



# **Outbound 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 administrators and consultants. We assume that you have experience using:

- Sage CRM
- MS SQL Server 2000+
- MS Exchange Server
- Microsoft Outlook 2000SR2 +

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

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

The Outbound Mail Filing Utility (OMF) is an Outlook add-in that will cross-reference all recipients of emails against either an Exchange folder or an SQL database. It will add the CRM email filing address to the BCC if one of the recipients is a corporate contact listed in the Exchange folder or SQL database.

Typically this extension is used in conjunction with the 21CRM Exchange Contact Synchronization extension. This contact synchronization populates the Exchange Public Folder that the Outbound 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, or if you decide to connect the Outbound Mail Filing utility to your CRM SQL server database directly.

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

## Installation

Note: You may have received a single download file from 21CRM Systems named "21CRMOMFBundle.zip". If so, decompress this ZIP file, and you will find the two .EXE files required for Client and Server installations contained inside. If you received two separate files, then you can use them separately.

## Prerequisites

There are several prerequisites you should ensure are satisfied on your CRM Web server before starting this installation:

- Working installation of Sage CRM
- SQL Server 2000+
- Exchange Server 2000+
- Outlook 2000SR2 + (installed and configured on the administrators machine)
- Administrator Privileges
- SQL User Account With Administrator Privileges
- .NET Framework Version 1.1

## Step 1: Server Side Administrator Installation

The first step is to install the Administrator package that will add all required information to the CRM database and copy all required files to the CRM installation directory. The Server Side Administrator package must be installed on the machine running the CRM Web Server.

### Prerequisites

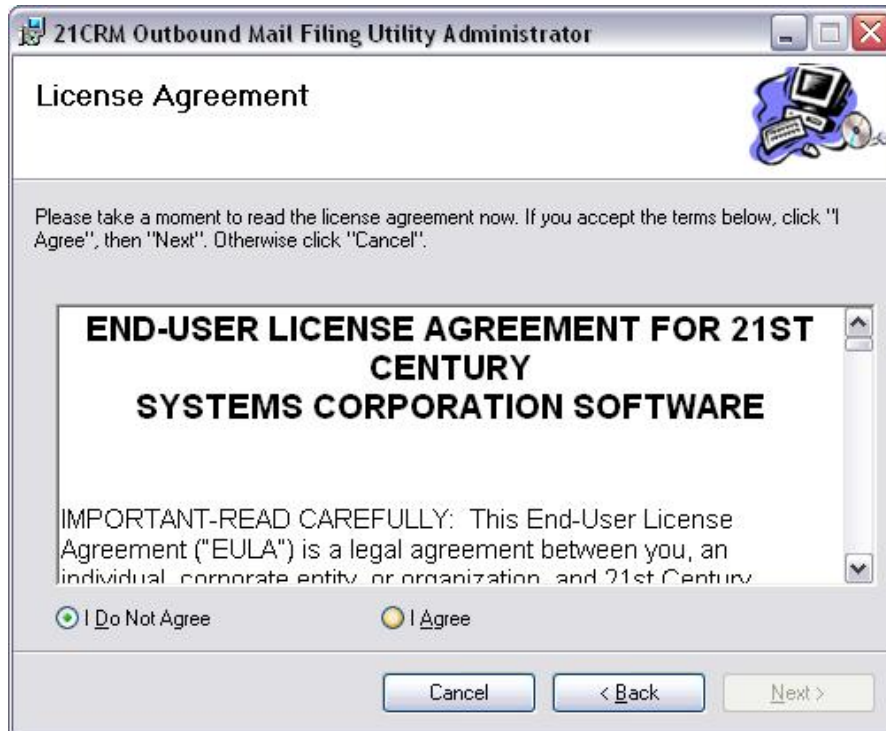
- Logged into the CRM server as a system administrator
- Logged in user has administrator rights to the exchange organization
- The CRM web server must have Microsoft Outlook 2000SR2+ installed and operational
- SQL Server account with at least “DB Creators” rights

