



c360 Copy Address Utility Installation Guide

Microsoft CRM 1.2 Compatible

Friday, September 24, 2004

c360 Solutions, Inc.
www.c360.com

Products@c360.com



Overview and Notes

Overview

The Copy Address utility allows Microsoft CRM users to quickly pull address information from CRM Lead, Contact and Account records so that this information is available in the Windows clipboard and can be pasted into other applications as a single address block. The Copy Address utility saves Microsoft CRM users the many steps involved in copying the various address fields from CRM records into a single address block. This tool is particularly useful for CRM users who often need to pull address information onto Microsoft Word documents for creating letters and other correspondence.

Microsoft CRM Compatibility

The Copy Address utility is compatible with Microsoft CRM version 1.2.

Technical Support

The Copy Address utility is a **free** c360 utility and is offered as-is. **c360 does not provide technical support for the installation or operation of this utility.**

Installation

The Copy Address utility requires a manual installation on the CRM server. It is recommended that a Microsoft CRM professional certified in the installation of Microsoft CRM perform the installation of this product. c360 will assume no liability for issues that arise during the installation of this utility.



Installation Instructions

Installation Instructions

Follow these steps to install the Copy Address utility:

1. Extract the c360.CopyAddress.zip file on the Microsoft CRM server computer
2. Copy the directory named 'CopyAddress' and the file named c360Icon.gif from the c360.CopyAddress.zip file to the \inetpub\wwwroot\Custom\c360\ folder on the server where Microsoft CRM is installed. If a Custom\c360\ folder does not exist, create it. If the c360Icon.gif already exists you may replace it but this is not necessary.
3. Open the \inetpub\wwwroot\web.config file on the Microsoft CRM server and make the following changes/additions (you may refer to the web.config file in the c360.CopyAddress.zip file for an example):

- a. Set the <appSettings> ISVIntegration key to "On" (highlighted). Please note that this value is case sensitive and that the "O" needs to be capitalized:

```
<add key="ISVIntegration" value="On" />
```

- b. Add the following line inside the <appSettings> element tags. Change the word 'localhost' (highlighted) to the name of your CRM server:

```
<add key="CRMServer" value="localhost" />
```

This line directs the customization to the appropriate website running Microsoft CRM.

4. Open the \inetpub\wwwroot_Resources\isv.config file and modify it to add the text below to the Lead, Contact and Account entities. In the example below, Copy Address is being added as a toolbar button on the Account entity. You will also want to add it as a tool bar button to the Lead and Contact entities. Copy Address is designed to work only with the Lead, Contact and Account entities.

```
<account>
  <ToolBar ValidForCreate="0" ValidForUpdate="1">
    <Button Title="Copy Address"
      ToolTip="Copy Address information of this record to clipboard."
      Icon="/Custom/c360/c360Icon.gif"
      Url="/Custom/c360/CopyAddress/redirect.aspx"
      PassParams="1"
      WinParams="menubar=no;status=no;toolbar=no;"
      WinMode="0" />
  </ToolBar>
</account>
```

5. If you receive an error when testing the utility, refer to the following article on c360's Knowledgebase <http://www.c360.com/Support/article.aspx?id=10075> or search for additional information.