



# AttachmentExtractor for MS CRM 2011

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Version 5.0, August 2013

## **Installation Guide**

(How to install/uninstall AttachmentExtractor for MS CRM 2011)

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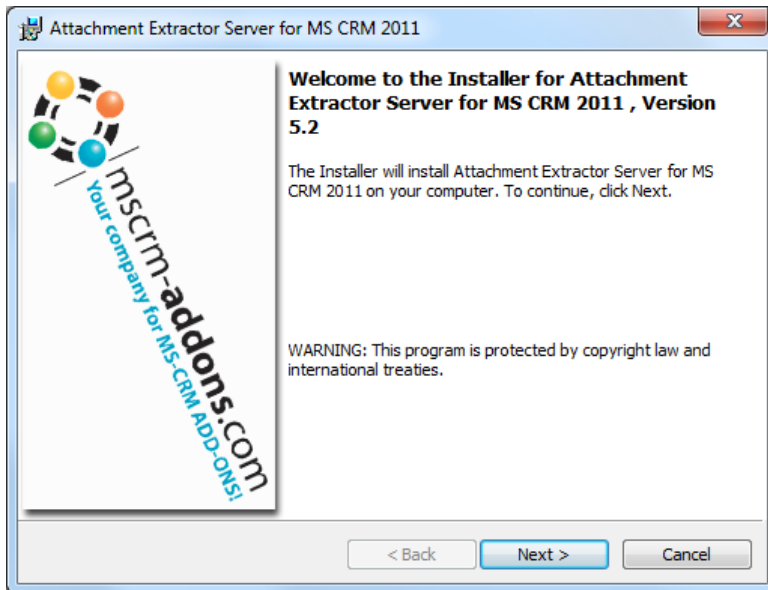
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# 1 Installation AttachmentExtractor

During the installation you have to specify an organization of CRM 2011, 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.

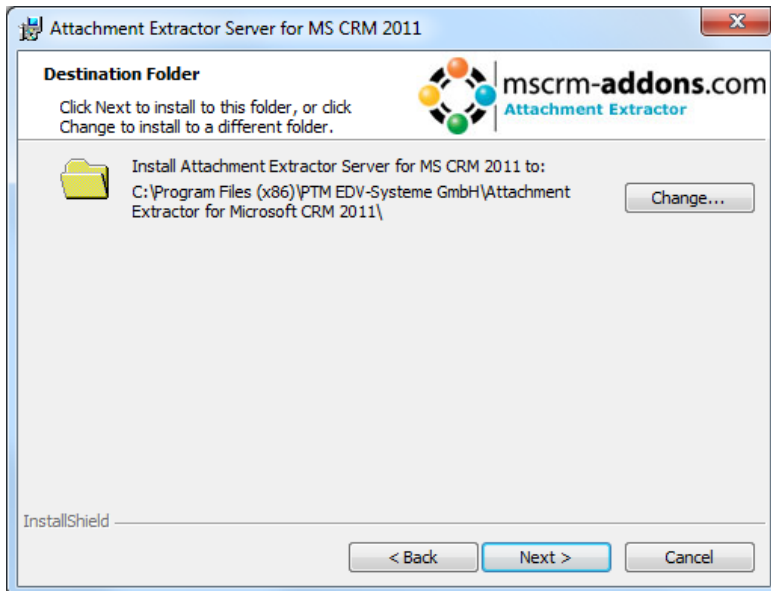
## 1.2 EULA (End User License Agreement)



You have to accept the license and click [NEXT]

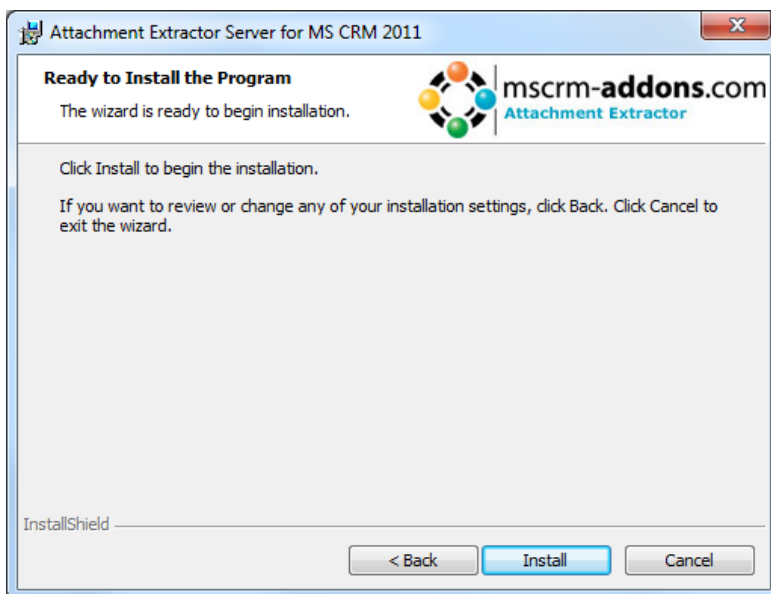
## 1.3 Folder Selection

Choose the installation folder:



Click [Change] to specify a different installation path.

