Email Router Install, Setup, Config

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Module 3: Email Router Install, Setup, Config

- Features
- Prerequisites
- Install Scenarios
- Installation & Upgrade
- Configure the Router
- Configure the User
- Smart Matching

Features

Features

- Tracking token can be turned off
- Support for POP3 accounts
- Does not need to be installed on Exchange Server
- Router can processes outgoing e-mail
- Outlook client can function as standalone router
- User accounts can be configured individually for router functionality
- Send e-mail functionality for recipients that do not exist in CRM
- Router Configuration Manager

Prerequisites

Microsoft CRM 2011 E-mail Router – Prereqs

- Windows Server 2008, Windows 7
  - 32 or 64 bit hardware supported
  - No support for Windows 2003
- Exchange 2003 SP+, 2007, 2010 and Online
  - 32 or 64 bit hardware supported
  - No support for Exchange 2000
- MAPI Client and Collaboration Data Objects
  - Required if Rule Deployment Wizard is not installed on Exchange Server
- Must be local administrator

Install Scenarios

Installation Scenarios

- Upgrade Existing Router
  - In place upgrade
- New Installation
  - Exchange Server 2003 SP 2 +, 2007 or 2010
  - CRM Server
    - Requires MAPI Client and Collaboration Data Objects
  - Standalone Windows 7 or Windows 2008 server
    - x64
    - Requires MAPI Client and Collaboration Data Objects

Installation & Upgrade

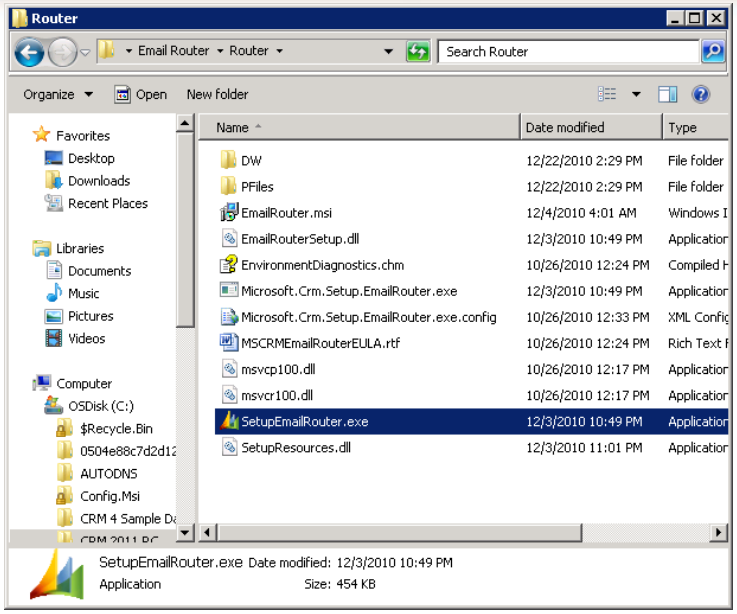
Microsoft CRM 2011 E-mail Router – Upgrade

- Upgrade
  - In place upgrade
  - Back up E-mail Router state files in C:\Program Files\Microsoft CRM Email\Service\:
    - Microsoft.Crm.Tools.EmailAgent.Configuration.bin
    - Microsoft.Crm.Tools.EmailAgent.SystemState.xml
    - Microsoft.Crm.Tools.EmailAgent.xml
    - Microsoft.Crm.Tools.Email.Management.config
    - EncryptionKey.xml
  - Move custom SmartMatching correlation to System Settings
  - Forwarding rules can be left deployed

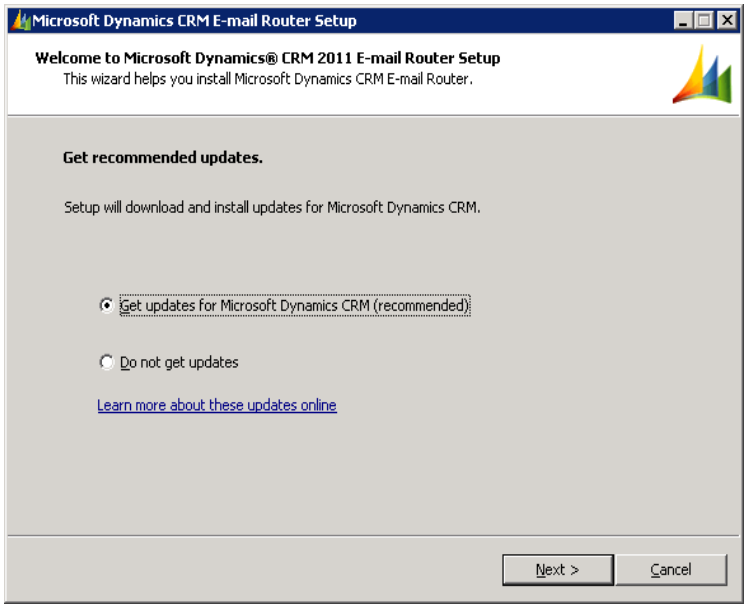
Microsoft CRM 2011 E-mail Router – Install

