TeamScope CRM Multiuser Installation Guide

(Revised 05/04/2006)

Attention OutlookCRM Users:

***TeamScope CRM* is the new name for *OutlookCRM*.**

The same great product with a brand new name!

Introduction

TeamScope CRM operates as a fully functioning solution in either a single-user or multi-user mode. In a single-user environment, installation and setup of the product is fully automated and is accomplished by the product's installer plus a Startup Wizard that runs the next time Outlook is launched.

In a multi-user environment, where you want a team of people to be able to access a shared set of data and a common, consistent program configuration, a few easy-to-follow steps will insure that the system is properly set up for the team to install and use. This guide provides these step-by-step instructions. *For more detailed information regarding TeamScope CRM multi-user setup and administration, please consult the TeamScope CRM Administration Guide help file.*

Preparation

1) Download the TeamScope CRM install file from the TeamScope website by requesting a download from here: http://www.teamscope.com/globals/download.asp

   We recommend that you check the following options:
   ☑ TeamScope CRM
   (includes the TeamScope CRM and Admin Tools installers)
   ☑ TeamScope CRM Reporter
   (to report on TeamScope CRM from an MS Access database)
   ☑ Contacts Scrubber
   (to assist you with consolidating duplicate contacts)

   Also, download the TeamScope CRM "User Only" installer, which comes into play later when you perform end-user installs (it provides for the installation of TeamScope CRM without any of the Administration tools):
   http://www.teamscope.com/dloads/81235425634/crm/TeamScopeCRM4UserOnlySetup.exe

2) Place the TeamScope CRM User Only installer that you just downloaded, "TeamScopeCRM4UserOnlySetup.exe", on a common fileserver location so that each of the workstations on which you are going to install TeamScope CRM can

access the files and execute them from this common network location.

3) All workstations on which you will be installing TeamScope CRM must have "Administrative" permissions to the local computer. In addition, the initial workstation being installed must have permissions to create new folders on the Exchange Server under "Public Folders/All Public Folders". Make sure that these conditions are met before proceeding.

Set up the first TeamScope CRM workstation (the Administrator)

The first TeamScope CRM workstation installed should be for the person that will be the administrator of the TeamScope CRM system.

1) Run the “TeamScopeCRM4Setup.exe” file that you downloaded. This installs and registers the appropriate TeamScope CRM files, including all of the Administration tools and utilities.

2) Start up Outlook. The TeamScope CRM “Startup Wizard” will display. Follow all of the instructions given as you go through the Startup Wizard screens.

   On one of the Startup Wizard screens, you are prompted for the location of the “TeamScope CRM” root public folder. Browse to your Exchange Public Folders; at your desired location within the Public Folder tree, click the “New” button to create a new folder that will become your TeamScope CRM “root folder”. You can name this folder whatever you like; we recommend calling it “TeamScope CRM”. Leave the “Folder contains” field set to “Mail and post items”.

   The Startup Wizard also prompts you to choose either a “Projects” or “Opportunities” focus. Select the option most appropriate to your intended use of TeamScope CRM. Select “Projects” if your CRM activities involve tracking project details and relationships; select “Opportunities” if you want to use TeamScope CRM to track the sale of products and/or services.

3) When the Startup Wizard is completed, within Outlook you will now see the TeamScope CRM toolbar and within the Public Folders, you will see all of the TeamScope CRM folders under your “TeamScope CRM” root folder.

4) Obtain and record a TeamScope CRM license for this PC. To do so, select the "Purchase/Register" option on the TeamScope CRM Menu, and in the Purchase/Register window, click button 2 ("Request License") to request a license key. Within a few minutes, you will receive an e-mail message containing the license key and instructions. Once this key has been received and accepted, the software will be activated to its full functionality. Licensing can also be done via a “Limited Organization-Wide License”; see the last section of this document for more information.