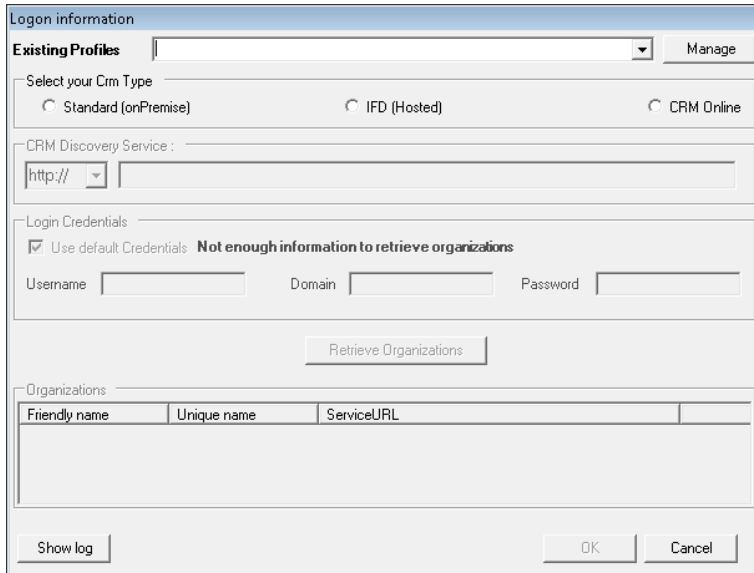
## 1.4 Confirm Installation



To start the installation 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

Existing Profiles: [Empty] Manage

Select your Crm Type

Standard (onPremise)  IFD (Hosted)  CRM Online

CRM Discovery Service: http:// [Empty]

Login Credentials

Use default Credentials **Not enough information to retrieve organizations**

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

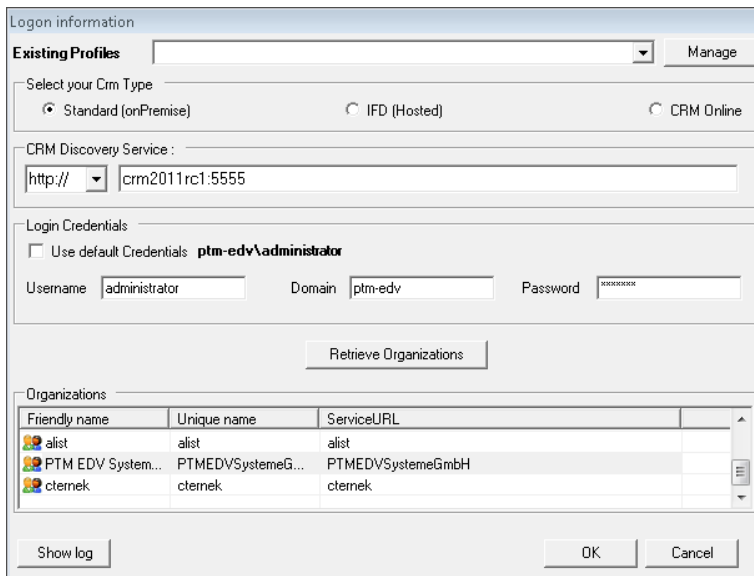
Retrieve Organizations

Organizations

Friendly name	Unique name	ServiceURL

Show log 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

Existing Profiles: [Empty] Manage

Select your Crm Type

Standard (onPremise)  IFD (Hosted)  CRM Online

CRM Discovery Service: http://crm2011rc1:5555

Login Credentials

Use default Credentials **ptm-edv\administrator**

Username: administrator Domain: ptm-edv Password: [Masked]

Retrieve Organizations

Organizations

Friendly name	Unique name	ServiceURL
alist	alist	alist
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
cternek	cternek	cternek

Show log OK Cancel

## 1.6 Finish



Installation is finished.

