



AutoMerge for MS CRM 3

Version 1.0.0

Implementation Guide
(How to install/uninstall,..)

Table of Contents

1	FOREWORD	3
1.1	IMPORTANT INFORMATION	3
2	REQUIREMENTS	3
3	INSTALLATION OF AUTOMERGE FOR MS CRM 3	3
4	INSTALL THE LICENSE	10
5	UNINSTALL AUTOMERGE	13
6	CONTACT	14

1 Foreword

Before installing AutoMerge for MS CRM 3, read this document and follow the steps carefully. Please read the Users Guide for AutoMerge after successfully installing AutoMerge for MS CRM 3 to better understand how it works.

1.1 **IMPORTANT INFORMATION**

Please note the following guidelines for using AutoMerge for MS CRM 3:

1. **DON'T use Word** while AutoMerge is running
2. **DON'T use WordMailMerge Client** while AutoMerge is running.
3. Only **ONE** instance of AutoMerge is possible.

2 Requirements

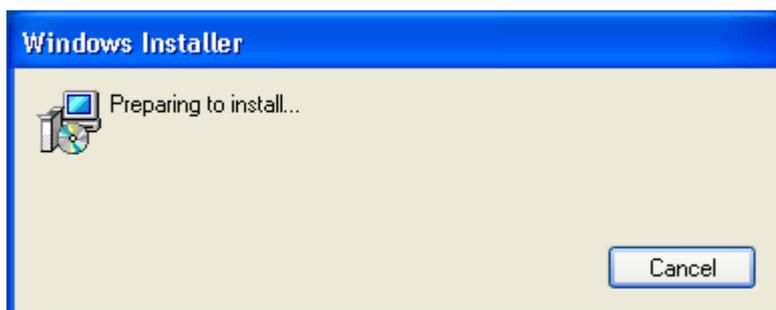
1. You must install AutoMerge on your MS CRM Server.
2. WordMailMerge Client must be installed.

3 Installation of AutoMerge for MS CRM 3

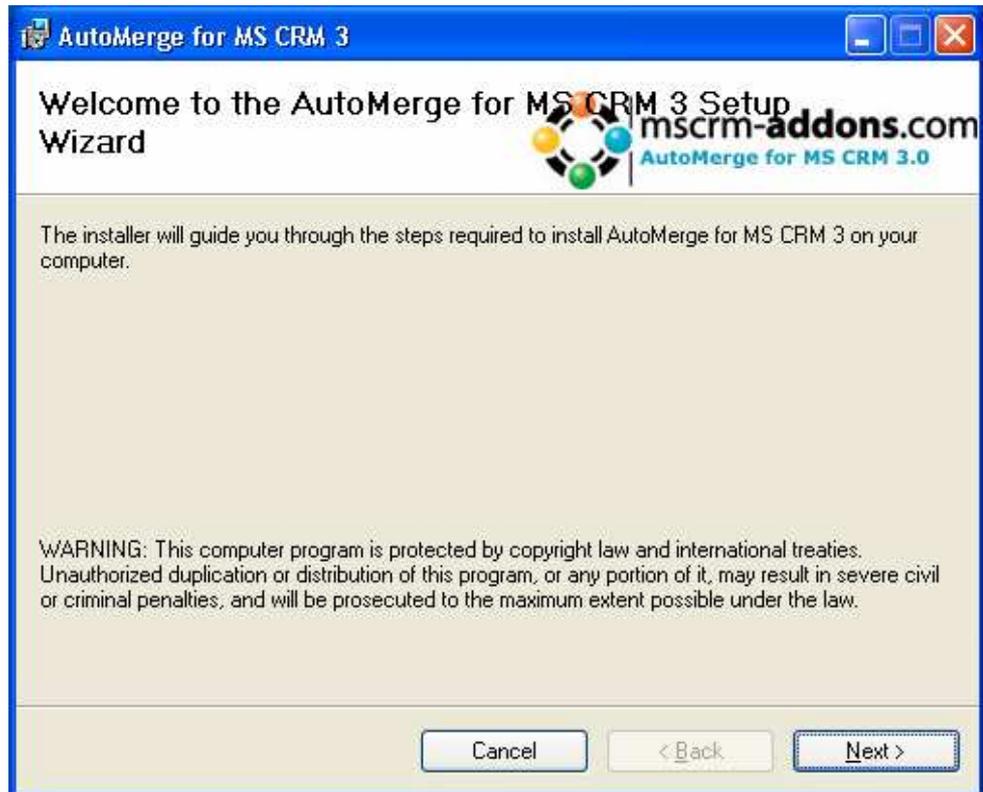
1. To start the installation, double-click on AutoMergeSetup.msi