- Setup includes self-healing
- Install consists of Router service, Rule Deployment Wizard and Configuration Manager
- Environment Diagnostics Wizard (EDW) will check for pre-existing environment issues
- Router install log file:
  - C:\Documents and Settings\<user>\Application Data\Microsoft\MSCRM\Logs \crm50emailroutersetup.log

Microsoft CRM 2011 E-mail Router – Install

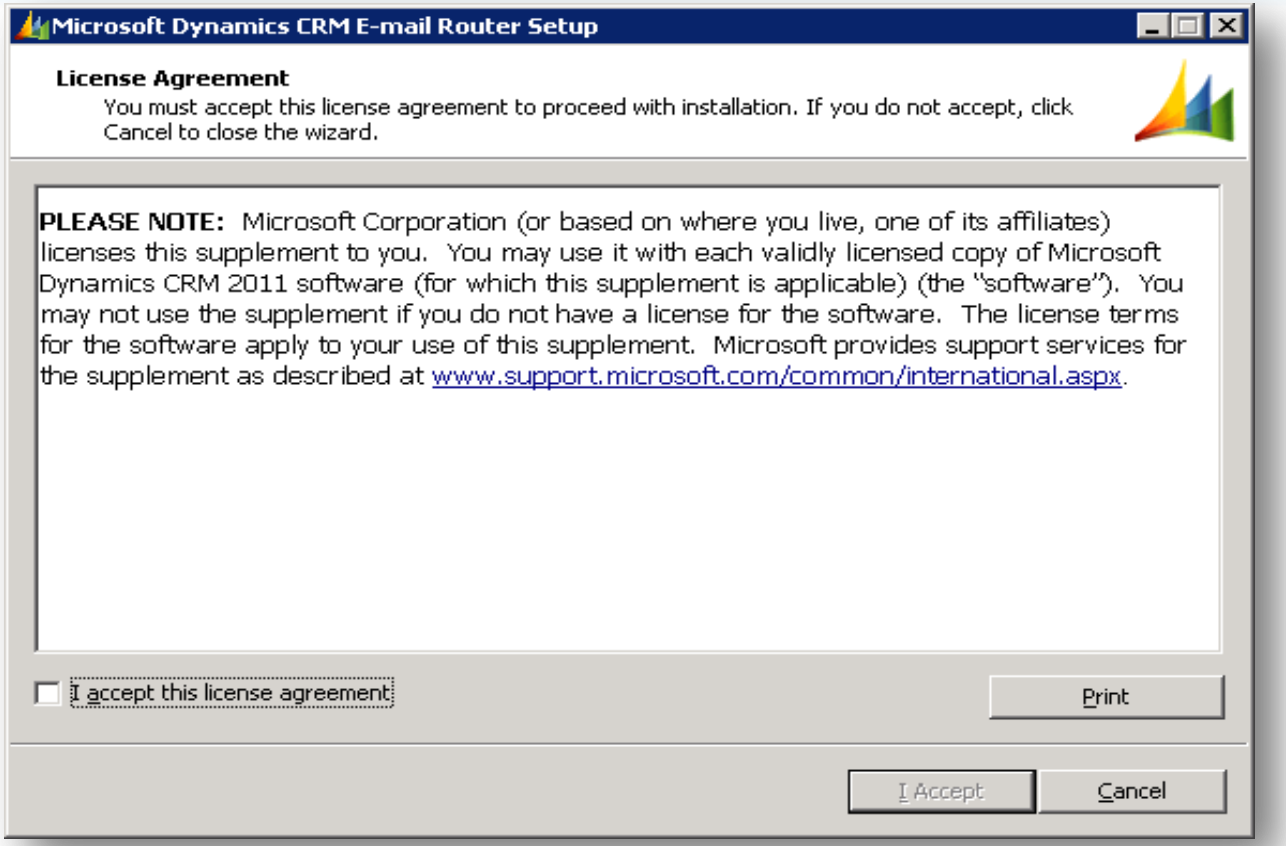


