



EmailSignature for MS CRM 3.0

Installation guide

(How to install EmailSignature for MS CRM 3.0)

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1 Welcome

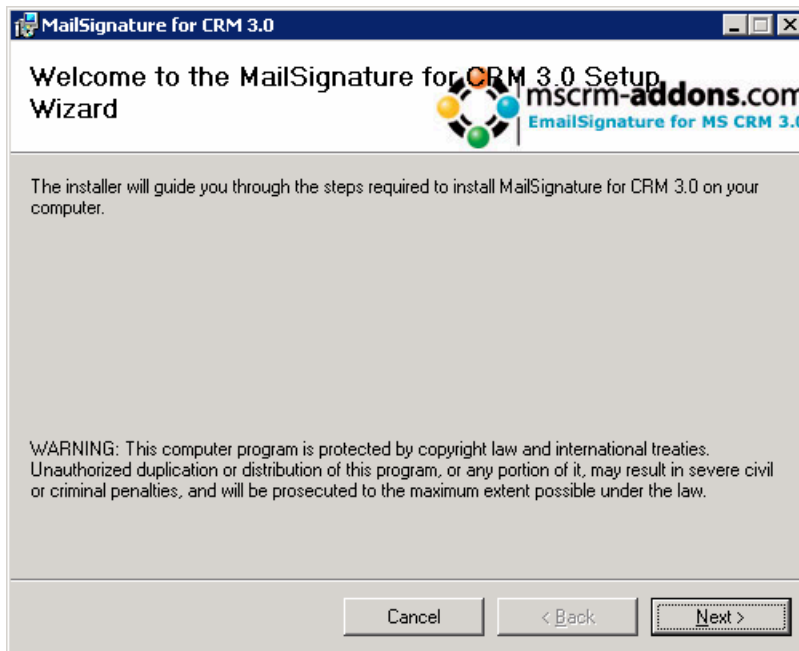
Welcome to the installation help for **EmailSignature for MS CRM 3**. This document will show you how to install and troubleshoot EmailSignature For MS CRM 3.0.

If you need to reach us, please see the Contact page

2 Installation guide

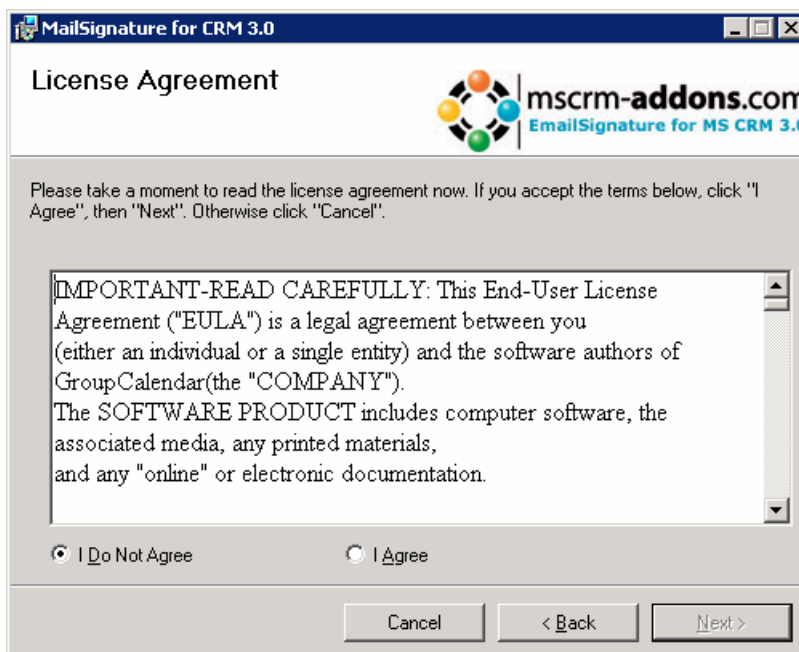
2.1 Running the installer

Execute the setup.exe and you will see this screen:



