



CRM Innovation, LLC

AutoNumber 2011 Installation Manual V1.1
AutoNumber Managed Solution Code V1.0.0.0

Installation

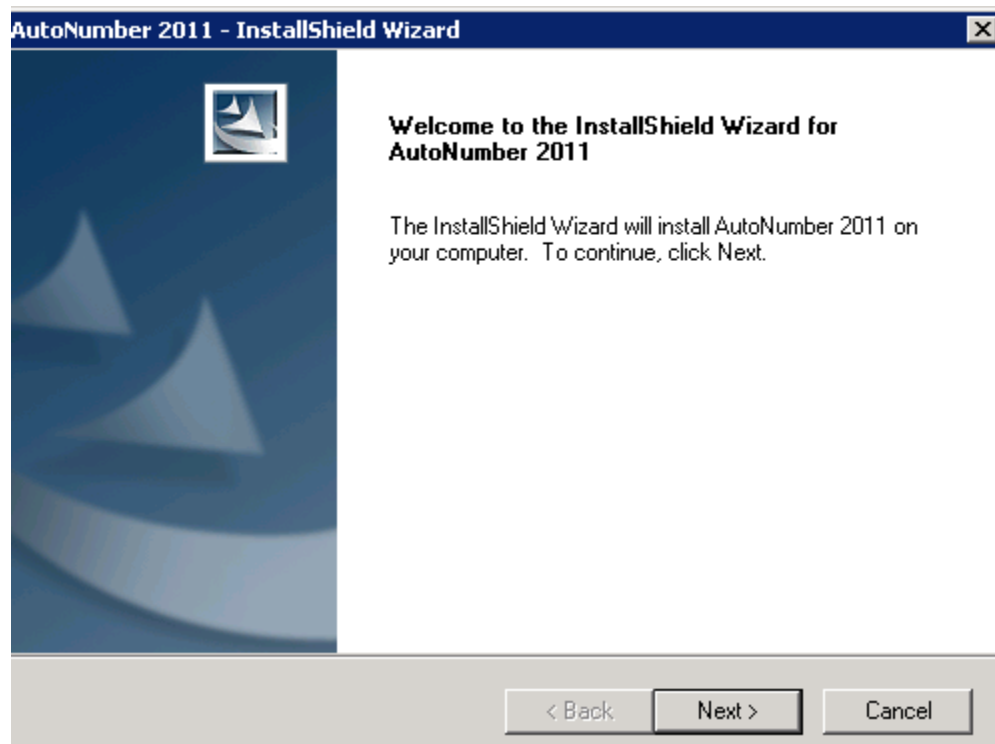
Support Questions? - support@crminnovation.com

A CRM best practice is to always export the customizations file before making any changes to the customizations or importing a new managed solution. We encourage you to make a backup now of the customizations file before proceeding with the installation of AutoNumber.

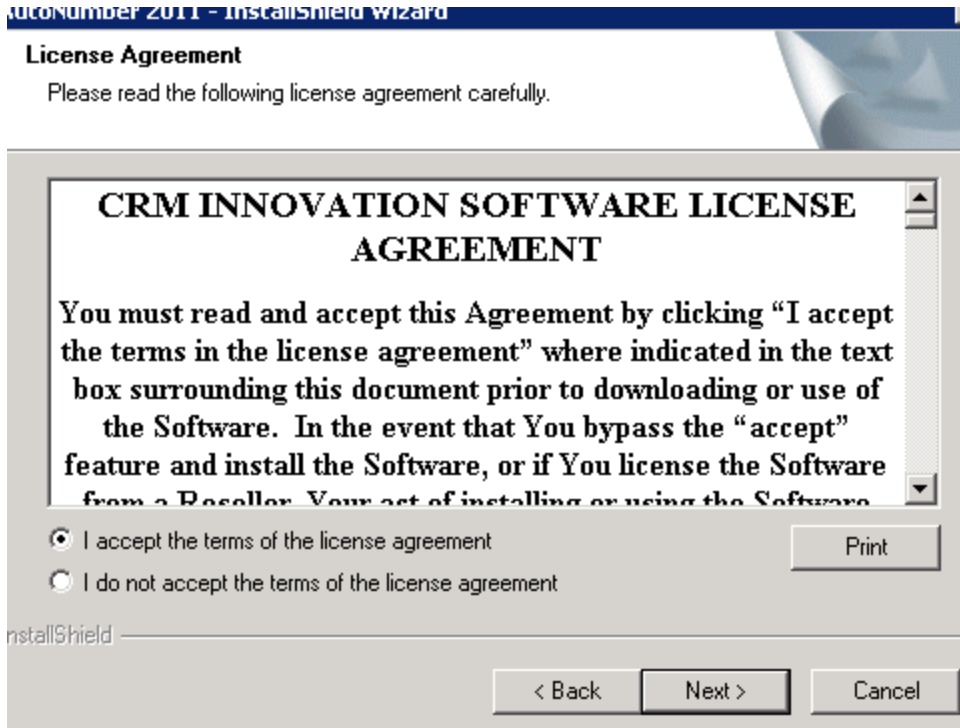
- Preferably the user doing the installation of AutoNumber should be the same user account that initially did the CRM installation. If not;
 - The CRM role of the User must be a System Administrator
 - The User must be a part of Deployment Administrator Group