- Navigate to folder containing files
- Run SetupEmailRouter.exe



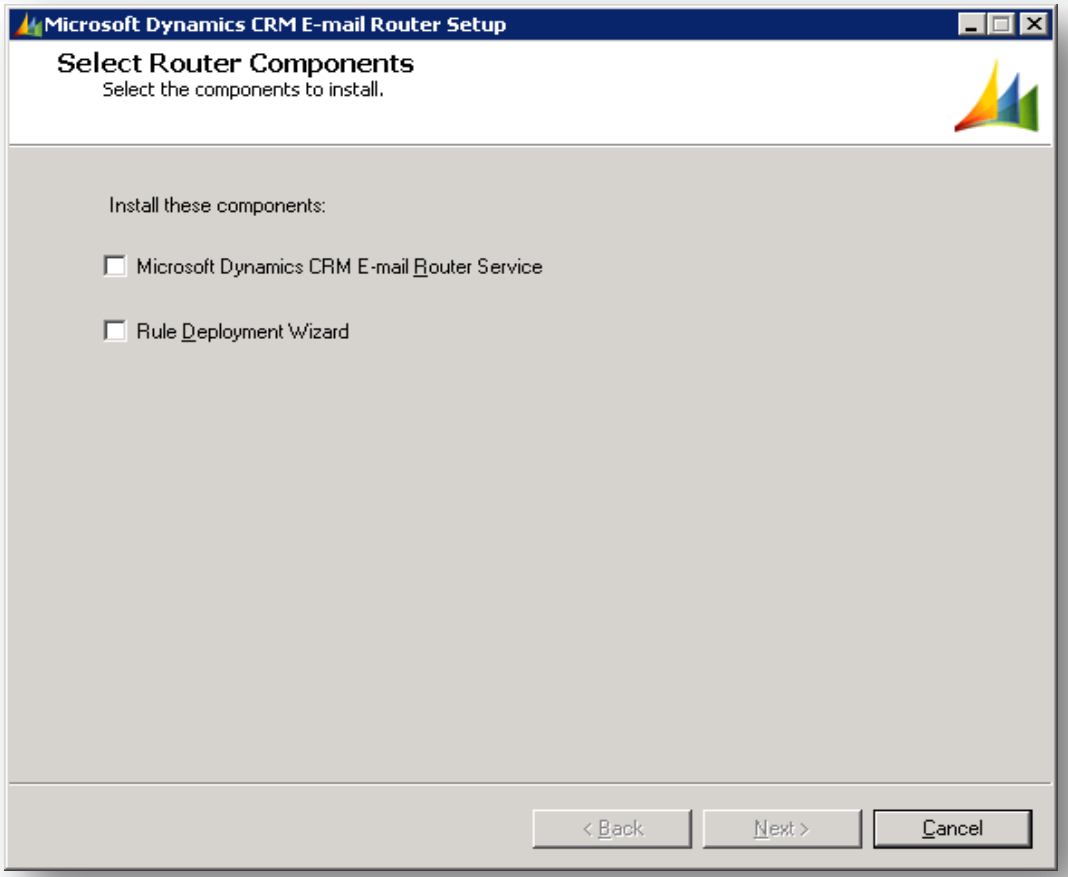
- Choose to update install files

Microsoft CRM 2011 E-mail Router – Install



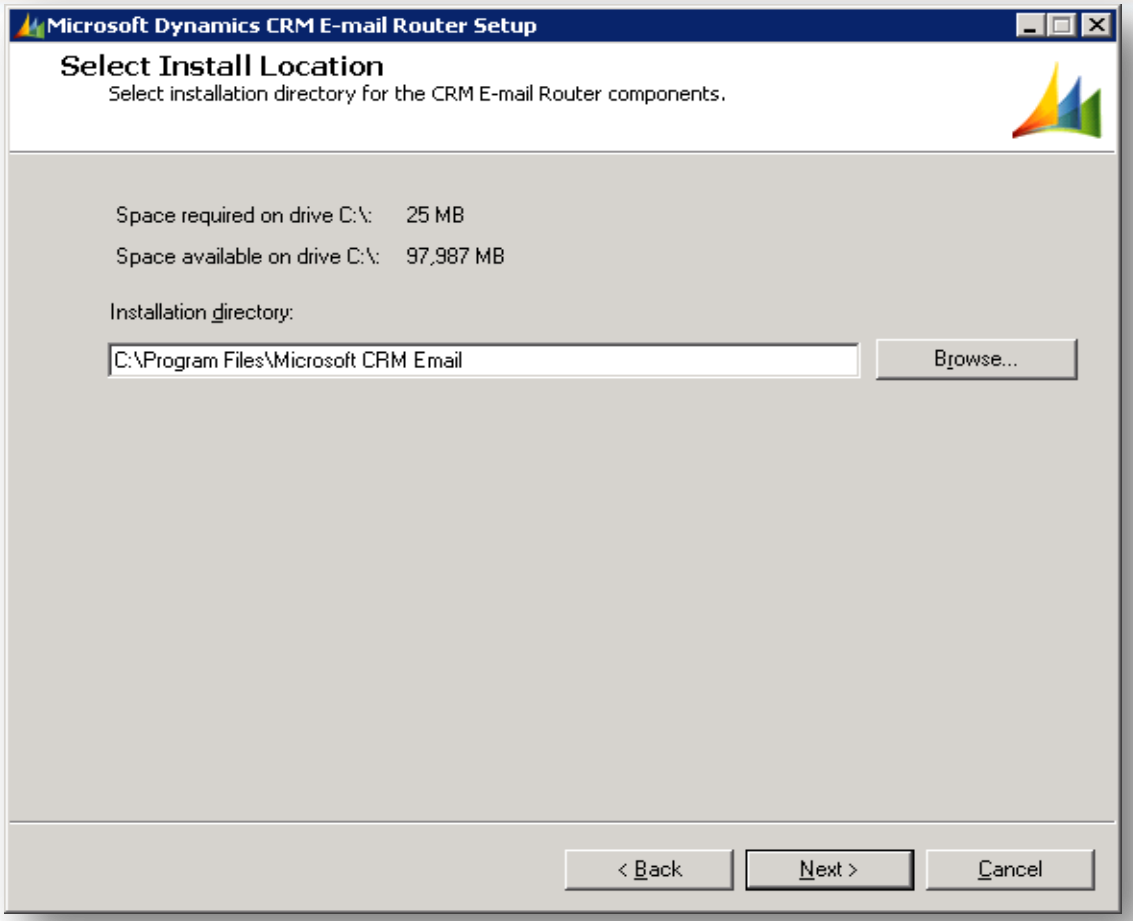
- Accept the license agreement

Microsoft CRM 2011 E-mail Router – Install



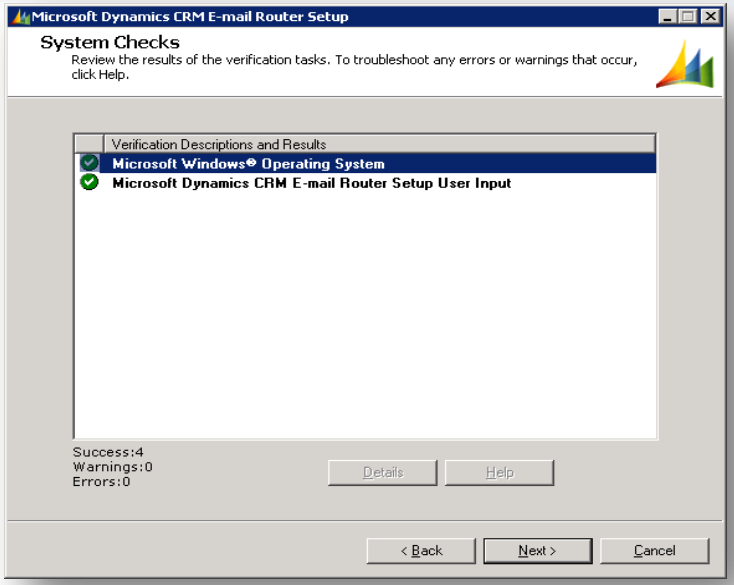
- Components can be installed on different computers
- Rule Wizard requires the MAPI Client

