



CRM Setup Factory: Extractor Version 4.0

User's Guide

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Who Should Read This Guide

This guide is for CRM administrators and consultants. We assume that you have experience using:

- Sage CRM 5.7+
- MS SQL Server 2000+
- Experience implementing and customizing CRM
- Using Sage Accpac ERP

How this guide is organized

You must read the “End-User License Agreement for CRM Systems Inc. Software” in the pages that follow. Acceptance of this agreement is required in order install and use the software.

This guide is designed as a step-by-step manual allowing you to complete an installation, configuration and use of CRM Setup Factory: Extractor.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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Coaching captions tab
Can place files in custom pages or program files folder – put files in more places

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Part 1: Installation

Prerequisites

The CRM Setup Factory has several prerequisites that must be satisfied prior to attempting installation. Not completing any one of these steps may result in a failed installation.

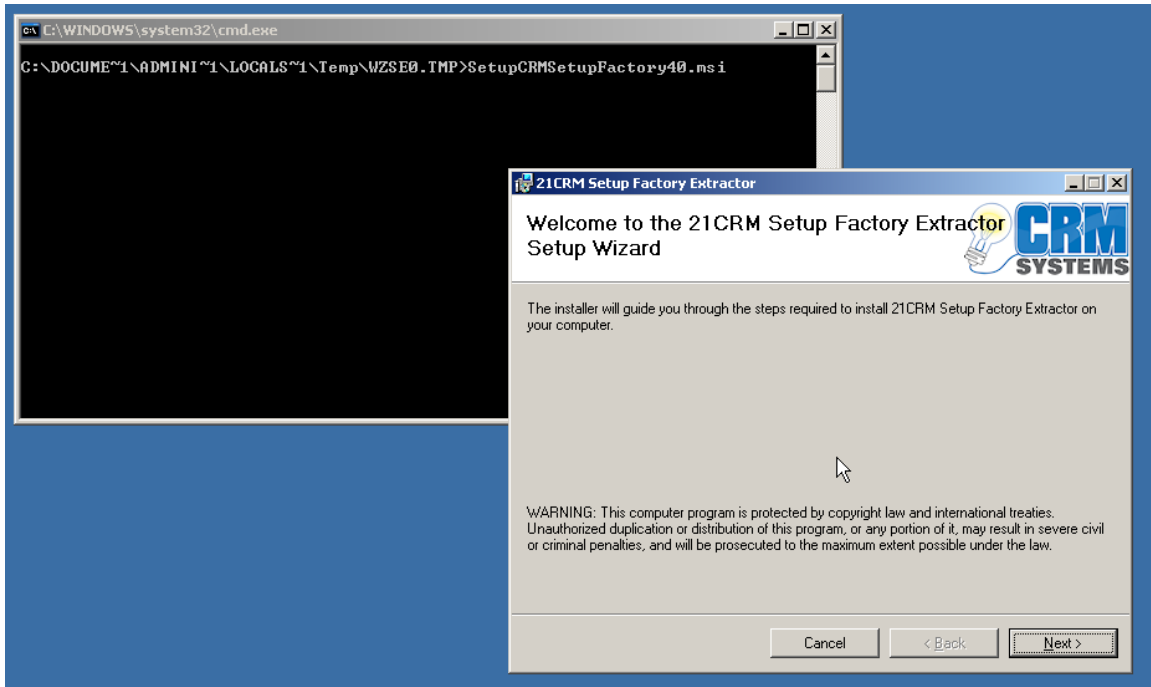
- Administrative rights on the local machine
- Microsoft .NET Framework 1.1 or higher
- Microsoft .NET Framework 1.1 SDK
- Microsoft Visual J# Runtime Components 2.0
- Working knowledge of SAGE CRM 5.7 +

Your machine is now prepared for the installation process.

Application Installation:

Before attempting the installation, ensure that the target machine meets the prerequisites outline in the Prerequisites section. The target machine does not have to be a CRM server, it can be any computer on the local network, including a local workstation. [Click on CRMSetupFactory40Setup.exe](#)

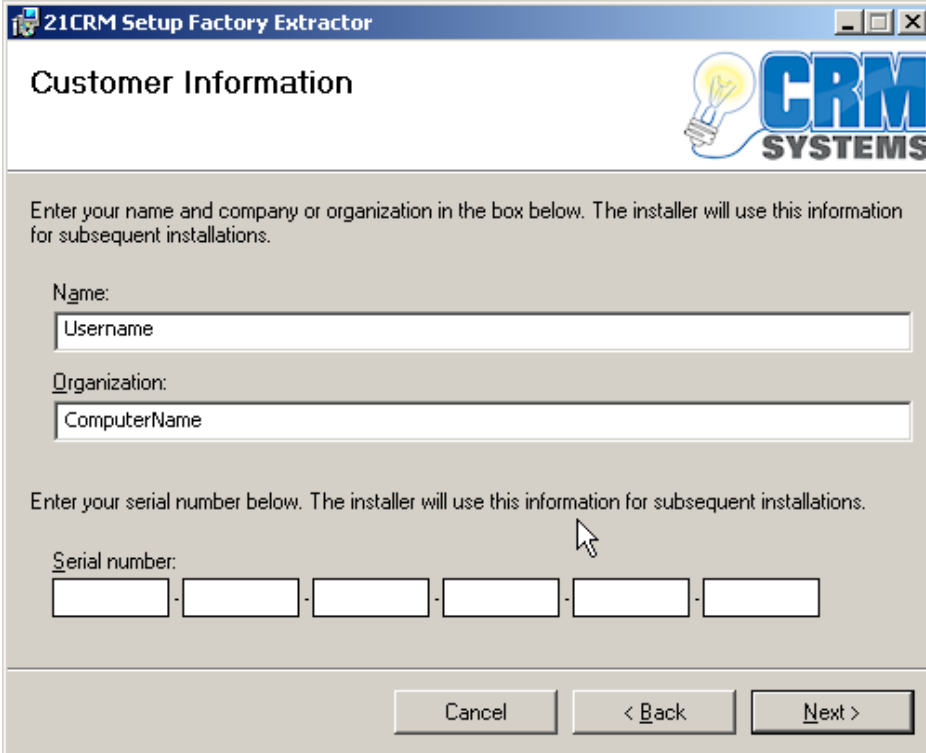
To begin the installation, navigate to the **Setup CRM Setup Factory.msi** file and execute it. This will display the following window:



To continue with the installation, click Next to display the following window:



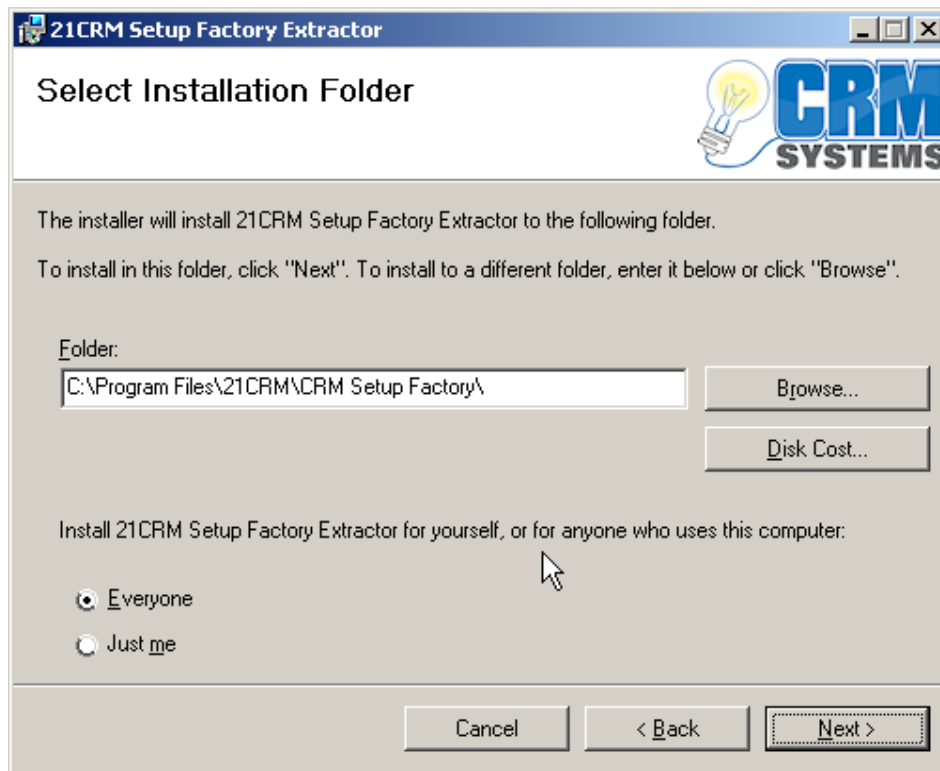
Read through the End-User License Agreement (EULA) completely before agreeing and continuing with the installation. You have certain rights in the EULA and should be fully aware of them before agreeing. After you have read and agreed to the EULA click Next to display the following window.