Steps,

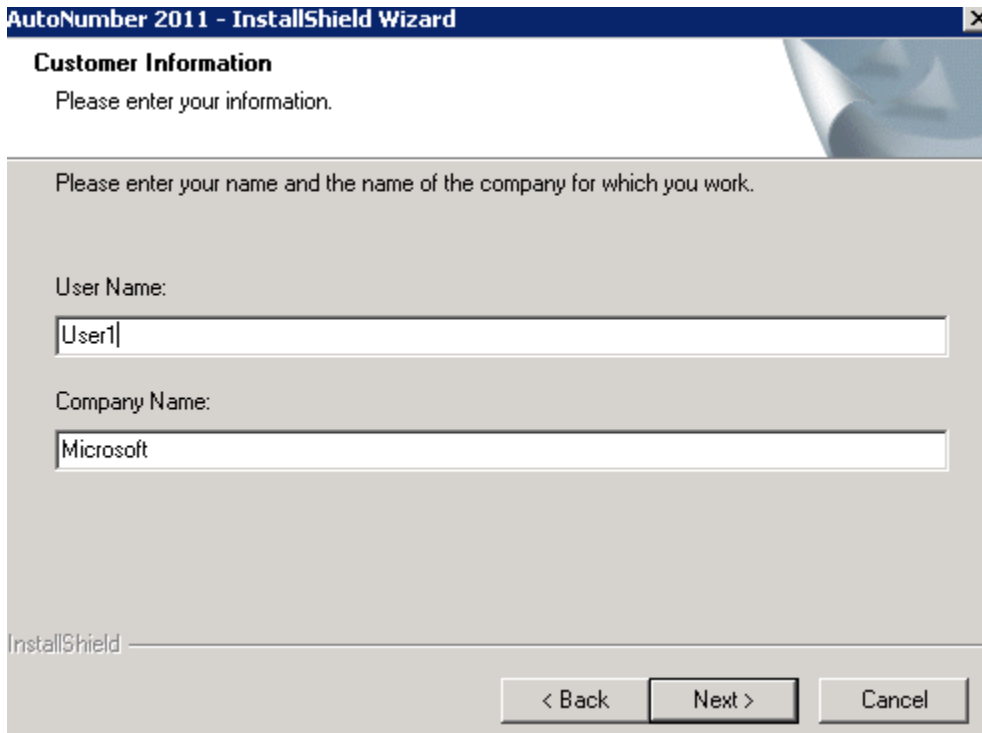
1. Run AN.2011.exe setup.
2. Click next on Welcome window