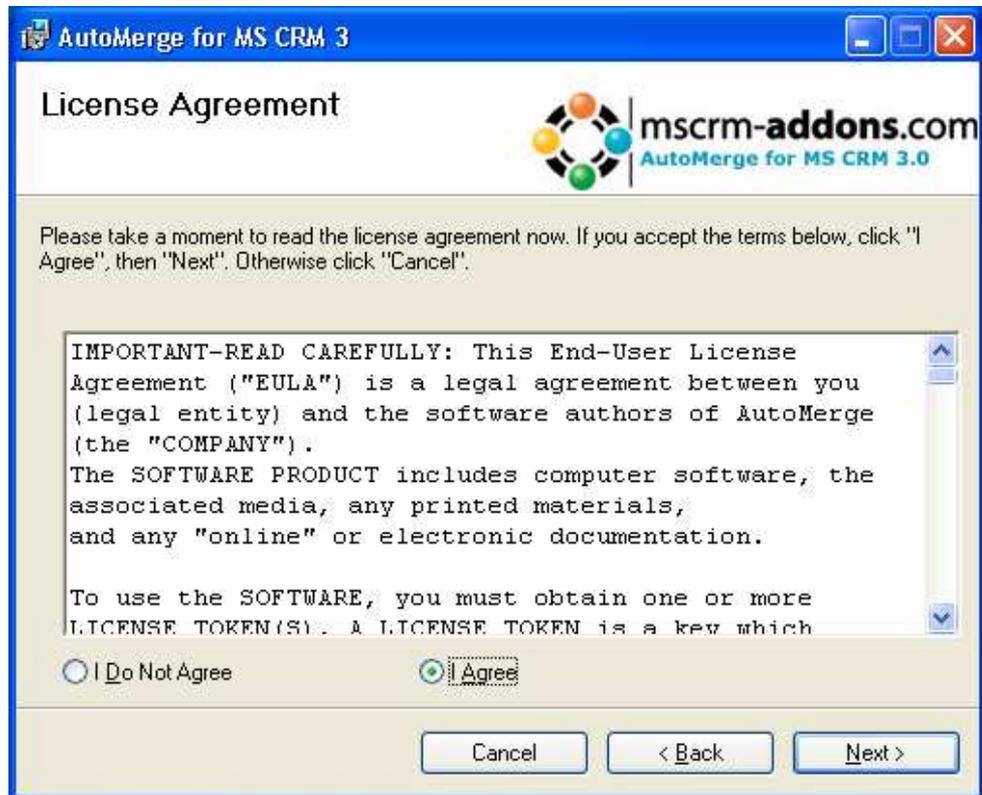
2. A dialog appears and informs you that the installer is loading and is preparing the installation.



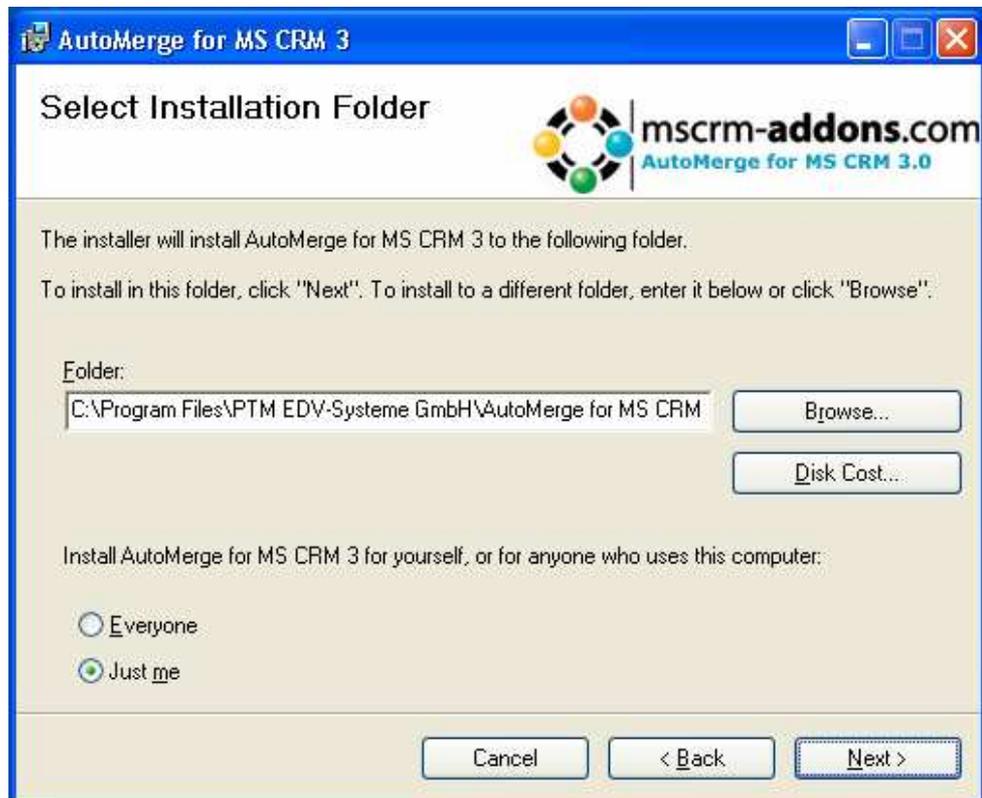
3. The following dialog appears. Click "Next" to continue the installation.