Microsoft CRM 2011 E-mail Router – Install

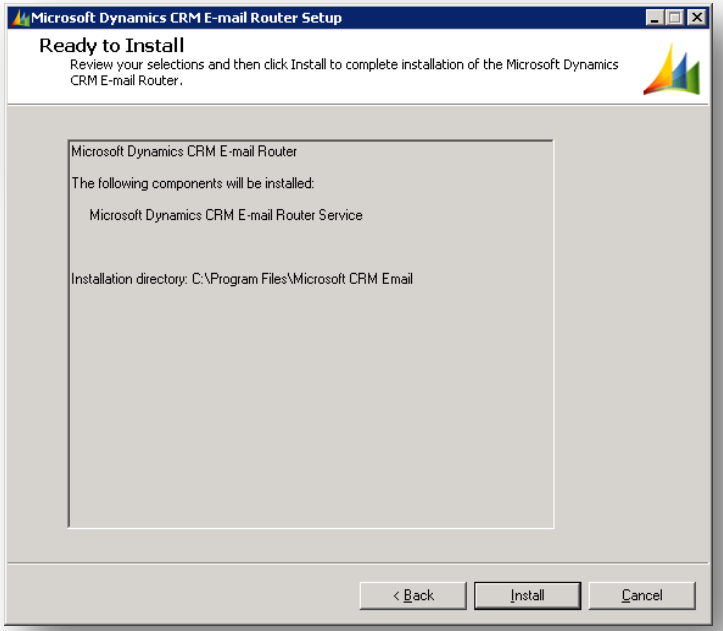


- Choose installation location

Microsoft CRM 2011 E-mail Router – Install

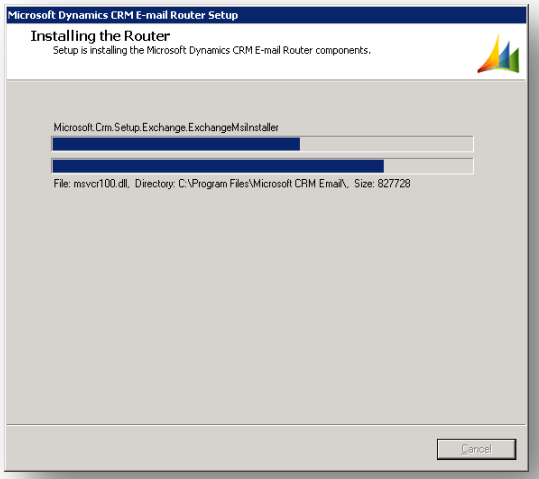


- EDW will check for errors
- If errors occur click Help

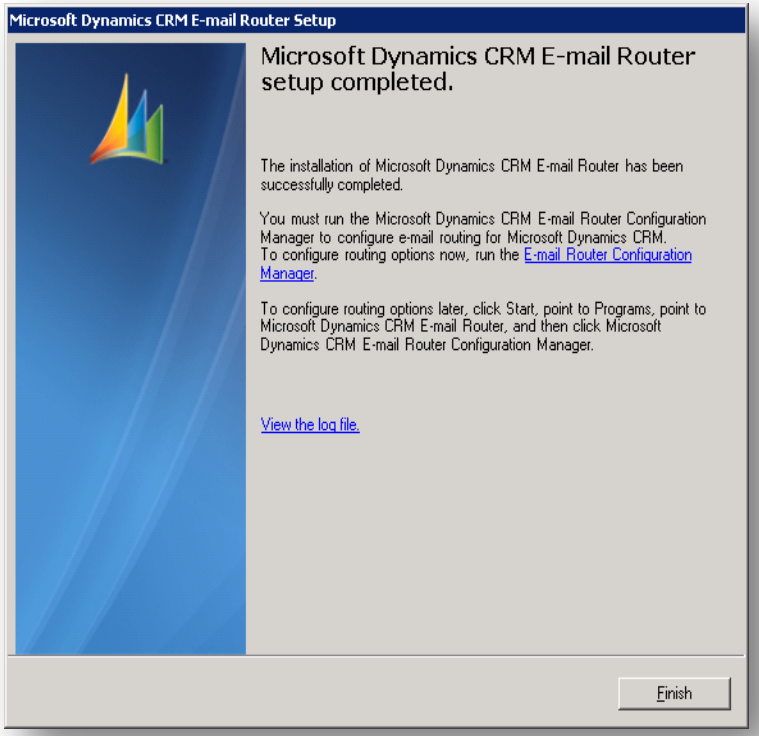


- Click Install button to install router

Microsoft CRM 2011 E-mail Router – Install



- Files will install



- If setup fails see installation log file

Microsoft CRM 2011 E-mail Router – Config

