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**AttachmentExtractor
for MS CRM 2013**

AttachmentExtractor for MS CRM 2013

Version 2013.5 - April 2014

Installation Guide

(How to install/uninstall AttachmentExtractor for MS CRM 2013)

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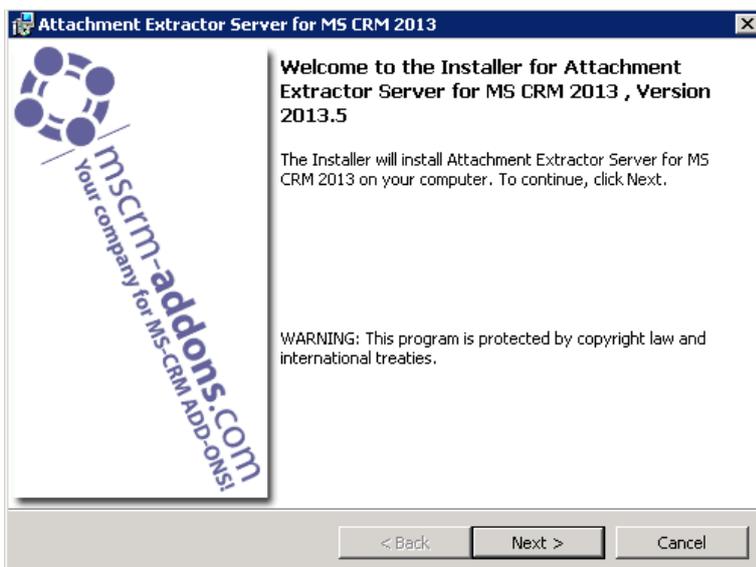
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1 Installation AttachmentExtractor

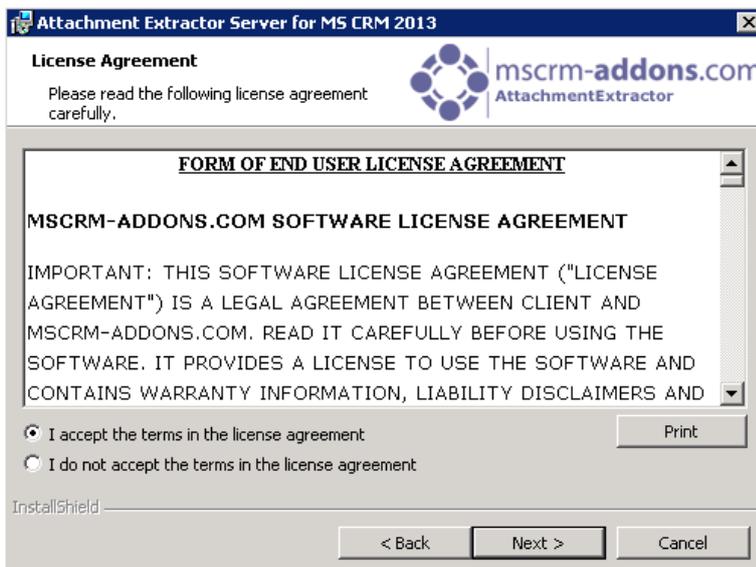
During the installation you have to specify an organization of CRM 2013, where **AttachmentExtractor** will be installed initially. Additional organizations can be setup from the installation manager after the original setup has finished.

1.1 Introduction



2 Click [NEXT] on the Welcome-Page.

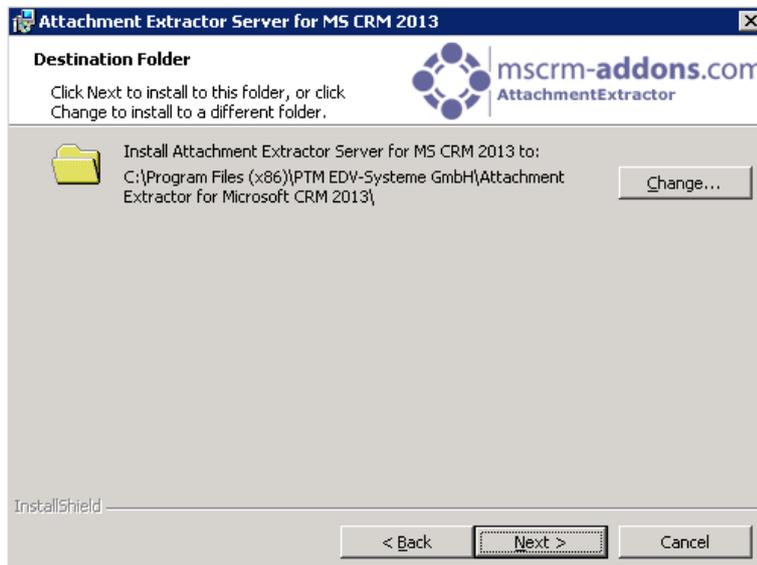
1.2 EULA (End User License Agreement)



