

# AutoMerge for MS CRM 3

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

Implementation Guide for AutoMerge.doc



## **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.

🙀 AutoMerge for MS CRM 3	
License Agreement	MSCrm-addons.com
Please take a moment to read the Agree'', then "Next". Otherwise c	license agreement now. If you accept the terms below, click "I ick "Cancel".
IMPORTANT-READ CAR Agreement ("EULA") (legal entity) and (the "COMPANY"). The SOFTWARE PRODU associated media, and any "online" o	EFULLY: This End-User License is a legal agreement between you the software authors of AutoMerge CT includes computer software, the any printed materials, r electronic documentation.
To use the SOFTWAR	E, you must obtain one or more A LICENSE TOKEN is a key which
OID o Not Agree	
	Cancel < <u>B</u> ack <u>N</u> ext >



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.

👹 AutoMerge for MS CRM 3	
Select Installation Folder	n-addons.com
The installer will install AutoMerge for MS CRM 3 to the following folder. To install in this folder, click "Next". To install to a different folder, enter it belo Folder:	ow or click "Browse".
C:\Program Files\PTM EDV-Systeme GmbH\AutoMerge for MS CRM	B <u>r</u> owse
(	Disk Cost
Install AutoMerge for MS CRM 3 for yourself, or for anyone who uses this c <u>Everyone</u> Just <u>m</u> e	omputer:
Cancel < <u>B</u> ack	<u>N</u> ext>



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.

🙀 AutoMerge for MS CRM 3	
Confirm Installation	MISCIM-addons.com
The installer is ready to install AutoMerge for h Click "Next" to start the installation.	MS CRM 3 on your computer.
	Cancel < <u>B</u> ack <u>N</u> ext>



7. Installation is running.

👹 AutoMerge for MS CRM 3	
Installing AutoMerge for MS CRM	MSCrm-addons.com
AutoMerge for MS CRM 3 is being installed. Please wait	
Cancel	<a>Back</a>

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.

🔀 AutoMerge for MS CRM 3				
Installing Au	Login	addons.com		
AutoMerge for MS CF	Select the user in which context AutoMerge should be run. Ensure that this user is a CRM user.	for MS CRM 3.0		
Please wait	Username			
	Password			
	Domain			
	Cancel OK			
	Cancel < <u>B</u> ack	<u>N</u> ext>		



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"

	🕰 .	
	Accessories	•
Administrator	m Administrative Tools	•
	microsoft CRM	▶
a Internet Explorer	microsoft Exchange	▶
Microsoft Office O	microsoft Office	•
Minun an ft Office U	microsoft Office Business Scorecard Manager 2005	•
	m Microsoft Solutions	•
Microsoft Uffice E	m Microsoft SQL Server 2005	•
AdventureWorks	Microsoft Visual Studio 2005	•
🧭 Microsoft ¥isual S	Startun	•
🍢 SQL Server Manaç	🔛 Uladama Daasimaa Kiti Taala	
🕕 Microsoft Dynami	windows Resource Kic Tools	·
· ·	Internet Explorer	
	🐫 Microsoft Dynamics CRM 3.0 Demonstration Virtual Machine (May 2006 Edition)	
	Microsoft MapPoint North America 2006	
	🔎 Windows Desktop Search	
	m PDFCreator	•
All <u>P</u> rograms 🜔	m www.MSCRM-ADDON5.com	EmailSignature for MS CRM 3.0
		💼 GroupCalendar for MS CRM 3.0 🔸 🥝 LicenseManager
	Log Off Oshigt Down	📄 💼 WordMailMerge for MS CRM 3.0 🔸 🎇 Login Configuration 📡
🛃 start 🔡 🦉	🔟 🖉 🐺 🛛 🖉 Microsoft CRM 3.0 🛛 🗁 C:\Program Files\PTM	👔 🛅 AutoMerge for MS CRM 3 💦 🔸 🛟 Workflow 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.

🔀 AutoMerge for MS CRM 3	
Installation Complete	mscrm-addons.com
AutoMerge for MS CRM 3 has been successfully in Click "Close" to exit.	istalled.
Please use Windows Update to check for any criti	cal updates to the .NET Framework.