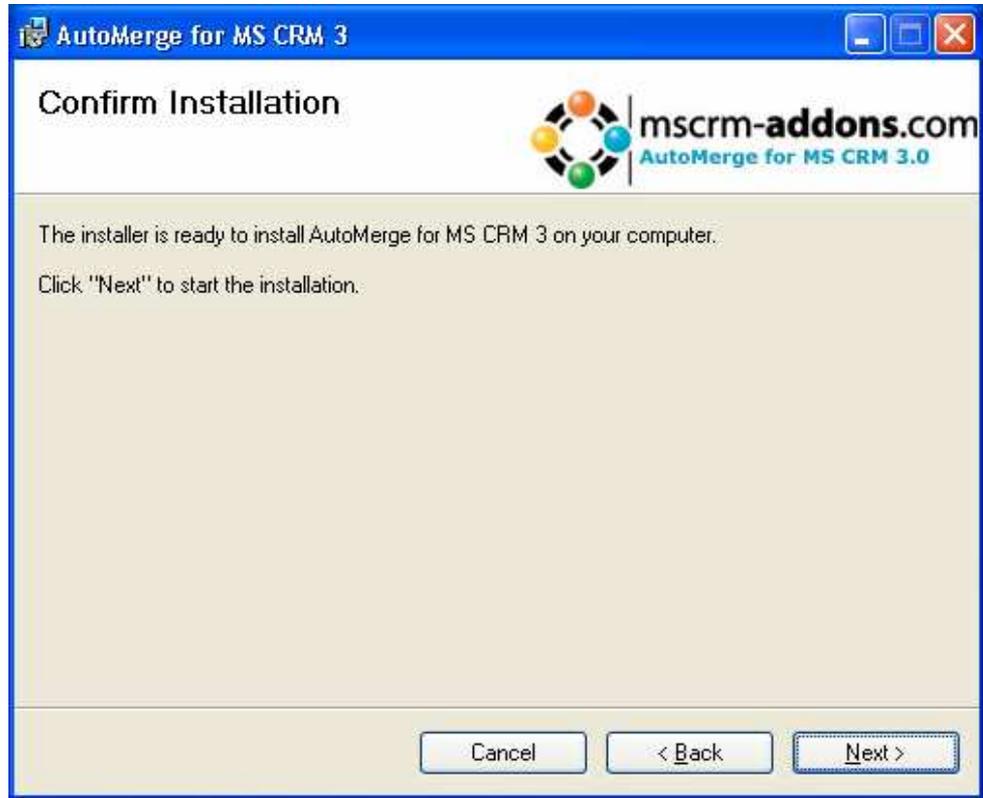
4. On the next page you must read and accept the License Agreement. Choose "I Agree" to continue the installation. If do not agree with the License Agreement you must choose "I Do Not Agree" and the installation of AutoMerge for MS CRM 3 can not be continued.



