



## **c360 Auto Merge Installation Guide**

Microsoft Dynamics CRM 3.0 compatible

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## Overview and Notes

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### Overview

This document outlines the process for installing c360 Auto Merge for Microsoft Dynamics CRM 3.0.

### Microsoft CRM Compatibility

c360 Auto Merge for Microsoft Dynamics CRM 3.0 is compatible with Microsoft Dynamics CRM version 3.0. For additional product information, please visit <http://www.c360.com/AutoMerge.aspx>

### c360 Auto Merge for Microsoft Dynamics CRM 3.0

c360 Auto Merge for Microsoft Dynamics CRM 3.0 provides organizations an opportunity to automate Word Mail Merge daily/weekly/monthly tasks.

Using Auto Merge, you can automate the following actions

- Print documents
- Save documents
- Create CRM letter activities

Auto Merge can be started via scheduled tasks or via the CRM Workflow Manager, therefore its possible to automate steps, like generate a document whenever a new contact/account or lead has been created/deleted.

Note: Word Mail Merge is mandatory to use Auto Merge

## Installation Instructions

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Before installing c360 Auto Merge, please read this document and follow the steps carefully. Please read the "Auto Merge Users Guide" after successful installation to learn more about the functionality

The installation of c360 Auto Merge for Microsoft CRM 3.0 requires the setup files which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

### Important Information

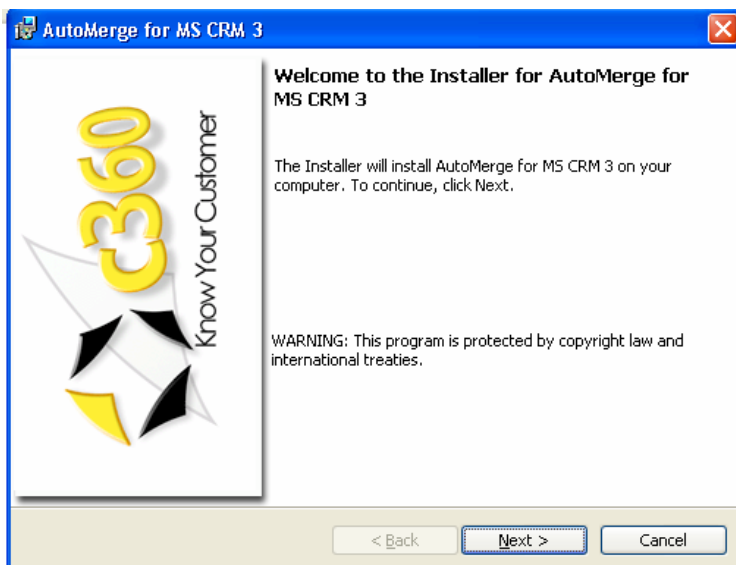
1. **DO NOT USE Microsoft Word** while Auto Merge is running
2. **DO NOT USE Word Mail Merge Client** when Auto Merge is running
3. Only **ONE** instance of Auto Merge is possible