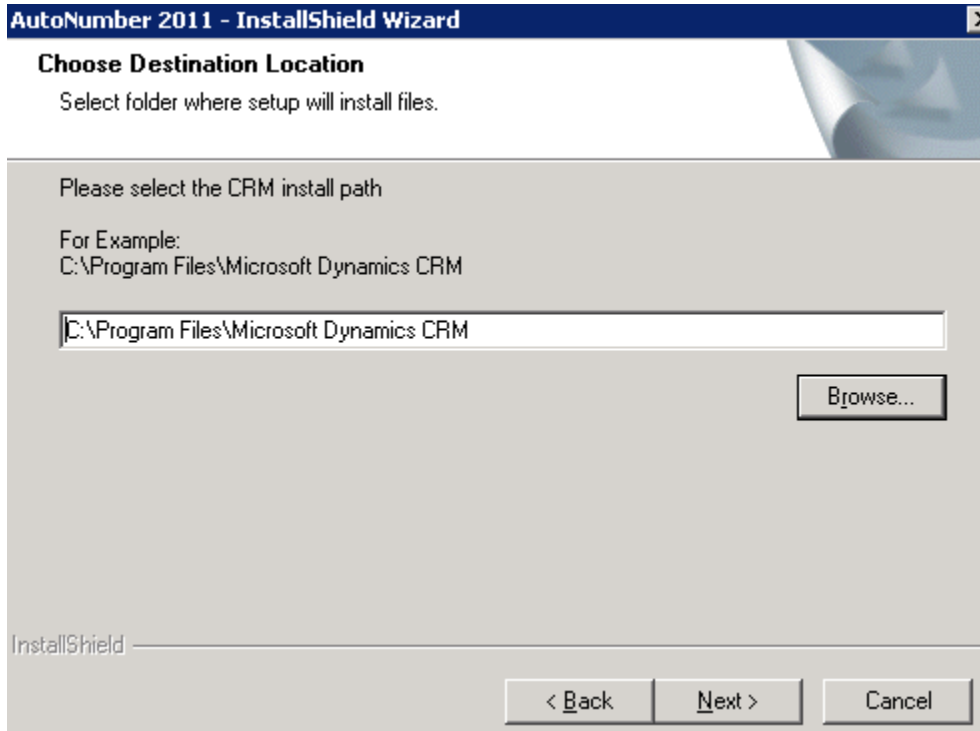
3. Read and accept the license and click on next.



