CRM Spell Check for Sage CRM Version 4.0

System Admin Guide

Publisher: CRM Systems, Winnipeg MB Canada

Who Should Read This Guide

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

- Sage CRM 5.8 or higher
- MS SQL Server
- 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 and configuration of the CRM Systems Spell Check Extension.

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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Part 1: Installation

CRM Prerequisites

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

- You **Must** have Word 2003, XP or 2007 installed on the CRM server you're installing spell check on. Word must be activated and not display any prompts or messages to the user
- CRM 5.8, 6.0, 6.1h or 6.2 must be **installed** on MS Sql Server 2000SP3+
- CRM must be **configured** in IIS to run as a user that has access to run Microsoft Word and CRM Spell Check.
- For users outside the US the windows user and SQL user used for installation must use the **mm/dd/yyyy** date format during the installation process. This date format can be restored to original settings after installation complete.
- Please ensure you read the installation guide prior to running this installation.
- The guide details all the necessary instructions you require to successfully install and run this software.
- CRM must be completely configured and functioning
- CRM must be configured to run in the context of a user who has permission to run word, and who, when logged into the server as that user, can execute word and save a new word document.
- You have **BACKED UP YOUR CRM DATABASE**. In the event of an integration failure, or other problem, you will need this backup to return to your previous state of affairs. **DO NOT SKIP THIS!** To backup your database, right click on the database in Enterprise Manager, and select "All Tasks / Backup Database".

CRM is now prepared for the installation process.

Possible Errors

While in most cases your installation should go smoothly, it is possible you could encounter errors during the install process. However, it is possible your CRM configuration may be slightly different than the installer expects. This is due to the fact that you have the ability to customize CRM on your own. If you receive an error message please read it carefully. Any errors that occur should be accompanied by an appropriate message, and may possibly include instructions on how to proceed. Please follow them.

CRM Setup Factory

CRM Spell Check is packaged for distribution using an exciting new technology developed specifically for deployments of commercial 3rd Party extensions to Sage CRM.

CRM Setup Factory will automatically ask you if you want to backup your CRM database, and if you agree, it will backup the database to the location of your choice. While we don't suggest you rely on this capability, it is available if necessary, and does ease the process of creating your "safety net" should an installation error occur.

CRM Setup Factory maintains a log file during installation that can be used to troubleshoot any errors that occur. This file is located at the:

[windowspath]\system32\install_log.log

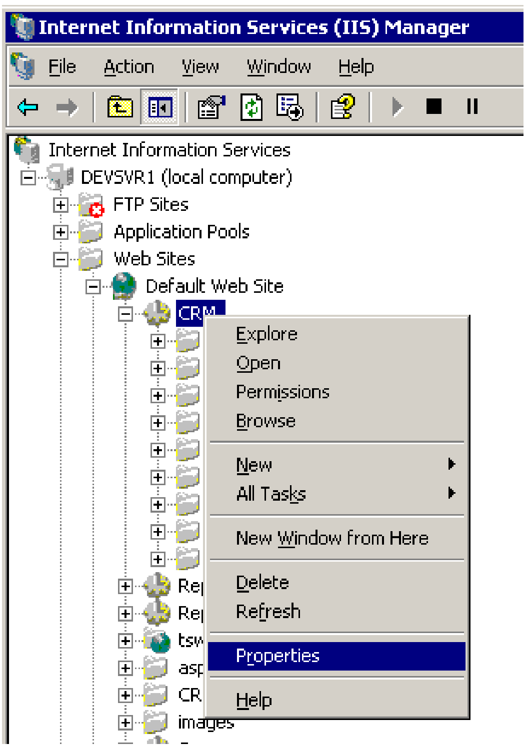
folder, and is available for review using any text editor, such as notepad. If you require support, it will be useful if you can send this log file along when you contact us.

Microsoft Word

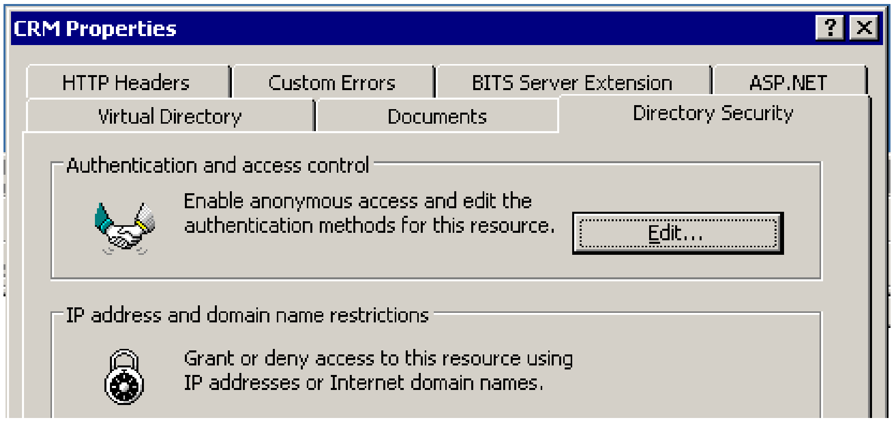
The CRM Spell Check Extension uses the Microsoft Word language dictionary as its language reference. It is therefore necessary for the CRM server to have MS Word installed and operational. It is also important that CRM be run in the context of a user who can run MS word on the server.

If you have not previously configured your CRM system to operate with a user other than the normal IIS_IUSER account, you should do so.

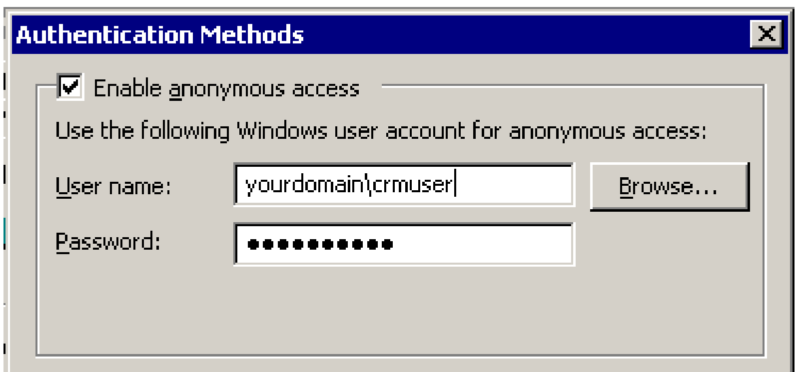
Right click the CRM virtual folder in the IIS administration module in Windows, and choose properties:



Choose the “Directory Security” tab.



Under “Authentication and Access Control”, click edit.



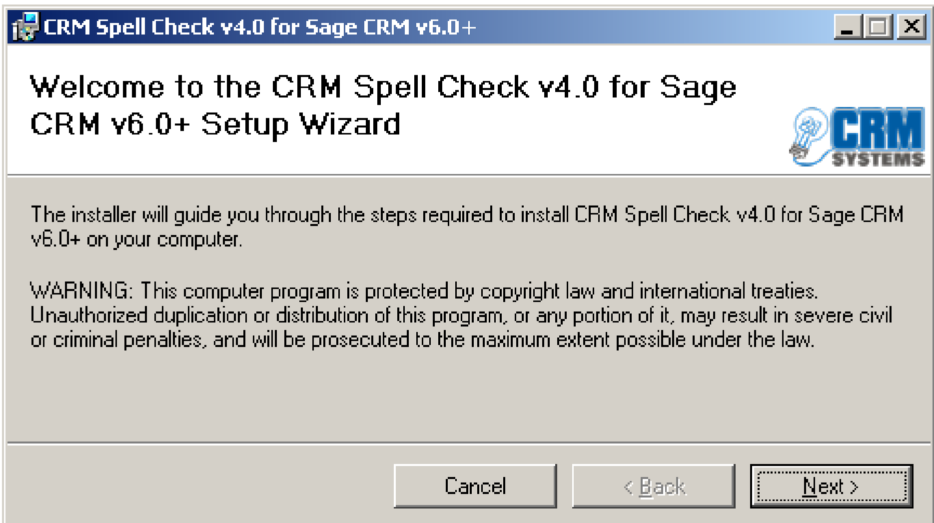
Edit the “anonymous” user to be a valid domain (or local system) account. Enter the password for this user, click OK, and windows will prompt you to confirm the password again. Complete this action.