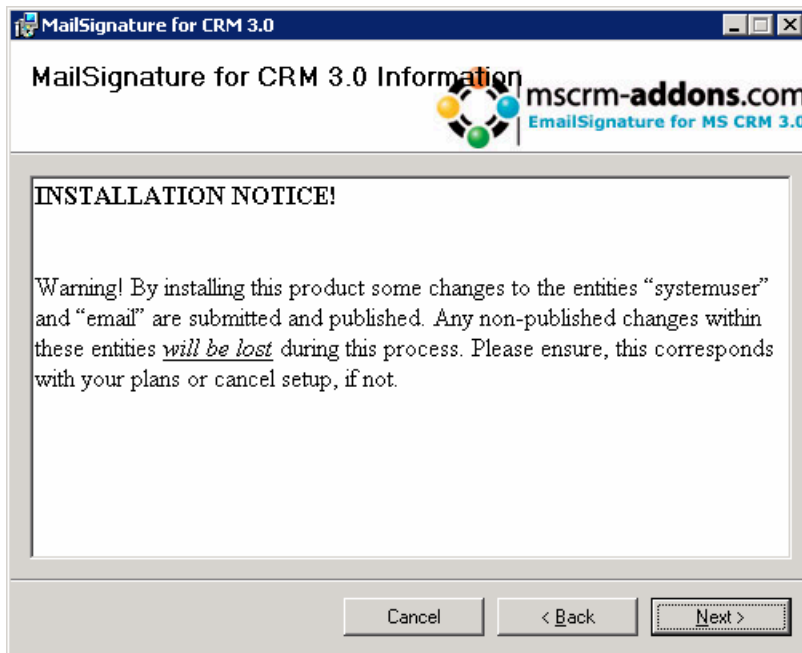
Click on Next to see the EULA → 2.2 EULA

2.2 EULA



Read carefully and select I Agree to enable the Next control and proceed to 2.3 → Installation Notice

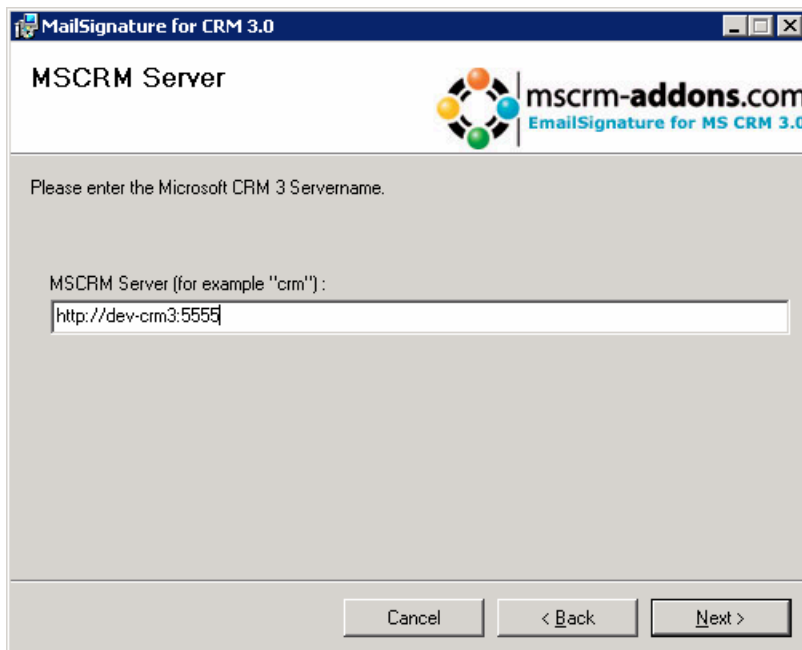
2.3 Installation notice



ATTENTION : Read this section very carefully, as the installation changes entities within MS CRM 3.0. This information is due to changes, as further enhancements of the product proceed.

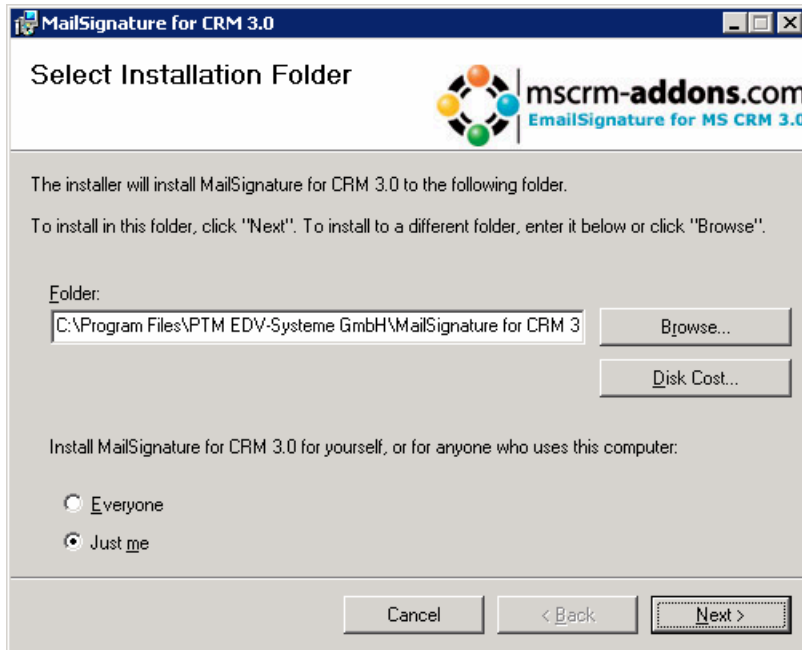
Select Next to proceed to → 2.4 CRM-Server setup

