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Preview:	

Situation #1. CRM Update Rollup 11 or older with pre-installed Global Preview

 Download updated version of Global Preview (<u>GlobalPreview-x64_1.0.3.msi</u>) from Akvelon.com. To get version 1.0.3, please click the "Download Akvelon Global Preview for CRM 2011 Onpremise - Update Rollup 11 and older" in the email you received from Akvelon.com:



2. Install **GlobalPreview-x64_1.0.3.msi** on the CRM server where the previous version of Global Preview is installed (click the "Install" button).

👹 Global Preview Setup	
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<u>P</u> rint	Back Install Cancel

3. Deactivate Global Preview for ALL CRM organizations that have it enabled. Please note: Only users with CRM System Administrator role can deactivate Global Preview. To deactivate Global Preview go to CRM Settings > Global Preview Settings and click the "About" button at the upper right-hand corner. A new window with your license information will open. Click the "Deactivate" button.

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RM: Global Preview	w currently activated.
Description	Value
License unique id	300256
Organization	crm
License type	Legal
Users	1/5
Dea	activate Update license Close

 Please make sure that "Akvelon Global Preview Administrators" and "Akvelon Global Preview Users" roles have been removed (CRM Settings > Customizations > Customize the System > Security Roles). In case you still see them, remove these roles manually.

File Solution: Default Solution Solution: Default Solution Solution: Default Solution		@ <u>H</u> elp ▼
Solution: Default Solution	Component Type Security Role View Cu	stomizable
 View 	Display Name	Name 2
Option Sets	✓ & Akvelon Global Preview Administrators ✓ & Akvelon Global Preview Users	Akvelon Global Preview A 📤 Akvelon Global Preview U
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+ Plug-in Assemblies Sdk Message Proces	Customer Service Representative	Customer Service Represe
Service Endpoints	Marketing Manager	Marketing Manager
Reports	Marketing Professional Sales Manager	Marketing Professional Sales Manager
Article Templates Contract Templates	Salesperson	Salesperson Schedule Manager
E-mail Templates	Scheduler	Scheduler
Security Roles		Netem (ustomizer)
Status: Existing		

- 5. Uninstall Global Preview using the "Add/Remove Programs" utility in the Microsoft Windows Control Panel (**name in programs list: "Global Preview"**), or by using the Global Preview installer.
- 6. Upgrade your Dynamics CRM server with Update Rollup 12 or newer (please contact your CRM Administrator for more details).

🚣 Microsoft Dynamics CRM Update Rollup 12 📃 🔍		
	Update Rollup 12 for Microsoft Dynamics® CRM Server (KB2795627-V2)	
	This wizard will install the Update Rollup 12 for Microsoft Dynamics® CRM Server (KB2795627-V2).	
	Before you install the update, we recommend that you do the following: - Back up your computer	
	- Close all programs You might need to restart your computer after you complete this update.	
	Click Next to continue.	
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel	

 Install the new version of <u>Global Preview 5.0</u> from Akvelon.com. To get version 5.0, please click the "Download Akvelon Global Preview for CRM 2011 On-premise - Update Rollup 12 and newer" in the email you received from Akvelon.com.

Situation #2. Customer has already upgraded CRM to UR12 (or newer) without de-installation of Global Preview:

In case you have upgraded your Dynamics CRM 2011 to Update Rollup 12 (or newer) w/o installation of the new version of Global Preview (<u>GlobalPreview-x64 1.0.3.msi</u>), you may find the following error



Please follow steps below to solve this issue.

 Download updated version of Global Preview (<u>GlobalPreview-x64_1.0.3.msi</u>) from Akvelon.com. To get version 1.0.3, please click the "Download Akvelon Global Preview for CRM 2011 Onpremise - Update Rollup 11 and older" in the email you received from Akvelon.com:





Dear

Thank you for your interest in Akvelon Global Preview for Microsoft Dynamics CRM. Global Preview for Dynamics CRM 2011 allows you to read any CRM entity in any CRM list without opening them individually.

	Download Akvelon Global Preview for CRM 2011 On- Premise - Update Rollup 12 and newer
AKVELON	Download Akvelon Global Preview User Manual for CRM Update Rollup 12 and newer
	Download Akvelon Global Preview for CRM 2011 On- Premise - Update Rollup 11 and older
	Download Akvelon Global Preview User Manual for CRM Update Rollup 11 and older

2. Install **GlobalPreview-x64_1.0.3.msi** to the CRM server where the previous version of Global Preview was installed. Click the **"Install"** button and then **"Finish"** button.