### Installation

To begin the installation run “21CRMOMFServer30Setup.exe”. The following screen will display:



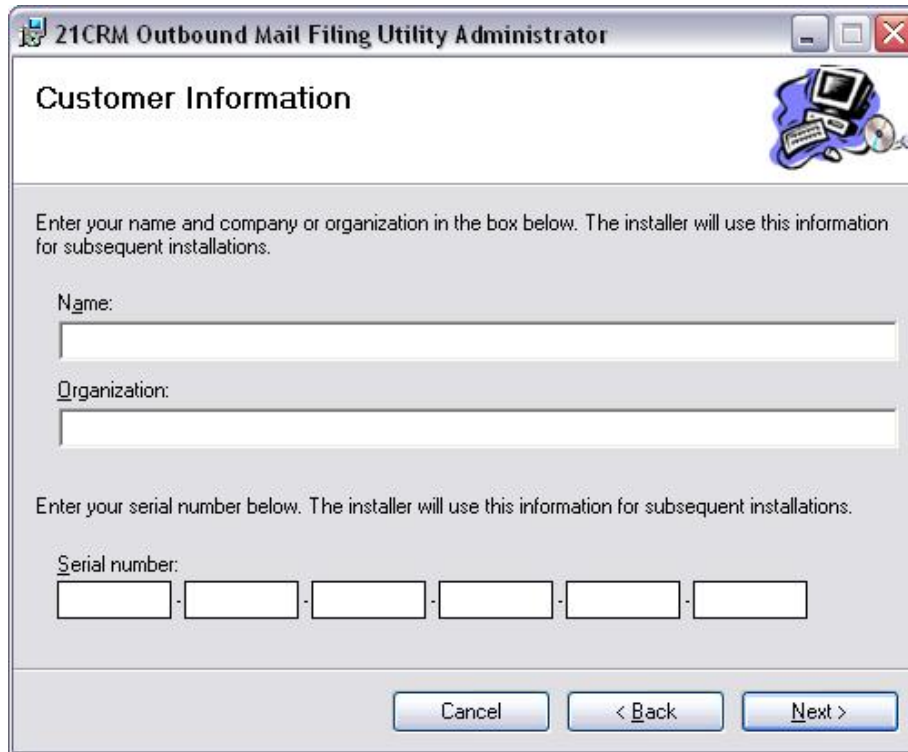
To continue simply click Next and the following screen will be displayed.



This is the End-User Licence Agreement (“EULA”). In order to complete the installation you must read and agree to the EULA, then click Next to continue.

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The following window is then displayed:



The screenshot shows a Windows-style dialog box titled "21CRM Outbound Mail Filing Utility Administrator". The main heading is "Customer Information". Below the heading is a small icon of a computer and a CD. The text inside the dialog reads: "Enter your name and company or organization in the box below. The installer will use this information for subsequent installations." There are two input fields: "Name:" and "Organization:". Below these is another instruction: "Enter your serial number below. The installer will use this information for subsequent installations." The serial number field consists of six small boxes separated by hyphens. At the bottom of the dialog are three buttons: "Cancel", "< Back", and "Next >".

Enter the name, organization and the license key provided at the time of purchase.

Once this information has been entered, click Next to continue and the following window will be displayed:

21CRM Outbound Mail Filing Utility Administrator

### Outbound Mail Filing Utility Administrator Setup

Please Enter The Information Required To Connect To The SQL Server Containing Your CRM Database.

SQL Server Name:

CRM Database Name:

User Name: (with administrator privileges)

Password:

Cancel    < Back    Next >

Enter all the information required to connect to the SQL Server. For security purposes all information is encrypted and stored in the registry.

- SQL Server Name - the name of the SQL Server that contains the CRM database.
- CRM Database Name - the name of the database containing your CRM data; defaults to "CRM".
- SQL User Name - the user name on the SQL Server that has access to the CRM database and is a member of the Database Creators group.
- SQL Password - the password associated with the above SQL Sever user account.