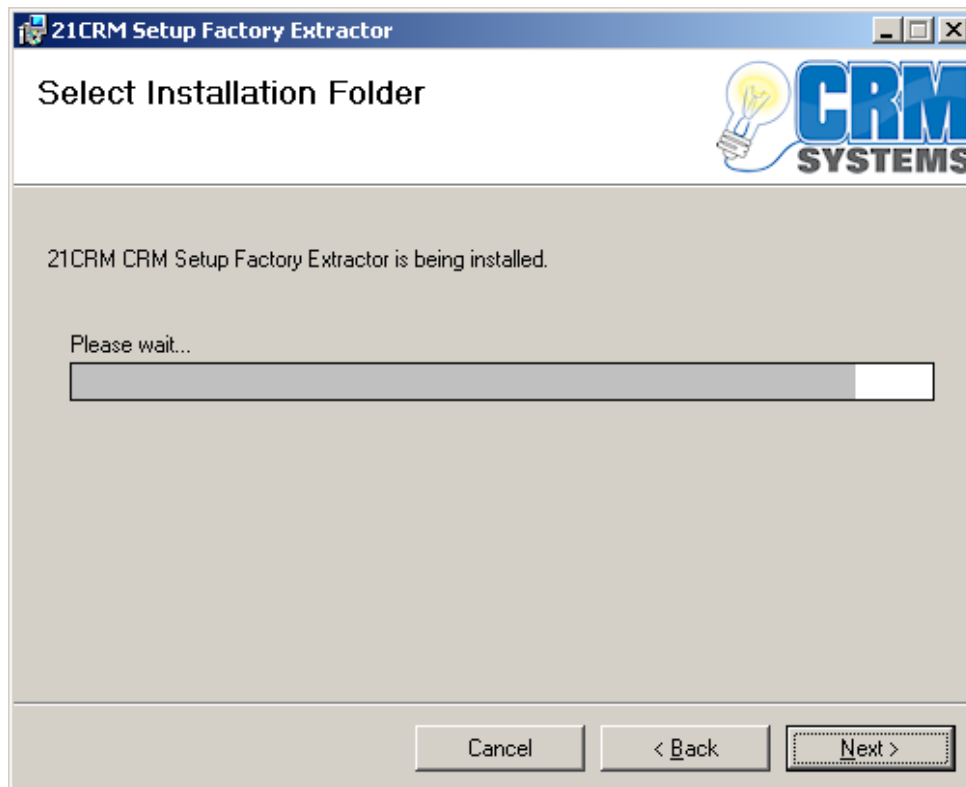
The screenshot shows a Windows-style window titled "21CRM Setup Factory Extractor". The window has a blue header bar with the title and standard window controls (minimize, maximize, close). Below the header, the text "Customer Information" is displayed on the left, and the "CRM SYSTEMS" logo is on the right. The logo features a lightbulb icon and the text "CRM SYSTEMS" in blue. The main area of the window contains two sections of text and input fields. The first section says "Enter your name and company or organization in the box below. The installer will use this information for subsequent installations." Below this are two labels: "Name:" followed by a text box containing "Username", and "Organization:" followed by a text box containing "ComputerName". The second section says "Enter your serial number below. The installer will use this information for subsequent installations." Below this is a label "Serial number:" followed by six small text boxes separated by hyphens. At the bottom of the window are three buttons: "Cancel", "< Back", and "Next >". A mouse cursor is pointing at the first empty box in the serial number field.

Here is where you will enter your licensing information. Be sure to enter your organization and serial number exactly as you have received them. If the name and organization do not match the information stored in your serial number the application will cease to function. After you have filled in all information, click Next to display the following window.

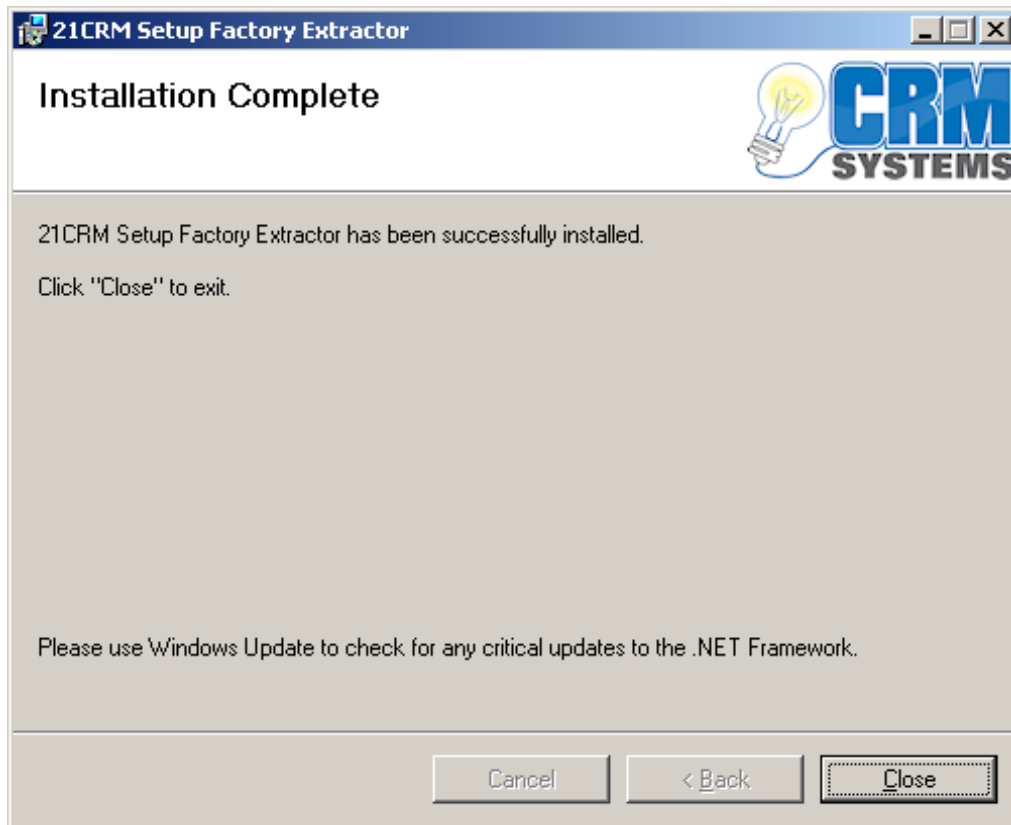
If you would like to install to a different directory than the default directory provided, click the browse button and navigate to the directory you wish to install to. Select who you would like to install the application for, the default is for everyone. When you are satisfied with the information here, click Next to display the following window.



This window indicates that the setup application has collected enough information to proceed with the installation. Click Next to begin the installation. The following window will be displayed.



This window shows the progress of the installation. Once the installation has completed, the following window will be shown.



This window indicates that the installation has completed successfully. If you received an error while installing, ensure that the target machine meets the prerequisites outlined in the prerequisites section.

CRM Setup Factory: Extractor is now installed and ready to use.

Step 2: Utilization

What is CRM Setup Factory: Extractor?

CRM Setup Factory: Extractor is a .NET application that allows the migration of all or part of a CRM system to another. You can quickly add customized tables and related metadata to another system. For example, move a development system to a live system, or perhaps create a backup of a system before any new radical changes are done or distribute your customizations to multiple servers.

CRM Setup Factory: Extractor provides a user friendly interface that will allow you to easily view and extract existing Tables, Screens, Workflows, etc. from an existing CRM system. CRM Setup Factory: Extractor stores all of the extracted data in a .NET executable that can be run at anytime, on any windows based system with the .NET framework installed, to merge the extracted data into the target system.

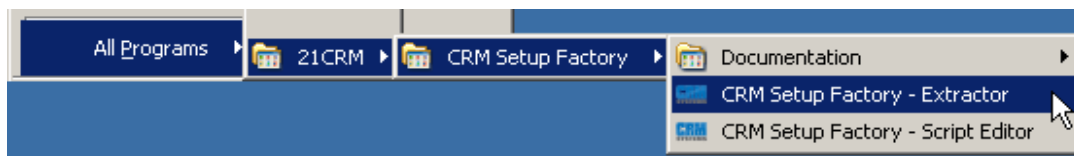
Using CRM Setup Factory: Extractor

There are several ways to start CRM Setup Factory: Extractor:

- 1) After installation, a shortcut should have been placed on your desktop



- 2) After installation, a menu item should have been added to your start menu under the CRM node.