You have now configured CRM so it will run properly with MS Word.

You should log off the CRM windows server, and log in as the user entered in the screen above. Launch MS Word, and make sure you can create a new Word document. If you can, you have confirmed your configuration from a security perspective.

Installing

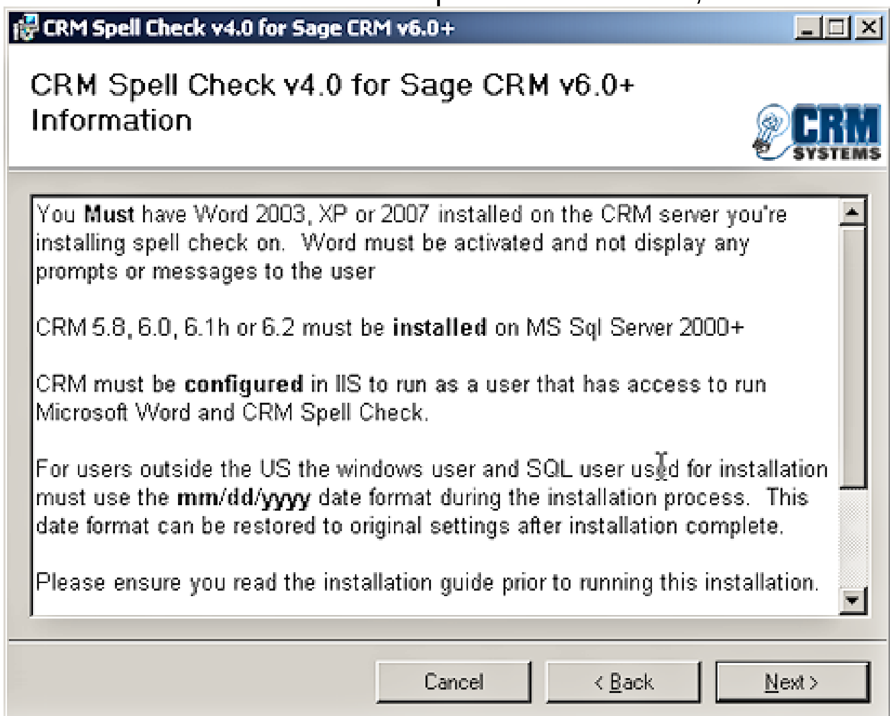
CRM Spell Check must be installed on the CRM server. Find and double click on the “CRMSpellCheck40Setup.exe” file. This will begin the CRM Spell Check installation.



Click **next** (above) to continue the installation process.

The Information page outlines the requirements for CRM Spell Check. These are detailed in the manual here, and listed on this screen during the installation process.

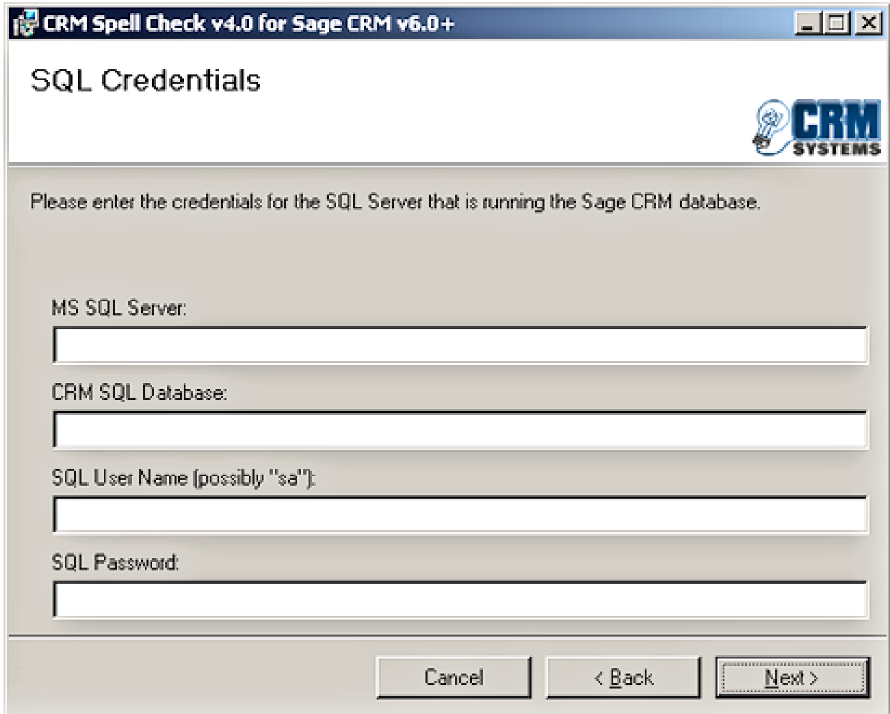
Please do not overlook these prior to installation, or the installation can fail.



Once you have read these and ensured you have the necessary pre-requisites, please click next to read the EULA agreement.

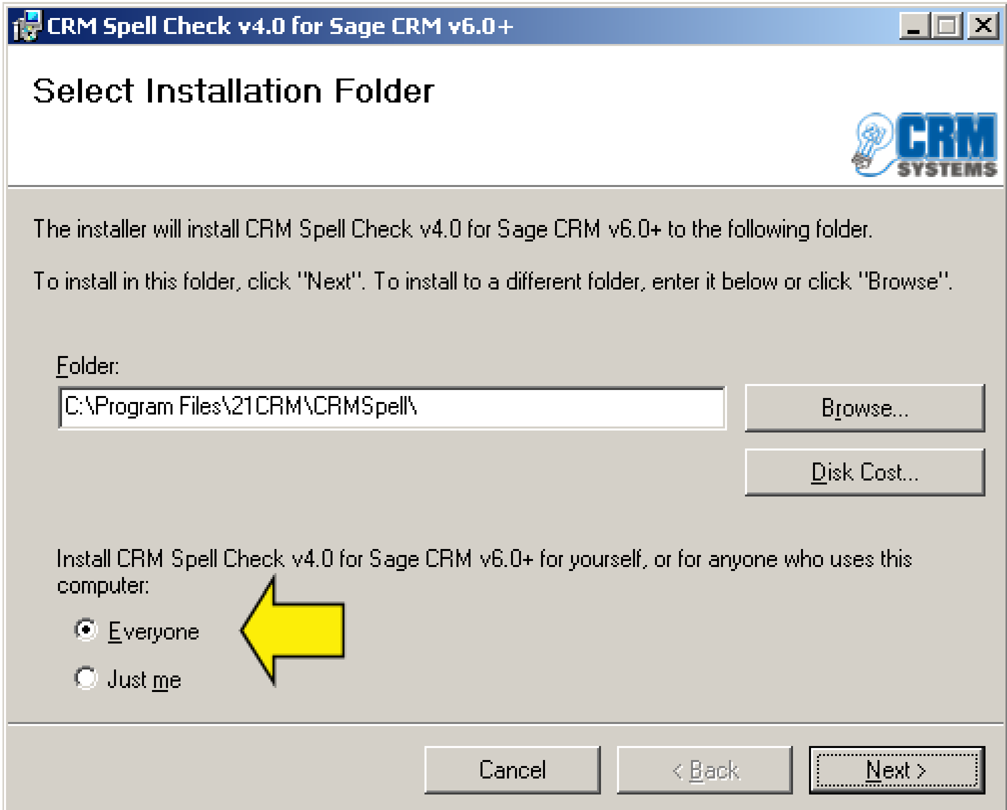
You must read and agree to the CRM Systems EULA. Click on “**I Agree**” then click on **Next** once you have agreed to the EULA (screen cap below).

