



c360 Email Link Installation and Configuration Guide

Email Link Version 1.2.1 – Microsoft CRM 1.2 Compatible

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Overview and Notes

Overview

c360 Email Link requires a manual installation. The steps to install and configure Email Link are listed in the following sections of this document.

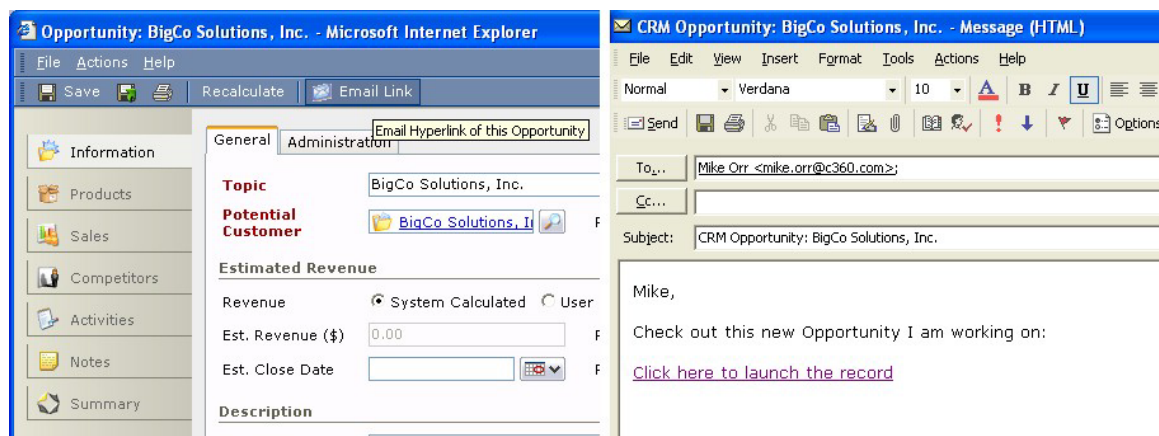
Microsoft CRM Compatibility

c360 Email Link version 1.2.1 is compatible with Microsoft CRM version 1.2.

Email Link Functionality

E-mail Link is a Microsoft CRM compatible product that allows Microsoft CRM users to click a button and send a link to a Microsoft CRM record in an e-mail. The recipient of the e-mail can click the link to open the Microsoft CRM record.

An example of what the e-mail link button and screens will look like is provided below:



Email Link

E-mail Link can be implemented as a button on the following CRM record types:

- Lead
- Contact
- Account
- Opportunity
- Case
- Contract
- Quote
- Order
- Invoice
- Competitor
- Sales Literature



When a user clicks the Email Link button, a regular (not Microsoft CRM) e-mail will open with one or more links to the record embedded in the body of the e-mail. The user may then add a personal message to the e-mail before sending it.



Installation Instructions

Installation Instructions

Follow these steps to install Email Link:

1. Extract the c360.EmailLink.zip file on the Microsoft CRM server computer
2. Copy the file c360. EmailLink.dll from the c360. EmailLink.zip file to the \inetpub\wwwroot\bin directory on the server where Microsoft CRM is installed.
3. Copy the folder named 'Custom\c360\ EmailLink' and all of its contents from the c360. EmailLink.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.
4. Modify the EmailLink.config file in the Custom\c360\EmailLink folder in the following ways:
 - a. Add, edit and/or remove the links as necessary to make sure all users can launch the linked record. Change only the highlighted text in this section. In the example below, the e-mail will contain three links; one for the internal server name, one for IP address and one for external server name. You may have as many links as you wish.

```
<email-body-config>
  <links>
    <link>
      <caption>Click here if you are in the office</caption>
      <destination>http://servername</destination>
    </link>
    <link>
      <caption>Click here if you are working over the VPN</caption>
      <destination>http://192.168.1.1</destination>
    </link>
    <link>
      <caption>Click here if you are outside the office</caption>
      <destination>http://crm.mycompany.com</destination>
    </link>
  </links>
</email-body-config>
```

