ActivityTools for Microsoft CRM 4.0

Installation guide
(How to install ActivityTools for Microsoft CRM 4.0)

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1   Welcome

Welcome to the installation help for **ActivityTools for MS CRM 4**. This document will show you how to install and troubleshoot
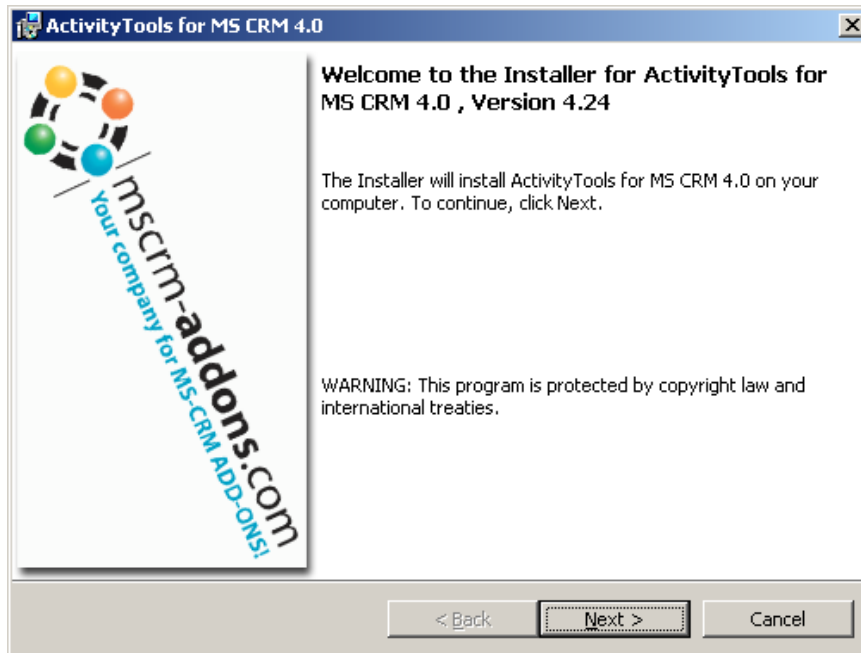ActivityTools for Microsoft CRM 4.0.

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

2 Installation guide

The user must be online during the Installation!
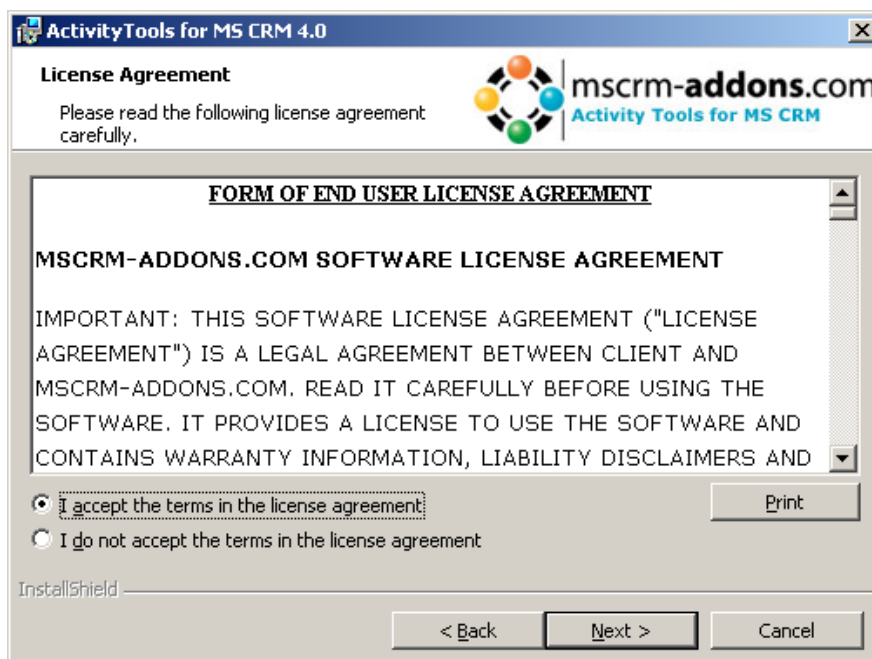
2.1 Running the installer