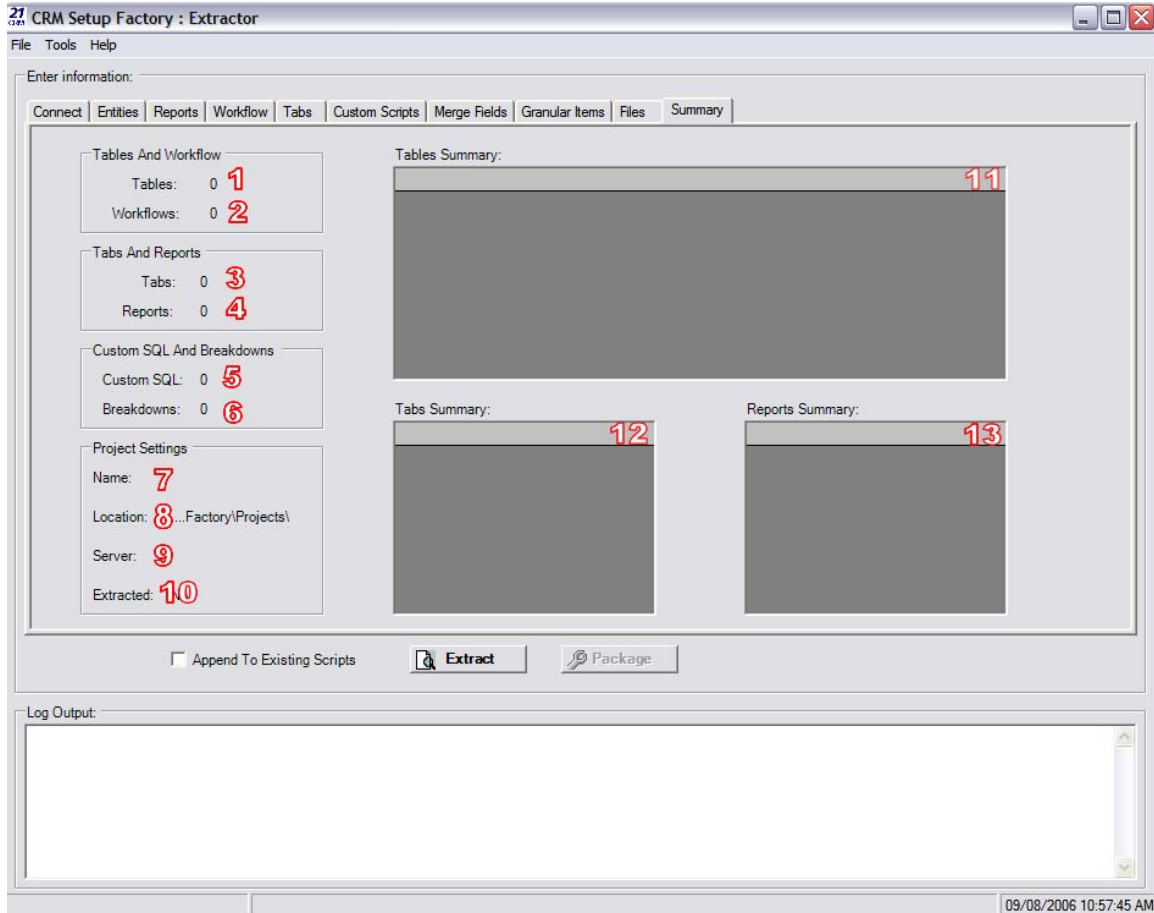


- 3) Locate the project file on you local machine and double click it.

Once CRM Setup Factory: Extractor has been opened; you will be presented with the Summary screen. This screen provides a brief summary about the project you are currently working on, at a glance.

Summary

The summary screen is used to display important data at a glance such as the current database, the number of entities marked for extraction, etc. It is recommended that you check that the settings are correct and that all the appropriate items in the system have been marked for extraction before extracting and creating the installer. This is the purpose of the summary screen.



The following is a list explaining the items shown in the above image.

#	Description
1	Displays the number of tables currently marked for extraction. Holding the mouse over it will display a brief summary indicating the names of the first ten tables marked for extraction followed by several periods (.) to indicate that there are more than ten tables marked for extraction.
2	Displays the number of workflows currently marked for extraction. Holding the mouse over it will display a brief summary indicating the names of the first ten workflows marked for extraction as well as how many workflows have been extracted and how many have not yet been extracted.

3	Displays the number of Tab entities that have tabs marked for extraction. Holding the mouse over it will display a brief summary indicating the first ten Tab groups and their respective tab amounts marked for extraction.
4	Displays the number of Report categories that have tabs marked for extraction. Holding the mouse over it will display a brief summary indicating the first ten categories with reports marked for extraction and the amount of reports marked for extraction.
5	Displays the number of custom T-SQL scripts in this project. Holding the mouse over it will display a brief summary indicating the names of the first ten T-SQL scripts added to the project.
6	Displays the number of table breakdowns that have been added to the project. Holding the mouse over it will display a brief summary indicating type of table breakdown and what parameters were used for the first ten breakdowns added to the project.
7	Displays the name of the currently loaded project.
8	Displays the last 20 characters of the location of the project. Holding the mouse over it will display the full path to the project directory.
9	Displays the name of the server currently connected to.
10	Displays the extraction status of the currently loaded project. There are three possibilities, which are as follows: <ul style="list-style-type: none">• Yes – everything marked for extraction has been extracted• No – nothing marked for extraction has been extracted• Partial Extraction – changes have been made to the project since the last extraction that have not yet been extracted
11	Displays all the tables that have been marked for extraction including the parameter for each table.
12	Displays all tab entities currently marked for extraction. Click the plus sign (+) beside a given entity to see all the tabs marked for extraction.
13	Displays all report categories currently marked for extraction. Click the plus sign (+) beside a given category to see all the reports marked for extraction.

Connect

Before you can view or select metadata to extract, you must connect to a source database and then identify your current work by defining a Project name and location. Projects enable the quick storage and access of your work, allowing that work to be easily modified or reviewed at a later time.

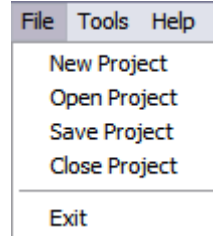
Once you have successfully configured your current project, CRM Setup Factory: Extractor will retrieve all information from the source database required for extracting target metadata. You will be unable to see the source CRM database information until a successful SQL connection is established. You may save your project (or load an existing project) at any time using the file menu. If you attempt metadata extraction prior to saving the project, you will be prompted to save the current project.

The screenshot shows the 'CRM Database Credentials' section with fields for Server (1), User (3), Database (2), and Password (4). A 'Connection Status' indicator (5) shows '* NOT Connected'. Below this is the 'Project Output' section with fields for Project Name (6) and Project Location (7), which is currently set to 'C:\Program Files\21CRM\CRM Setup Factory\Projects\'. At the bottom of the Project Output section are three buttons: 'Browse' (8), 'Clear Logs' (9), and 'View Logs' (10).

The following is a list explaining the items shown in the above image:

#	Description
1	The name of the SQL server on the network to connect to.
2	The name of the CRM database on the SQL server.
3	The user name to use when connecting to the SQL server.
4	The password associated with the user name.
5	Displays the connection status.
6	The name of the project.
7	The location to store the project and all associated files. The default is “<Program Files>\CRM\CRM Setup Factory: Extractor\Projects.”
8	Use this button to browse to another directory to store the project.
9	Use this button to clear all existing script files. (Use with extreme caution)
10	Use this button to view the scripts.

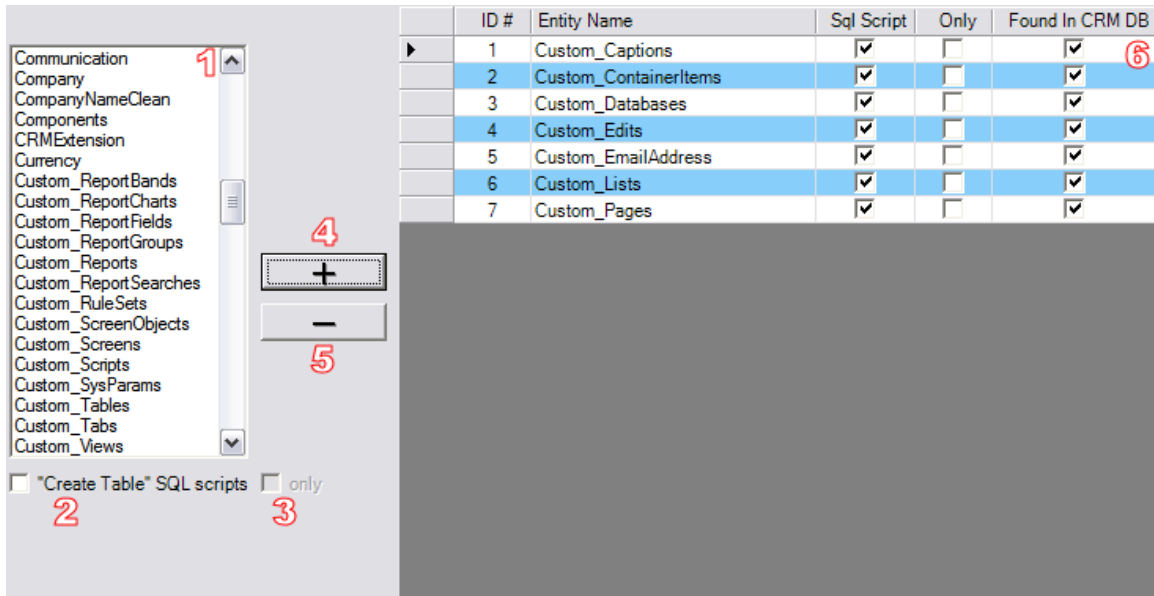
CRM Setup Factory will create a new project when you open it, however If you would like to create a new project, save or close the opened project and use the file menu and to select the appropriate action.



Once the project has been setup, the next step is to select the tables to be extracted. This is accomplished by navigating to the “Entities” tab and marking the desired tables for extraction.