The next stage is to enter your SQL Server name and credentials so CRM Spell Check can install into your CRM database:



Please ensure you fill in all fields:
The MS SQL Server
CRM SQL database name
SQL User and Sql Password

The next step is to select the installation Folder

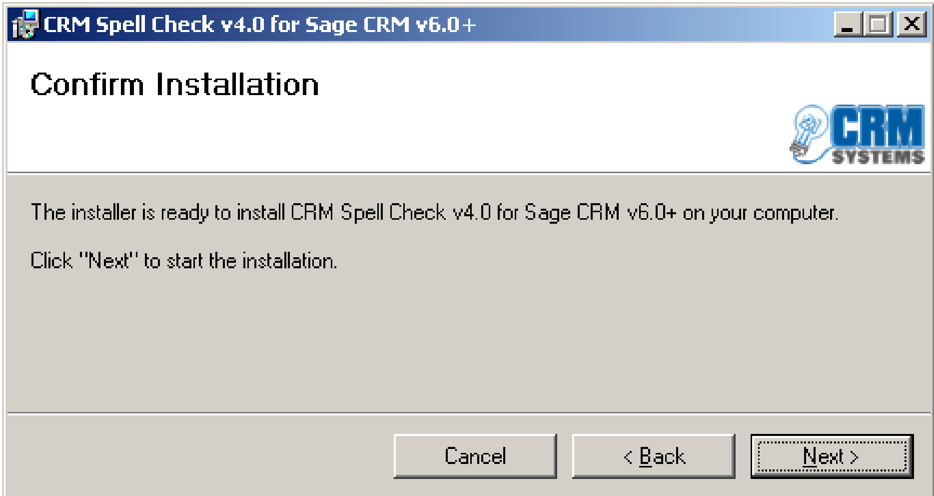


On this page you be asked to choose your installation path.

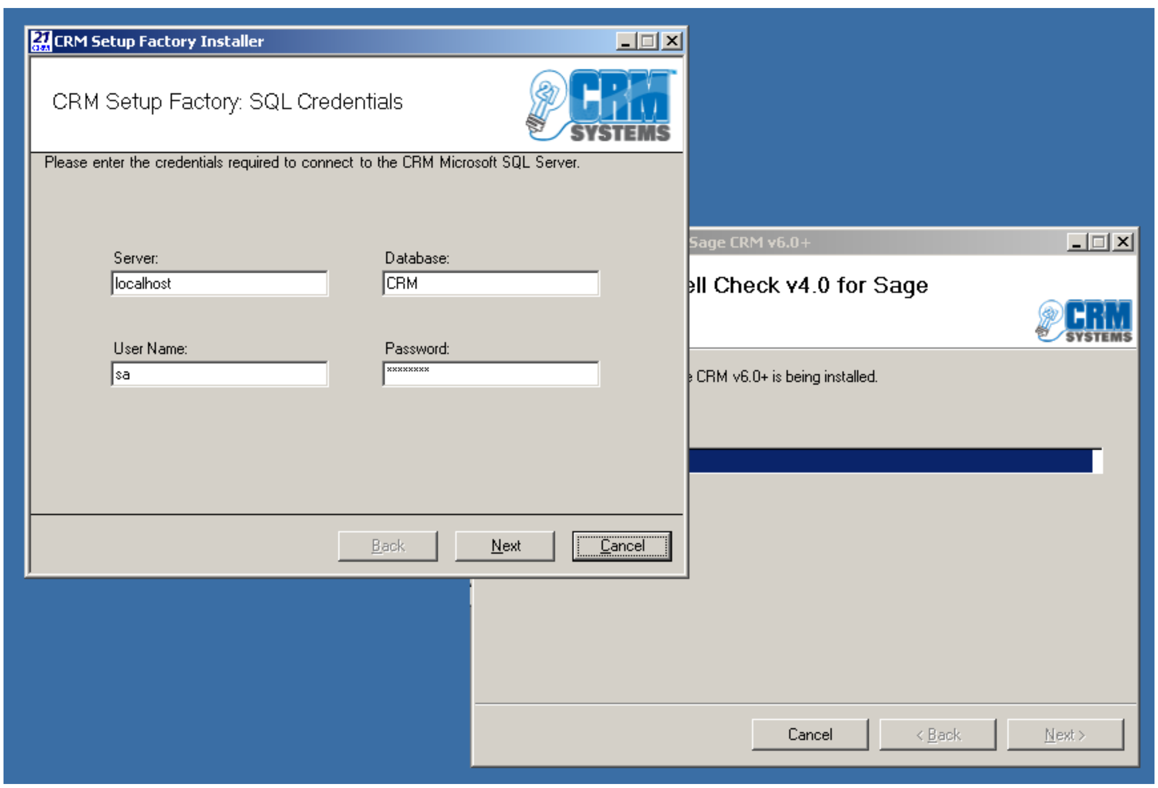
IMPORTANT: Ensure the radio buttons at the bottom of the screen have "Everyone" selected (yellow arrow).

Click **next** to continue.

The installer is now ready to complete the implementation. Click next (below) to begin.