Set up the TeamScope CRM central configuration

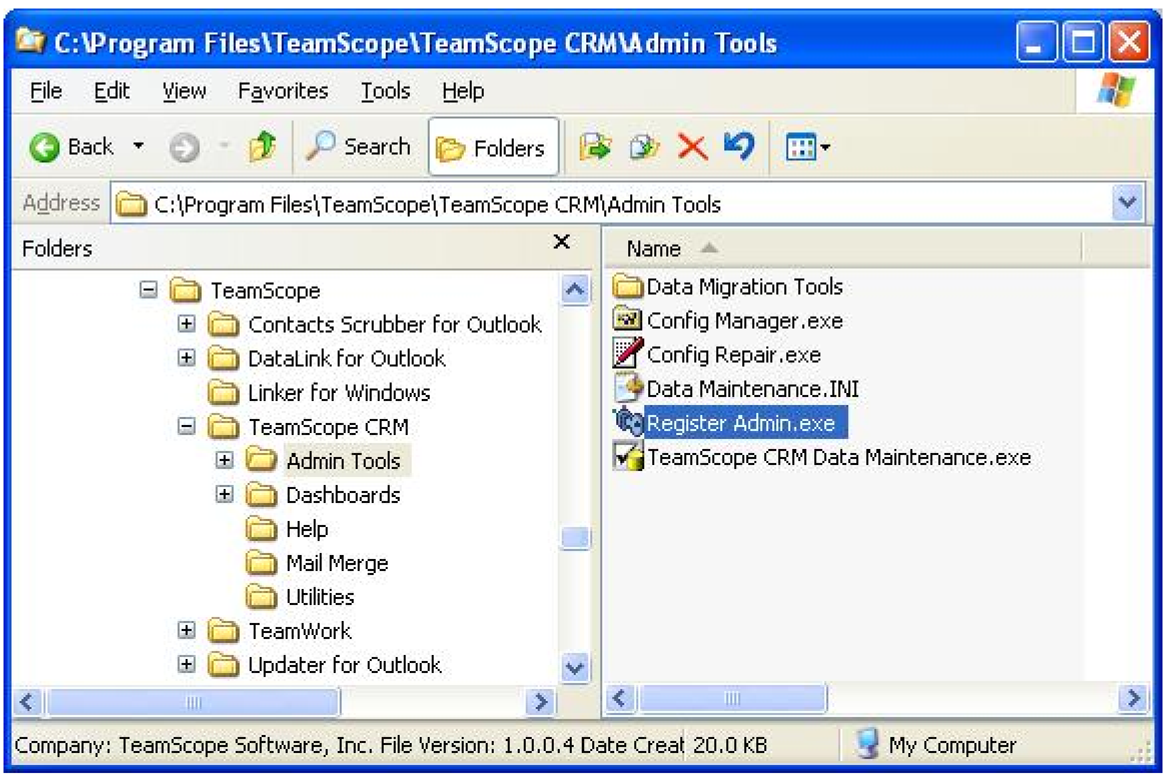
This section should be performed from the same workstation as the above initial TeamScope CRM install.

1) Create a new public folder under the "TeamScope CRM > Users" folder. Name it "TeamScope CRM Central Config" and use the default type of "Mail and post items". Set the Exchange folder permissions for this folder so that your TeamScope CRM Administrator is an "Owner", and all of your TeamScope CRM users have "read only" access (i.e. "Reviewer" permissions would be a typical setting for users).

Note: This folder can actually be located anywhere within your Exchange Public Folder structure, and may be named whatever you like. The location and folder name specified above are suggestions.

2) Using Windows Explorer, locate and run the "Register Admin" utility. If you kept the default installation locations, this file should be located at

"C:\Program Files\TeamScope\TeamScope CRM\Admin Tools\Register Admin.exe"