Entities

In most scenarios you will need to extract table metadata from the system, as this is the foundation for most CRM components. This can be accomplished from the “Entities” section which will provide you with a list of entities currently in the system that you can select to extract. **All associated metadata** in the system (i.e. views, captions, etc.) related to the entity will be extracted. If you would like to extract only a portion of the entity’s metadata (for example, only translations), you should see the section labeled “Granular Items” later in this document.



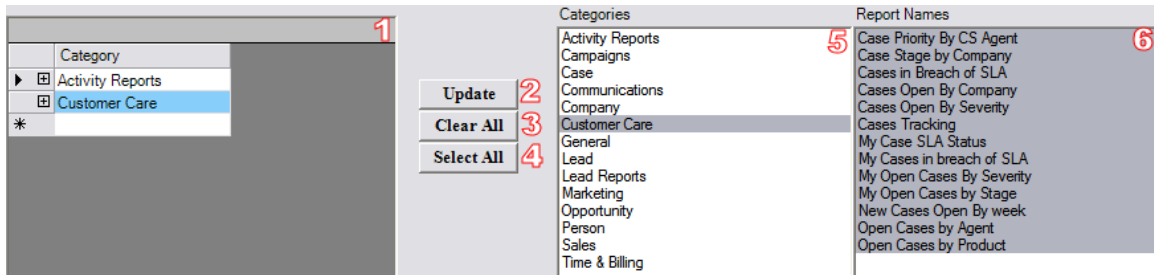
The following is a list explaining the items shown on the above image:

#	Description
1	Lists all of the tables that were found in the CRM database. You can select one at a time or multiple tables.
2	Check this box to generate the required T-SQL Create Table scripts. This script will update the target database to match the source database. That is, tables or fields that are missing will be added if this option is selected. If this is not selected the table will not be extracted but its metadata will be.
3	Check to extract the SQL table scripts and none of the metadata.
4	Click this button to mark the selected tables for extraction with the selected options.
5	Click this button to remove the selected item in the datagrid (6) from the list of tables marked for extraction.
6	Lists all of the tables currently marked for extraction and all their associated properties.

Once all of the desired tables have been marked for extraction, the next step is to select which reports to extract from the system. This is done from the “Reports” tab.

Reports

CRM Setup Factory: Extractor provides the ability to extract individual CRM Reports. Click the “Reports” tab to access this aspect of the software. CRM Reports are grouped by Categories. Within each category, you may select individual reports to extract. Reports extracted will contain all of the field and query information contained in the original report. This is a fast way of moving reports from system to system or including reports in your customized component for easy distribution.



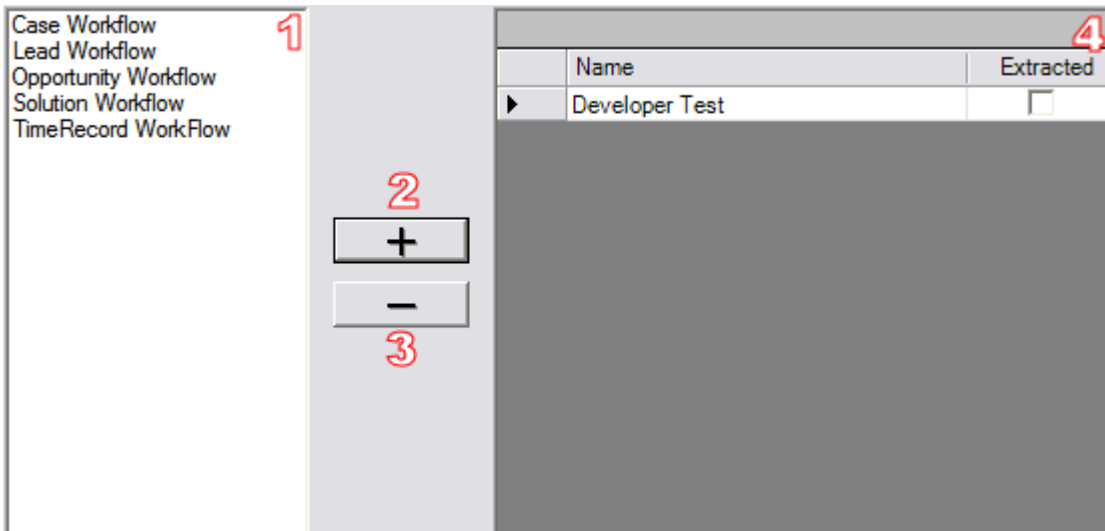
The following is a list explaining the items shown in the above image:

#	Description
1	Lists the report categories that have reports marked for extraction, clicking this plus sign (+) beside the category name will provide a link to view the selected reports. This is the same list that is displayed under the summary tab.
2	Use this button to update the list of reports marked for extraction.
3	Use this button to clear the list of reports marked for extraction.
4	Use this button to mark all reports for extraction.
5	Lists the report categories that were found in the system. Selecting one populates the list of reports in the selected category.
6	This is a list of all the reports in the selected category. To mark a report for extraction select it and click the updated button.

After all the desired reports have been marked for extract, the next step is to select which workflow entities to extract from the system. This is accomplished from the “Add Workflow” tab.

Workflow

The “Workflow” section of CRM Setup Factory: Extractor displays all the CRM Workflows in the source database. Workflows are extracted on an “all or none” basis. An extracted workflow from the source database *will* overwrite any workflow in the target database with an identical name. The structure or content of a workflow cannot be viewed or modified within the user interface of CRM Setup Factory: Extractor – you should use the Sage CRM workflow editor for this purpose.



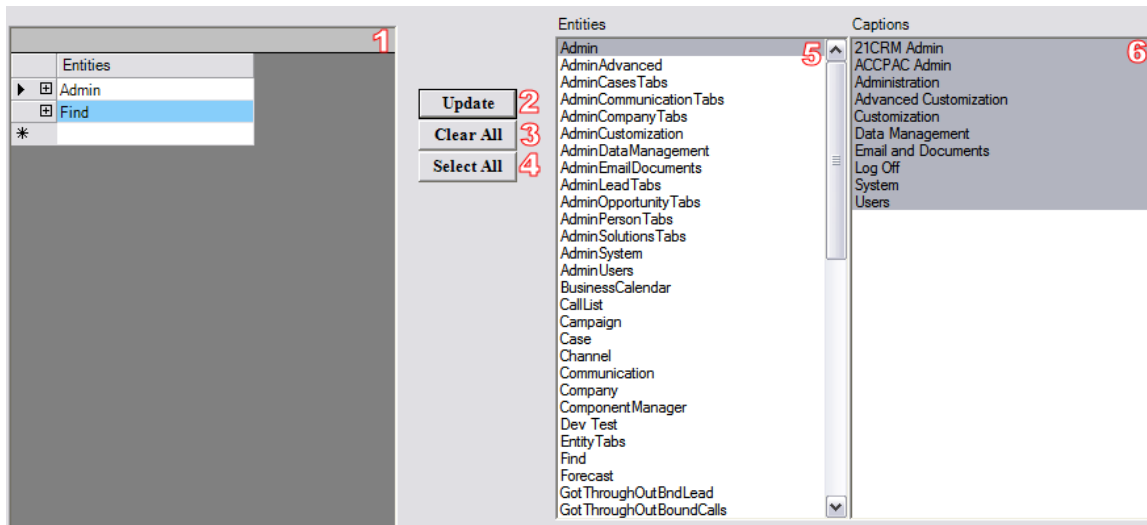
The following is a list explaining the items shown in the above image:

#	Description
1	Lists the workflow objects currently in the system.
2	This button adds the selected workflow to the list of workflows marked for extraction.
3	This button removes the selected workflow from the list of workflows marked for extraction.
4	Lists of all the workflows marked for extraction in the system. It also includes a column indicating whether the particular workflow has already been extracted.

After the desired workflows have been marked for extraction, the next step is to select which tab entities to extract. This is done for the “Tabs” tab.

Tabs

CRM uses tabs throughout the system as navigation tools for the user. In most cases the component you are extracting will be rendered useless if the user has no way of actually navigating to the component itself. The “Tabs” section of CRM Setup Factory: Extractor will allow for the selection of which tabs you would like to extract. CRM Tabs are grouped by Entities (i.e. tables or system menus). Within each entity, you may select which tabs to extract.