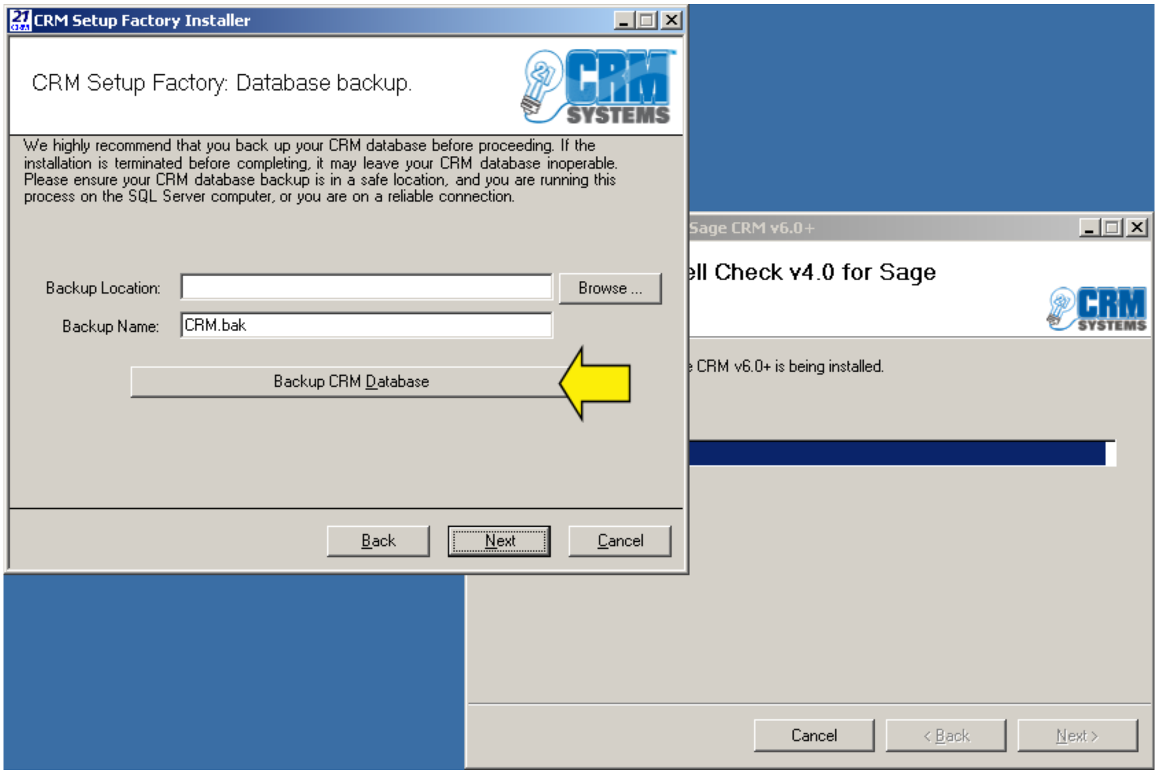


The installation will begin. Your screen will look like the following:

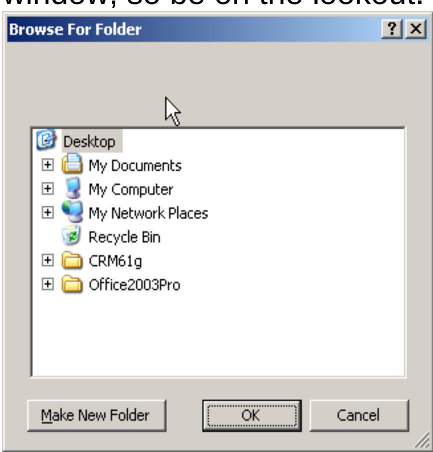


CRM Setup factory will pop up with the sql credentials you had entered previously. Click next to continue installation.

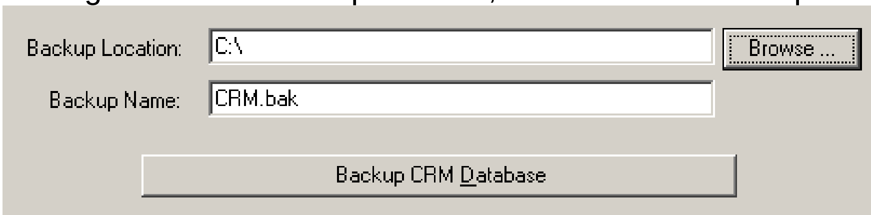
Soon thereafter, CRM Setup Factory will ask you if you wish to proceed, or backup your database:



If you were to click "Browse" you would be presented with the folder browse window. It is possible this window could pop up behind the Setup Factory window, so be on the lookout.



Having selected a backup location, now enter the backup name to use

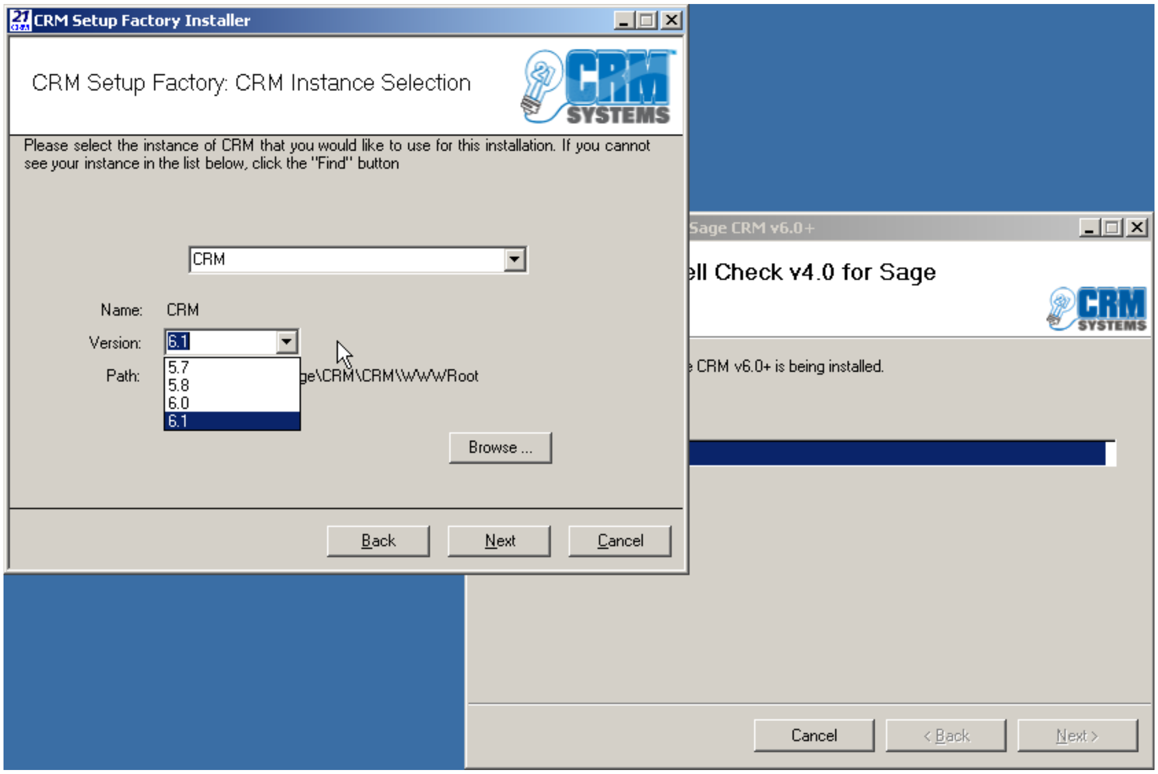


Enter the name you wish to give your backup file (i.e. CRM.BAK as above). SQL backups use the extension ".bak". We suggest you do as well. Click OK. Setup Factory will then back up your database, and continue the installation procedure.

If you do not wish to back up at this time, click on Next to continue the installation or "cancel" if you want to abort this installation, so you can go and manually back up your database, or to restart at a later time.

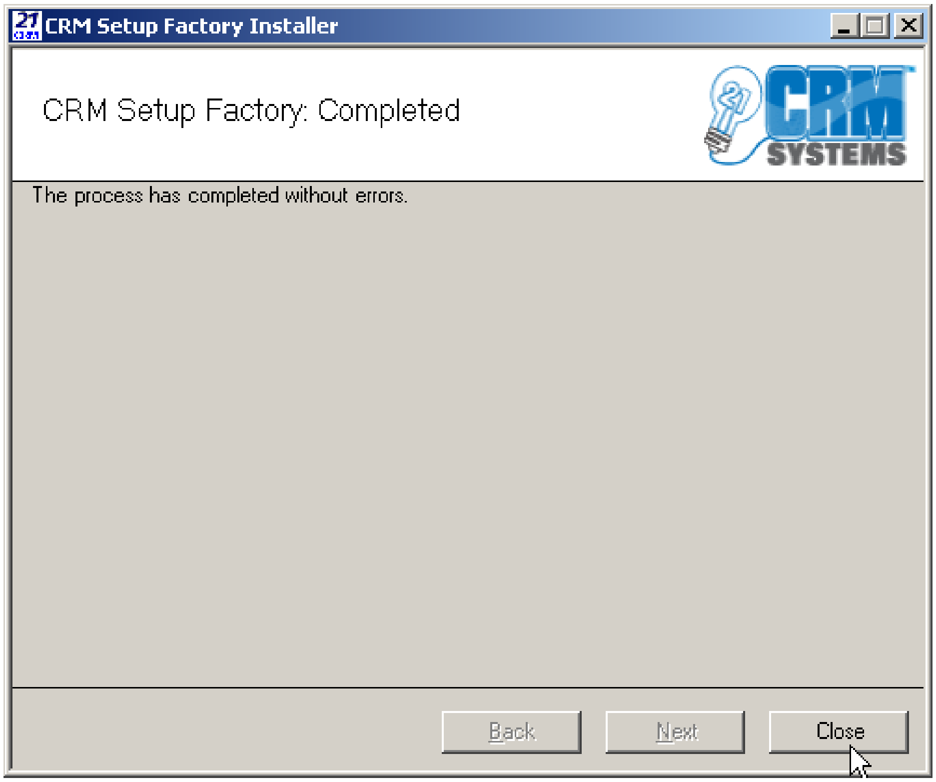
CRM Instance Selection

You will then need to tell CRM Setup Factory into which instance of CRM you wish to install.



