



# **Inbound Mail Filing Utility V3.0**

## **Installation & Setup Guide**

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## **Who Should Read This Guide**

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This guide is for CRM and Windows administrators. We assume that you have experience using:

- ACCPAC CRM
- MS Exchange Server
- MS Active Directory

### **How this guide is organized**

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration of Inbound Mail Filing Utility.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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## **What is the “21CRM Inbound Mail Filing Utility”?**

The Inbound Mail Filing Utility (IMF) is a COM+ application installed on an Exchange Server that will analyze emails received by the Exchange Server and BCC forward them to the CRM Mail Management Server if the email address is cross-referenced to a store of CRM email corporate contacts (ie, an exchange public contacts folder).

Typically, this extension is used in conjunction with the 21CRM Exchange Contact Synchronization extension. This contact synchronization populates an Exchange Public Folder that the Inbound Mail Filing Utility uses to determine eligibility for auto-filing.

This product can be used without it if you populate your public folder in another way, but the Contact Synchronization automates the process using your contacts in CRM.

See our website at <http://www.21crmsystems.com/mailfile> for more information.

## **Installation**

### **Prerequisites**

There are several prerequisites you should ensure are satisfied before starting this installation:

#### **Exchange Server:**

- Exchange Server 2000+
- .NET Framework Version 1.1 on the Exchange Server

#### **User performing the installation:**

- Active Directory administrator privileges
- Exchange Server administrator privileges

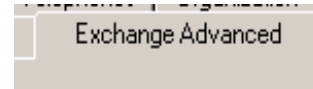
## Step 1: Active Directory setup

Before installing the software, the User under which the COM+ Inbound Filing Application will run needs to be given appropriate permission to each user's mailbox for which email will be filed.

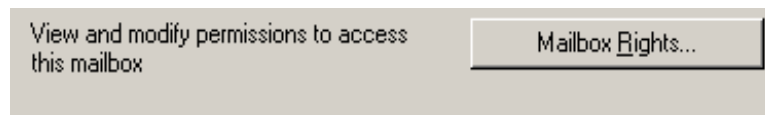
### For *each* Active Directory user to have email filed:

Go to the user's properties.

Click on the "Exchange Advanced" tab.



Click on the "Mailbox Rights" button.



The Application User must be given "full mailbox access".

Permissions for SELF	Allow	Deny
Delete mailbox storage	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read permissions	<input type="checkbox"/>	<input type="checkbox"/>
Change permissions	<input type="checkbox"/>	<input type="checkbox"/>
Take ownership	<input type="checkbox"/>	<input type="checkbox"/>
Full mailbox access	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Important:** The administrator is *by default* denied full access. While performing the installation, you should be logged into the Exchange Server as the user who you configure to have access to everyone's email boxes to avoid security conflicts.

## Step 2: Software Installation

To begin the installation, run the executable “21CRMExchangeIMFSetup30.exe”. This will install the software on the Exchange server.

Accepting the EULA agreement will enable the installation.

Ensure “For everyone” is selected (for who can use the software).



Note the Program Files directory location.

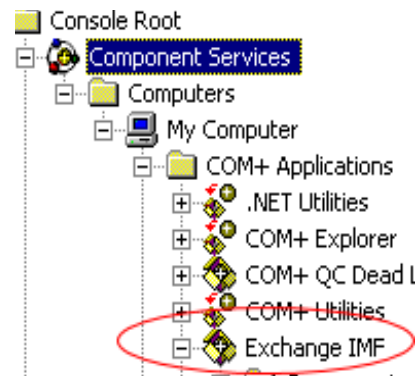
## Step 3: Software Configuration

### COM+ Application Configuration

The COM+ application has been installed. It must now be configured to run using the Active Directory user who was given appropriate mailbox rights.

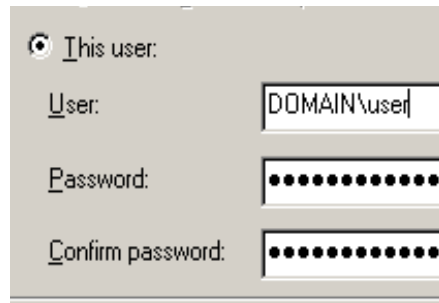
Go to the “Component Services” window by opening “Control Panel” → “Administrative Tools” → “Component Services window”.