You have to accept the license and click [NEXT]

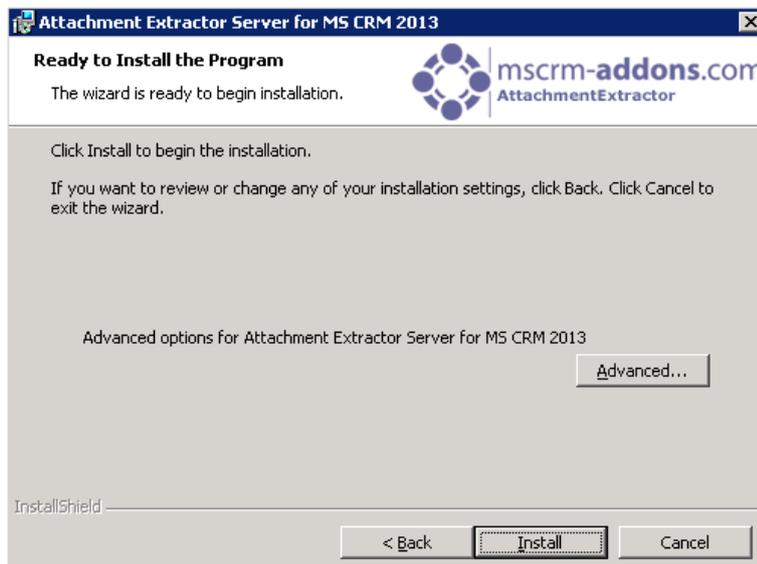
1.3 Folder Selection

Choose the installation folder:



Click [Change] to specify a different installation path.

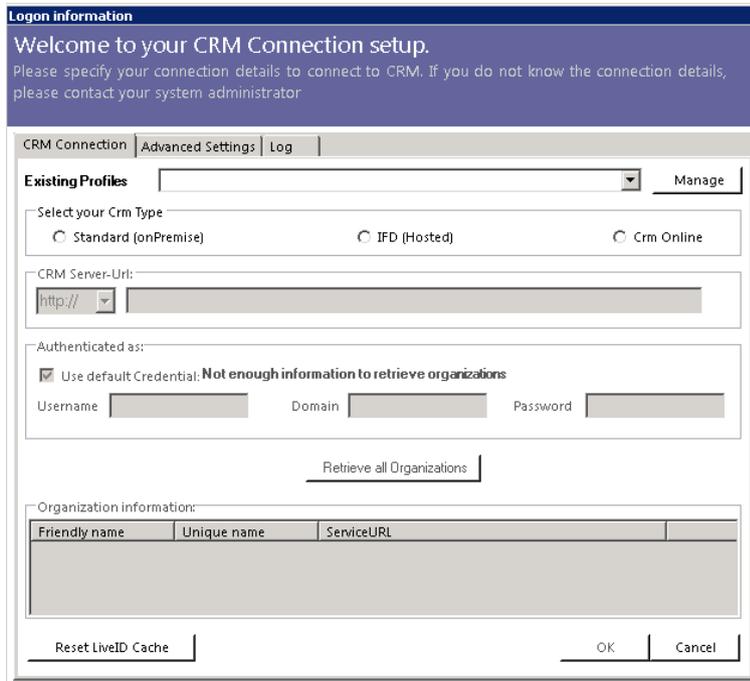
1.4 Confirm Installation



To start the installation of AttachmentExtractor click [Install]

1.5 Configure CRM Server

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



Logon information

Welcome to your CRM Connection setup.
Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Advanced Settings | Log

Existing Profiles: [Empty] Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) Crm Online

CRM Server-Url: http:// [Empty]

Authenticated as:

Use default Credential: **Not enough information to retrieve organizations**

Username [Empty] Domain [Empty] Password [Empty]