- E-mail Routing Deployment Scenarios
  - Use Outlook as incoming/outgoing mail router
    - Default setting for new users
  - Use Router service as incoming/outgoing mail router
  - Use Forward mailbox as incoming mail router
    - Outgoing e-mail would use Outlook or router service
- All scenarios can be configured per user
- Full support for POP3 or Exchange

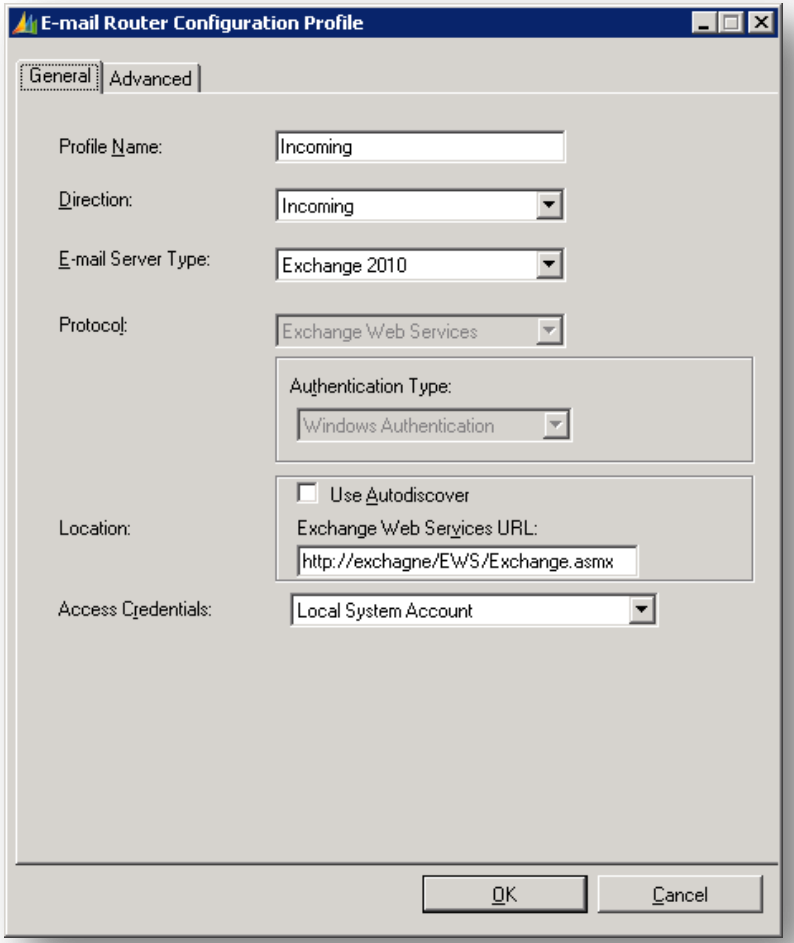
Microsoft CRM 2011 E-mail Router – Config

What needs to be configured?