## 2 Security Roles

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

### **General security roles for all products:**

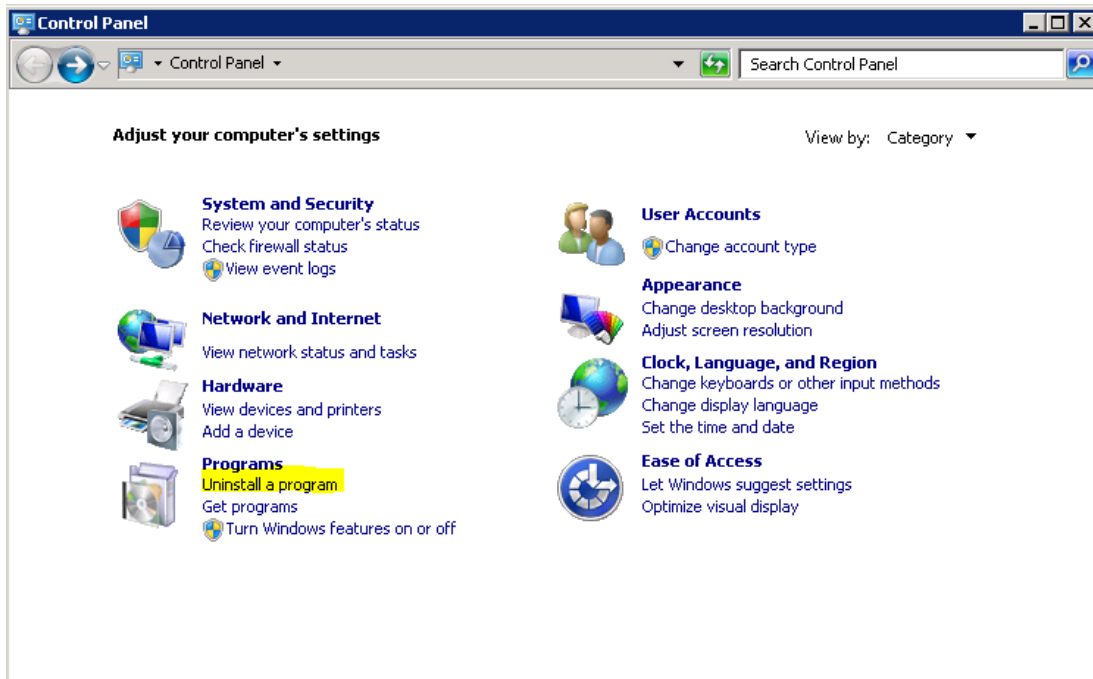
The following security role is required by all our products.

- MSCRM-Addons General Security Role

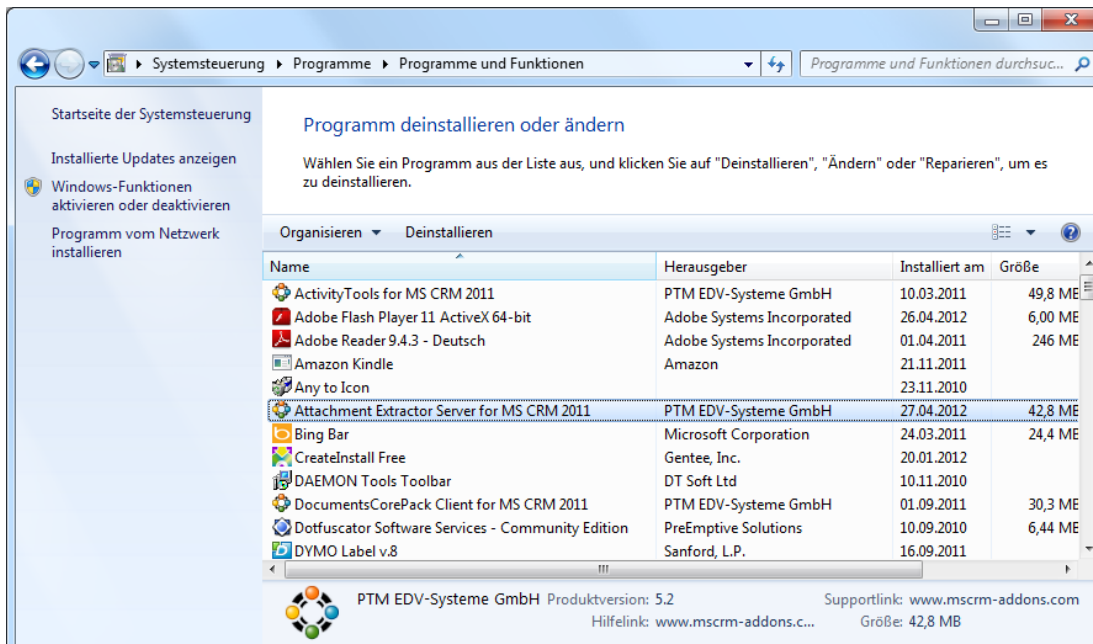
This security role contains the basic requirements for using the product itself and to be able to perform the license check.

### 3 Uninstall AttachmentExtractor

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



Find "AttachmentExtractor for MS CRM 2011", select it and click on "Uninstall"



Confirm the question if you're sure to uninstall AttachmentExtractor  
It may take a few minutes to uninstall AttachmentExtractor.

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## 4 Contact

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

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