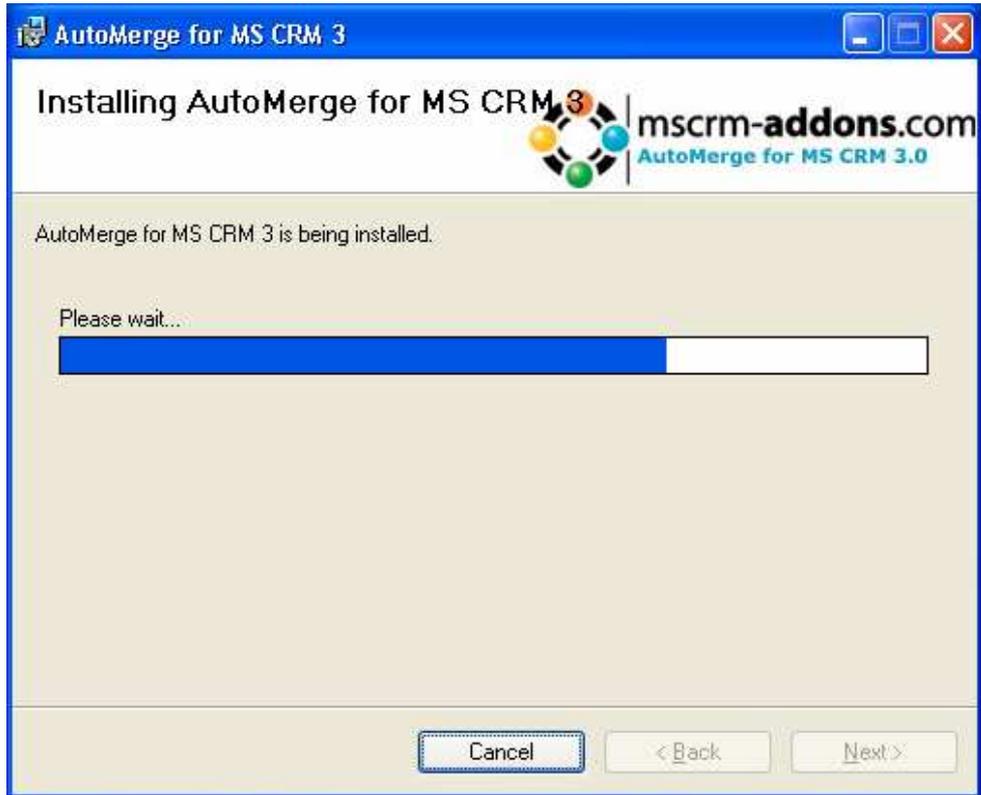
5. On the next page you must decide where to install AutoMerge for MS CRM 3. To change the default installation folder, click on the "Browse"-button and select the folder where you wish to install the program. Click on the "Disk Cost"-button to see the current free space of your disk(s) and how much disk space is required to install AutoMerge. You can also specify if you want to install AutoMerge for everyone or just for yourself. If you're ready with these settings, click "Next" to continue.



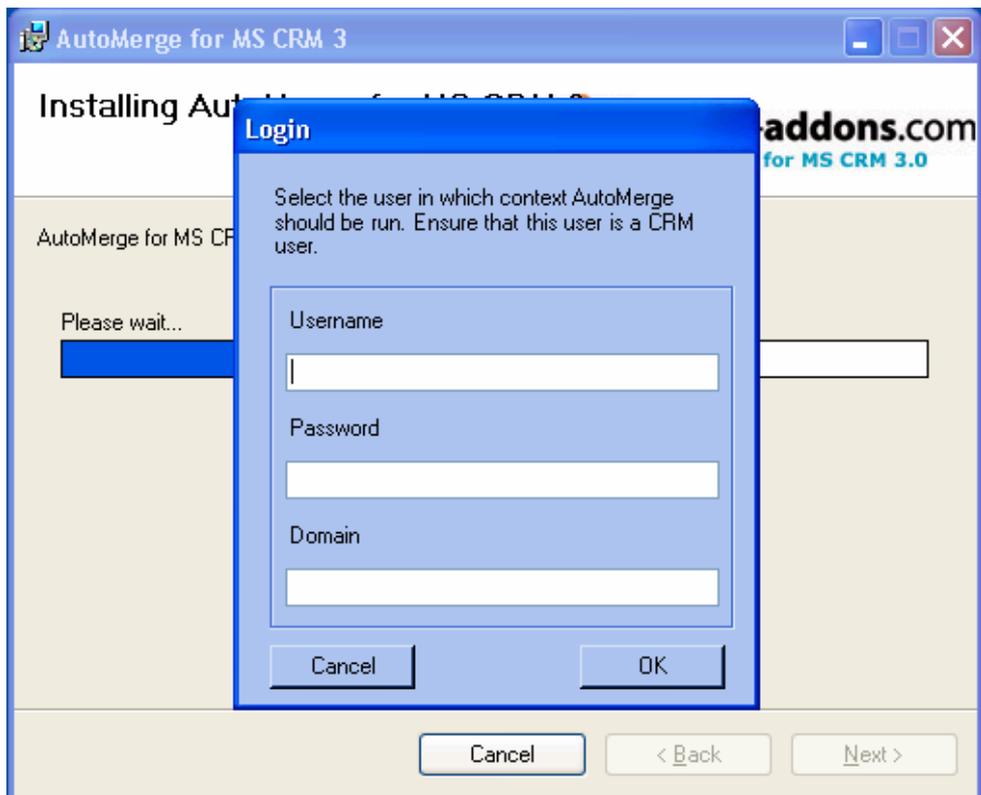
6. On the next page of the installation wizard you're ready to start the installation. If you've made a mistake, you can click the "Back"-button to change the configuration of the installation. When you're ready to begin, click "Next" to start the installation of AutoMerge for MS CRM 3.