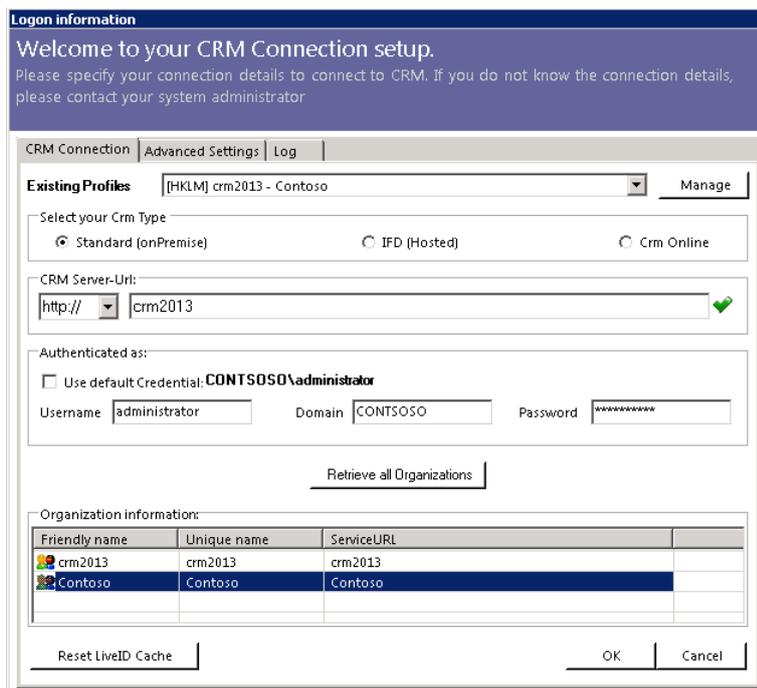
Retrieve all Organizations

Organization information:

Friendly name	Unique name	ServiceURL

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. As soon as the Organizations are retrieved press the [OK]-button.



Logon information

Welcome to your CRM Connection setup.
Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm2013 - Contoso Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) Crm Online

CRM Server-Url: http:// crm2013 ✓

Authenticated as:

Use default Credential: **CONTOSO\administrator**

Username administrator Domain CONTOSO Password *****

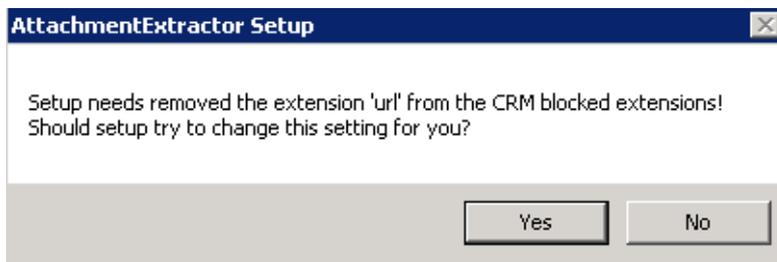
Retrieve all Organizations

Organization information:

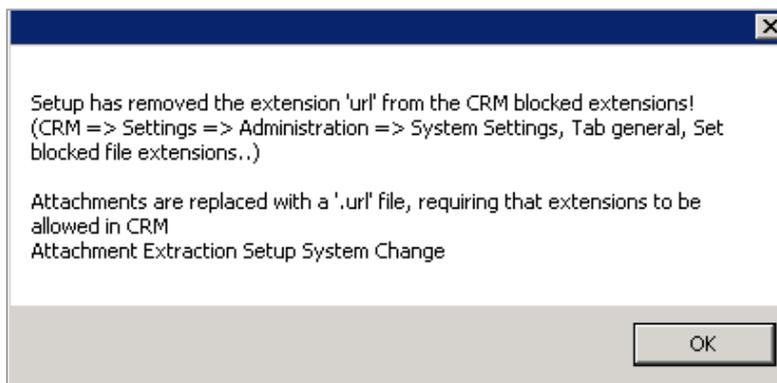
Friendly name	Unique name	ServiceURL
crm2013	crm2013	crm2013
Contoso	Contoso	Contoso

Reset LiveID Cache OK Cancel

If following Message Box appears, click on [Yes].

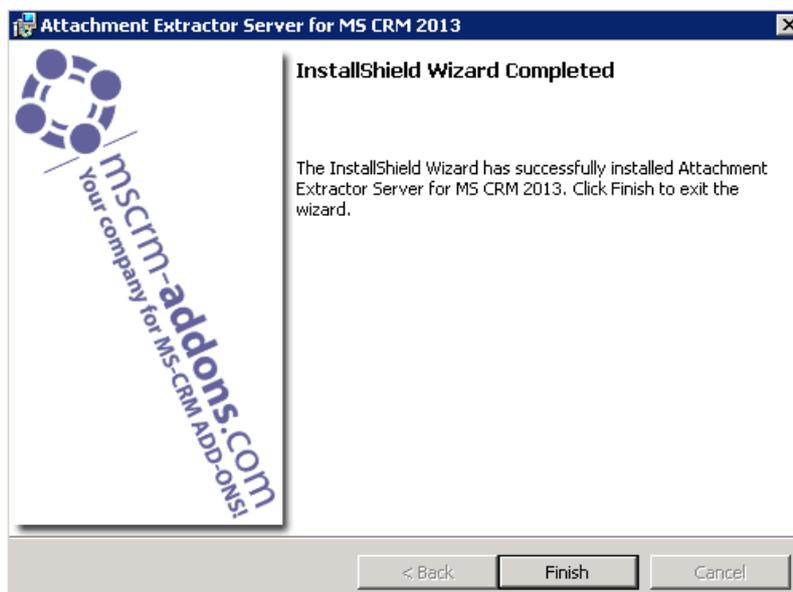


This will open next Message Box:



Click on [OK] to confirm.