5. The remainder of the EmailLink.config file contains XML tags that allow modification of the CRM record data that is included in the e-mail subject line.
Note: While these settings can be changed, c360 does not provide support on the modification of this section of the EmailLink.config file.
6. 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.EmailLink(MSCRMv1.2).zip files for an example):
 - a. Set the <appSettings> ISVIntegration key to "On":



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

- b. Add the line below inside the <appSettings> element:

```
<add key="c360EmailLinkLocation" value="/Custom/c360/EmailLink"/>
```

This line will allow for the location of the Email Link web files to be moved if necessary.

7. Open the \inetpub\wwwroot_Resources\isv.config file and modify it as follows (an example file has been included in EmailLink.zip. This file may be used in place of the default file in your installation if no other changes to your file have been previously made):

- a. Insert the following lines inside the various entity elements for which you want the Email Link button to appear. This example illustrates how to make Email Link appear on Account records:

```
<account>
<ToolBar ValidForCreate="0" ValidForUpdate="1">
  <Button Title="E-mail Link" ToolTip="Launch E-mail window for sending this
Record."
        Icon="/_imgs/ico_16_138.gif"
        Url="/Custom/c360/EmailLink/LaunchEmailWindow.aspx"
        PassParams="1" WinParams="" WinMode="0"/>
</ToolBar>
</account>
```

You've now completed all the installation steps.

Note: If you receive an error when trying to access Microsoft CRM, you may need to stop and restart the World Wide Web publishing service on the Microsoft CRM server. You can do this by going to Start > Settings > Control Panel > Administrative Tools > Services and right clicking the entry titled 'World Wide Web Publishing Service.' The right click menu will give you the option to 'stop' the service. Once the service has stopped, you may right click the entry again and choose 'start.'

8. **This step outlines how to deploy Email Link in the Microsoft CRM Sales for Outlook client.** Version 1.2 of Microsoft CRM employs a configuration file titled OutlookClient.xml. This file is the Outlook Client equivalent of the isv.config file and utilizes the exact same structure. Adding the isv.config entries listed in this guide will allow users to launch Email Link from the Outlook client. It is important to note that the server name must be specified in OutlookClient.xml. For example, the following entry in isv.config:

```
<account>
<ToolBar ValidForCreate="0" ValidForUpdate="1">
  <Button Title="E-mail Link" ToolTip="Launch E-mail window for sending this
Record."
        Icon="/_imgs/ico_16_138.gif"
        Url="/Custom/c360/EmailLink/LaunchEmailWindow.aspx"
        PassParams="1" WinParams="" WinMode="0"/>
</ToolBar>
</account>
```

must be implemented as:



```
<account>
<ToolBar ValidForCreate="0" ValidForUpdate="1">
  <Button Title="E-mail Link" ToolTip="Launch E-mail window for sending this
Record."
      Icon="/_imgs/ico_16_138.gif"
      Url="http://server/Custom/c360/EmailLink/LaunchEmailWindow.aspx"
      PassParams="1" WinParams="" WinMode="0"/>
</ToolBar>
</account>
```

in OutlookClient.xml. In this example you would replace the text 'server' with the name of your CRM server.

An Email Link configured copy of OutlookClient.xml is included in the EmailLink download file. You may open it in a text editor like notepad and use the search and replace function to quickly replace the word 'server' with your CRM server name.

Removal Instructions

Follow these steps to install Email Link:

1. Remove the changes to the isv.config and OutlookClient.xml files.
2. Delete the \Custom\c360\EmailLink directory (if no other customizations are installed in this directory)
3. Delete the c360.EmailLink.dll from the \inetpub\wwwroot\bin directory



Email Link Files

File List

c360 Email Link includes the following files:

- \wwwroot
 - \bin
 - c360.EmailLink.dll
 - \Custom
 - \c360
 - \EmailLink
 - LaunchEmailWindow.aspx
 - \Licenses
 - c360. EmailLink Version 1.lic