Select the proper CRM instance. If multiple copies of CRM are installed on this server, then you will see several options to choose from.

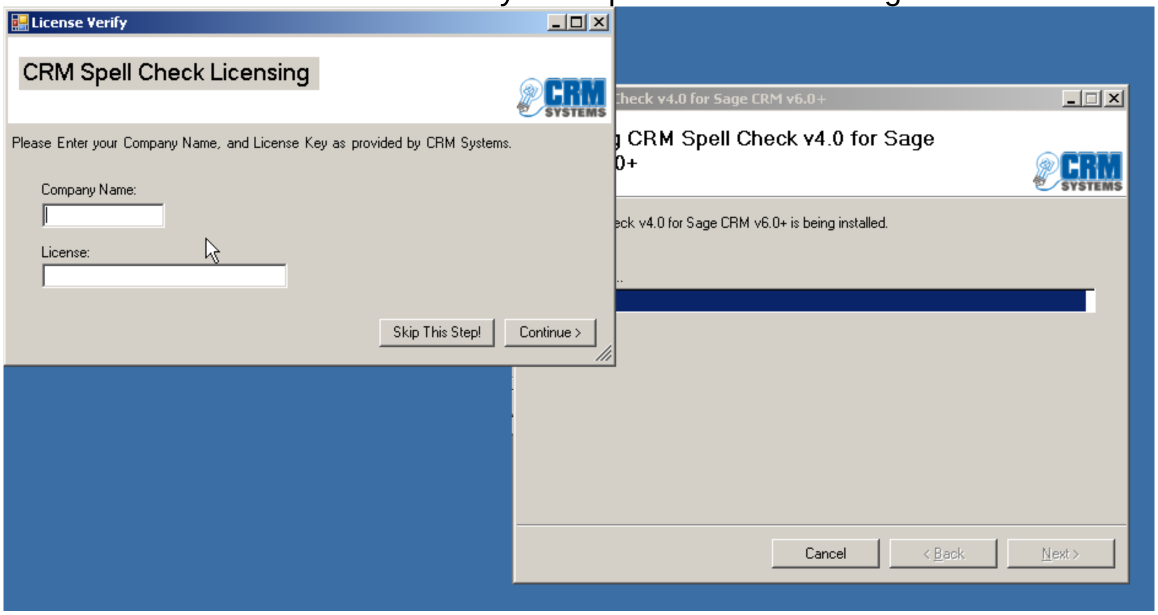
The installation into CRM will begin:



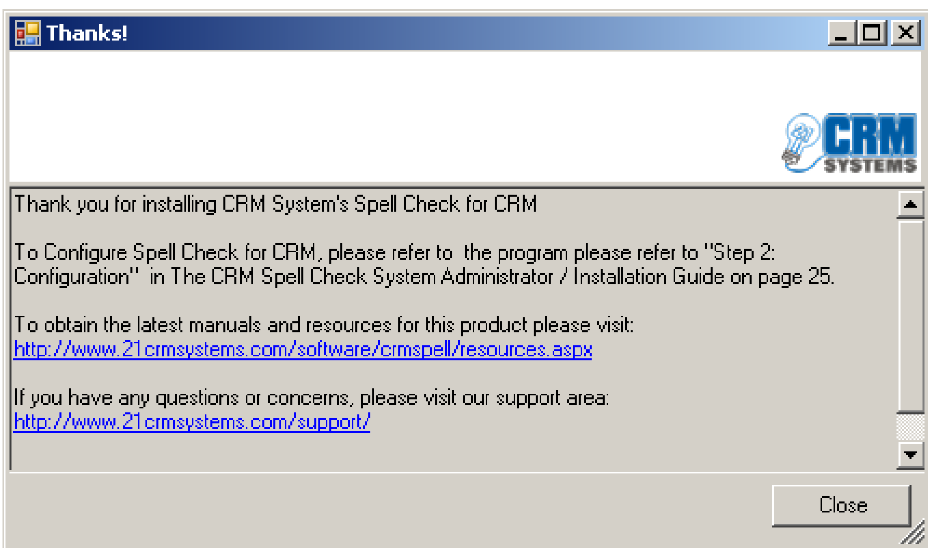
Note: Installing CRM Spell Check over a Terminal Services Session may result in graphical displays not refreshing correctly or displaying properly. This does not indicate an installation problem, you just won't see the progress bars (above) while the installation is occurring.

Once complete, you will see this screen that shows the Installer is finalizing the installation.

The installer will now ask for the keys for Spell Check Licensing…



Enter the company Name and License that were given to you upon receipt of the purchase or trial e-mail. Enter these to complete your installation.



Installation Complete

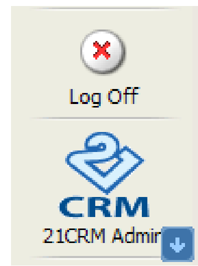
Your installation is now complete. **We strongly suggest you now reset the CRM server using the “IISRESET” command at the windows command prompt**. This will ensure CRM’s ***meta*** data is updated fully. The thank you screen also contains support and resource links for this software at www.21crmsystems.com

Part 2: Configuration

Prior to being used, CRM Spell Check requires some minimal configuration.

The CRM Admin Common Control Panel

All CRM Extensions utilize the "CRM Admin Common Control Panel". This control panel provides you with a single location to manage your license keys, and configure each of our products.



Log into CRM, and click on the "Administration" menu button in the CRM menu bar. You should see the CRM Admin button in the lower left hand corner.

Click the button, and you will be taken to the CRM Systems Extension Products Menu

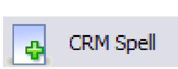
CRM Systems Extension Products Menu	
Menu Selection	**Description**
CRM Spell	CRM Spell Check
Settings	Licenses, Keys & Settings

It is possible that your menu may have additional options. If you have other CRM Extensions installed such as:

- CRM Order Entry
- CRM Time & Billing
- ERP Connect
- others

Icons for those products may also appear.

CRM Spell – used to administer CRM Spell Check specifically.
Settings – used to view, and manage CRM Systems license keys and some product specific settings. There are no product specific settings for CRM Spell Check, but an entry will have been made here with your license key and related information.

Click the 

button to access the CRM Spell Check Admin Menu.