4. Provide Company details

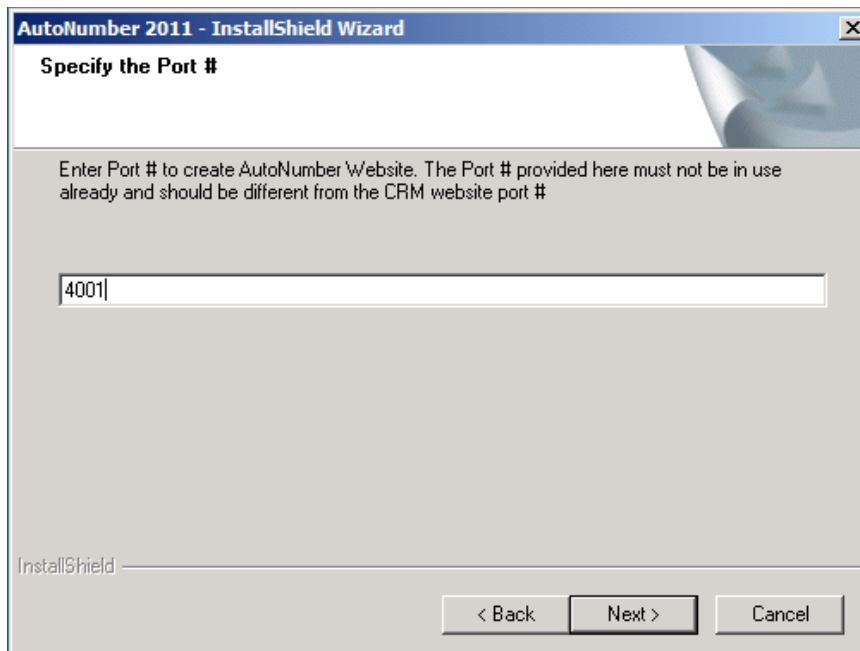


5. Specify CRM installation path



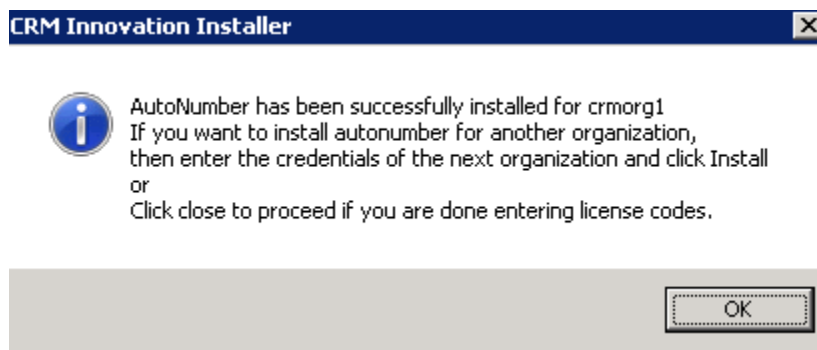
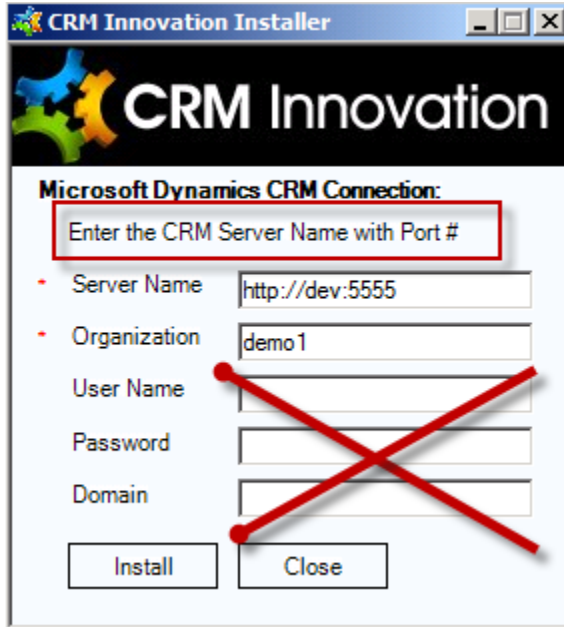
6. Specify the Port # which will be assigned to the AutoNumber website that the installer will create on the CRM server.

NOTE: Do not enter the CRM Port# nor any other port number for a website that is currently in use. We suggest something like 4001.



7. Click next and the next steps will launch the AutoNumber Installer. Fill the details and click on Install.

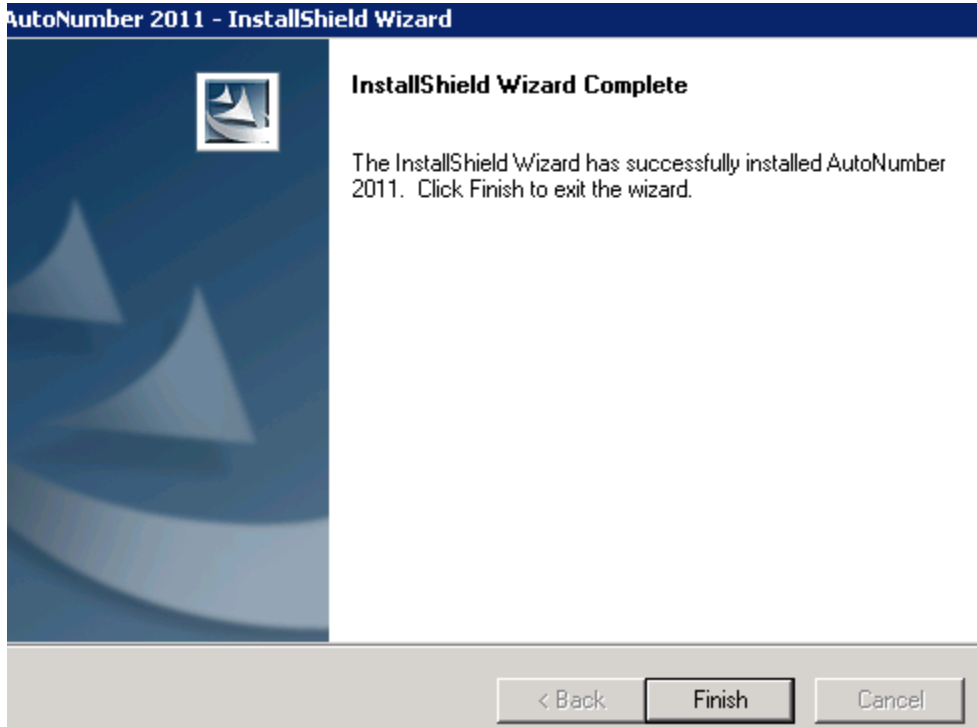
NOTE: Unless instructed to by the CRM Innovation Support technician only enter information into the **Server name and **Unique Organization Name** fields – Do not enter anything in the User Name, Password or Domain name fields. Be sure to enter either http:// or https:// for ssl environments.**