### Requirements

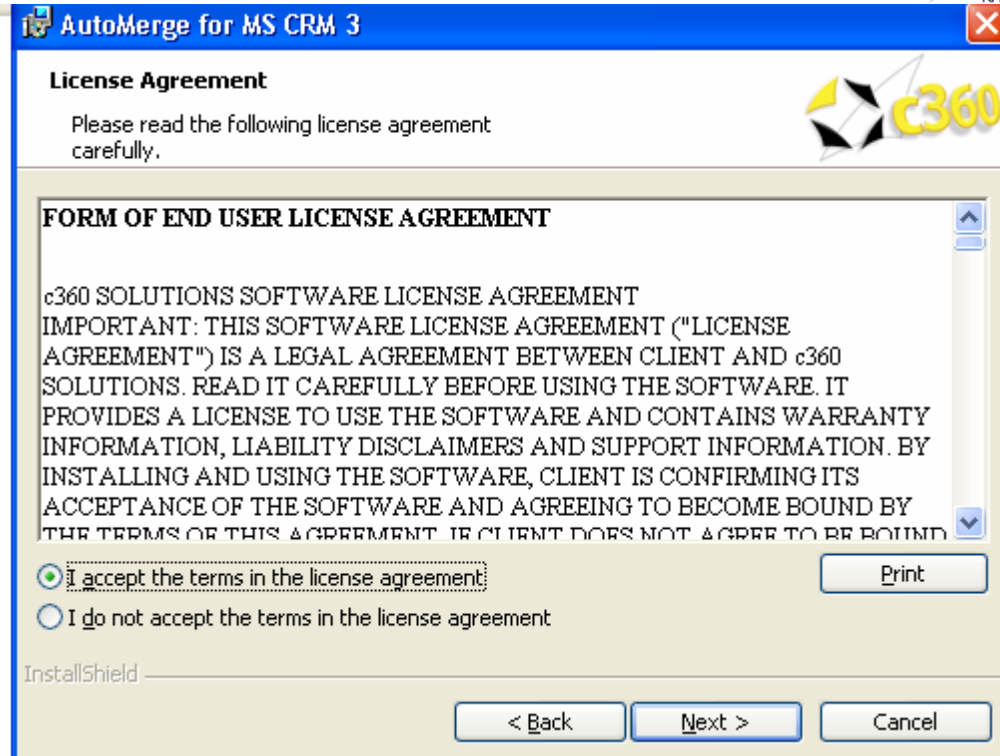
1. Auto Merge must be installed on your CRM Server
2. Word Mail Merge client must be installed

### Steps to install Auto Merge for Microsoft CRM 3.0

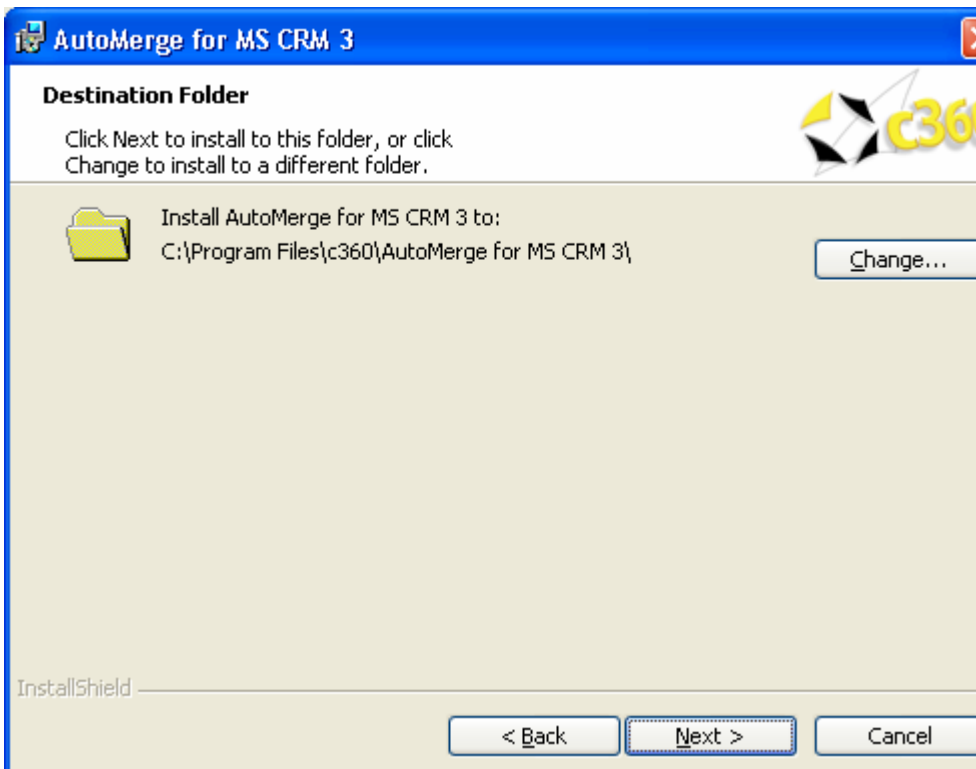
1. Extract the "c360.AutoMerge(MSCRMv3.0).zip" file into a folder on the Microsoft CRM server machine.
2. Double click the 'AutoMerge Setup.exe' file. You will see the following screens.