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

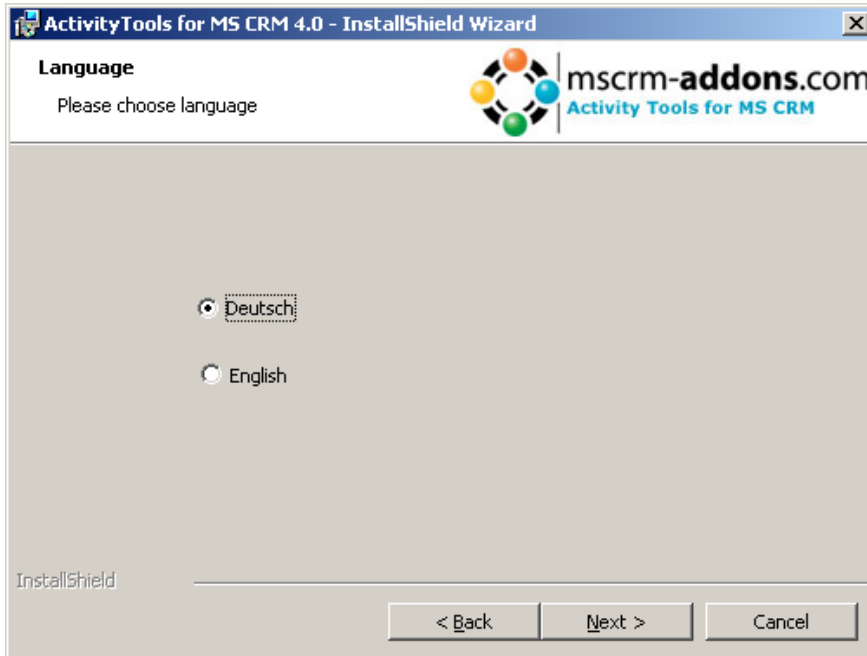Click on Next to see the EULA ➜ 2.2 EULA
In case of an upgrade of a previous Version you will get an update information displayed in this dialog.

2.2 EULA

Read carefully and select "I accept" to enable the Next control and proceed to 2.3 ➔ Installation Notice.
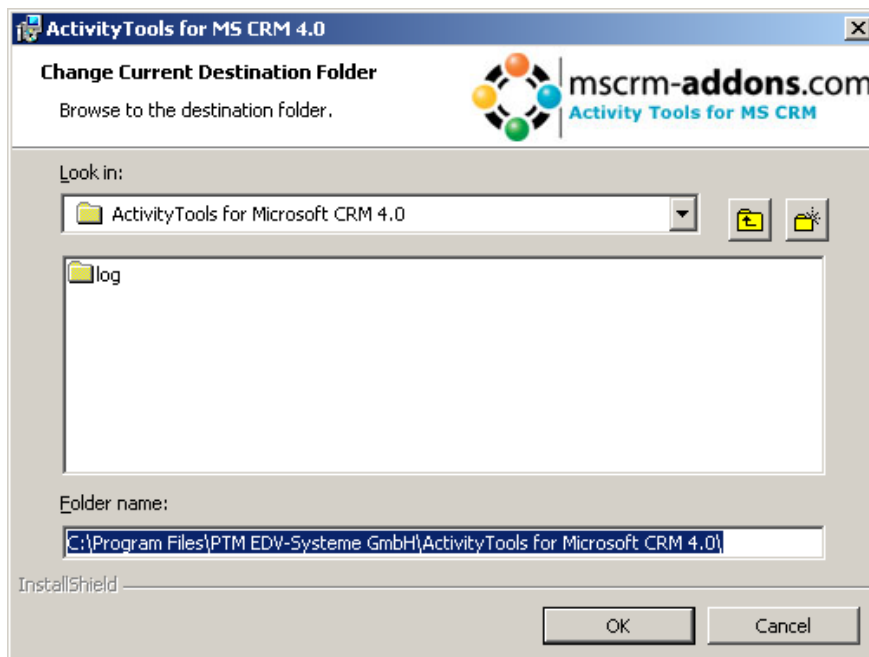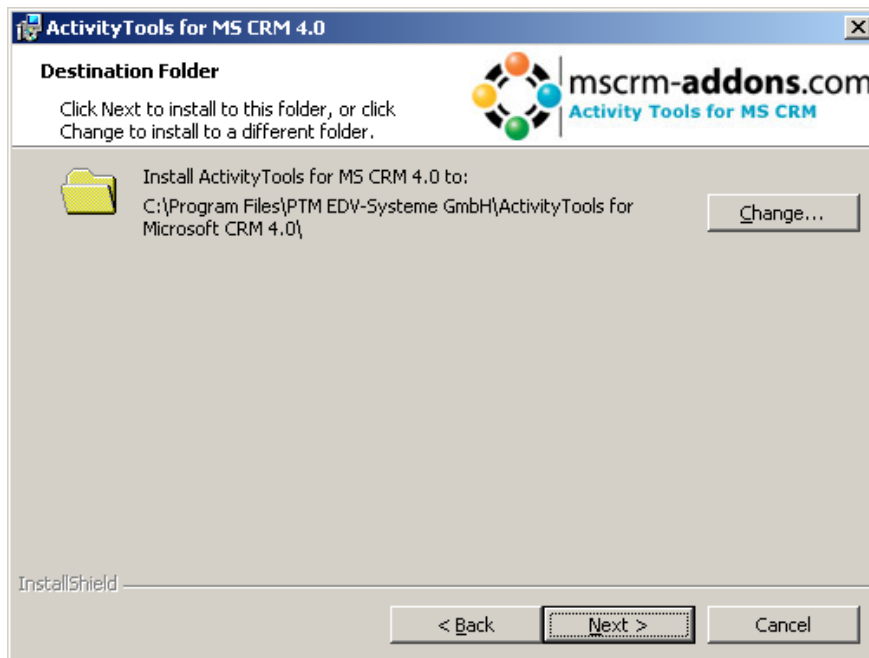
2.3 Choose language