The CRM Spell Check Admin Menu

The menu appears as follows:

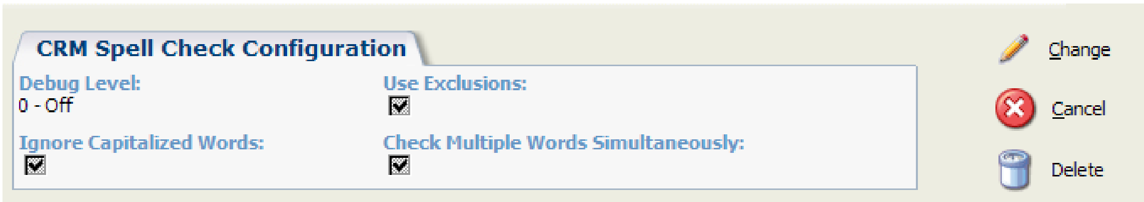
Spell Check for Sage CRM Version 4.0	
Menu Selection	**Description**
Settings	Administrative Settings
Exclusions	Word Exclusion Management
Manage	Manage Field Spell Checking
Return	Return to 21CRM Admin Menu

The menu items are described below:

- Settings – general software settings
- Exclusions – lists and allows you to manage the list of words excluded from spell checking. Use this to enter common jargon or other terms that CRM Spell Check identifies as misspelled, when in fact they are correct.
- Manage – allows you to enable and disable spell checking on any text field, on any screen in CRM.
- Return – return to the common CRM Admin Menu.

Configure Settings

Select the “Settings” menu item. This will display the following page.



The settings on this page are as follows:

- **Debug Level**:
  This setting indicates the level of debugging or audits that are written to the CRM Spell Check error logs when the software is used. This setting is set to “0 – Off” by default and it is recommended that you keep this setting unless you are experiencing problems with the software or are instructed to do so by a CRM Systems support technician. The possible options are as follows:

  - 0 – Off : Nothing is written out
  - 1 – Minimal: Very basic audits written out
  - 2 – Expanded: Mostly all audits are written out
  - 3 – Verbose: Every audit is written out

- **Use Exclusions**:
  This setting indicates whether the Word Exclusion list is used. If enabled, and words appear in the list, they will be ignored for the purposes of spell checking.

- **Ignore Capitalized Words**
  This setting will ignore capitalized words, usually used for Names, locations ,etc.

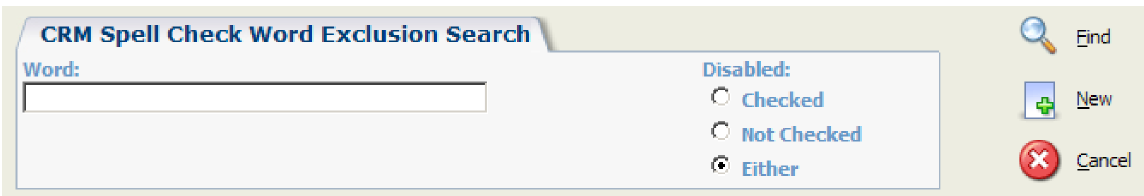
- **Check Multiple Words Simultaneously**
  This allows spellcheck to check multiple words during the spell checking process.

Word Exclusion List

If you are continually experiencing a situation where CRM Spell Check is indicating a word is spelled incorrectly, when in fact for your purposes it is correct, the system administrator can add that word to the exclusion list found in the Spell Check Admin menu 

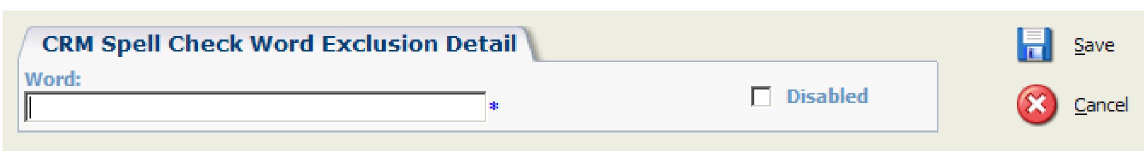
.

CRM Spell Check will then ignore the word and allow it to be added without incident.



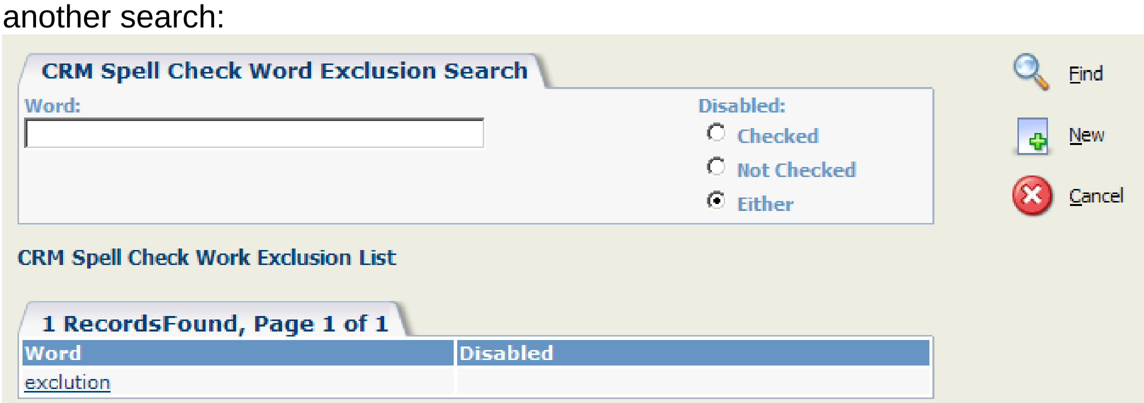
Click “New” to add new word exclusion. Or fill in the “Word” field and hit “Find” to search for a word already added.

NOTE: CRM Spell Check automatically ignores any word that begins with a CAPITALIZED letter, or that begins with a number, such as “48 Co.”. You do not need to exclude such words.



Enter the word to exclude, and click “save”. You can come back at any time and edit a word, marking it as “disabled” if you want the exclusion to temporarily not apply. You can delete words from the list if they are no longer required.

Once you have added a word to the list, it should be viewable when you perform another search:



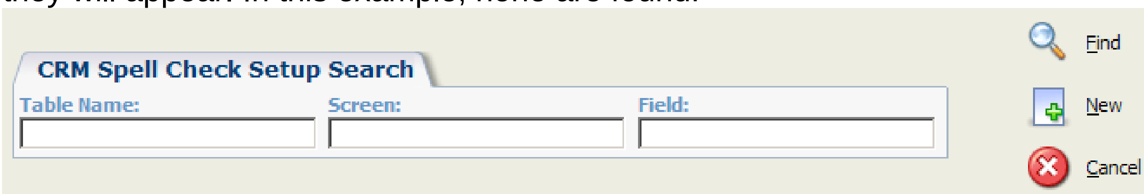
You have completed the configuration of word exclusion.

Configure Fields for Spell Checking

By default, CRM Spell Check does not begin checking any specific fields in CRM. You can find out which fields have been configured at any time using the "Manage" option 

from the CRM Spell Check admin menu.