😸 Global Preview Setup	
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3. Deactivate Global Preview for ALL CRM organizations that have it enabled. Please note: Only users with CRM System Administrator role can deactivate Global Preview. To deactivate Global Preview go to CRM Settings > Global Preview Settings and click the "About" button at the upper right-hand corner. A window with the license information will open, click the "Deactivate" button.

			At Microsoft Dynamics CRM	CRM Administrator ?
File Home				
New New Activity Record -	Import Advan Data	ced		
New	Tools			
Settings	🔂 🖳 -	G	Manage entities 🞉 Settings ⋥ Save as default —	🔞 About 📤
▲ Customization			Accounts	
Customizatio	ons	50	Appointments	
Solutions Ovnamics M	arketplace		Cases	
🖄 Global Previ	ew Settings	8	Competitors	
▲ Process Center		8	Contacts	
🛃 Processes			E-mail Messages	
Workplace	^	9	Faxes	
Calas		0	Leads	
Sales			Letters	
Marketing			Notes	
Service			Opportunities	
Settings		Ø	Phone Calls	
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Resource Cent	er 🗸	•		•

RM: Global Preview	w currently activated.	
Description	Value	
License unique id	500236	
Organization	crm	
License type	Legal	
Users	1/5	
De	activate Update license Close	

Wait until the License Agreement window is displayed and simply close this window:

😂 Global Preview for Microsoft Dynamics CRM Webpage Dialog	×
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CRM: Global Preview currently not activated.	
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http://crm2011/CRM/ISV/Akvelon/M 🗸 Trusted sites Protected Mode: Off	

1

 Please make sure that "Akvelon Global Preview Administrators" and "Akvelon Global Preview Users" roles have been removed (CRM Settings > Customizations > Customize the System > Security Roles). In case you still see them, remove these roles manually.

Solution: Default Solution	1	
Diution: Default Solution	Component Type Security Role View Cu	stomizable 💽
🖻 👔 User Chart	Display Name A	Name 💈
 View Option Sets 	Akvelon Global Preview Administrators	Akvelon Global Preview A
Client Extensions	Akvelon Global Preview Users	Akvelon Global Preview U
💣 Web Resources	CEO-Business Manager	CEO-Business Manager
nocesses	CSR Manager	CSR Manager
+ Plug-in Assemblies	🗌 🎯 Customer Service Representative	Customer Service Represe
Sdk Message Proces	🗆 🍪 Delegate	Delegate
Service Endpoints	🗆 🎯 Marketing Manager	Marketing Manager
Penorts	🗌 🧟 Marketing Professional	Marketing Professional
Connection Roles	Sales Manager	Sales Manager
Article Templates	Salesperson	Salesperson
Contract Templates	Schedule Manager	Schedule Manager
E-mail Templates	Scheduler	Scheduler
Mail Merge Templates Security Roles	Suctem Customizer	Sustam Customizar
81 Field Security Profiles	1 - 15 of 15 (2 selected)	I

5. Uninstall Global Preview using the "Add/Remove Programs" utility in the Microsoft Windows Control Panel (program name in the programs list is: "**Global Preview**"), or by using the Global Preview installer.



6. Execute CRM2011-Server-KB2795627-v2-ENU-amd64.exe to re-install UR12 (you can find Update Rollup 12 here: <u>http://www.microsoft.com/en-us/download/details.aspx?id=36229</u>). In case you are using newer Update Rollup (e.g. 13 or newer), please re-install appropriate version of Update Rollup. Please note that it will not be installed from scratch. Installer will repair the CRM files only if needed. Usually, this operation takes about 3-5 minutes. There is no need to restart CRM server.

Microsoft Dynamics CRM Update	Rollup 12
Installing Update Rol Setup is now installing the U	lup 12 ^{pdate.}
Microsoft.Crm.UpdateWrapp	er.HotfixMspInstaller
	<u> C</u> ancel
Microsoft Dynamics CRM Update	Rollup 12
	Update Completed The Update Rollup 12 for Microsoft Dynamics CRM Server (KB2795627-V2) completed successfully.
	<u>View the log file,</u>
	<u>F</u> inish

 Install the new version of <u>Global Preview 5.0</u> from Akvelon.com. To get version 5.0, please click the "Download Akvelon Global Preview for CRM 2011 On-premise - Update Rollup 12 and newer" in the email you received from Akvelon.com.