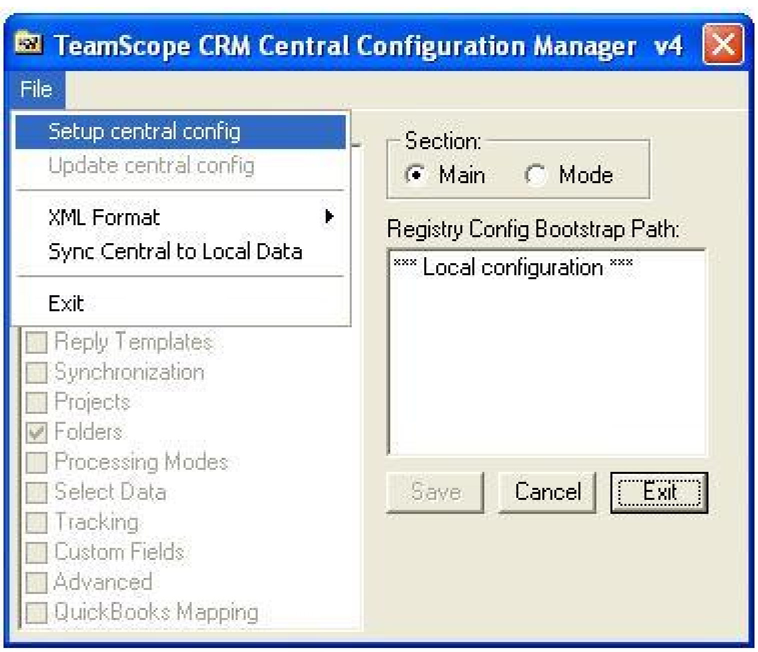


This program prompts you to establish your TeamScope CRM Administrative password:

This password is not related to any other Windows or Outlook password. Any simple password is fine. (The more important security on your TeamScope CRM central configuration is determined by the Exchange folder permissions established in step 2 above.)

3) Run the “Central Config Manager” tool; it is located on the Windows Start menu at “Start/Programs/Teamscope/TeamScope CRM/Admin Tools/Central Config Manager”.

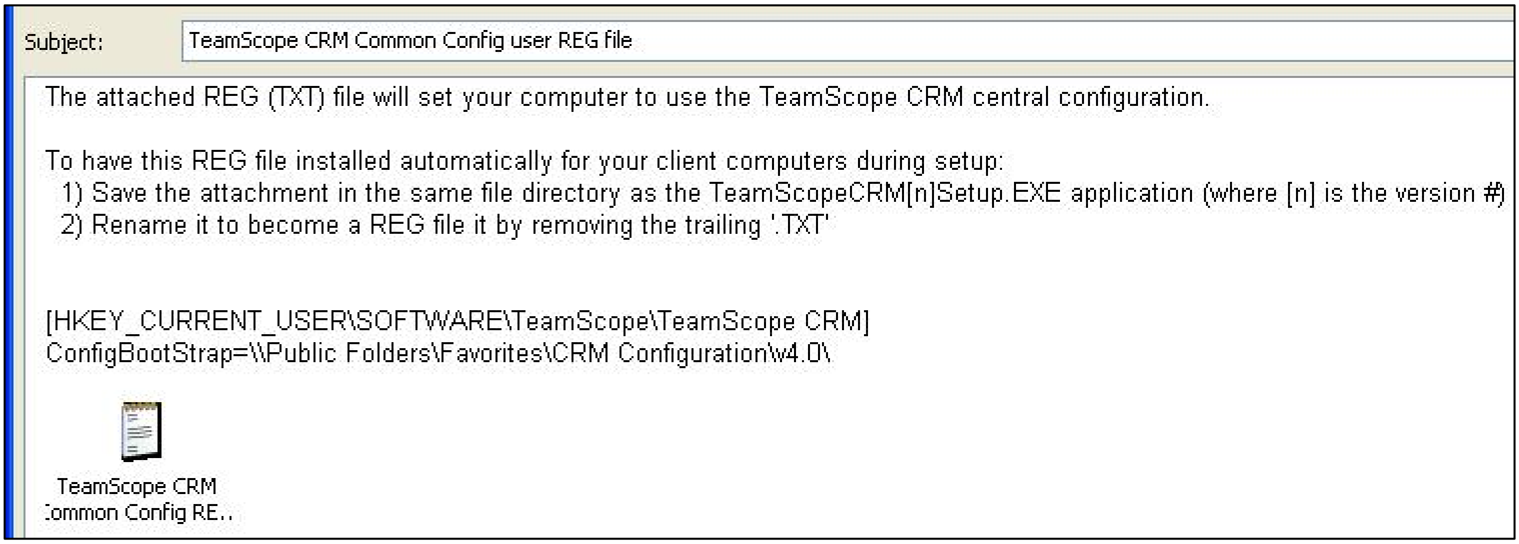
4) Select the menu option “File / Setup Central Config”:



The utility prompts you to identify a folder to use to store the central TeamScope CRM Configuration. Browse to and select the public folder that you created in step

2 above.