Select a language and click on the "Next"-button.

2.4 Installation notice

ATTENTION: The installation will perform changes on the E-Mail and ISV-Config entities within MS CRM 4.0.
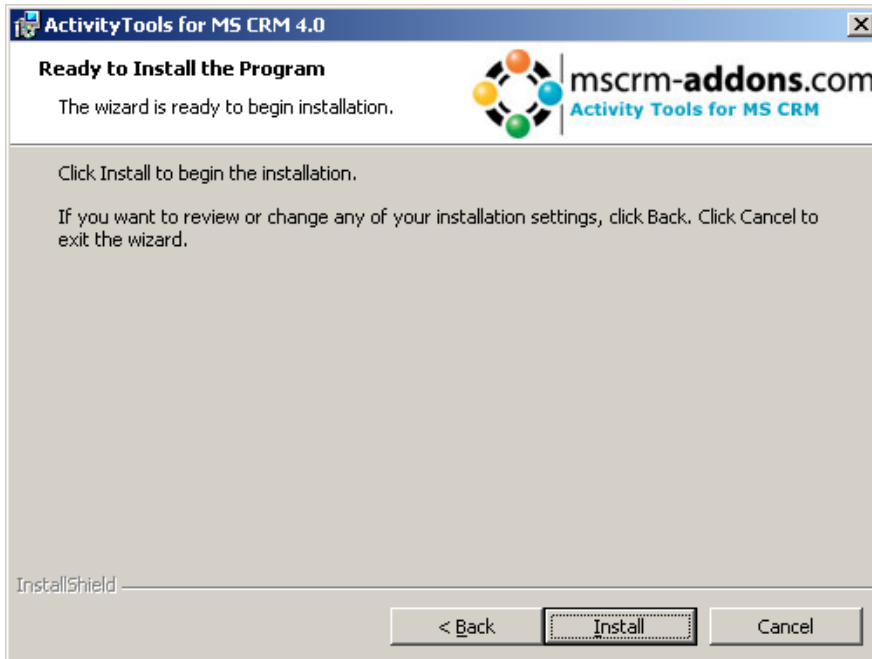
Select Next to proceed to ➔ 2.5 Destination folder