Enter the criteria for your search and click **find**. If any entries have been made, they will appear. In this example, none are found:

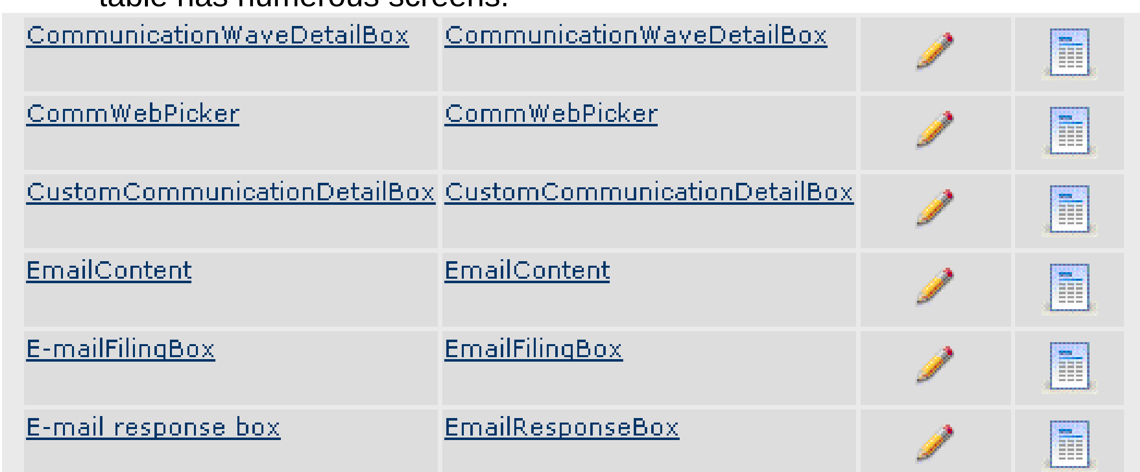


In this example we will enable CRM Spell Check to spell protect the "Detail" field on the new communication (ie, task or appointment) screen.

To enable a field for spell checking, you need to do a little background research first. You need to know 3 things:

1. The ***table name*** the field is located on, for example, "Communication".

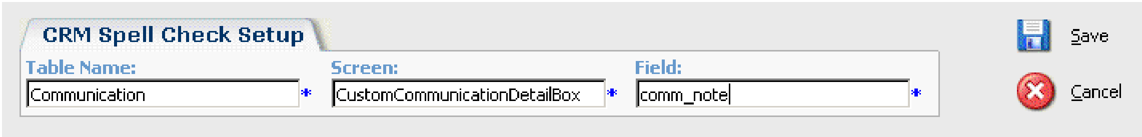
2. The ***screen name*** that the field appears on. For example. Communication table has numerous screens:



   The one we are interested in is the "CustomCommunicationDetailBox" – which is the screen used to allow you to enter details of a task or appointment.

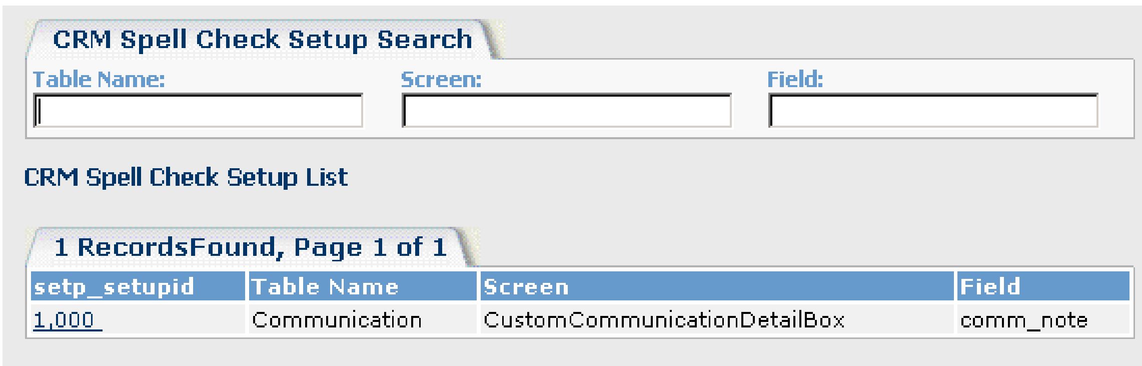
3. The ***field name***. You should always enter field names in lower case letters. In this example, we'll be spell protecting "comm_note" – the detail field for a new task or appointment.

Fill in the details of your new field to spell protect:

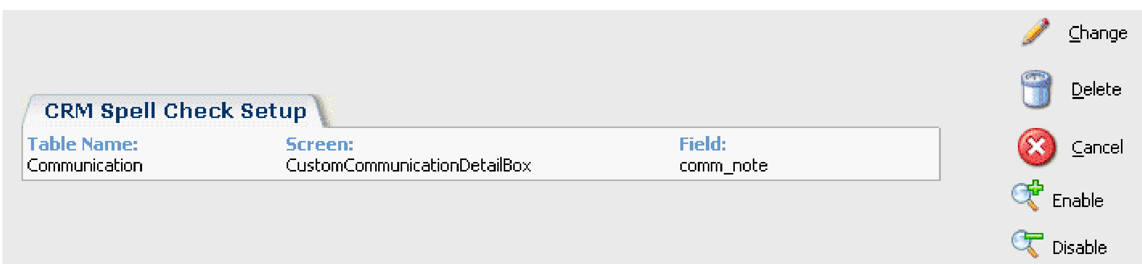


Click **save**.

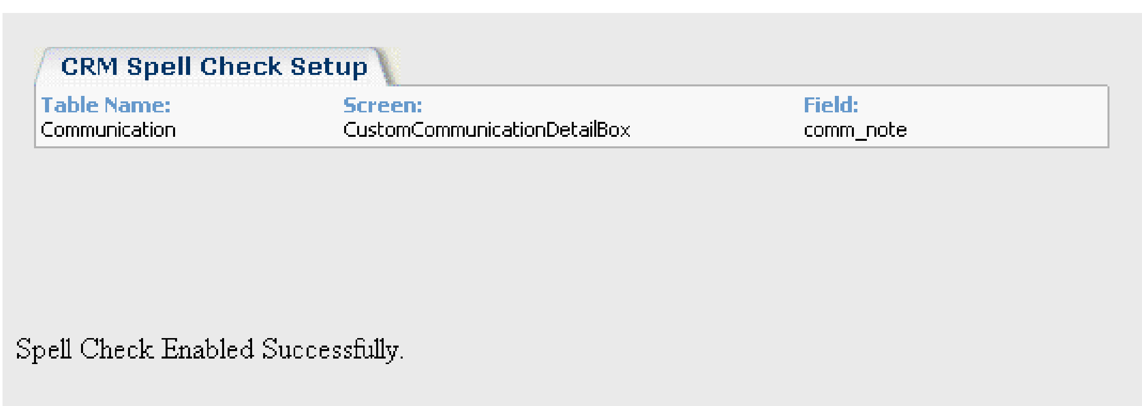
Return to the search screen. Click your new field:



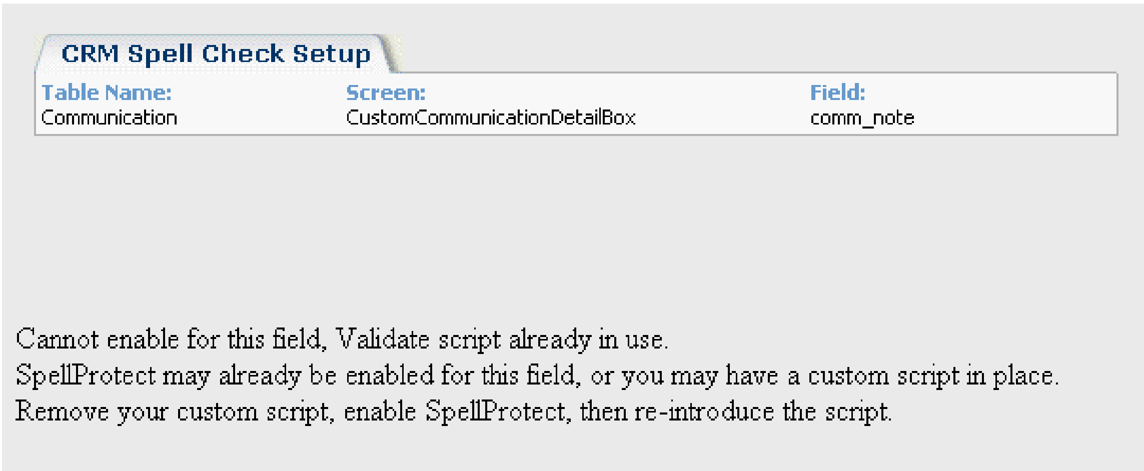
You can now enable the field for spell checking.