Once the information has been entered, click Next to continue. The following screen is displayed:

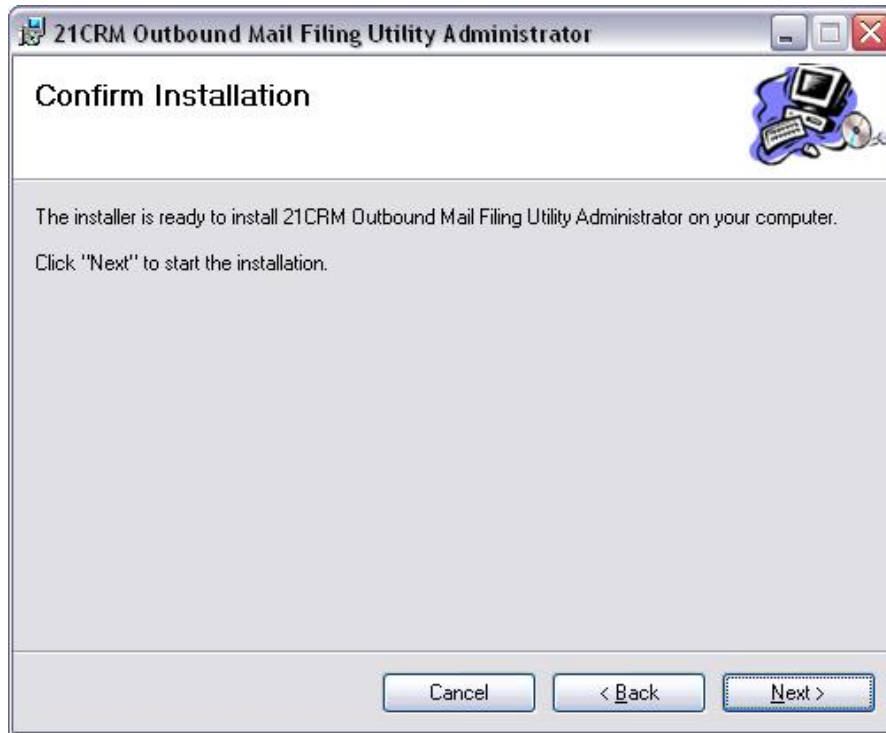


Choose where to install Outbound Mail Filing Utility on the local machine. The default is C:\Program Files\21CRM\21CRM Outbound Mail Filing Utility Administrator\CRM Files\. The directory can be changed to any directory of your choice, by clicking the Browse button, but the default is recommended.

The Disk Cost button can be used to view the amount of space required to install Exchange Contact Sync and the amount of free space left on the selected drive.

In order for the service to run regardless of which user is logged in, install the service for “Everyone”. For the service to run only when then user who is currently logged in is using the computer, select “Just Me”.

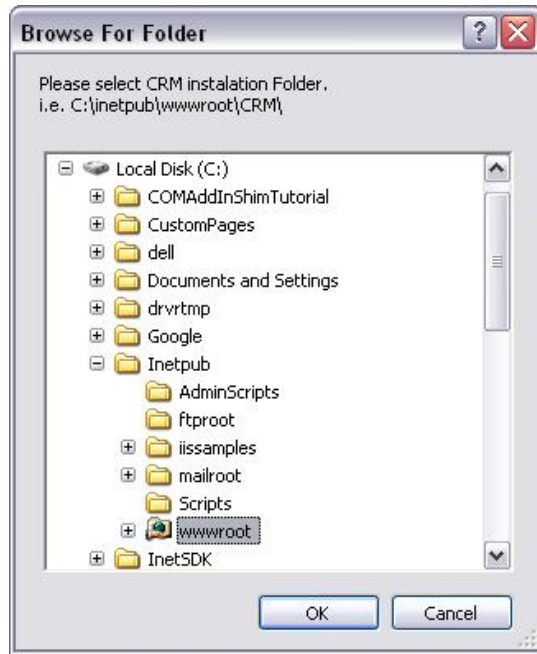
Click the Next button to display the following window:



To begin installation, click the Next button. The following window is displayed to inform you of the progress:



During the installation phase the following dialog widow will display:



Select the installation path of CRM. This is by default C:\inetpub\wwwroot\CRM. Once you have selected the CRM installation path, click OK. The installation will complete and display the following window:



Click Next to close this window and complete the installation of the Administrator package.