- Forwarding mailbox profile must be configured.
- Incoming e-mail profile needs configuration
  - Only needed if router will monitor users mailbox
- Outgoing e-mail profile needs configuration
- Deployment needs to be created

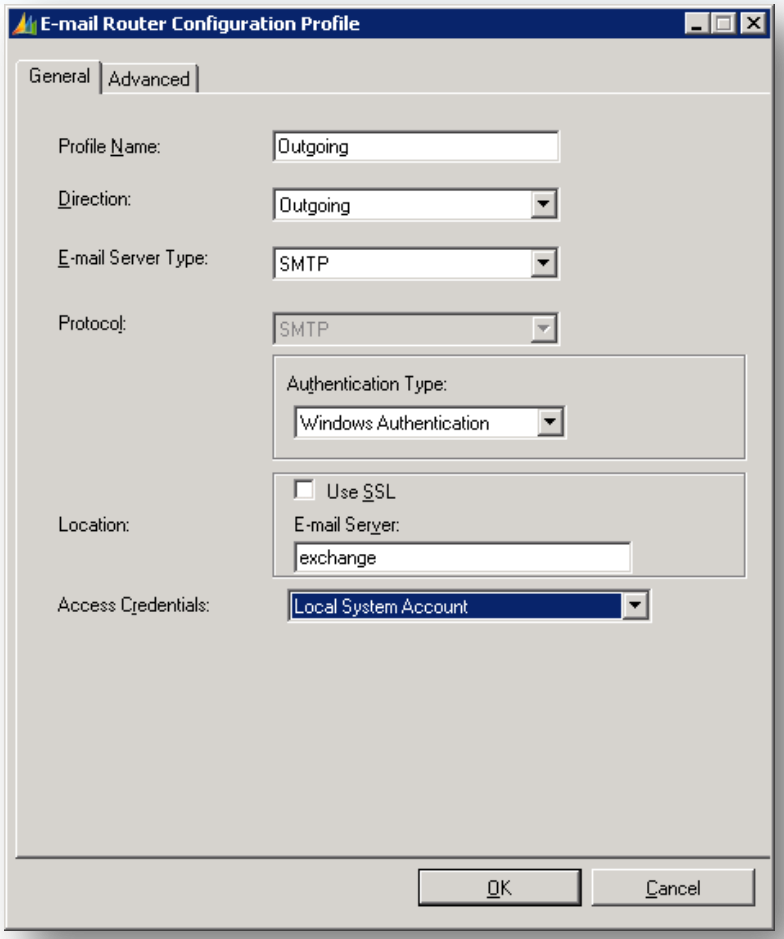
Microsoft CRM 2011 E-mail Router – Config

- Configure Incoming
  - Profile used to route mail into CRM
  - Tells the router service how it should connect to mail server
  - Accepts both Exchange and POP3 mailboxes