Click the “Enable” button. If all goes well you will see the following:



If an error of any kind occurred while enabling the spell check, you will see something similar to the following, although the specific reason for the error may be different:



If this occurs, follow the instructions provided, or contact us for further assistance. You can find out more online at http://www.CRMsystems.com/crmspell

Enabling Users

By default, users are NOT enabled for spell checking. You must enable those users in the system that you wish to use spell checking. You can do this by accessing their user profile in the CRM User admin area:

Edit their user profile, and look to the “User Admin Extra” section at the end of the screen. You will see a new option:

Check this box, and click save. This user is now enabled for CRM Spell Checking.

Users who are NOT enabled for CRM spell checking, do not use CRM Spell Check licenses, and will not see any sort of message if they enter invalid data into a spell protected field.

Enabling "Ignore Spelling"

By default, if a user is enabled for spell checking, and they enter invalid data into a spell-protected field, they will not be able to save their data until the spelling error is corrected. Sometimes, however it is necessary to save "incorrect" data. Sometimes this is because the data is not "incorrect", even if the software thinks it is, sometimes its simply because it is inconvenient to correct it at that particular time.

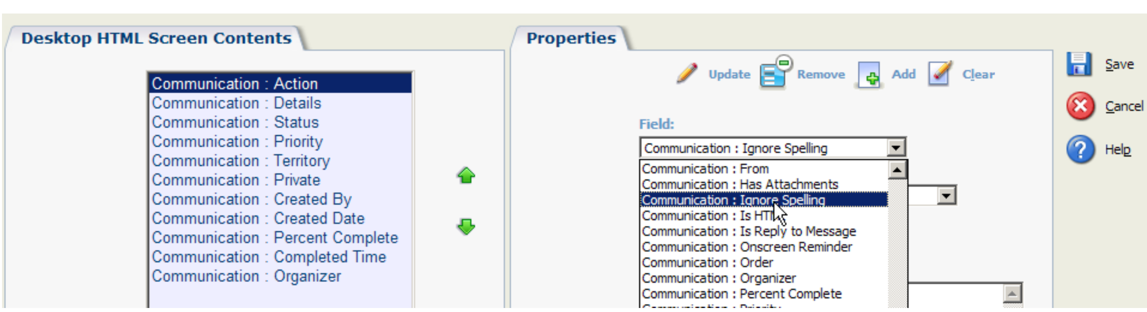
When you first enable spell checking on any given table within CRM, CRM Spell Check adds the field "prefix_ignorespelling" to the table, where "prefix" is the proper prefix for fields on that table. For example, above when spell checking was enabled for the "communication" table, the following field was added to the table:

comm_hasattachments	comm_hasattachments	Selection	
comm_ignorespelling	comm_ignorespelling	Text	1
comm_ishtml	comm_ishtml	Text	1

This field can be added to the screen, so that the user has the ability to "check" it, thereby ignoring spell checking for that one use.

Add this field to your screen. The user will now be able to bypass spell checking on an exception basis. If you do not add this field, the user will be forced to correct spelling before they continue. See the section below on using CRM Spell Check for instructions on how to mark a record to be "ignored".

You need to add this field to **any** screen that uses spell checking, and that you want to enable this bypass function.

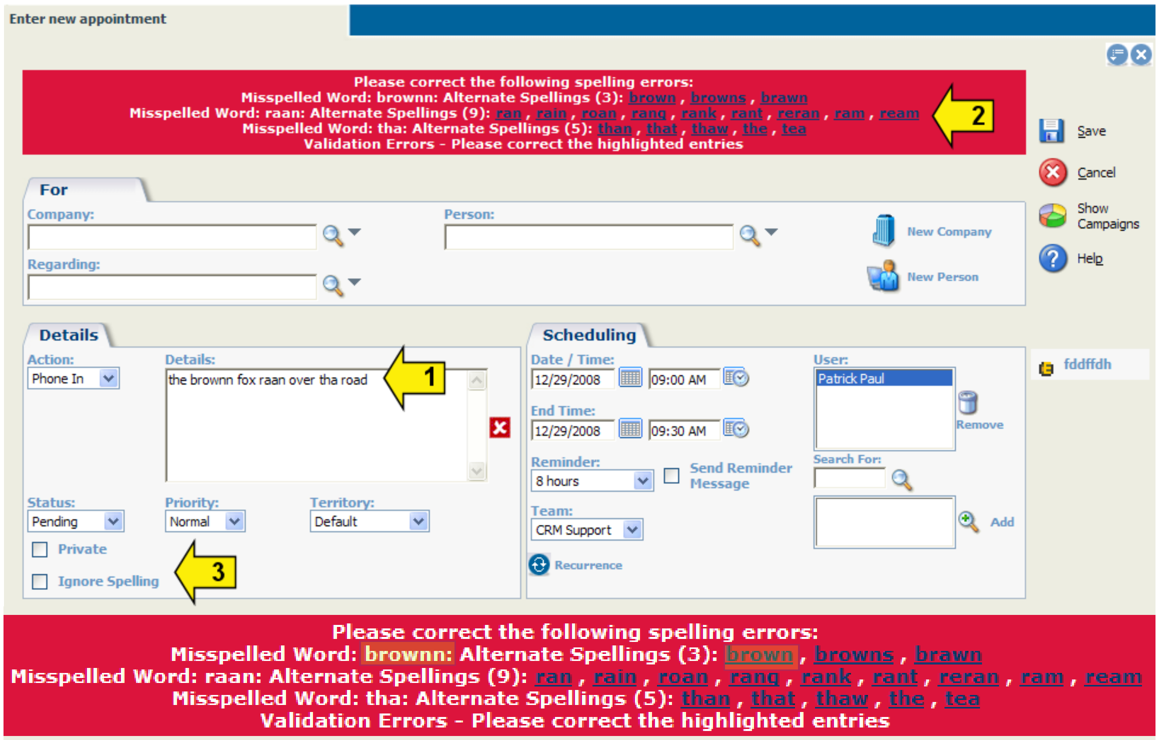


Part 3: Using CRM Spell Check

Creating or Editing Records

Create or edit any record on a screen that has spell protect enabled.

Enter or edit the text, and click save:



If your text contains spelling errors, you have 3 options:

- Use the error message at the top of the screen (arrow 2). You can click on any of the alternate spellings, and CRM Spell Check will correct the spelling for you (arrow 1). The above highlights the errors ('brownn' and corrections 'brown')
- Manually edit your text and change the spelling. You might do this instead of #1 if the alternate spellings are all wrong.
- Click "Ignore Spelling" (arrow 3). Choosing this option allows you to "Save" again, and ignore the spelling error.

Choose your option, and then click save. If you no longer have any spelling errors, of if you chose to ignore spelling, your record will save.

That is all there is to it!

Known Issues & Troubleshooting

At this time there are no known issues with the CRM Spell Check installation process.

If you experience any issues, please report them to us 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
200 - 1335 Erin Street
Winnipeg, MB, Canada
R3E 2S7
Phone: 1.204.480 9772
Email: support@CRMsystems.com

Online: www.21CRMsystems.com

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