## Configuration

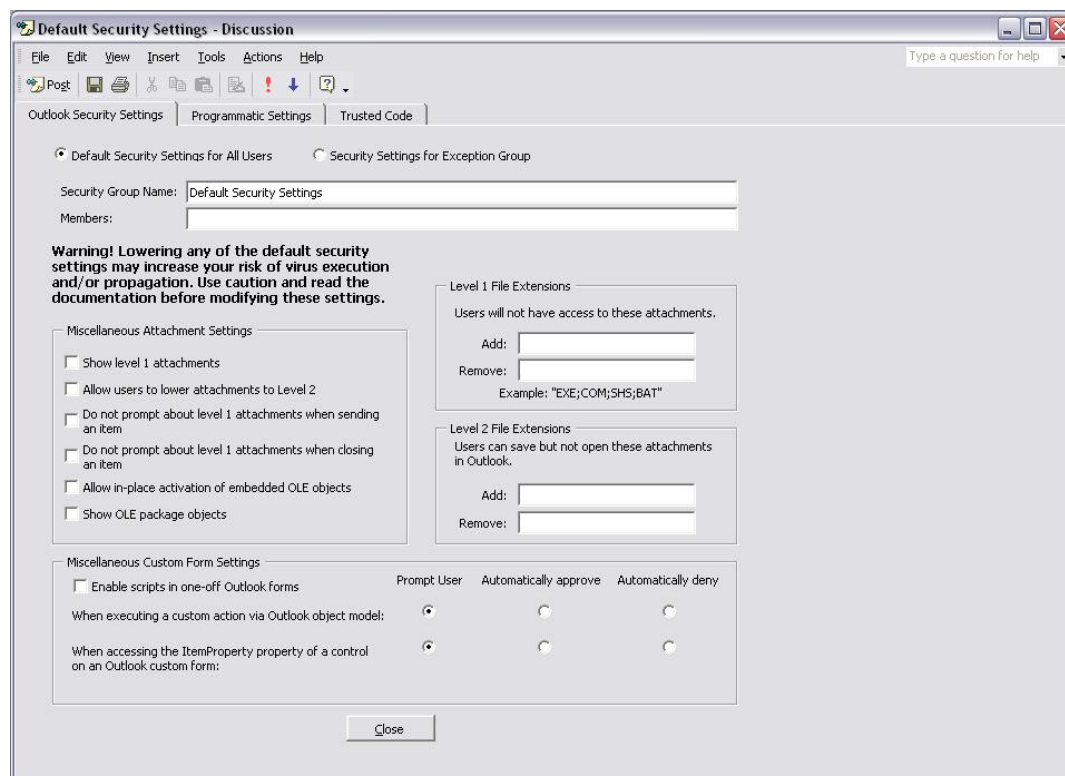
Once the installation of the Administrator package is complete there are a few administrative tasks to be completed before the client will be able to run the add-in.

During the installation, the Microsoft Outlook Security Features Administrative Package was installed on the machine along with the required Outlook Security Form. In order for the add-in to run without displaying a security warning to the user, this add-in must be specified as from a trusted source. Do this by specifying the add-in as a trusted add-in.

The following steps will demonstrate how to set up the permissions for the add-in to run on Outlook 2000 or XP (2002), and Outlook 2003.