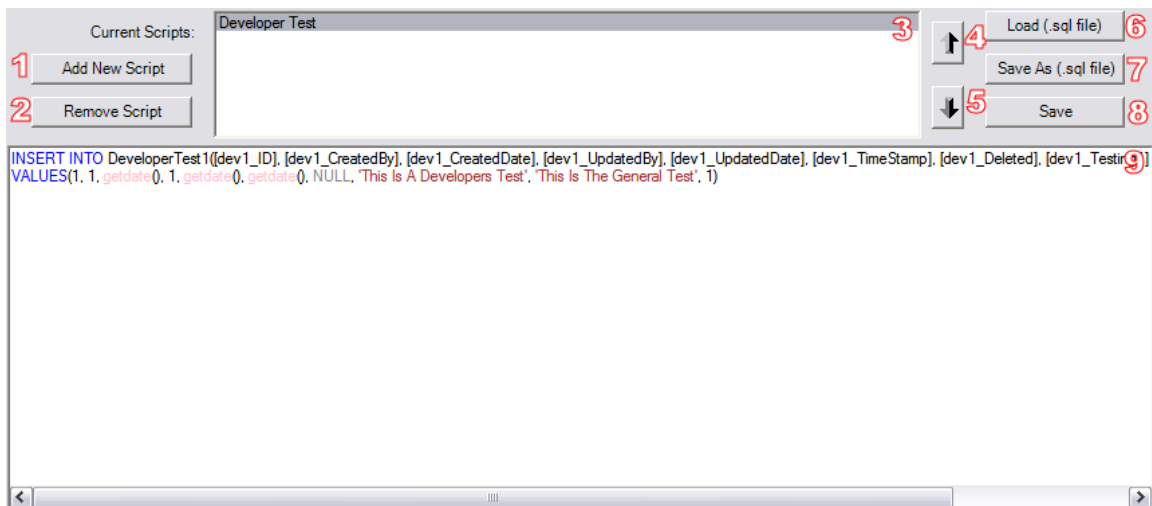
The following is a list explaining the items shown above.

#	Description
1	Lists the tab entities that have tabs marked for extraction. Click the plus sign (+) beside the entity name to provide a link to view the selected tabs. This is the same list that is displayed under the summary tab.
2	Use this button to update the list of tabs marked for extraction.
3	Use this button to clear the list of tabs marked for extraction.
4	Use this button to mark all tabs for extraction.
5	Lists the tab entities that where found in the system. Selecting one populates the list of tabs from the selected entity.
6	Lists the tabs in the selected entity. To mark a tab for extraction simply select it and click the updated button.

Once all the desired tabs have been marked for extraction, the next thing to do is define the custom T-SQL script to be run on the target system after all the objects marked for extraction have been added. This is done from the “Custom Scripts” tab.

Custom Scripts

In some scenarios the extracted components functionality might depend on certain data being in the database. This is the purpose of the “Custom Scripts” section. This section will allow you to add your own custom SQL scripts to the installer that will be run on the target system after all database modifications have been made. You should use this section if you have extracted data critical components from the system and the “Merge Fields” will not suffice.



The following is a list explaining the items shown above.

#	Description
1	Use this button to add a new script. This will display a dialog asking for a name for the new script.
2	Use this button to remove the selected script from the list.
3	Lists the custom SQL scripts in the project. The order that they appear in this list is the order that they will be run on the target system. This is useful if you have scripts that must be run in sequence.
4	Use this button to move the selected script up in the order of execution.
5	Use this button to move the selected script down in the order of execution.
6	Use this button to load an existing T-SQL script.
7	Use this button to save the selected script to the file system.
8	Use this script to save the changes to the selected script file. If changes are made to a script, you will be prompted to either save or discard changes when you select another script.
9	This is the script editor. It provides very basic syntax highlighting for the most common SQL operators. It is recommended that you use a T-SQL scripting environment such as Query Analyzer then copy and paste the script into this window.

If a custom SQL scripts causes an exception, an entry is added to the error log and execution continues on the next script. It is for this reason that we recommend that you only place multiple commands in a script if they are dependant on each other (i.e. Transactions).

After you have created your custom SQL scripts, the next step is to set up the merge fields.

Merge Fields

Quite often while playing back a CRM Setup Factory installer it is desirable to replace values extracted from the source system, with values more appropriate to the target system. For example, most tables in CRM contain audit fields such as `prefix_createdby`, and you may want to populate this field with a specific value during installation.

By default, CRM Setup Factory predefines two merge fields, as follows. You should not modify or remove these:

- CRM_UID
- COMPONENT

When executing your custom scripts, CRM setup factory will “merge” the “mergein” values into the specified “mergeout” fields. It is good practice to make your “mergeout” field names begin and end with percentage signs (%) so it is easy to identify them, and so it will be highly unlikely anything else in your script file would follow the same syntax. When modifying the scripts back on the target machine these values are replaced with the data provided in the `Merges.c21` script file or the Merge Fields tab.

You can add or edit existing merges from the “Merge Fields” tab.

```
Merges will replace certain text from the script fields with the specified text.
The format is as follows:

#mergeout: <TEXT TO REPLACE> #mergein: <TEXT TO REPLACE WITH>

Only one merge per line is permitted. Merges cannot span multiple lines.

#mergeout:%CRM_UID% #mergein:1
#mergeout:%COMPONENT% #mergein:Developer_Test
```

As can be seen in the example above, the text `%CRM_UID%` will be replaced with “1” during the script playback.

After you are satisfied with the merge fields, the next step is to select specific items from the system to extract. This is done from the Granular Items tab.

Granular Items

The Granular Items is used to specify, in specific detail, items that you wish to extract. This allows you to independently extract captions, screens, tabs, lists, etc. This is much more granular than the Entity extractor, which, upon selecting an entity will extract everything related to that entity. Use the Granular Items if you only want to extract certain aspects of an entity (a specific screen, a specific set of tabs, a specific caption or select list, etc). For example, someone might have the scenario where they would like to extract all custom captions for a selection field. Selecting the Custom Caption radio button and entering the selection field name in the capt_family textbox will cause Setup Factory to replace all selection items on the target system for that field.

Select which table to extract the data from and fill in the text boxes that are displayed. Indicate whether or not to use “Like” in the comparison and click the Create button. Selecting an item in the History list will populate the text boxes and allows you to edit the specific details.

The following is a list explaining the items shown in the above image:

#	Description
1	Check this box to use the LIKE operator in the SQL statement used to extract the data.
2	Use this button to add the breakdown to the list.
3	Use this button to remove the selected item in the history list from the list of breakdowns.
4	Use this button to save the changes made to the selected breakdown.

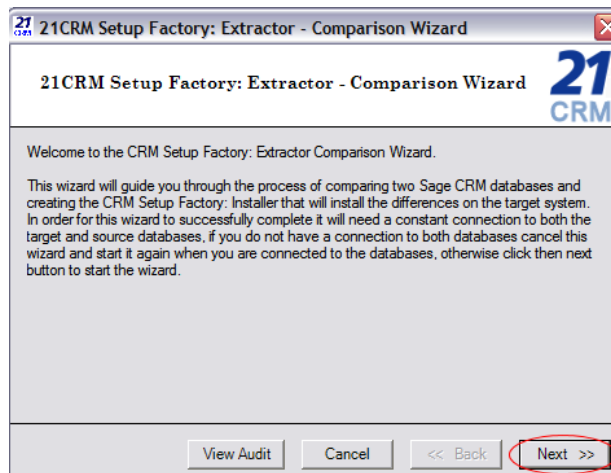
Alternatively you could use the “Comparison Wizard”.

Comparison Wizard

One of the most powerful features of CRM Setup Factory is the CRM Comparison Wizard. This wizard will allow you to compare two CRM systems together (the CRM system on the Connect tab is the “Source”). You may use this when you are not sure what custom data requires extraction (or manual entry is too time-consuming). The Comparison Wizard will compare two CRM databases and report the differences, allowing you to choose what should be marked for extraction. To start the wizard you should select which aspect of the system you wish to compare. You do this by choosing one of the radio buttons on the “Granular Items” tab. Then, instead of entering matching values into the text fields, click on the button labeled “Use Wizard”, which appears below the text fields.

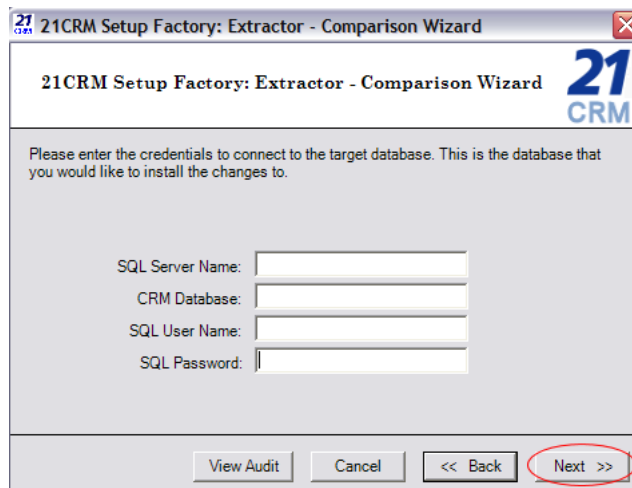
Use Wizard

This will start the wizard and display the following dialog:



This dialog explains what the Comparison wizard is and what it will do. It is worth mentioning that you will require a constant connection to both the source and target databases at all times during this process. When you are ready to begin the process click the “Next” button, this will display the following dialog.

Hint: If the “Target” system is not on your local network (for example, at a customer site) you will need to backup the database at the remote site, copy the backup to your local network, and restore the database to SQL server. CRM does NOT need to be installed or connected to this database – only the database itself is necessary.



21CRM Setup Factory: Extractor - Comparison Wizard

21CRM Setup Factory: Extractor - Comparison Wizard **21 CRM**

Please enter the credentials to connect to the target database. This is the database that you would like to install the changes to.