2.4 CRM Server Setup



State your desired CRM-Server as seen above and press next to continue to → 2.5 Select installation folder

2.5 Select installation folder



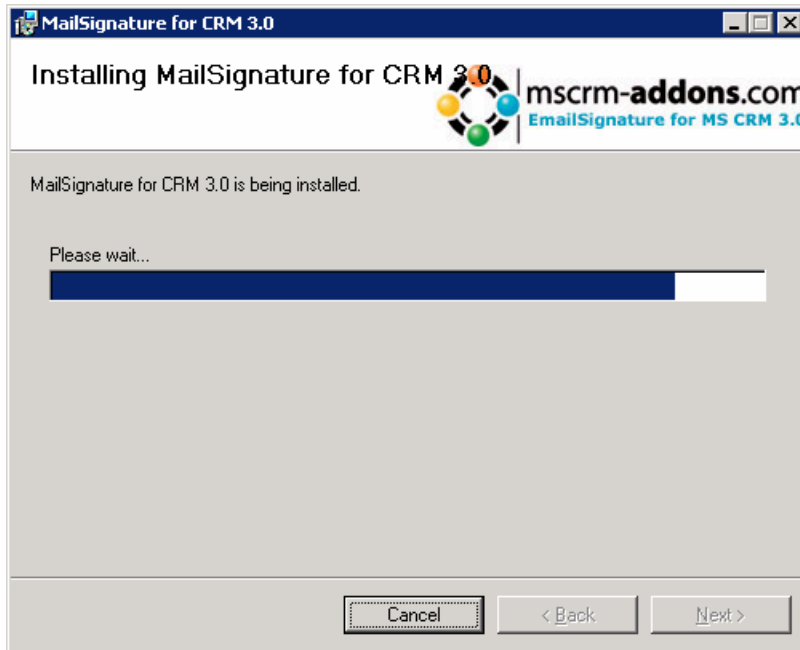
Change to your needs and click on next to continue to → 2.6 Confirm installation

2.6 Confirm installation



Make sure your input was correct and click on Next to start installation

2.7 Installation



After selecting install, the progress might stop at this position for some time, as CRM is customized at this point. A new TabSection will be added to the User entity and the onsave event is enabled on the main form. Please do not prevent this, as the onsave event is critical for the application.

Furtheron, the global.js situated in your CRM-Folder under `_common/scripts` will be modified as following:

The code-section

```
//{863a215a-4b69-479d-a42e-295de4cca359}
document.write('<script language="javascript"
src="http://localhost:5555/ptmscripts/SignatureFunctions.aspx"></script>');
//{863a215a-4b69-479d-a42e-295de4cca359}
```

will be added to the global.js, with localhost being replaced by your servername. Do not change this, or the product will cease to work and uninstall will fail.

A backup-copy of your global.js is created during installation. The file is identified by the name global and the installation date and time.

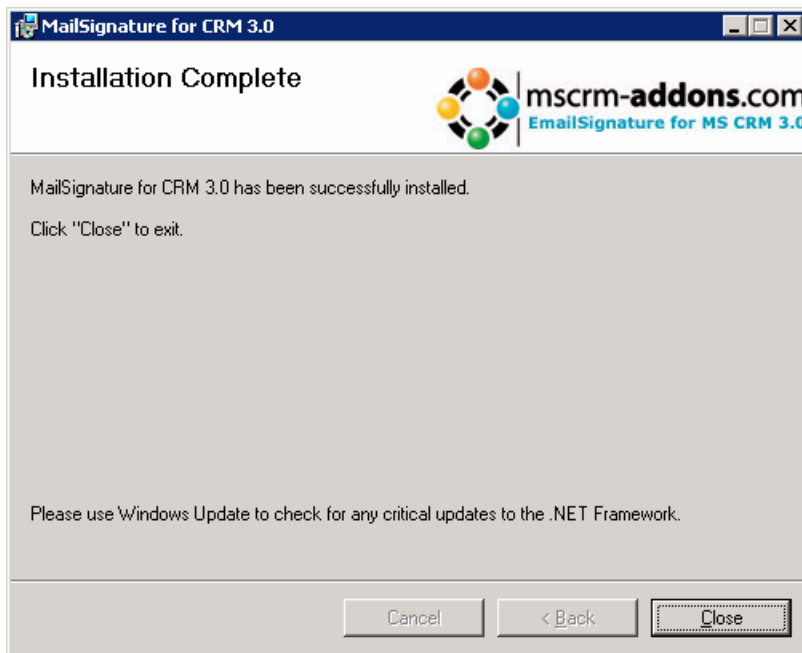
The comment section will be left after uninstall, but the code itself will be removed.

The referenced directory and file are created during installation.