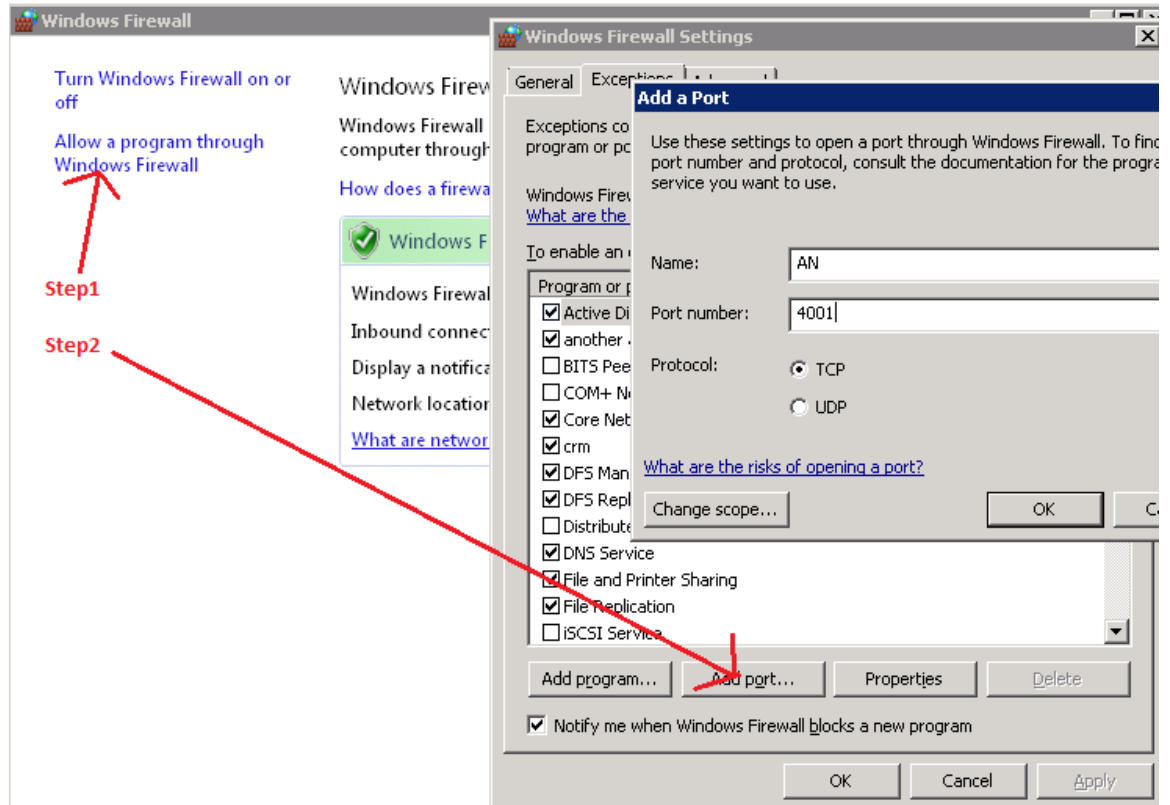
- Once installation completed successfully close Installer and which brings up the License registration tool. Provide the license file and click on Register button.



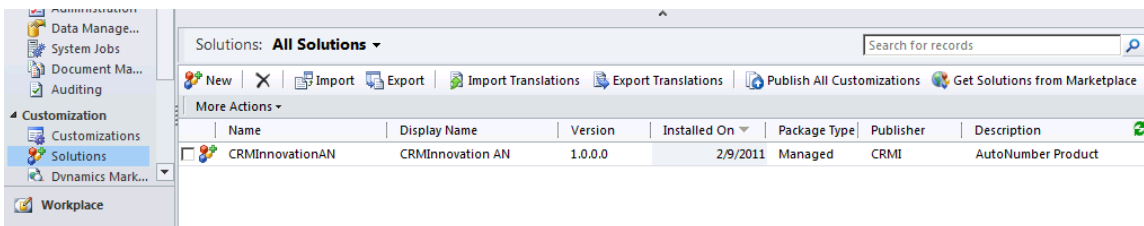
- Once license registered the setup will complete by clicking on finish window.



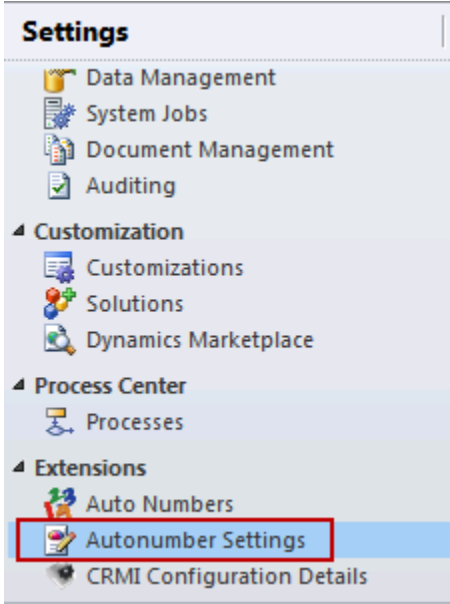
Note you might need to allow the AutoNumber website to pass through the Windows Firewall. This step depends on the individual server settings. To pass the website from windows provide the port # in windows firewall as shown in below screen shot. Port # is same as used at the time of setup.