SQL Server Name:

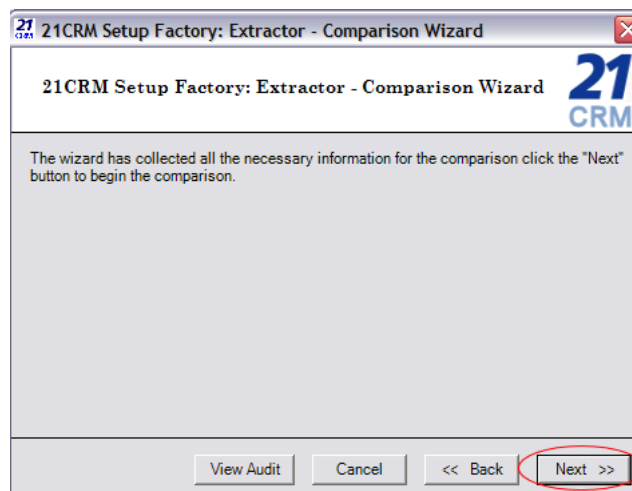
CRM Database:

SQL User Name:

SQL Password:

View Audit Cancel << Back **Next >>**

This dialog prompts you for the SQL credentials for the target CRM system. The source SQL credentials are taken from the information entered on the “Setup” tab. After you have finished entering the SQL credentials click “Next” to continue. At this point the wizard will check connectivity to the target system and if there was an error connecting an error message will display. Once the SQL credentials have been verified the following dialog will be displayed.



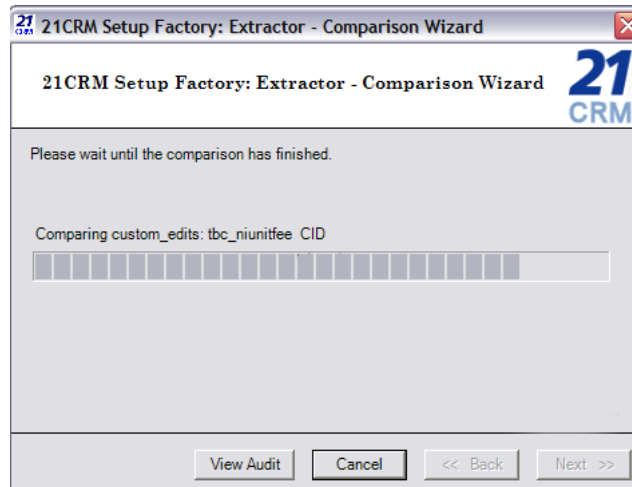
21CRM Setup Factory: Extractor - Comparison Wizard

21CRM Setup Factory: Extractor - Comparison Wizard **21 CRM**

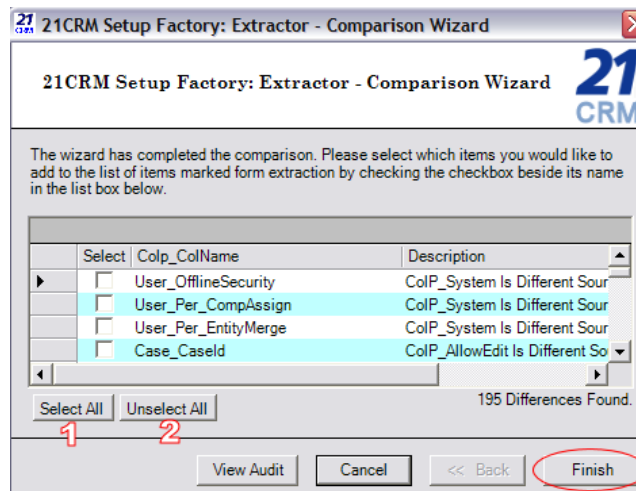
The wizard has collected all the necessary information for the comparison click the “Next” button to begin the comparison.

View Audit Cancel << Back **Next >>**

This dialog informs you that the wizard has collected all the required information and is ready to begin the comparison routine. Click “Next” to display the following dialog:



This dialog illustrates the comparison process to you by updating the status bar each step of the way. Once the comparison has completed the wizard will automatically display the following dialog:



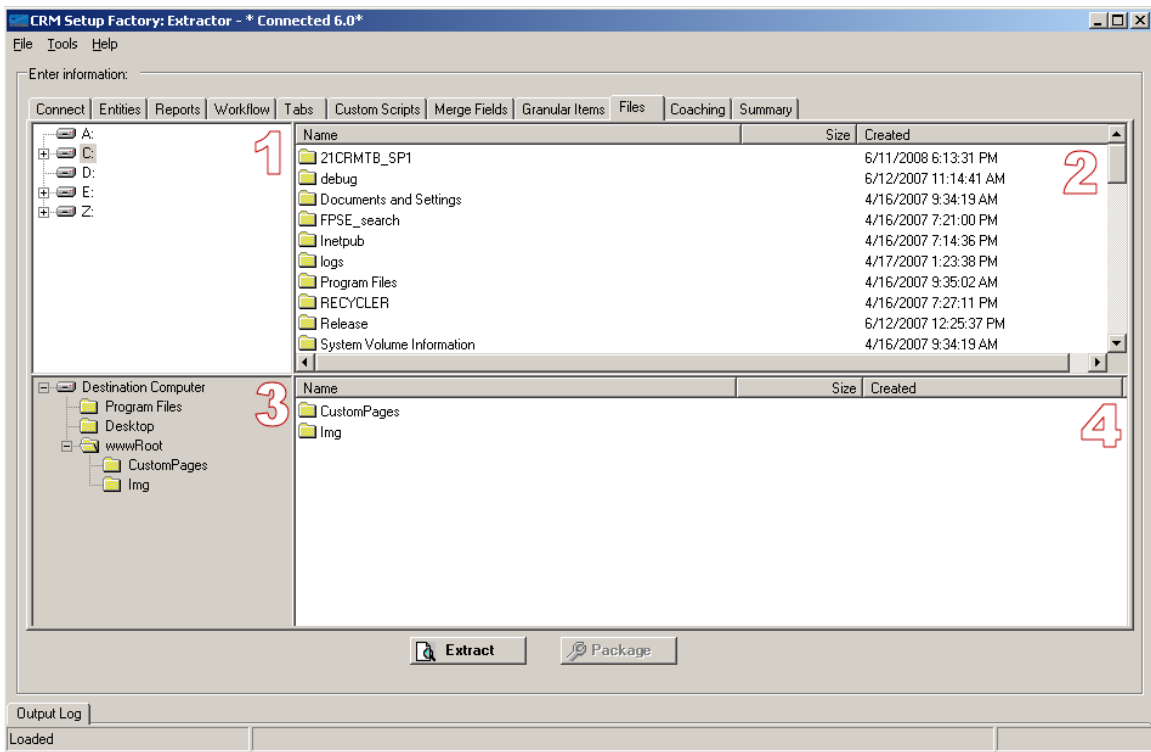
This is where you will actually select what data you would like to mark for extraction. You accomplish this by clicking the checkbox beside the record. Each type of comparison will display custom results (however they will all have a “Description” field which will explain the database differences. (The description shows what is different in the *target* database). You can select all of the differences by using the “Select All” (1) button and you can clear all selections by using the “Unselect All” (2) button. Once you have finished selecting which records you would like to extract, click the “Finish” button. This button will close the window and update the granular item list accordingly. (All information recorded in the granular items section will be extracted when the system extracts the metadata).

After you choose all the desired granular items, the last step is to select which files you would like to migrate to the target file system. This is accomplished from the Files tab.

Files


Most CRM extensions rely on .ASP pages or .DLL application extensions to function and you will need to add these files to the target file system in order for them to function properly. This is the purpose of the “Files” section. From here you will be able to browse the source file system and add files to the installer. CRM Setup Factory: Extractor will then add these files to the file system after the extraction process has finished.

If the target system has more than one CRM installation or a non-default installation directory, the instance selected during the installation will be used to extract the files to.