2.5 Destination 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 Install to start installation.
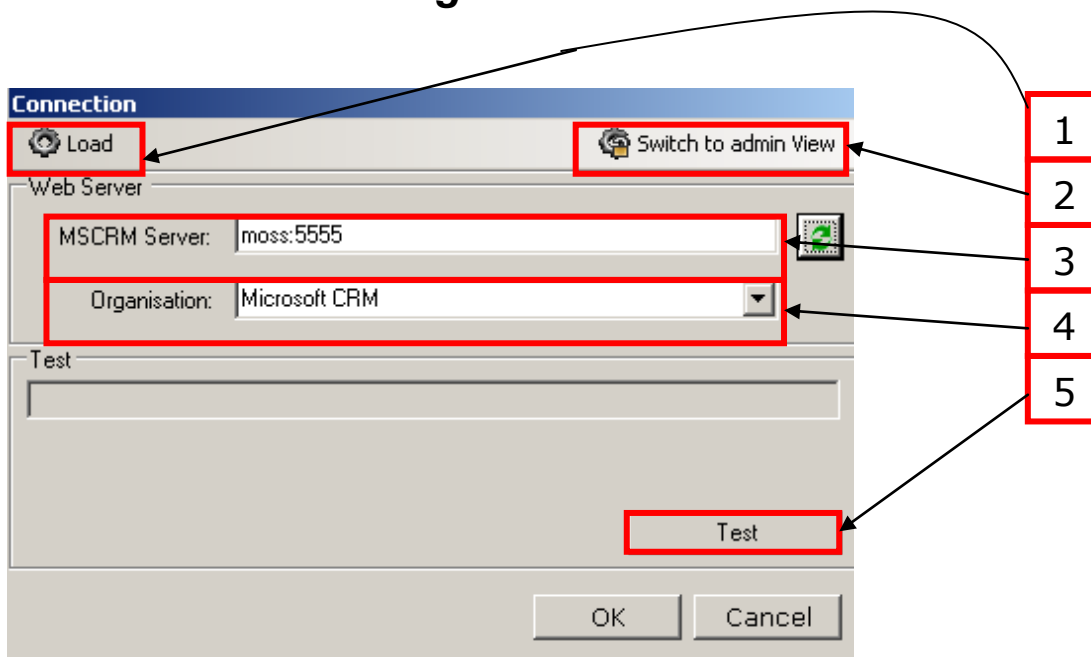
2.7 Installation
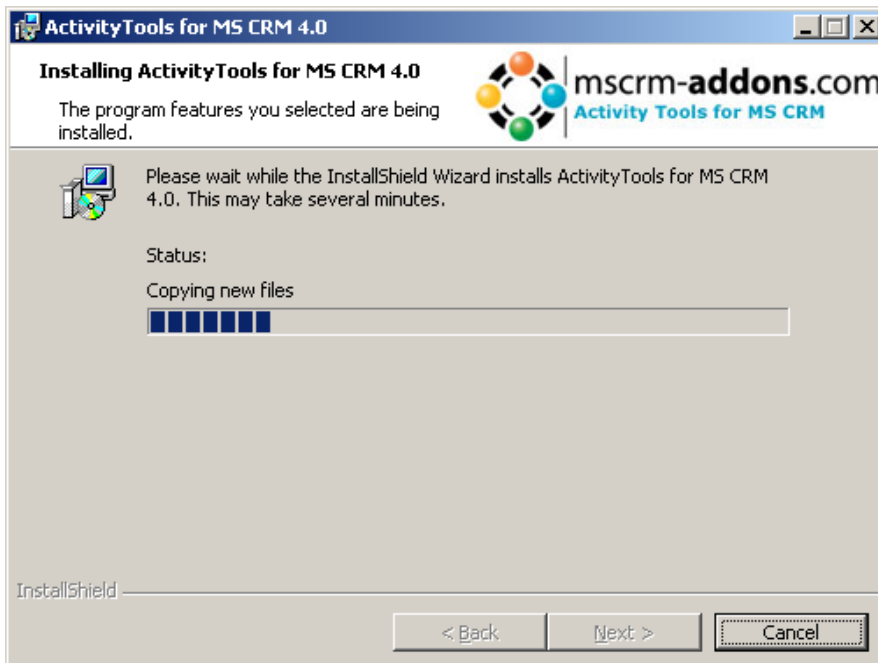
After selecting install, the progress might stop at this position for some time, as CRM is customized at this point.

During the setup you will be prompted with the login information screen ➔ 2.8 Login Information Dialog.

2.8 Connection Dialog

1. Load
Allows you to load saved profiles.

2. Switch to admin View
Here you switch to admin View.

3. MSCRM Server
Here you have to enter the CRM-servername. Furthermore you have to enter a port, if it is not "80".
(eg: servername: crm, Port: 5555).