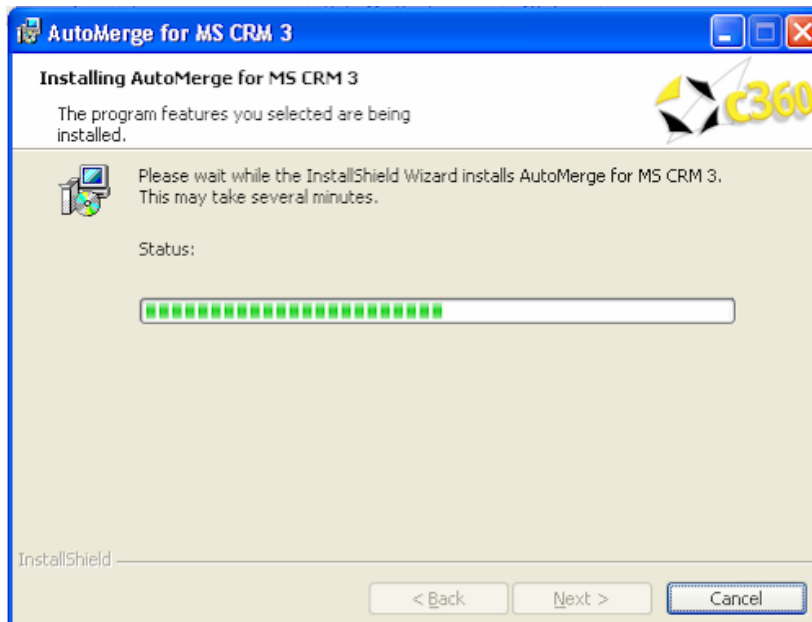
3. On this next page, read and accept the License agreement



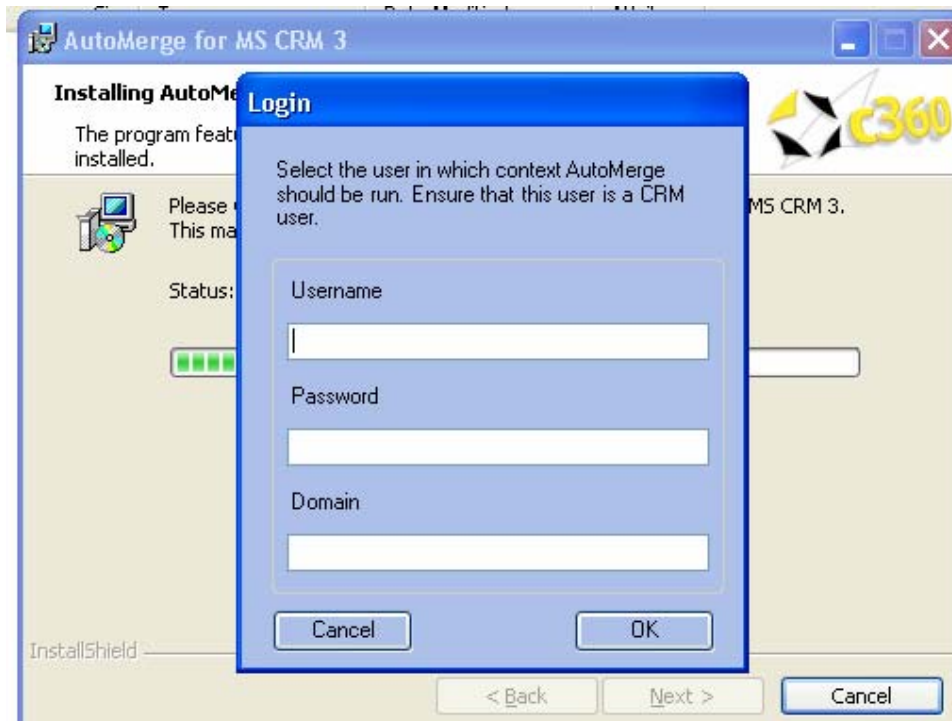
4. Please select the Installation folder



5. Installation is running



6. A dialog appears in you which you must enter the login credentials of the user under which context Auto Merge should be run. Ensure that the user is a CRM user and has enough privileges