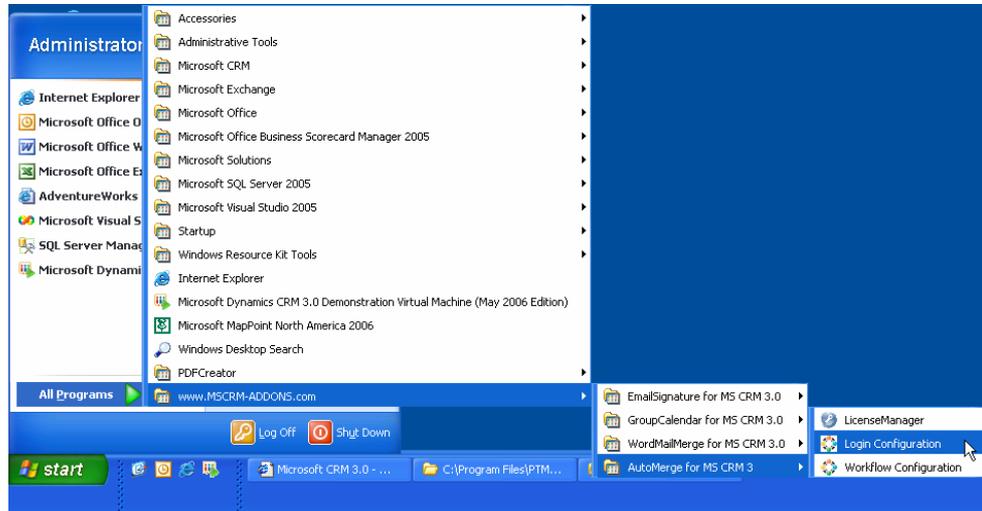
7. Installation is running.



8. A dialog appears in which you must enter the login credentials of the user under which context AutoMerge should be run. Ensure that the user is a CRM user and has enough privileges.



You could cancel this step during the installation. But ensure that you set the credentials before using AutoMerge. To do that, go to the Start menu to "All Programs\www.MSCRM-ADDONS.com\AutoMerge for MS CRM 3\Login Configuration"

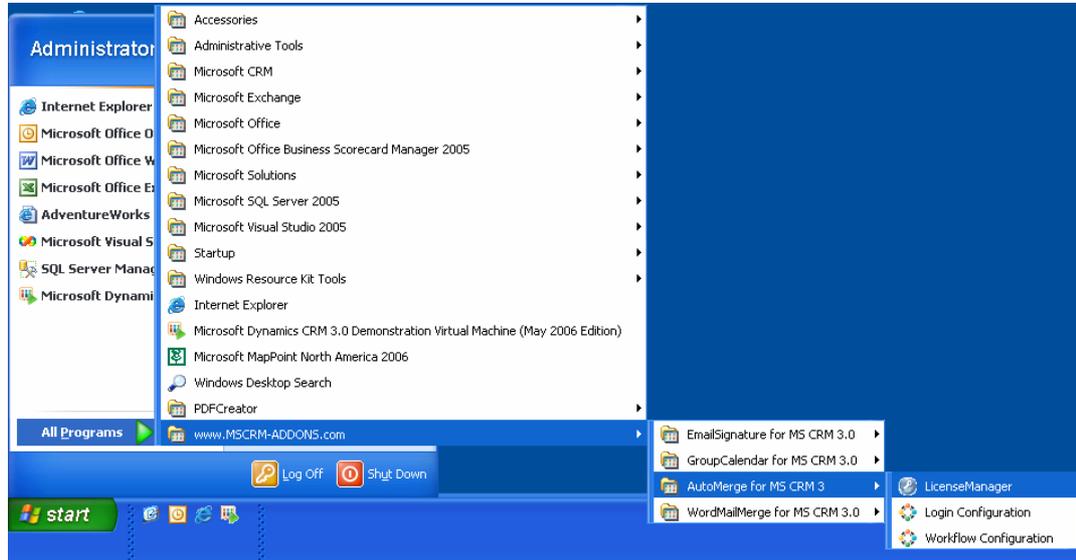


9. Congratulation, if you see the following dialog, AutoMerge for MS CRM 3 has successfully installed on your computer and is ready to use. Click on "Close" to exit the installation wizard.