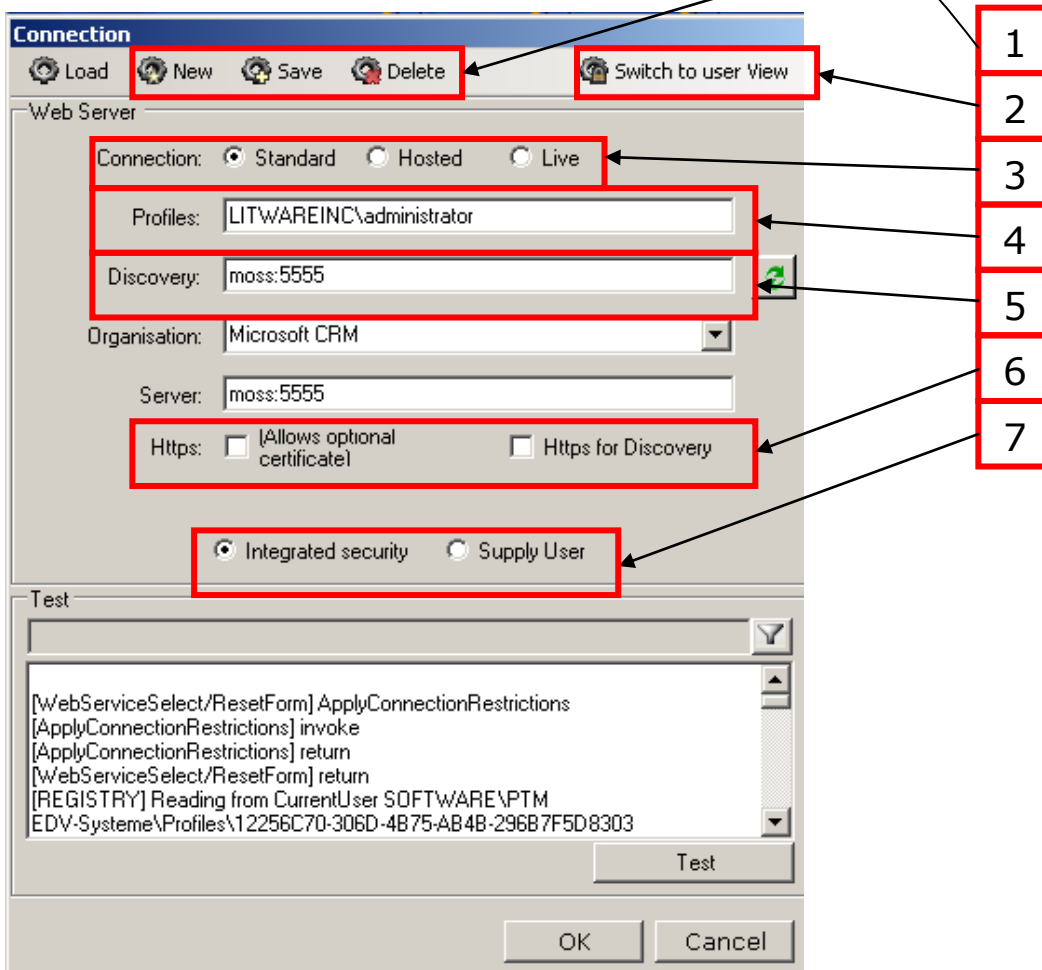### 4. Organization
Here you have to enter a name for the Organization or click on the [Arrow-down] Button and the available Organizations will appear.

5. Test
Before you click "OK" you should check the connection.

Connection-Dialog (Admin View)