Some function calls will be added to the onload event of the mail-entity:

```
f_resize_EMailWindow();
f_CheckSenderRecipient();
f_FillInSignature();"
```

2.8 Finalizing installation



After installation the "Installation Complete" screen will appear.

Congratulations! You have successfully installed EmailSignature for MS CRM 3.0

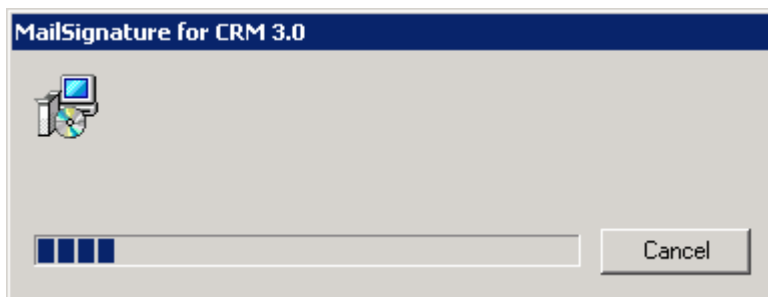
3 Automatic Uninstall

If you require to uninstall EmailSignature for MS CRM 3.0, open the Add/Remove Programs section in your Control Panel, select EmailSignature for MS CRM 3.0 and select uninstall.

ATTENTION!

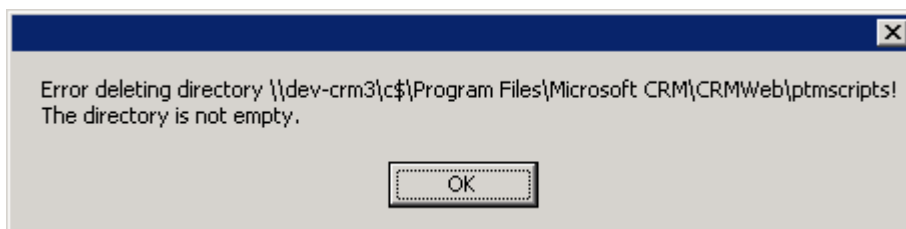
By uninstalling this product some changes to the entities "systemuser" and "email" are reverted and the entities published. Any non-published changes within these entities *will be lost* during this process. Please ensure, this corresponds with your plans or cancel uninstall, if not.

After selecting uninstall, you will see this dialog.



The dialog might stand in this position for some time, as customizations to CRM are reverted (see the Attention! text above).

During uninstall you might encounter the following message with your servername instead of "dev-crm3":



While using EmailSignature for MS CRM 3.0, signature and setting files are created and placed within the directory stated above. The Uninstall does not remove these files and therefore also leaves the directory in place. If you choose to reinstall EmailSignature for MS CRM 3.0, the settings and signature files are reused.

Before changing global.js, a backupfile is created.

3.1 *Manuall interaction on uninstall*

The uninstall does not revert the following changes, due to the impossibility to tell, if the user has done further changes:

- Enabling the onload event on the main form of the entity "email"
- Enabling the onsave event on the main form of the entity "systemuser"
- Removing the codedelimiters inside global.js, as these might be used by other products. These delimiters are comments and have no impact on the functions of the global.js
- Removing the directory "ptmscripts" if any non-installation files have been found inside the directory at point of uninstall.
- Adding the "everyone has full control" right to the "ptmscripts" folder created during install.

4 Q&A and Troubleshooting

Q: How do I create a default signature/setting?

A: A default signature is the same as a personalized signature/setting, but without the user-guid. A default setting would have the name "settings.aspx", a default signature would have the name "signature.aspx".

The content of a settings_.aspx might look like this :

```
<maximizeWindow=True>
<defaultSender={0283F7E4-9D61-DA11-8F5C-0003FF71453B}>
<senderType=8>
<senderName=Ben Burton>
```

All fields are compulsory. No mandatory fields.

Q: Can I have personalized settings with a default signature?

A: Yes, you can. The default file is used, if no user-specific file is found. ATTENTION! Saving always creates a settings and a signaturefile.

Q: I cannot save a personalized Signature/Setting

A: Please check the access tights on the folder "ptmscripts" located in your CRMWeb directory

Q: EmailSignature ceased working after running an update of CRM

A: The update might have overwritten the global.js and removed the customcode required by EmailSiganture for MS CRM 3.0. Ensure the following lines of code are included in global.js.

```
//{863a215a-4b69-479d-a42e-295de4cca359}
document.write('<script language="javascript"
src="http://localhost:5555/ptmscripts/SignatureFunctions.aspx"></sc
ript>');
//{863a215a-4b69-479d-a42e-295de4cca359}
```

localhost:5555 should be replaced with your CRM-Server name.

5 Contact

If you have questions to the product send a Email to support@mscrm-addons.com

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