The following is a list explaining the items shown in the above image:

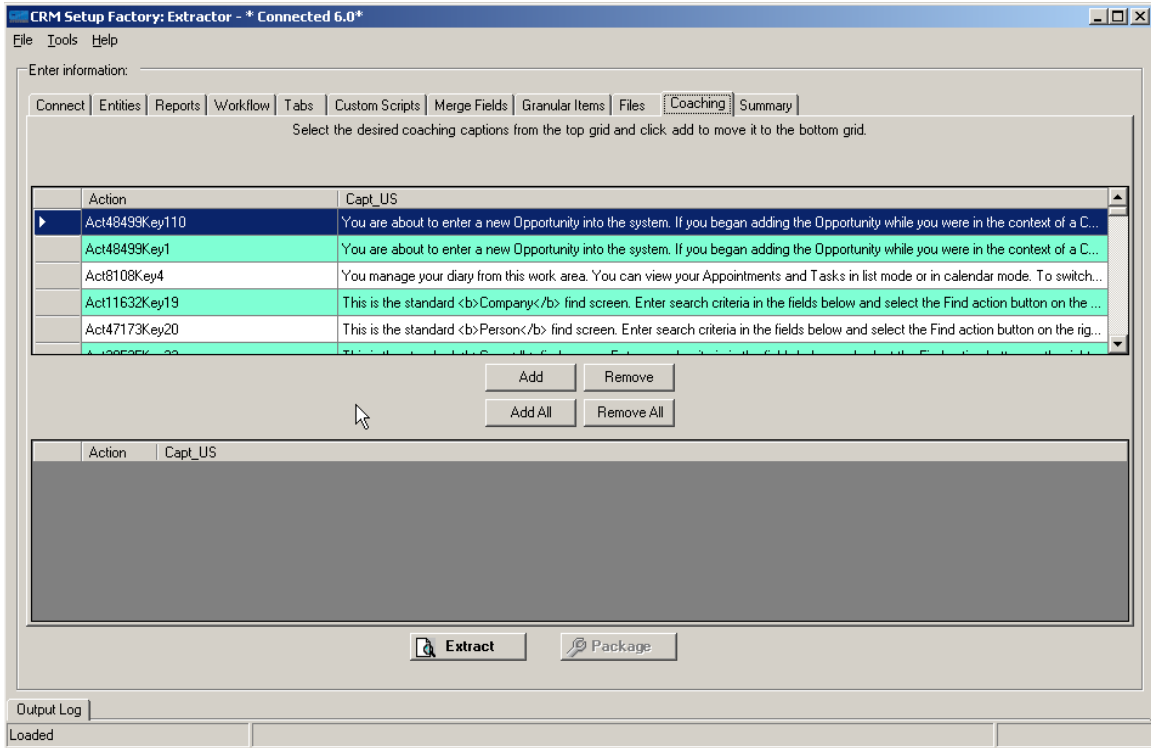
#	Description
1	The tree view of the file system.
2	Displays the contents of the selected folder in the tree view (1).
3	The treeview of the target file system. This contains 3 default folders: <ul style="list-style-type: none"> ➤ Program Files Represents the target systems “Program Files”

	<ul style="list-style-type: none">➤ Custom Pages Represents the custom pages directory of the target systems CRM instance.➤ Desktop Represents the Desktop of the target system
4	Displays the contents of the selected folder in the tree view (3) on the target system. You can add new folders here by right clicking and adding a directory 

To add files, drag and drop them into the target systems file structure (4).

Now that all the entities to be extracted have been selected, it is time for the actual extraction. The following buttons are always visible and can be clicked at any time from any tab.

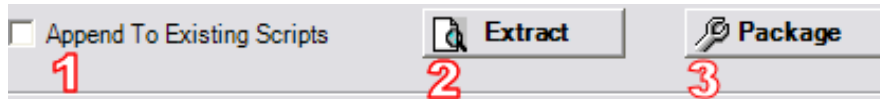
Coaching



Under the coaching tab you can pick which coaching items you wish to add to the package. Simply select and click on Add, Remove, Add all, Remove All to keep which Coaching items you would like to transfer.

Extraction

To create the installer that will play back the extraction you will need to use the “Extract” and “Package” buttons respectively. The “Package” button will not become enabled until a successful extraction has been completed. These buttons should only be used after you have selected all the items you would like to extract, and after you have used the script editor to edit your scripts.



The following is a list explaining the items shown in the above image:

#	Description								
1	This check box indicates to only extract data that has not yet been extracted and append the information to the existing scripts. If you have removed any objects from the project it is recommended that you leave this unchecked to get a fresh set of scripts, excluding the objects that were removed.								
2	Clicking this button will begin the extraction process. During the extraction process the “Log Output” textbox will be populated, as well as a progress bar will indicate the progress of the extraction.								
3	<p>After a successful extraction, or if the current project has been extracted before, this button becomes enabled. Clicking it will create the executable that is used to install the extracted objects into the target system. This creates four files in the “Installer” folder under the project directory they are as follows:</p> <table border="1"> <tbody> <tr> <td>SetupFactory.exe</td> <td>This is the executable that you will execute to install the extracted objects on the target system.</td> </tr> <tr> <td>Files.zip</td> <td>This file contains all the files that were selected to be installed on the target system. <i>NOTE: Even though this is a .zip file, modifying it in any way will corrupt the file and you will need to recreate the file from CRM Setup Factory: Extractor</i></td> </tr> <tr> <td>CRMSetupFactory.dll</td> <td>Application extension required by SetupFactory.exe</td> </tr> <tr> <td>EIF.dll</td> <td>Application extension required by SetupFactory.exe</td> </tr> </tbody> </table> <p>You must copy all four of these files to the same directory on the target</p>	SetupFactory.exe	This is the executable that you will execute to install the extracted objects on the target system.	Files.zip	This file contains all the files that were selected to be installed on the target system. <i>NOTE: Even though this is a .zip file, modifying it in any way will corrupt the file and you will need to recreate the file from CRM Setup Factory: Extractor</i>	CRMSetupFactory.dll	Application extension required by SetupFactory.exe	EIF.dll	Application extension required by SetupFactory.exe
SetupFactory.exe	This is the executable that you will execute to install the extracted objects on the target system.								
Files.zip	This file contains all the files that were selected to be installed on the target system. <i>NOTE: Even though this is a .zip file, modifying it in any way will corrupt the file and you will need to recreate the file from CRM Setup Factory: Extractor</i>								
CRMSetupFactory.dll	Application extension required by SetupFactory.exe								
EIF.dll	Application extension required by SetupFactory.exe								

	machine in order to successfully install the extracted objects.
--	---

Using CRM Setup Factory: Script Editor

What is the Script Editor?

CRM Setup Factory: Extractor creates script files with the .c21 file extension that it uses to store the metadata extracted, along with other information such as Merges, Custom SQL scripts and data that indicates how the target system should be set up. These scripts are stored in clear text to allow the end user the opportunity to edit them, for reasons such as adding Merge fields to the scripts or to check that the information you intended on extracting was extracted.

This can all be accomplished in any text editor such as Notepad, but the downfall of this is that you must constantly reference the documentation for proper syntax and parameter counts, which can result in corrupt scripts that cause the installer to malfunction. *It is worth mentioning that one corrupt script could potentially corrupt an entire CRM instance.* This is one reason that playing back a CRM Setup Factory Installer will automatically ask the user to backup the database.

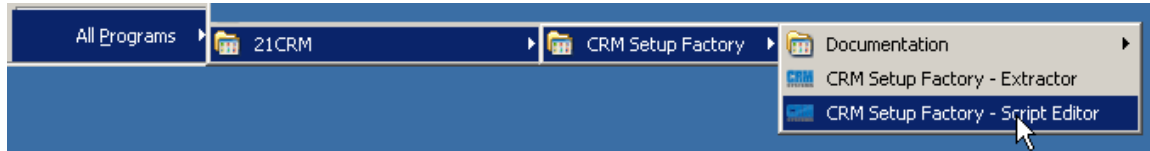
The CRM Setup Factory: Script Editor allows you to modify the .c21 script files in an environment that provides syntax highlighting as well as a summary panel that will show you the proper syntax for the script you are currently working on and the required parameters and their corresponding fields in the CRM database.

Opening the Script Editor

There are several ways to open the script editor and they are outlined below:

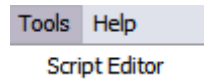
- **Start Menu**

After installation a shortcut should have been added to your start menu under the CRM node



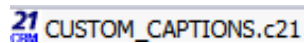
- **CRM Setup Factory: Extractor**

From the CRM Setup Factory: Extractor interface you can use the “Tools” menu to launch the script editor.



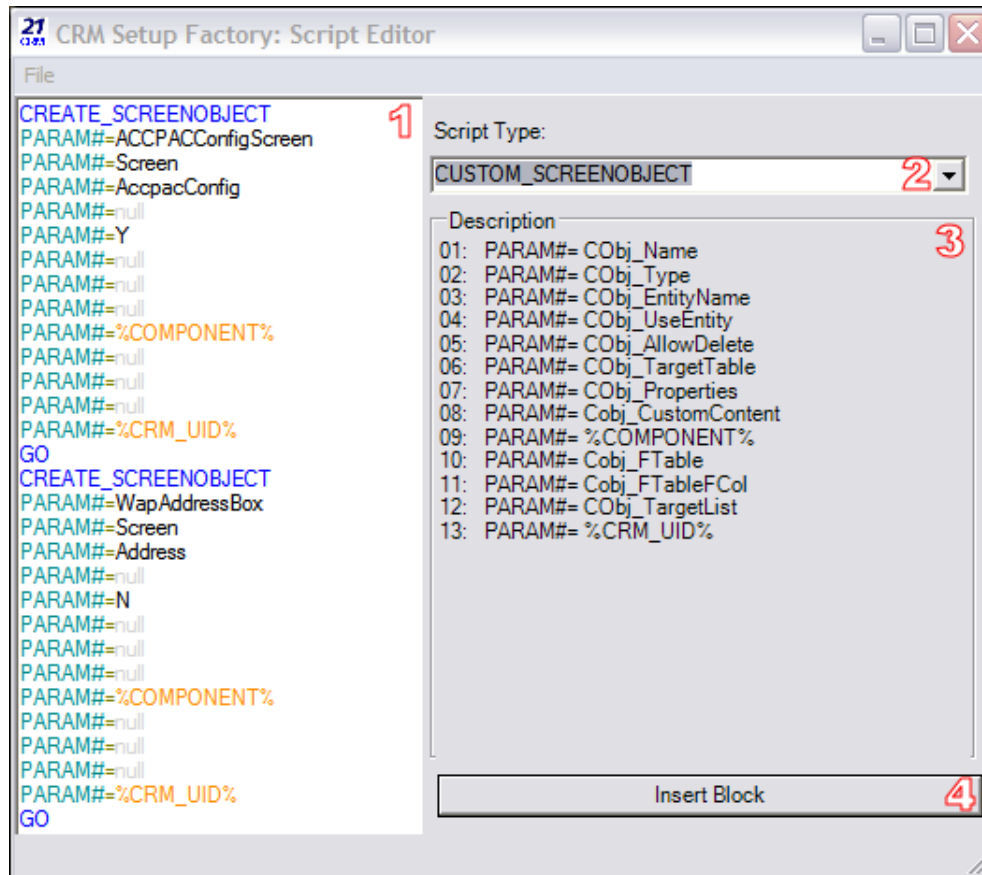
- **Script File**

Double clicking on a script file from Windows explorer will launch the Script Editor.