1. New, Save, Delete
Allows you to create, save and delete profiles.

2. Switch to user View
Here you switch to user View.

3. Connection
Here you can choose the kind of connection (standard, hosted or live).

4. Profile
Here, the profile is indicated.

5. Discovery
Usually the discovery is the same as the CRM-server (Otherwise, contact your system administrator).

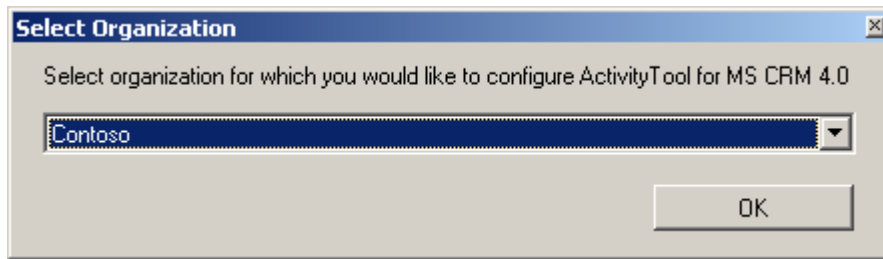**6. Https**
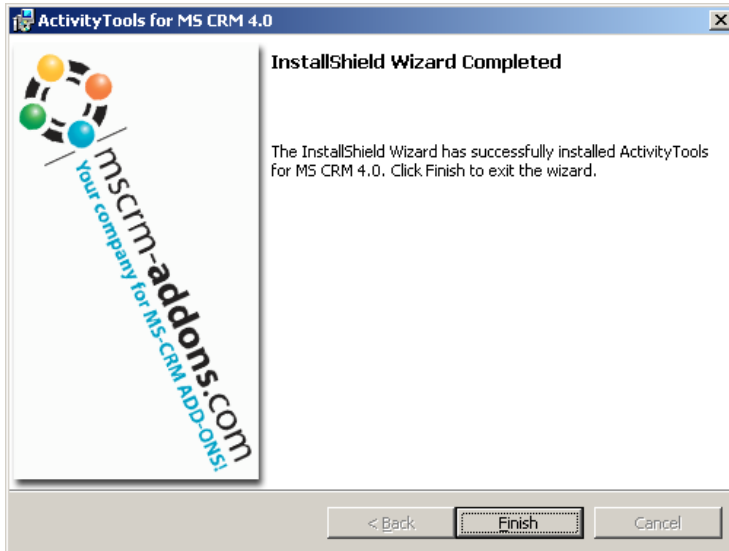If the CRM server is configured to use HTTPS, the client must also be configured for a secure server.

7. Integrated Security – Supply User
Here you can choose to supply a user or use integrated security.

2.9 Select Organisation

2.10 Finalizing installation

After installation the "Installation Complete" screen will appear.
Congratulations! You have successfully installed ActivityTools for Microsoft CRM 4.0
The ActivityTools Config will start automatically after the installation.
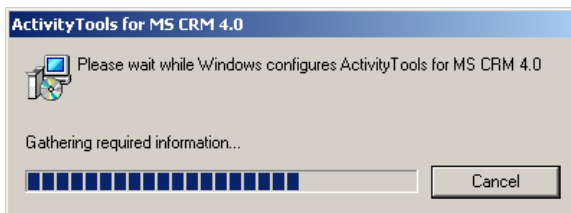
3 Uninstall

If you require to uninstall ActivityTools for Microsoft CRM 4.0, open the Add/Remove Programs section in your Control Panel, select ActivityTools for Microsoft CRM 4.0 and select uninstall.

ATTENTION!
By uninstalling this product some changes to the entities "ISV-Config" 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