1.6 Finish



Click on [Finish] to complete the installation.

2 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

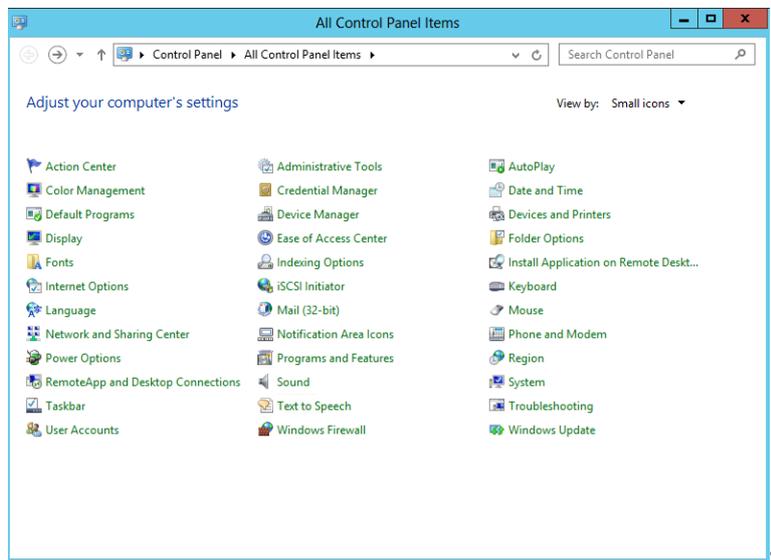
This security role contains the basic requirements for using the product itself and to be able to perform the license check.

Click on [Yes to apply the security role to all users.

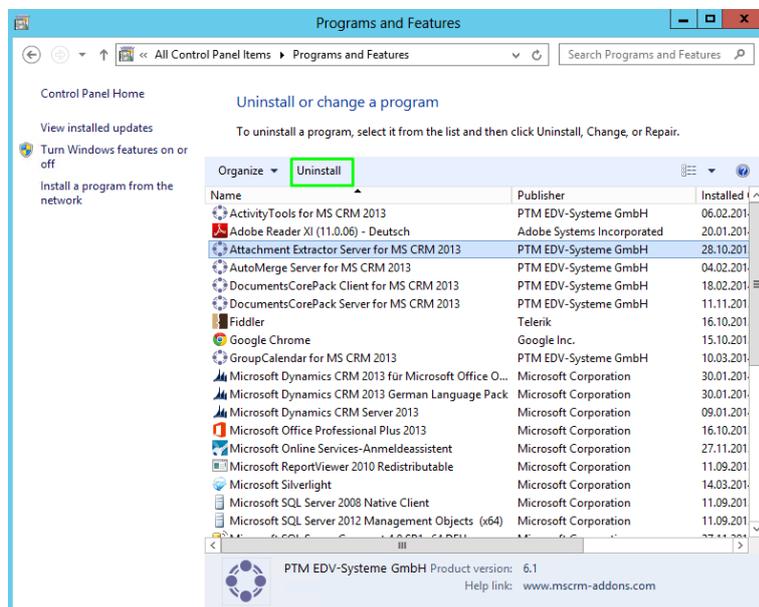
Attention: Bypassing this step requires you to either manually assign the roles to all users or to include the rights into your existing security roles!

3 Uninstall AttachmentExtractor

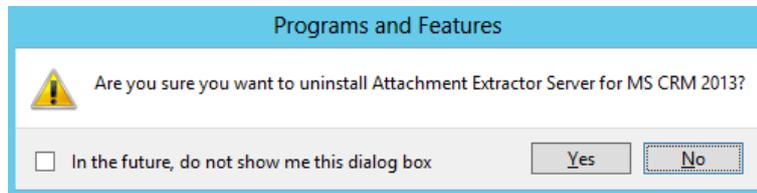
To uninstall AttachmentExtractor, open “Uninstall a program” in the Control Panel



Find “AttachmentExtractor for MS CRM 2013”, select it and click on “Uninstall”.



Following window appears:



Confirm the question if you're sure to uninstall AttachmentExtractor Server for MS CRM 2013. Click on [No] if you don't want to uninstall AttachmentExtractor Server for MS CRM 2013.

It may take a few minutes to uninstall AttachmentExtractor.

4 Contact

If you have questions to the product send an email to

support@mscrm-addons.com

or visit our blog

<http://blogs.mscrm-addons.com>

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