### Outlook 2000 / XP:

1. From the Start menu open “21CRM Outbound Mail Filing Utility/ Outlook Security Features Administrative Package” and run “Shortcut to Outlook Security Form”.
2. A dialog is displayed to select a folder. Under the Public Folders/All public Folders node create a folder called “Outlook Security Settings” if it does not exist. Select this folder and click OK to continue. The following form is displayed:



3. You will need to make the following changes
  - a. Under the Programmatic Settings tab, change the following options to Automatically Approve
    - When accessing the address book via Outlook Object Modal
    - When resolving names via Simple MAPI
    - When accessing address information via Outlook Object Modal
    - When opening messages via Simple MAPI.
  - b. Under the Trusted Code tab, click the Add button and browse to the CRM Files directory in the installation directory (by default C:\Program Files\21CRM\21CRM Outbound Mail Filing Utility Administrator\CRM Files\). Select the 21CRM\_OMF.dll file and click Open.
4. Now from the tools menu hover over “Forms” and select “Publish Form”. A dialog will be displayed asking you where you would like to publish this form to, from the drop down labeled “Look In” select “Personal Forms Library” and name the Form “Outlook Security” then click publish
5. Back in Outlook right click the folder we created earlier “Outlook Security Settings” and select properties.
6. Under the General tab set “When posting to this folder, use:” to “Outlook Security” which will be under “Personal Forms Library”.
7. Under the Administration tab set “This folder is available to:” to “All users with access permission”.
8. Under the Permissions tab ensure that the default user’s permission level is set to Reviewer or higher.

**Outlook 2003:**

1. Open Outlook 2003.
2. Open the Macro Security Settings dialog from the Tools/Macro/Security menu.
3. Click on the Trusted Sources tab.
4. Check Enable All Plug-ins.
5. Click OK.
6. Restart Outlook.

## Step 2: Client Installation

The Administrator installation must be completed prior to running the Client installation. The client installation is much less involved and requires little configuration as most of the configuration is inherited from the Administrator installation. The client installation must be installed separately and individually on EACH computer that will auto-file outbound email messages from Microsoft Outlook.

### Prerequisites

- SQL Server login with at least read access to the CRM database
- Administrative privileges on the target machine (to allow software installation, not required on a permanent basis)
- Outlook 2000SR2+ installed and configured on the target machine for the user who will be auto-filing.

### Installation

To begin the installation, open "21CRMOMFCClient30Setup.exe". This will display the following screen:



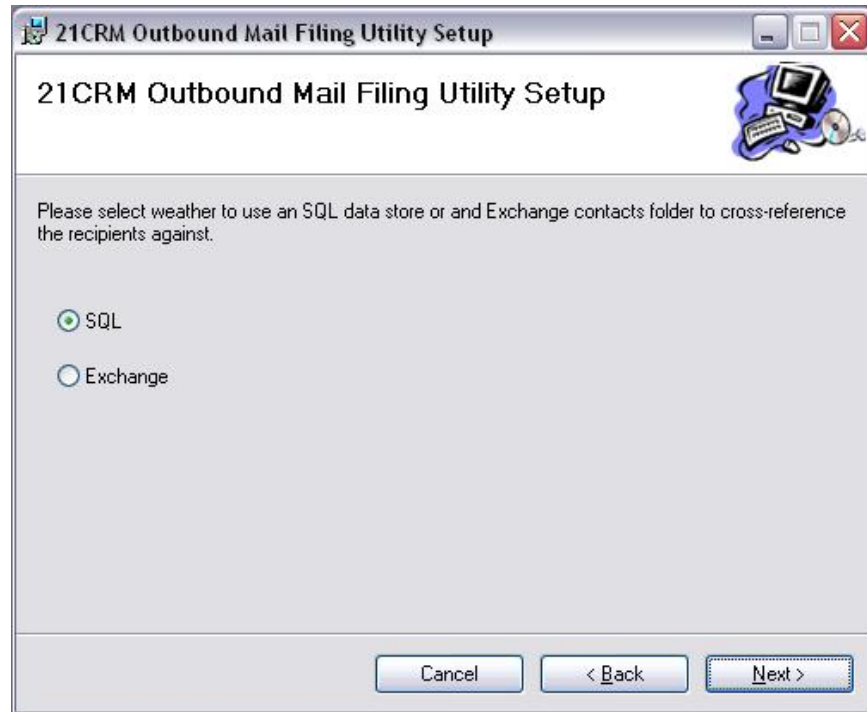
To continue, click the Next button and the following screen will display:



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If you do not accept the agreement, do not install this software. Installing the software indicates your acceptance to the agreement, and makes you party to a legal agreement, as outlined in the text of the agreement. You have certain rights under this agreement, and you should make yourself aware of them.