3.1 Manual interaction on uninstall

The uninstall does not revert the following changes, due to the impossibility to tell, if the user has done further changes:
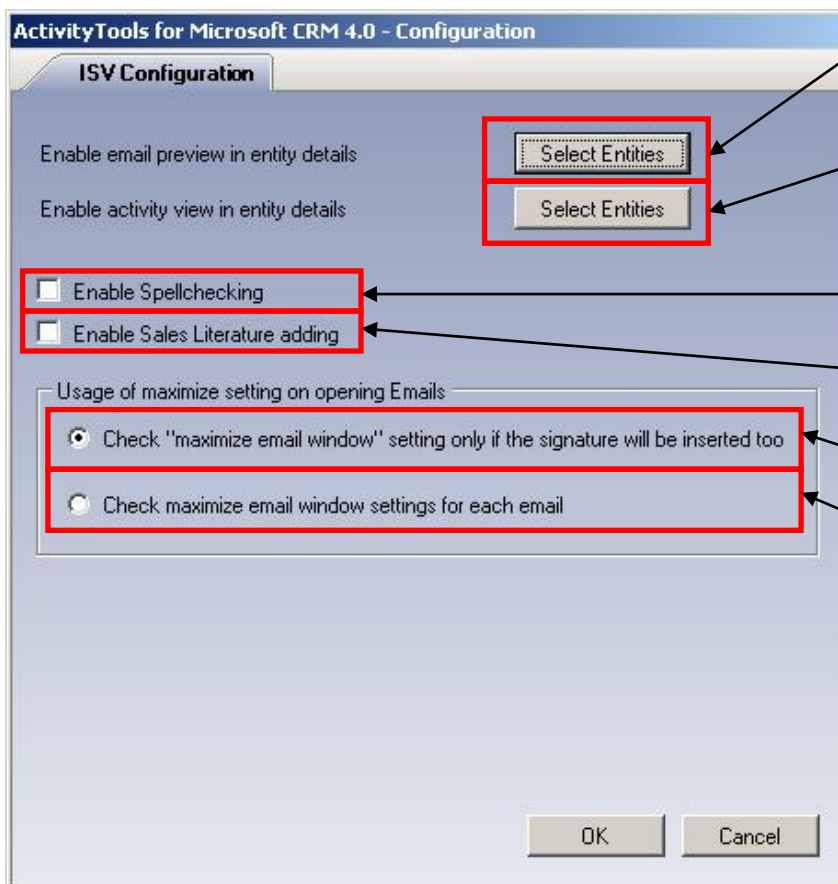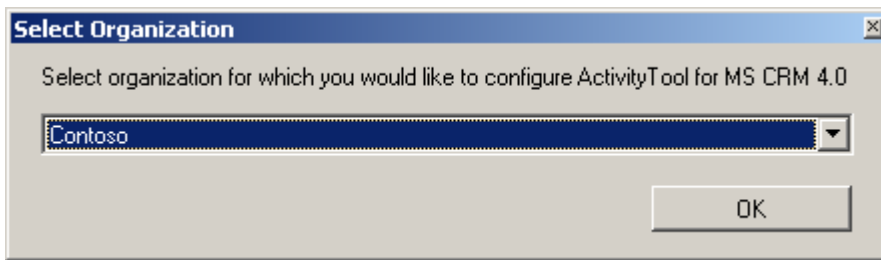
• Enabling the onload event on the main form of the entity "email"

4   ActivityTools Config

After the installation of ActivityTools the "ActivityTools Config" will start automatically.
You can always start the setup to change the config.

4.1 Configuration Tool

At the beginning you have got the option to select the Organization to configure.

By clicking this button you can select entities where the EmailPreview function will appear. ➔ Entities detail window

By clicking this button you can select entities where the activity view function will appear. ➔ Entities detail window
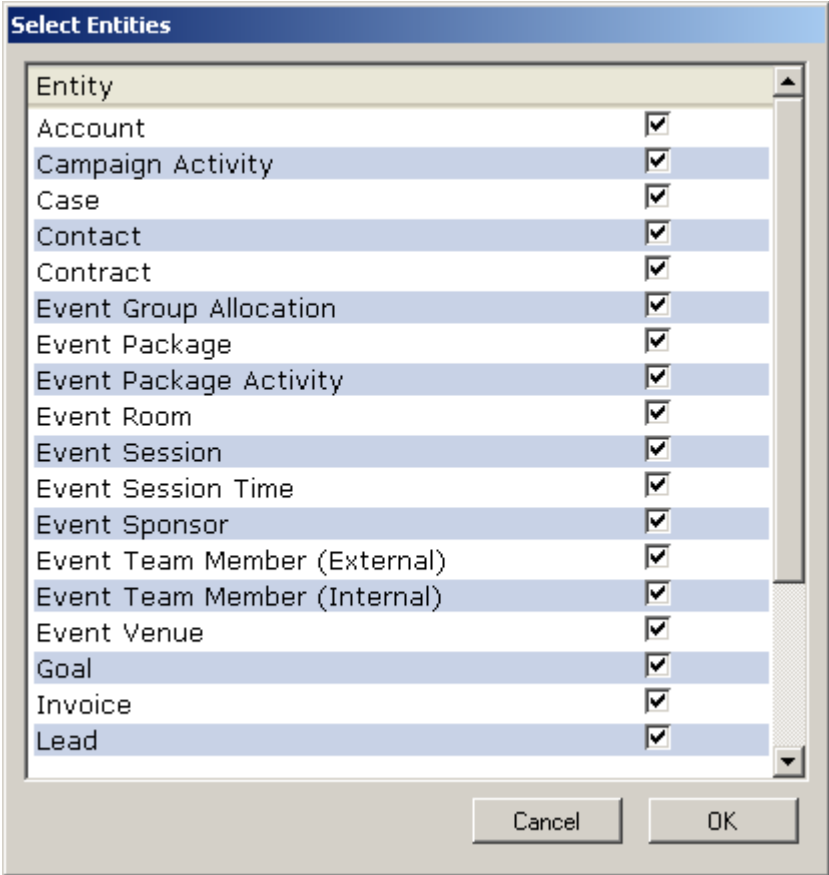
Adds a spellcheck to the email entity.