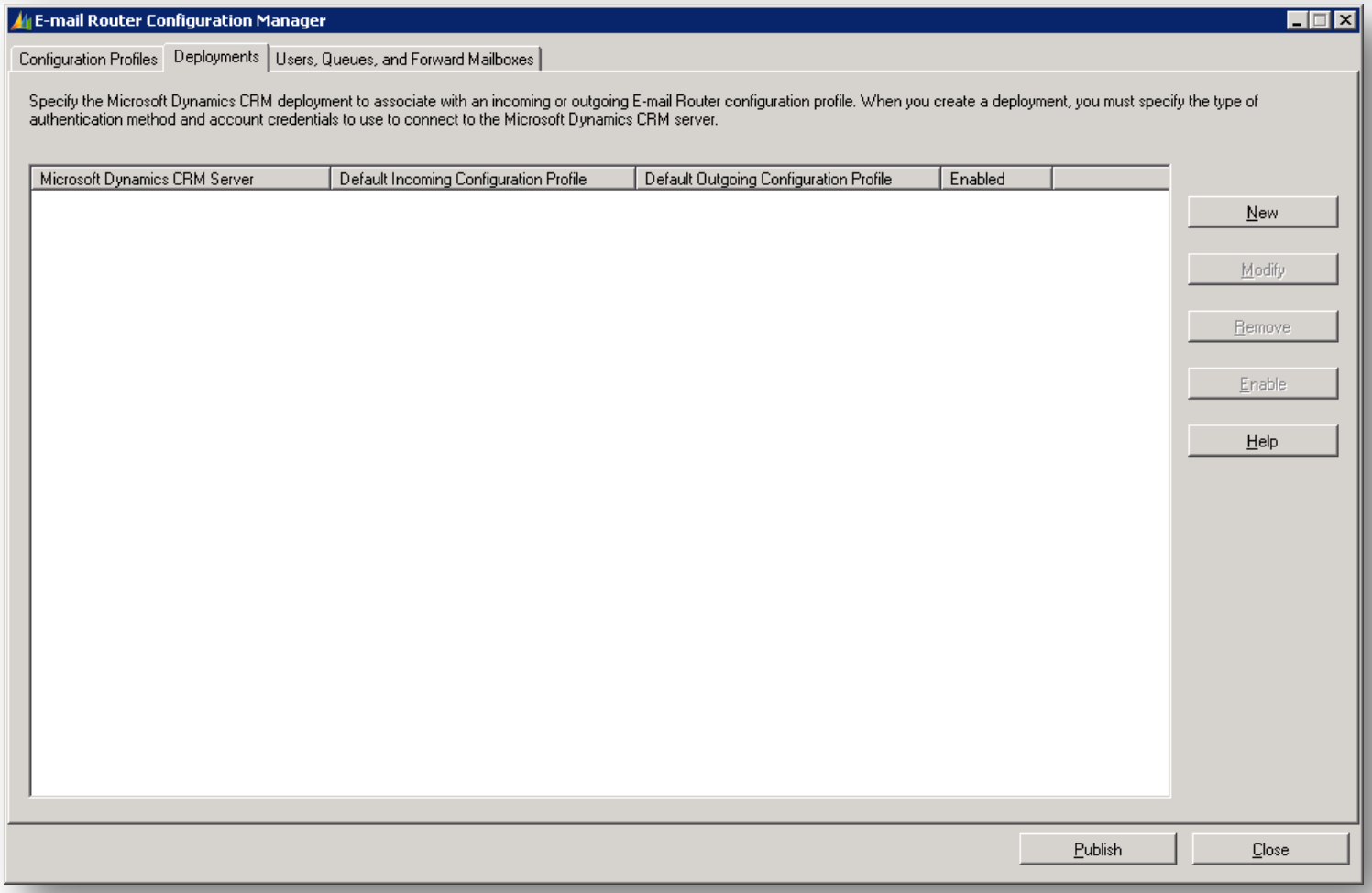


Microsoft CRM 2011 E-mail Router – Config

- Configure Outgoing
  - Profile used to send e-mail out of CRM
  - Supports
    - SMTP on Exchange
    - Exchange Online
    - Stand-alone SMTP
    - ISP SMTP server
  - This profile tells the router service how it should connect to the SMTP server



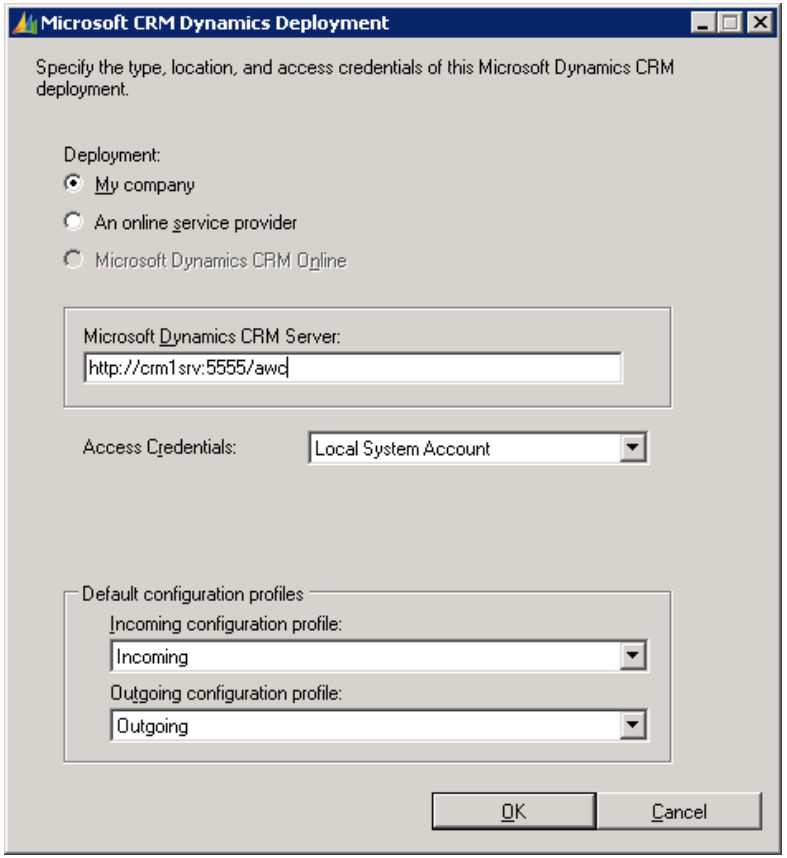
Microsoft CRM 2011 E-mail Router – Config