You will see Exchange Inbound Mail Filer as “Exchange IMF” installed as a COM+ application.



Right click the “Exchange IMF” application and under its properties, go to the “Identity” tab.

For choosing which account the application will run under, select “This User” and enter the network credentials of the Active Directory user, configured above, to have appropriate mailbox rights.



## COM+ Mailbox Registration

The Next step required is to register the COM+ component for each user's mailbox that will have mail filed.

As you have noted the Program Files location of the software installation, you will now use that information to register the COM+ component to capture the inbound email event on the Exchange Server.

In the "Program Files" directory for the Inbound filer, a script called "regevent.vbs" will be used.

Open a command prompt, navigate to the Program File directory for the Inbound software, and **for each user's mailbox**, type a command similar to the following (making the correct substitutions):

```
C:\Program Files\21crm\IMF>cscript regevent.vbs ADD "onsave"  
ExchangeMailFile.InBoundEvents  
file://./backofficestorage/[YOURDOMAIN.COM]/mbx  
/[USERMAILBOX]/inbox/evtsnk1
```

```
C:\>  
C:\>cd "Program Files\21crm\Exchange Mail Automation"  
C:\Program Files\21crm\Exchange Mail Automation>cscript regevent.vbs ADD "onsave"  
" ExchangeMailFile.InBoundEvents file://./backofficestorage/[YOURDOMAIN.COM]/mbx  
/[USERMAILBOX]/inbox/evtsnk1
```

If you want to delete this registration in the future, the following command will work:

```
cscript regevent.vbs delete  
file://./backofficestorage/[YOURDOMAIN.COM]/mbx/  
[ USERMAILBOX]/inbox/evtsnk1
```

## Licensing Configuration

Finally, before anything will run correctly, you must alter the setup.ini file in the "Program Files" directory that the Inbound Mail Utility was installed to.

Following are definitions of what each variable does for the software.

**CORPORATE\_CONTACTS\_FOLDER** = "Corporate Contacts" : This is the Public Folder that the Inbound Filer will communicate with, (the folder should be auto-populated/maintained by 21CRM System's Contact Sync product), to determine which emails will be filed.

**FORWARDING\_ADDRESS** = "fileit@YOURDOMAIN.COM" : This is the address that the CRM MailManagement Server checks to file emails into CRM. The Inbound filer forwards emails to this address, when the email addresses are found in the Contact folder.

**EXCHANGE\_STORE** = "mbx" : In general, this is always mbx - used by the Exchange Server.

**Server** = "EXCHANGE\_SVR\_NAME" : The Exchange Server's name.

**File\_Internal\_Emails** = False : The Inbound Filing Utility captures all emails sent to mailboxes. If you want to avoid filing emails into CRM sent within your organization, set this variable to False.

**LOG\_Information** = True : This variable will enable logging in the "Program Files\21CRM\IMF\Logs" directory. You can see basic information on whether there were any errors and that the Filer is running correctly.

**LOG\_Directory** = "C:\Documents and Settings\UserA\Desktop" : You can set the Logs location to any directory you choose. Generally this variable is commented out, using an apostrophe (') at the beginning of the line.

**Append\_to\_Log** = True : Append to all logs or overwrite the last entry.

**KEY** = "12345-12345-12345-12345-12345-12345" : The Software License Key provided to you by 21CRM Systems.

**Company\_Name** = "Your company Name" : The Company name you provided to 21CRM Systems.

After these variables, you must enter a list of users (whose mailboxes you have registered).

**Note:** The userName variable remains unchanged. Only change what is between the double-quotes. The part before the semi-colon is the user's inbox name, which may be different from the email address that they use.

Example:

```
userName = "userA;userA@YOURDOMAIN.COM"  
userName = "userEF;userE@YOURDOMAIN.COM"
```

**You have successfully completed the Installation and Configuration of the Inbound Mail Filing Utility from 21CRM Systems.**

## Known Issues & Troubleshooting

At this time there are no known issues with the 21CRM IMF software.

If you experience any issues, please report them to us contacting your software provider, or, if you are a 21CRM Systems partner, by logging into our online self-service support portal at <http://www.21crm.ca> and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

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