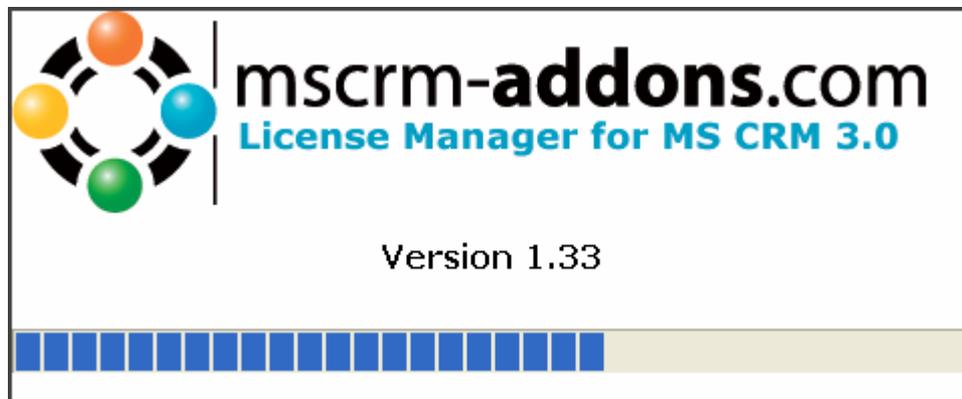


4 Install the License

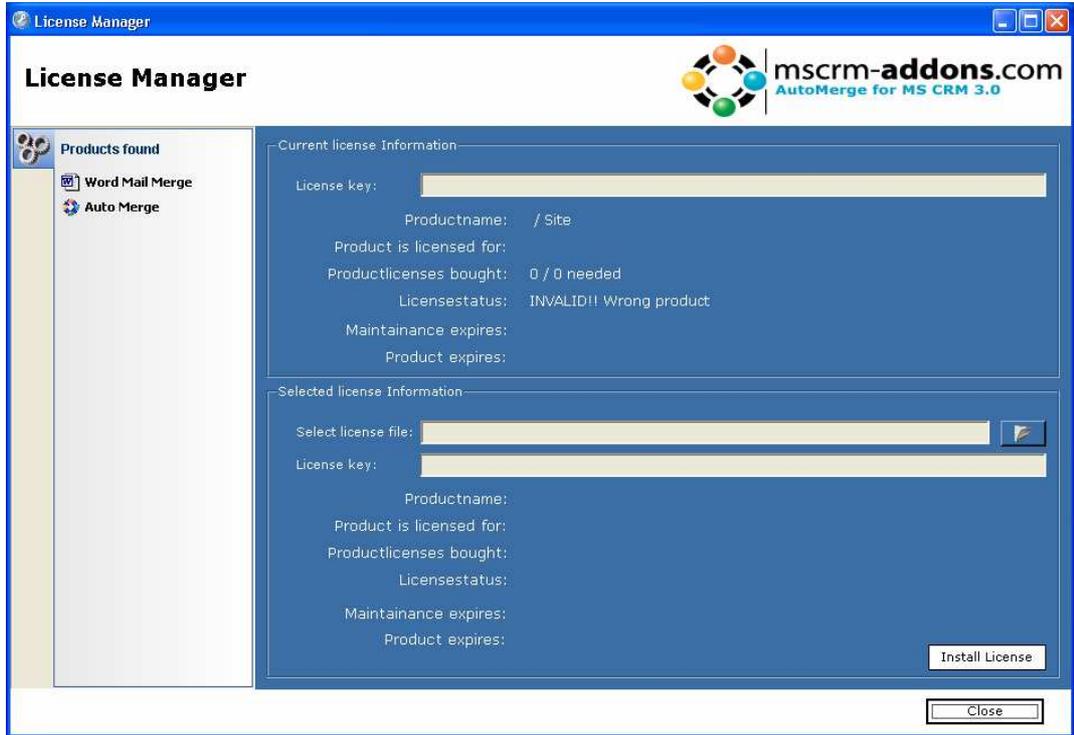
1. To install a license for AutoMerge, use LicenseManager which can be found in the start menu in "All Programs\www.MSCRM-ADDONS.com\AutoMerge for MS CRM 3\LicenseManager"