Using CRM Setup Factory: Script Editor

Once the Script Editor is open, you will be presented with the following interface:



The following is a list explaining the items shown in the above image:

#	Description
1	This is the area where you will write your scripts. The script editor offers syntax highlighting for all .c21 script files to help ensure a properly formatted script file.
2	This list contains all the recognized script types and allows you to select the desired type to view the outline of how a properly formatted block should look.
3	The description for the selected script type is displayed here. It displays how many parameters are required for the script type block and their corresponding values in the CRM database.
4	Clicking this button will insert an empty script block of the selected type into the script. You will not be able to add a script block to a script of another type. Attempting to insert a DBCreate script into a Custom_ScreenObject script results in a message box indicating that the action is invalid.





To open, close or save a script simply select the appropriate action from the "File" menu. Selecting "Save As" will allow you to save a copy of the script to your file system while leaving the original script unaltered and in its original location. The original script file will still be used but this will allow you to back up a specific script file.

After you have altered the desired scripts you must compile the scripts into the SetupFactory.exe installer. You can accomplish this by opening CRM Setup Factory: Extractor and loading the project that contains the scripts you edited and clicking on the "Create Installer" button, for more information on the creation of the installer see the section labeled "Extraction" above.

Using CRM Setup Factory: Installer

What is CRM Setup Factory: Installer?

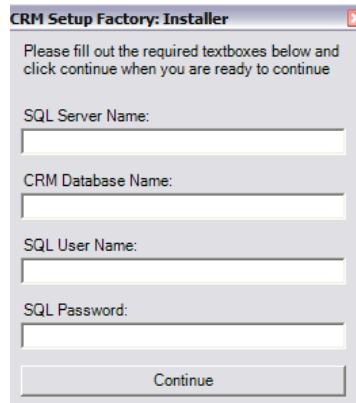
CRM Setup Factory: Installer is an application that is automatically created when you click the “Package” button in CRM Setup Factory: Extractor under the project directory in a folder named “Installer”. The CRM Setup Factory: Installer is what plays the extracted scripts back on the target machine. The installer consists of four files which all need to be in the same directory for the application to run. They are outlined below.

Name ▲	Size	Type
 CRMSetupFactory.dll	632 KB	Application Extension
 EIF.dll	212 KB	Application Extension
 Files.zip	3 KB	Compressed (zipped) Folder
 SetupFactory.exe	544 KB	Application

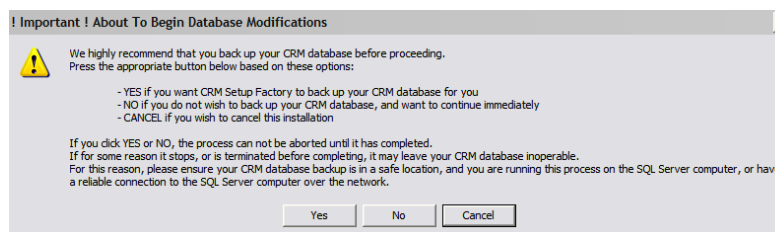
SetupFactory.exe	This is the executable that you will execute to install the extracted objects on the target system
Files.zip	This file contains all the files that were selected to be installed on the target system. NOTE: <i>Even though this is a .zip file, modifying it in any way will corrupt the file and you will need to recreate the file from CRM Setup Factory: Extractor</i>
CRMSetupFactory.dll	Application extension required by SetupFactory.exe
EIF.dll	Application extension required by SetupFactory.exe

Using CRM Setup Factory: Installer

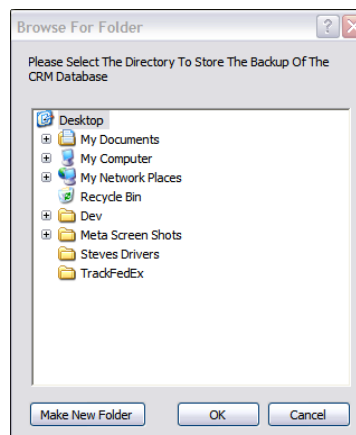
To begin the installation process, execute the SetupFactory.exe file which will display the following interface.



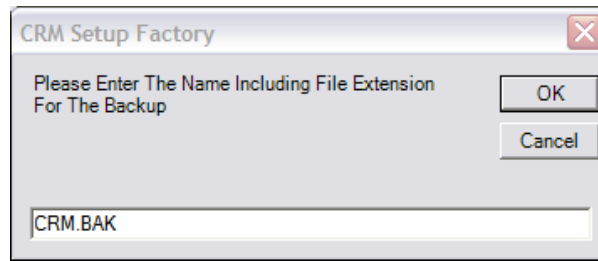
Enter all the information required to connect to the target SQL Server. It is strongly recommended that you run CRM Setup Factory: Installer on the CRM web server. After entering the SQL Server credentials, a dialog will display asking if you would like CRM Setup Factory: Installer to create a backup of the CRM Database. Read the dialog carefully and select the appropriate option to continue.



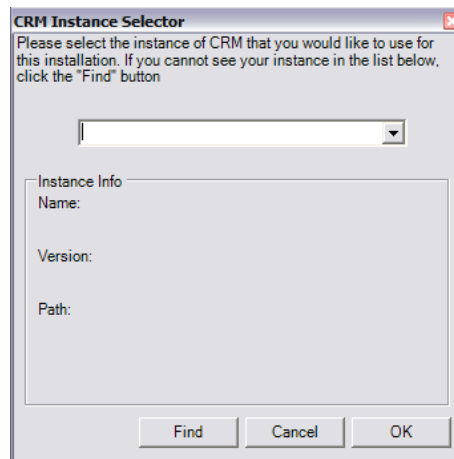
If you choose to have CRM Setup Factory: Installer backup of the CRM database you will be prompted with two dialogs. The first will ask you for the location on the local file system to place the backup.



After selecting the location to store the backup, a second dialog will request a name for the backup, the default is CRM.BAK.

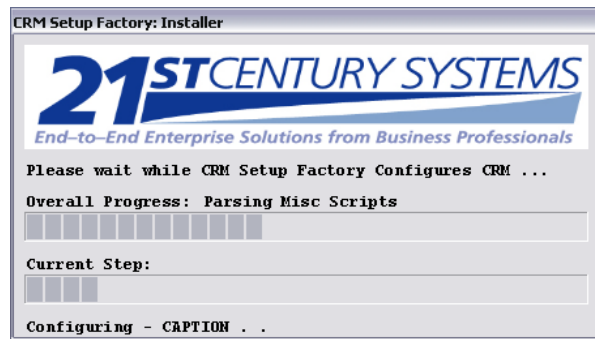


Once you have created the backup, if you chose to do so, the process will begin. If you have multiple instances of CRM, or if CRM is installed in a non-default location, you will be presented with the “Instance Selector”.



This dialog will list all the instances of CRM that were found on the machine. If the instance to be used for this installation is not in the list of available instances, use the Find button to navigate to the installation directory of the desired instance. The Instance Info section will give you a brief summary of the selected instance, including the name of the instance as well as the version of CRM and the path to the installation.

If you cannot find the appropriate instance or do not wish to continue, click the Cancel button. Otherwise, once you have selected the appropriate instance, click the OK button to continue with the installation. This will display the following window.



This dialog will remain open until the installation has completed, after which it will close itself and any other open dialogs completing the installation process.

If an error occurs during the installation a file name Error_Log.txt will be created in the directory that CRM Setup Factory: Installer was run from, containing all the errors that arose during the installation process.

Known Issues & Troubleshooting

At this time there are no known issues with the CRM Setup Factory: Extractor.

If you experience any issues, please report them to us by contacting your software provider, or, if you are a CRM Systems partner, by logging into our online self-service support portal at <http://www.CRMsystems.com> and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

For further assistance you can contact us:

CRM Systems Inc
201 – 1335 Erin Street
Winnipeg, MB R3E 2S7
Phone: 1.204.480.9772
Email: support@CRMsystems.com

Online: <http://www.CRMsystems.com>

Electronically submitted support requests generally will be responded to the fastest. Please consider using that option.