The following window is then displayed:



Choose which method to use for cross-referencing the recipients. If SQL is selected, then the target machine is expected to have a constant connection to the SQL server or the process will fail and the email will not be filed in CRM. If Exchange is selected, then the user must synchronize with the Exchange server before going offline.

Click the Next button to display the following screen:

21CRM Outbound Mail Filing Utility Setup

Please enter the information required to connect to your SQL Server that is currently hosting your CRM database.

SQL Server Name:

CRM Database Name:

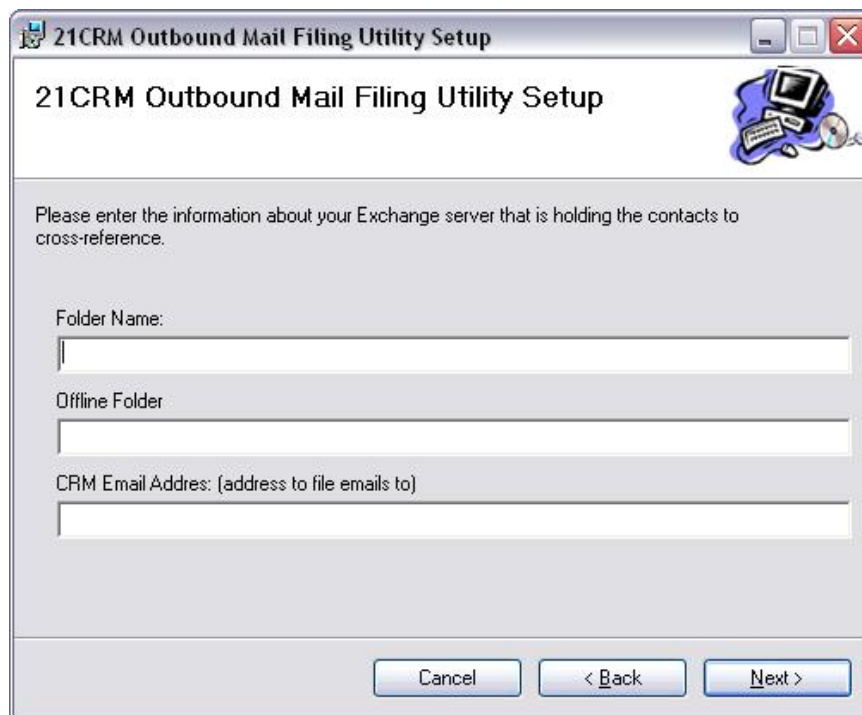
SQL User Name:

SQL Password:

Cancel < Back Next >

Enter the information required to connect to the SQL server. This information is required to connect to the database for validating the license. **The product will not work until it has connected to the SQL server and validated the license.** Therefore, all target machines are required to have a connection to the SQL server during installation and the initial running of the add-in. The user account does not have to be an administrator but must have read access on the CRM database. All database information is encrypted and stored in the registry.

Once the information has been entered, click Next to continue. The following screen is displayed:



21CRM Outbound Mail Filing Utility Setup

Please enter the information about your Exchange server that is holding the contacts to cross-reference.

Folder Name:

Offline Folder

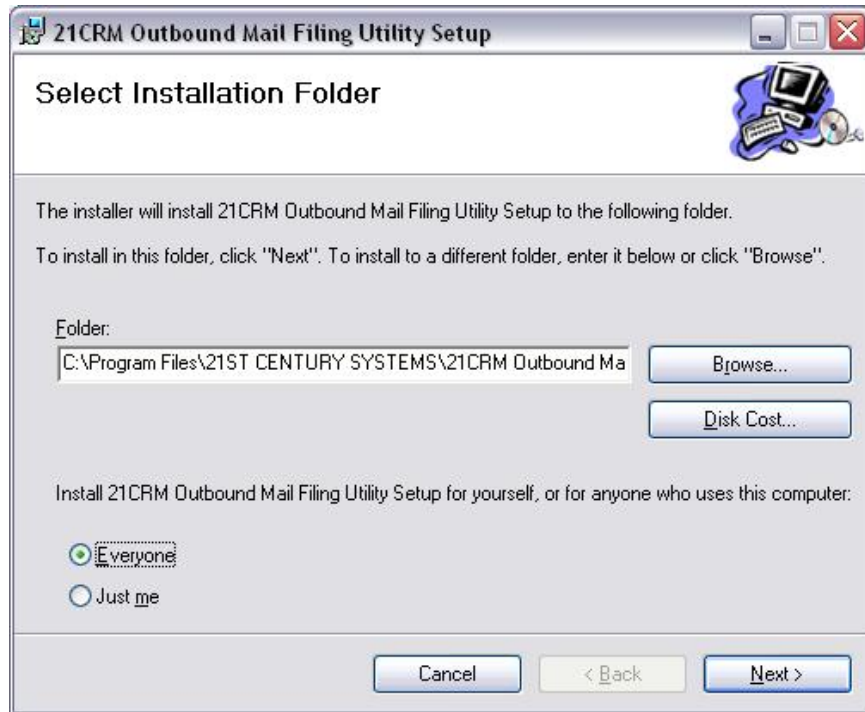
CRM Email Address: (address to file emails to)

Cancel < Back Next >

Enter the folders to search and the email address used to file a copy of the email. The settings are as follows

- Folder Name – the folder on the Exchange server to use for the cross-referencing process. This field is required
- Offline Folder – the folder under the Favorite’s node that will be used for the cross-referencing process. This field is optional, when left empty no local Favorite Outlook folders will be searched. Use this only if you have synchronized a public folder offline.
- CRM Email Address – the email address set up in CRM as the mail management server email address for email filing, for example, crm@yourdomain.com

Once completed, click Next to display the following screen:



Choose where to install Outbound Mail Filing Utility on the local machine. The default is C:\Program Files\21CRM\21CRM Outbound Mail Filing Utility\CRM Files\

The directory can be changed to any directory of your choice, by clicking the Browse button, but the default is recommended.

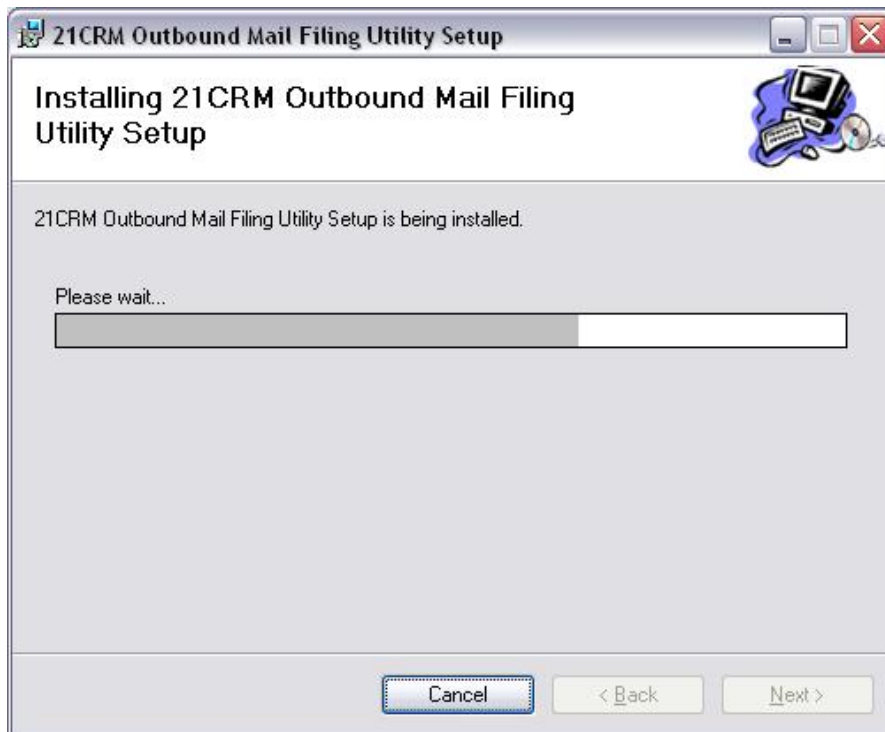
The Disk Cost button can be used to view the amount of space required to install Exchange Contact Sync and the amount of free space left on the selected drive.