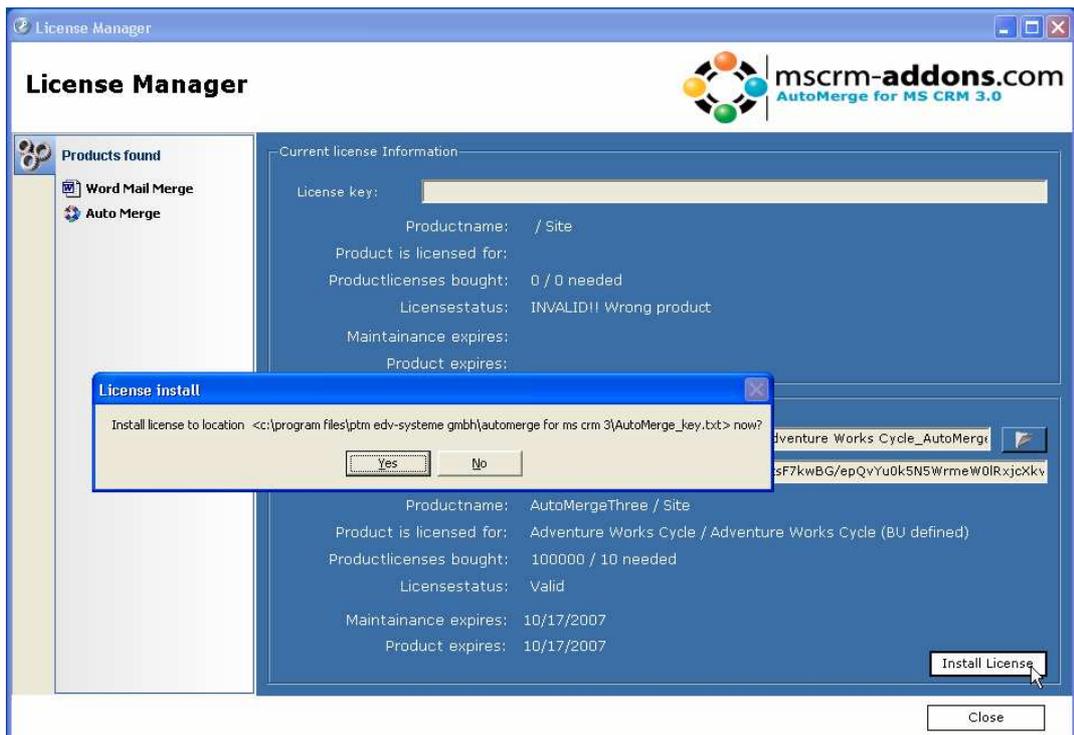
2. Wait while LicenseManager is loading



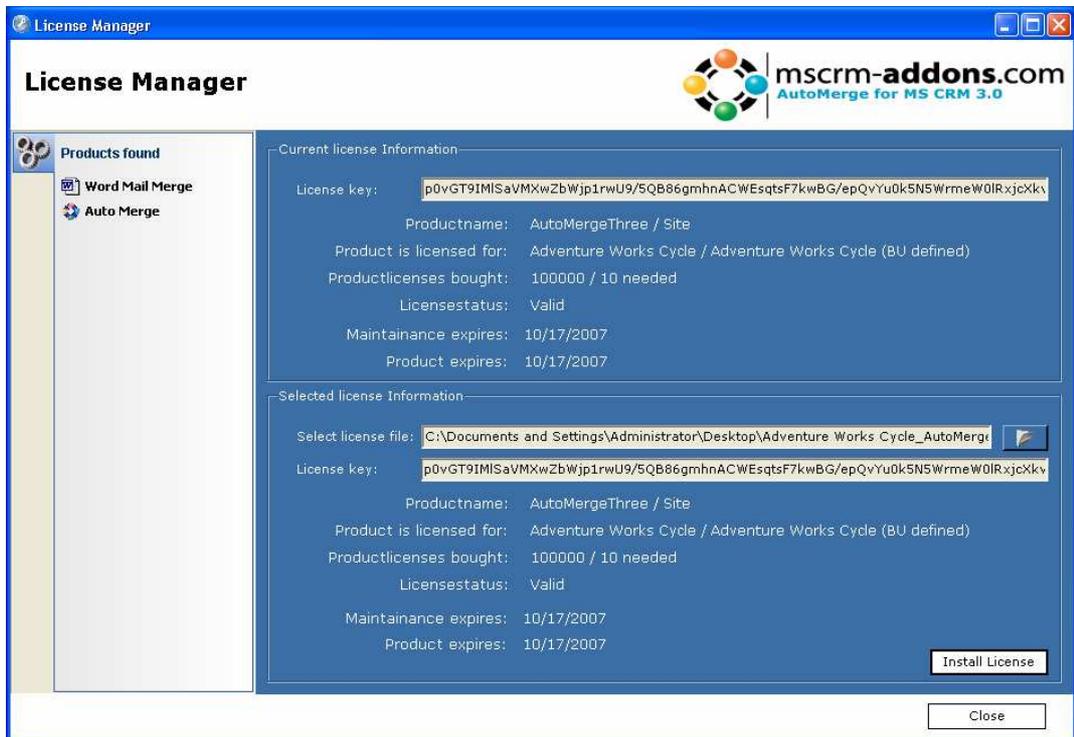
- The LicenseManager shows you the currently installed license for AutoMerge. If you have no license installed, it looks like this