The utility then automatically copies the necessary files into this folder, and generates and displays a special post item with a .REG file attachment in it:



5) The next step is to save the attachment contained in this post item off as a file. To do this:

   a. Right-click on the attachment, and select “Save As…”.

   b. Browse to the common fileserver location you established above, where you stored the “TeamScopeCRM4UserOnlySetup.exe” file.

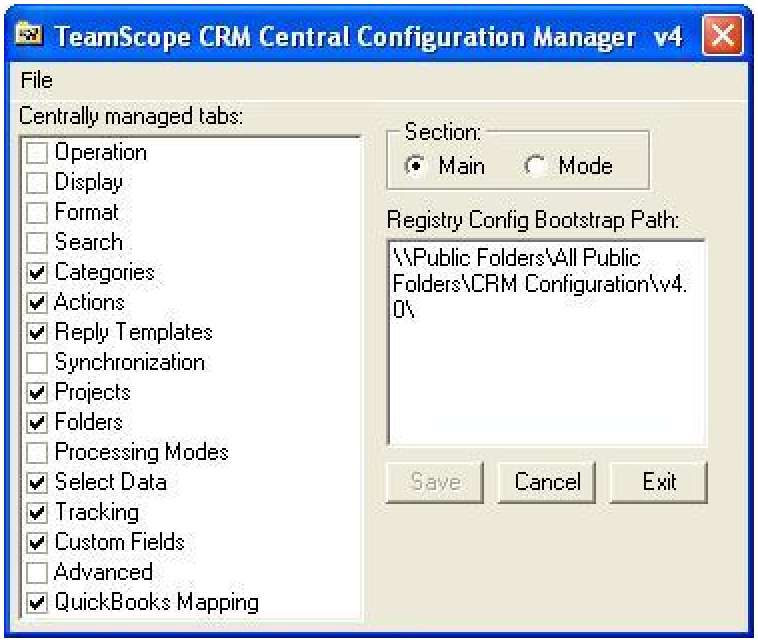
   c. Before saving the attachment, remove the trailing “.TXT” from the displayed filename, so that the proposed filename is displayed as “TeamScope CRM Common Config.REG”.

      (*The attachment in the post item contains a ".TXT" because Outlook security prevents including a ".REG" file, while it allows attachments of a “.TXT” type. This is why you must rename the file by removing the ".TXT", which turns it into a ".REG" file in the fileserver folder.)*

   d. Click the Save button.

   e. Close the post item.

6) The Central Config Manager utility is now active:



This utility allows you as an administrator to specify which parts (tabs) of the TeamScope CRM configuration are centrally controlled, and which remain under each user's local control. By default, a set of tabs is preset for being centrally managed; we recommend that you leave these settings intact for now. The control of tabs can be changed in this utility at any time without harmful interruption to your users. Please see the *TeamScope CRM Administration Guide* for more information on using this utility and managing a centralized configuration.

Install the additional TeamScope CRM workstations (TeamScope CRM users)

You can now install TeamScope CRM on your user workstations. On any new workstation that you are installing, make sure that you are logged onto the Windows account of the person that will be using TeamScope CRM on this computer, and that Outlook is configured for the e-mail account of this same person that will be using TeamScope CRM. Also remember that the logged-in Windows user needs to have Administrative rights on the computer.

1) To install TeamScope CRM for an additional user, run the "TeamScopeCRM4UserOnlySetup.exe" file that you saved in the common network fileserver location.