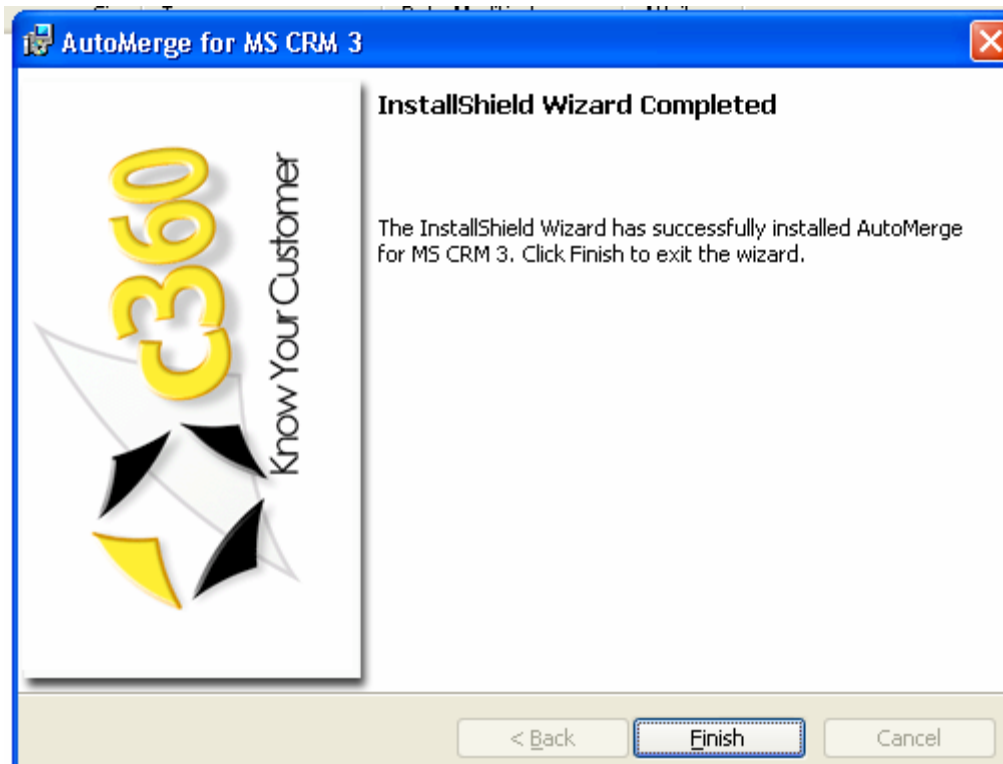


**Note –**

If you do not enter the login/credential information during setup, you can access that afterwards at

**"C:\Program Files\c360\AutoMerge for MS CRM 3\AutoMergeLoginConfig.exe"**

7. The installation is now completed



8. You will now be asked if you want "Word Mail Merge" to change the isv.config for you

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## Troubleshooting \_\_\_\_\_

Search the c360 Knowledge Base for up-to date information regarding installation errors. [www.c360.com/support](http://www.c360.com/support)



## Licensing

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### **For fresh installation of c360 Auto Merge for Microsoft CRM 3.0**

License setup application can be obtained from c360 Solutions Inc upon request.

### **Evaluation Licenses**

The product is installed as a fully functional trial version that is valid for 1 month from installation date

### **Demo Licenses**

To download "demo licenses" for one of the sample Microsoft Dynamics CRM 3.0 installations for organization names 'Adventure Works Cycle Demo', 'Adventure Works Cycle' or 'Microsoft CRM', please visit our website at <http://www.c360.com/Licenses.aspx>

### **License Setup Instructions**

Please visit below site at <http://www.c360.com/LicenseManager.htm>



## Uninstall Instructions ---

### Steps to uninstall c360 Auto Merge for Microsoft Dynamics CRM 3.0

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select Auto Merge for MS CRM 3 from the list of the currently installed programs
3. Click 'Remove'
4. Click 'Yes' in the confirmation message box to begin the uninstall process.



## International Languages ---

c360 Word Mail Merge for Microsoft Dynamics CRM 3.0 includes language translation files which allow you to select the language displayed to the user (German, French etc).

Please go to our language product page <http://www.c360.com/Language.aspx> to obtain instructions for installing and configuring the language translation.