- To install the license, click on . A dialog appears and you must browse to the location of the license file, select it and click on "Open". After that, you see under "Selected license information" the information of the current license. If you're ready to install, click on "Install License" on the right bottom corner. You must click on "Yes" to install the license.



- Now you can see the newly installed license under "Current license information".



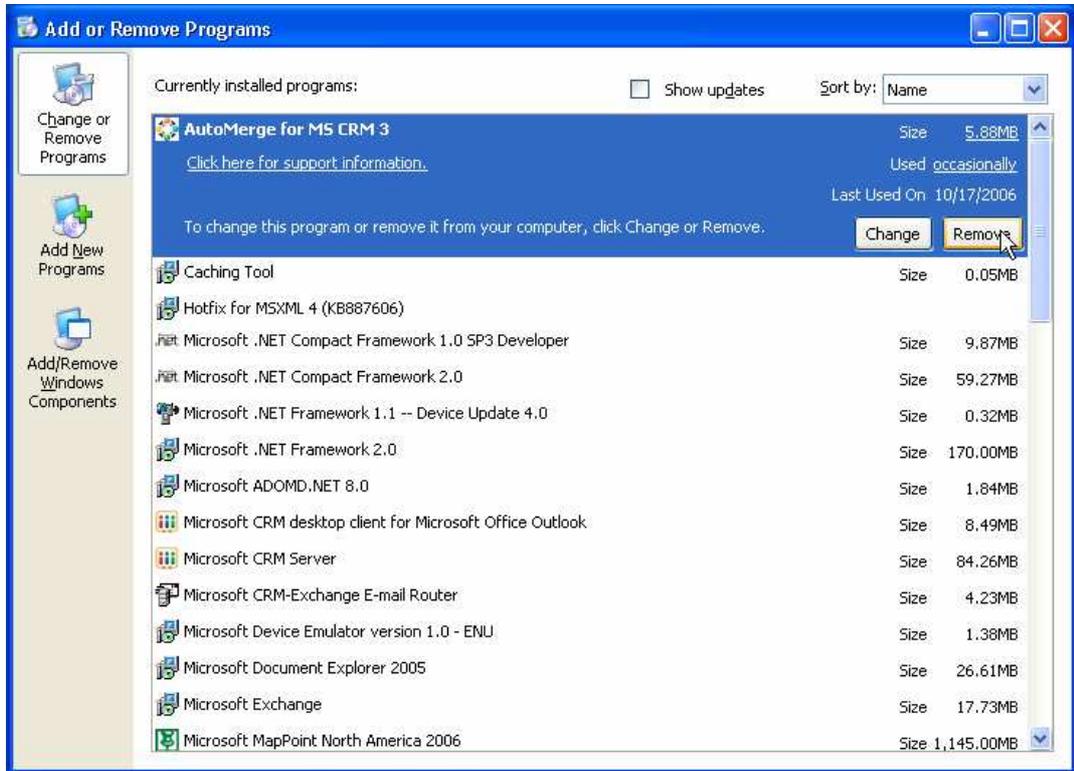
- Click on "Close" to exit LicenseManager and you are now ready to use AutoMerge for MS CRM 3. Please read the "Users Guide" to better understand how to use AutoMerge.

5 Uninstall AutoMerge

1. Got to "Add or Remove Programs" on the "Control Panel"



2. Search for "AutoMerge for MS CRM 3" in the list and click on the "Remove"-button to start the uninstaller. Please note that while uninstalling AutoMerge IIS will be resetted. And all configurations for the Workflow in the workflow.config will be removed.



3. Follow the instructions of the uninstaller to complete uninstall AutoMerge.

6 Contact

If you have problems with the product send a Email to support@mscrm-addons.com or call +43 316 680 880 0