2) Open Outlook. The TeamScope CRM Startup Wizard runs; follow the instructions provided, including setting up the TeamScope CRM/Contact folder to be viewable as an Outlook Address book.

3) When the Startup Wizard has finished, TeamScope CRM is set up on this workstation.

4) Obtain and record a TeamScope CRM license for the user. To do so, select the "Purchase/Register" option on the TeamScope CRM Menu, and in the Purchase/Register window, click button 2 ("Request License") to request a license key. Within a few minutes, the requester will receive an e-mail message containing the license key and instructions. Once this key has been received and accepted, the software will be activated to its full functionality. Licensing can also be done via a "Limited Organization-Wide License"; see the last section of this document for more information.

Limited Organization-wide (LO) Licensing

When you purchase TeamScope CRM, your organization is set up in our licensing system with the number of user licenses you purchased. Individual licenses are then obtained by each user via the “Purchase/Register” window within the product, as specified in the instructions in this document. Once a license is e-mailed to a user, the license count in our system is decremented by one, and the e-mail address of the requesting user is recorded in our system. Should that user leave your company or stop using TeamScope CRM and you wish to transfer their license to a new user, you can contact TeamScope or your assigned TeamScope Solution Partner and we can make the adjustment in our license system.

As an alternative to this approach, you may also request to use our Limited Organization-wide (LO) License method. An LO License provides your TeamScope CRM administrator with direct control over the use of TeamScope CRM within the organization, while eliminating the need for users to individually request licenses. With LO licensing, the TeamScope CRM administrator can selectively activate and deactivate users and centrally manage the license key provided by TeamScope. The total number of Active Users permitted is controlled by the LO License key.

INSTALLATION:

Installation of the LO License key is very simple. The LO License is sent to you from TeamScope via e-mail; your TeamScope CRM administrator copies the e-mail into the TeamScope CRM Central Configuration public folder. (If this is an upgrade of an existing license in order to permit additional Active Users, the administrator will need to rename or remove the old license e-mail already in the TeamScope CRM Configuration folder.) Once the LO License key is installed in the TeamScope CRM Configuration folder, this key will be used by all TeamScope CRM users. If there is no LO License key installed in the TeamScope CRM Configuration folder, then TeamScope CRM will look in each individual user's Windows registry for an individual user license key.

OPERATION:

When Outlook starts and TeamScope CRM is installed on that workstation, TeamScope CRM automatically starts. At this startup, TeamScope CRM locates the current user's contact record in the TeamScope CRM Users public folder. If a contact record for the current user is not found in this folder, TeamScope CRM attempts to create a new one. During the process of creating this record, TeamScope CRM accesses the encrypted LO License key to obtain the maximum number of Active Users permitted. TeamScope CRM then determines the number of currently Active Users (this is done by filtering the Users folder with the filter criteria "Private <> Yes"). If the number of permitted Active Users is less than the number that are currently Active, the new user record is created with the Private checkbox off (unchecked), indicating that this user is Active; otherwise a new user record is not created, and a warning is displayed stating, "The total number of Active Users permitted by your license have been allocated. Your copy of TeamScope CRM is not activated. Please contact your TeamScope CRM administrator."

Once either an existing user record is found or a new one is created, TeamScope CRM then begins its license verification process. If the user's record indicates that this user is Inactive, then TeamScope CRM does not initialize and no messages will be presented to the user. If the user's record indicates that the user is an Active User, then TeamScope CRM reads the encrypted LO License key and compares the maximum permitted number of Active Users to the number of users that are currently flagged as Active in the Users folder. If the current number of Active Users is less than or equal to the permitted value, then TeamScope CRM initializes. If the current number of Active Users is greater than the maximum permitted Active Users, then TeamScope CRM does not initialize and the warning message "The number of Active Users exceeds the maximum permitted Active Users. Please contact your Outlook Administrator." is displayed.

IMPORTANT: The TeamScope CRM administrator may manually modify the Private flag of User records and in this way activate or deactivate users. Be careful never to activate more users than your LO License permits, since having more Active Users than are permitted will cause *all* users of TeamScope CRM to become disabled.