## 4 Install the License

 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"

Administrator administrative Tools	
Administrator in Administrative Tools	
	l i
m Microsoft CRM	
🔊 Internet Explorer 💼 Microsoft Exchange	
© Microsoft Office ▶	
📷 Microsoft Office Business Scorecard Manager 2005	
Microsoft Office E	
Adversaria State 2 m Microsoft SQL Server 2005	
😸 Adventureworks 🛅 Microsoft Visual Studio 2005	
Startup	
🔆 SQL Server Mana 🚵 Windows Resource Kit Tools	
Microsoft Dynami 🏽 🈹 Internet Explorer	
👊 Microsoft Dynamics CRM 3.0 Demonstration Virtual Machine (May 2006 Edition)	
Microsoft MapPoint North America 2006	
🔎 Windows Desktop Search	
m PDFCreator	
All Programs 👂 🚔 www.MSCRM-ADDONS.com 🔹 🗎 EmailSignature for MS CRM 3.0 🔸	
🔞 GroupCalendar for MS CRM 3.0 🔸	
🔀 Log off 😈 Shgr Down 🛛 🚔 AutoMerge for M5 CRM 3 🔹 🧭 LicenseManager	
👫 start 🛛 🧭 🖸 🎊 🐘	ı
🗘 Workflow Configu	ation

2. Wait while LicenseManager is loading





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

License Manager		
License Manager		mscrm-addons.com
Products found	Current license Information	
Word Mail Merge	License key:	
Auto Merge	Productname: Product is licensed for:	/ Site
	Productlicenses bought:	0 / 0 needed
	Maintainance expires:	
	Selected license Information	
	Select license file:	
	License key:	
	Productname: Product is licensed for:	
	Productlicenses bought:	
	Licensestatus:	
	Maintainance expires: Product expires:	
		Install License
		Close

4. To install the license, click on **L**. 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.





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

Products found	Current license Information	<b>—</b> ·
💌 Word Mail Merge	License key: p0vGT9IMISaV	MXwZbWjp1rwU9/5QB86gmhnACWEsqtsF7kwBG/epQvYu0k5N5WrmeW0lRxjc
💱 Auto Merge	Productname:	AutoMergeThree / Site
	Product is licensed for:	Adventure Works Cycle / Adventure Works Cycle (BU defined)
	Productlicenses bought:	100000 / 10 needed
	Licensestatus:	Valid
	Maintainance expires:	10/17/2007
	Select license file: C:\Documents	and Settings\Administrator\Desktop\Adventure Works Cycle_AutoMerge
	License key: puvo i stimilsav	MXw2DWjp1rwU9/5QB86gmhnACWEsqtsF/kwBG/epQvruukswswrmewulkxjc
	Productname: Product is licensed for:	AutoMergeInree / Site Adventure Works Cycle / Adventure Works Cycle (BU defined)
	Productlicenses bought:	100000 / 10 needed
	Licensestatus:	Valid
	Maintainance expires:	10/17/2007
	Product expires:	10/17/2007

6. 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 resettet. And all configurations for the Workflow in the workflow.config will be removed.

🐱 Add or Remove Programs 📃 🗆 🔀					
	Currently installed programs:	Show up <u>d</u> ates	Sort by: Name	~	
C <u>h</u> ange or Remove	👯 AutoMerge for M5 CRM 3		Size	<u>5.88MB</u>	
Programs	Click here for support information.		Used	occasionally	
1			Last Used On 🗄	10/17/2006	
Add New	To change this program or remove it from your computer, cl	ck Change or Remove.	Change	Remove	
Programs	😼 Caching Tool		Size	0.05MB	
1	🛃 Hotfix for MSXML 4 (KB887606)				
9	Ret Microsoft .NET Compact Framework 1.0 SP3 Developer		Size	9.87MB	
Add/Remove <u>W</u> indows	Net Microsoft ,NET Compact Framework 2.0		Size	59.27MB	
Components	Ticrosoft .NET Framework 1.1 Device Update 4.0		Size	0.32MB	
	🛃 Microsoft .NET Framework 2.0		Size	170.00MB	
	B Microsoft ADOMD.NET 8.0		Size	1.84MB	
	III Microsoft CRM desktop client for Microsoft Office Outlook		Size	8.49MB	
	III Microsoft CRM Server		Size	84.26MB	
	P Microsoft CRM-Exchange E-mail Router		Size	4.23MB	
	🛃 Microsoft Device Emulator version 1.0 - ENU		Size	1.38MB	
	🔀 Microsoft Document Explorer 2005		Size	26.61MB	
	🛃 Microsoft Exchange		Size	17.73MB	
	IV Microsoft MapPoint North America 2006		Size	I,145.00MB	

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

## 6 Contact

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