through all claim values
- 12. Click Finish.
- 13. In the Rules Editor, click Add Rule, and in the Claim rule template list, select the Pass Through or Filter an Incoming Claim template, and then click Next:
  - Claim rule name: Pass Through Primary SID (or something descriptive)
  - Add the following mapping:
  - i. Incoming claim type: Primary SID
  - ii. Pass through all claim values



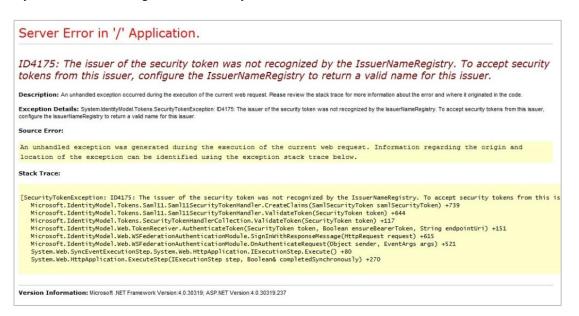
- 14. Click Finish.
- 15. In the Rules Editor, click Add Rule.
- 16. In the Claim rule template list, select the Transform an Incoming Claim template, and then click Next.
- 17. Create the following rule:
  Claim rule name: Transform Windows Account Name to Name (or something descriptive)
  Add the following mapping:
  Incoming claim type: Windows account name
  Outgoing claim type: Name
  Pass through all claim values
- 18. Click Finish, and when you have created all three rules, click OK to close the Rules Editor.

You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.



## 9 Troubleshooting

If you see the following error, there may be two reasons for this:



#### Reason 1:

This indicates that you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one in the token signing certificate in ADFS.

```
<issuerNameRegistry type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31bf3856ad364e35">
<trustedIssuers>
```

```
<add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
</trustedIssuers>
</issuerNameRegistry>
```



#### If you see the following error:

erver Error in '/' Application.	
eyset does not exist	
scription: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.	
ception Details: System Security Cryptographic GruptographicException: Keyset does not exist	
urce Error:	
unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the trace below.	g the
ack Trace:	
CryptographicException: Keyset does not exist System.Security.Cryptography.Utils.CreateProvHandle(CspParameters parameters, Boolean randomKeyContainer) +5557310 System.Security.Cryptography.K3KCryptography.CBC (SpAlgorithmType keyType, CspParameters parameters, Boolean randomKeyContainer, Int32 dwKeySiz System.Security.Cryptography.K3KCryptoferviceProvider.CetKeyPair() +221 System.Security.Cryptography.K3KCryptoferviceProvider.CetKeyPair() +221 System.Security.Cryptography.K3KOryptoferviceProvider.CetKeyPair() +221 System.IdentityModel.Tokens.X509AsymmetricSecurityKey.get_PrivateKey() +161 System.IdentityModel.Tokens.X509AsymmetricSecurityKey.get_PrivateKey() +181 System.IdentityModel.Selectors.SimpleTokenResolver.TryResolveSecurityKeyCore(SecurityKeyIdentifierClause keyIdentifierClause, SecurityKey& key) +3 Microsoft.IdentityModel.Tokens.EncryptedSecurityTokenHandler.ReadToken(KmlReader reader) +290 Microsoft.IdentityModel.Web.K5federationAuthenticationModule.SignInMithResponseMesage(HttpRequest readerQuotas) +360 Microsoft.IdentityModel.Web.K5federationAuthenticationModule.SignInMithResponseMessage(HttpRequest readerQuotas) +360 Microsoft.IdentityModel.Web.K5federationAuthenticationModule.SignInMithResponseMessage(HttpRequest readerQuotas) +360 Microsoft.IdentityModel.Web.K5federationAuthenticationModule.SignInMithResponseMessage(HttpRequest request) +417 Microsoft.IdentityModel.Web.K5federationAuthenticationModule.SignInMithResponseMessage(HttpRequest request) +417 System.Web.SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80 System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +165	
rsion Information: Microsoft NET Framework Version 4.0.30319, ASP NET Version 4.0.30319.17929	

#### Reason 2:

This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snap-in for local computer) and find your HTTPS certificate. In the context menu, under all tasks, select the "manage private keys" option and grant access to everyone.

#### **Checklist for general troubleshooting:**

- Is the Setting WebApplicationPort still intact?
- Are there any not http/https bindings in CRM?
- Are there any not http/https bindings in the products website?
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as connection type?
- Is the firewall allowing the required ports both internally and externally?



## 10 Contact

If you have questions to the product send an Email to <u>support@mscrm-addons.com</u> or visit our blog <u>http://blogs.mscrm-addons.com</u>

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