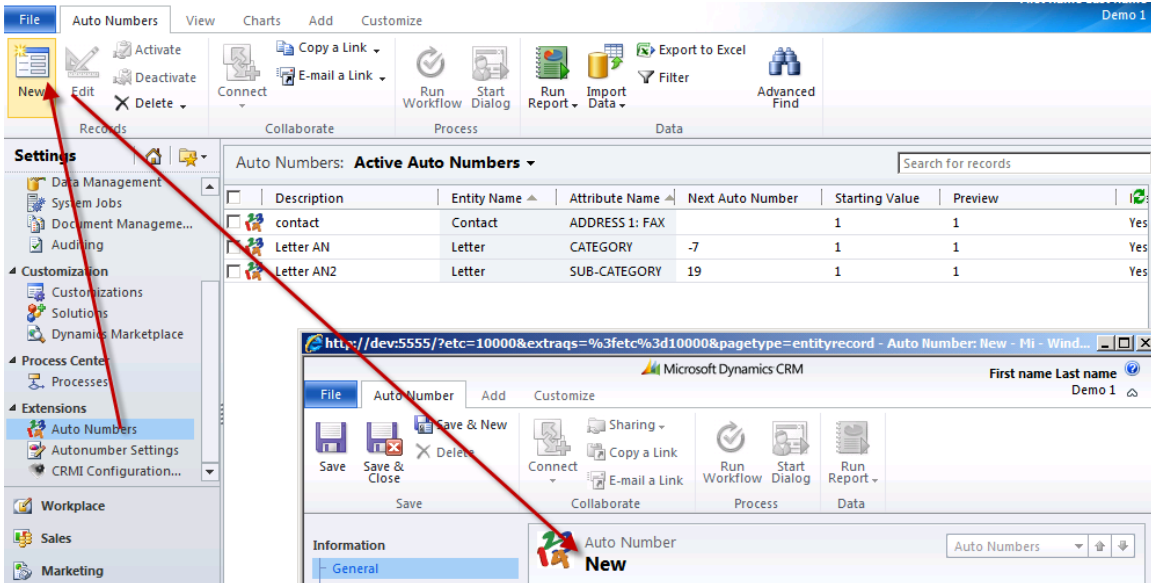
When completed you will see the AutoNumber managed solution in the Solutions section.



Navigate to the Extensions, AutoNumbers custom setup page to select and publish AN for the entities that you will create AutoNumber Records.

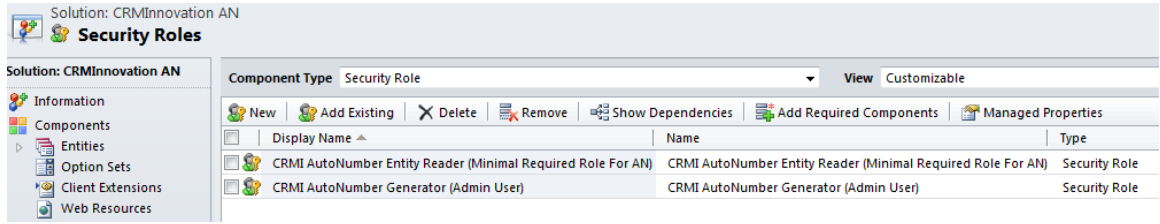


To create a new AN record go to Auto Numbers under extensions, select New and then enter in the AutoNumber parameters. Be sure to select the Enable check box, otherwise no numbers will be generated.



Points to be noted,

- **Roles included in solution:** CRMInnovation AN solution includes following 2 roles and details of this roles provided below,



- CRMI AutoNumber Entity Reader (Minimal Required Role For AN)

Role given to user who only supposed to create CRM records which will get AutoNumber assigned to them. This is the minimum role required for user to be able to use AutoNumber feature.

- CRMI AutoNumber Generator (Admin User)

To be able to publish AutoNumber entities, create AutoNumber records user needs this privileges to be assigned.