In order for the service to run regardless of which user is logged in, install the service for "Everyone". For the service to run only when then user who is currently logged in is using the computer, select "Just Me".

Click the Next button to display the following window:



This screen indicates that the installer has enough information to begin the installation. Click the Next button to begin the installation. The following window is displayed to inform you of the progress:



Once the installation is complete the following screen will display:



Click Close to finish the installation process.

## Configuration

Very few settings can be modified from the client machine. All settings are stored in the registry and can be found in the directory: HKLM\Software\21 CRM\Outbound Mail Filing Utility. The settings that can be modified from the client machine are:

- Email - the email address added to the BCC of all outgoing emails that have a corporate contact in the recipients list.
- Folder – the Exchange folder to be used for the cross-referencing process.
- OfflineFolder – the favorite’s folder to be used for the cross-referencing process.
- Server – the SQL server on the network.
- SQL – this value can be set to either “True” or “False” (and is case sensitive) and indicates whether to use SQL for the cross-referencing process. True indicates that SQL should be used and False indicates an Exchange folder should be used. SQL cross referencing CAN be faster than exchange referencing, but this depends on the specific nature of your overall solution. If you need to decrease traffic on the exchange server, and have spare capacity on the SQL server, consider setting this to “True”

## Troubleshooting

**Problem** The add-in does not seem to be filing outbound email.

**Solution** The first step would be to make sure that the add-in is actually loading. There is a registry setting located under HKLM\Software\21 CRM\Outbound Mail Filing Utility\ called "ShowDialog". When this setting is set to True the following dialog should be displayed when Outlook has started and the add-in has successfully loaded.



If this setting is set to True and this dialog does not display then check the ErrorLog.txt file located in the program file directory which by default is C:\Program Files\21 CRM\Outbound Mail Filing Utility\ErrorLog.txt.

If there are no errors in the log, or the log doesn't exist, then the problem is actually with Outlook not loading the add-in. The two main reasons why this would happen are:

- The security settings are not being properly inherited (2000/XP) or the security settings are not configured properly. To correct this see the "Configuration" section in this document.
- Outlook has disabled the add-in. You can tell if Outlook has disabled any add-ins by going to About in the Help menu of Outlook. Click Disabled Items to display all of the currently disabled add-ins. If Outbound Mail Filing Utility is in the list, select it and click the Enable button.

**Problem** A licensing error is being displayed.

**Solution** The first step is to ensure that the client machine has a connection to the SQL Server. If the client is connected to the SQL server and the error persists then check the error message that displays. There are three different licensing errors that can occur and they are as follows.

- **You Have Used All of Your Licenses.  
Please Inform Your System Administrator or Contact 21CRM Systems.  
Email: support@21crmsystems.com Web Site:  
www.21crmsystems.com.”**

All of the licenses purchased are currently in use. To correct this either contact 21CRM Systems and purchase more licenses or remove some of the machine that are registered from the “21CRM Admin” button in the administrator menu in CRM.

- **Your Licenses Has Expired.  
Please Inform Your System Administrator Or Contact 21CRM Systems**

Your license has expired and you will need to contact 21CRM Systems to acquire a new license key.

- **Your Licenses Key Is Not Valid.  
Please Inform Your System Administrator Or Contact 21CRM Systems**

The license key entered is not valid. You can change the license key from the “21CRM Admin” button from the CRM Administrator menu within CRM.

## Known Issues & Troubleshooting

At this time there are no known issues with the 21CRM OMF 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.21crmsystems.com> and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

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