Adds the ability to add sales Literature to emails.

Check only if the signature will be inserted too.

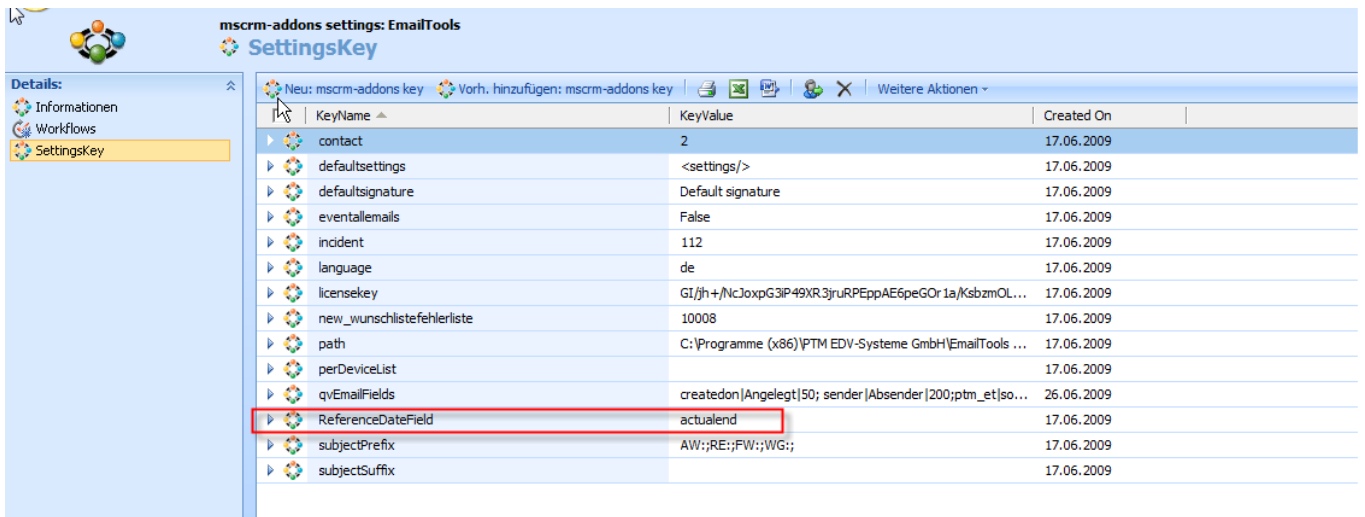Maximize email window setting for each email.

4.2 Entities detail window:

Select Entities

Entity	
Account	☑
Campaign Activity	☑
Case	☑
Contact	☑
Contract	☑
Event Group Allocation	☑
Event Package	☑
Event Package Activity	☑
Event Room	☑
Event Session	☑
Event Session Time	☑
Event Sponsor	☑
Event Team Member (External)	☑
Event Team Member (Internal)	☑
Event Venue	☑
Goal	☑
Invoice	☑
Lead	☑

Cancel   OK

4.3 ReferenceDateField

A short explentation on how to change the ActivityTools reference date setting:

Please create a new settings key with the value "ReferenceDateField" and set the correct value.

Link (KB –Article):
http://www.mscrm-addons.com/Support/KnowledgeBase/tabid/103/Default.aspx

5   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
"mscrm-addons   setting",   a   default   signature   would   have   the   name "defaultsignature".

The content of a default settings might look like this :

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

All fields are compulsory. No mandatory fields.

You can find the default settings and signature in the mscrm-addons temp entity in your CRM.

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

A: Yes, you can. ATTENTION! Saving always creates a settings and a signature entry.

Q: I cannot save a personalized Signature/Setting

A: Please check you have write access to the Mscrm-Settings-Key entity.

6   Contact

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

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