- E-mail Router Configuration Manager

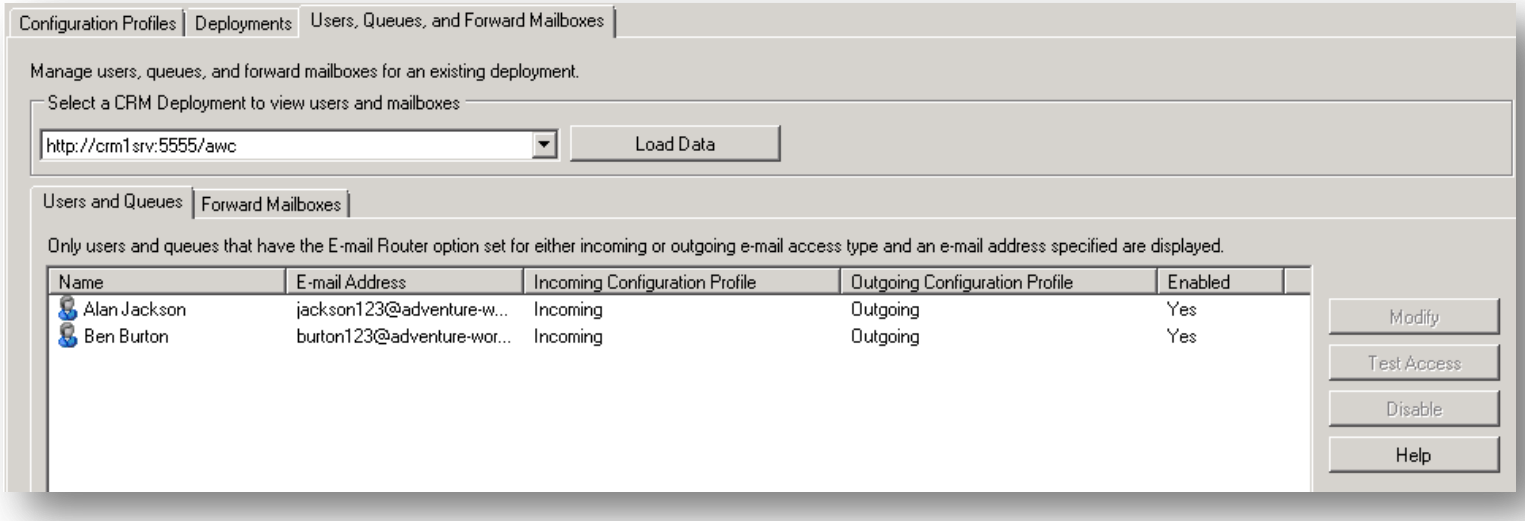
Microsoft CRM 2011 E-mail Router – Config

- Configure Deployment
  - Configurable for on-premise or hosted installations
  - Tells the router service how to contact CRM
  - Required if using the router service in any capacity
  - Org Name is case sensitive



Microsoft CRM 2011 E-mail Router – Config

- Users, Queues, and Forward Mailboxes
  - Displays mailboxes configured to use router
  - Test router service mailbox access using Test Access button
  - Use Forwarding tab to set up forwarding mailbox



Microsoft CRM 2011 E-mail Router – Config

- For changes to take effect click Publish button
  - Router settings are held in XML file, not DB
    - C:\Program Files\Microsoft CRM Email\Service\Microsoft.Crm.Tools.EmailAgent.xml
- Rule Deployment Wizard
  - Only required if using Forward mailbox
  - Forward rules do not need to be redeployed if upgrading

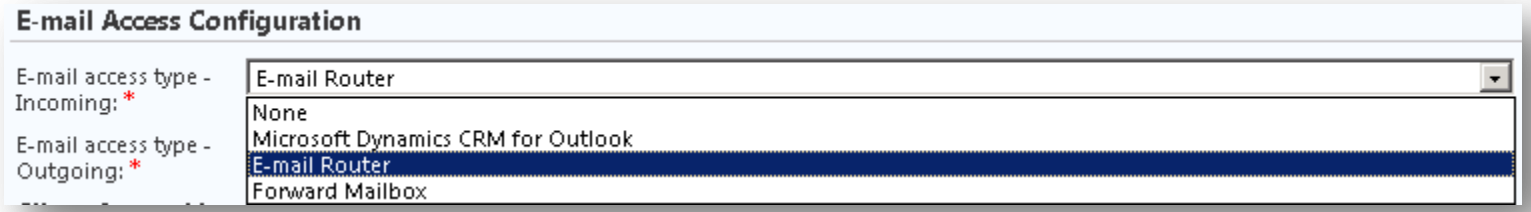
User Configuration

User Settings

- Approve or Reject Email for a particular User
- Must Approve before a user can send email from CRM

User Configuration

User Settings



- Configured per user
- Default setting is for Outlook
- Queues can also be configured
- Outlook setting will only send CRM e-mail when Outlook is open and connected to Exchange
- Settings -> Administration -> Users -> User Account -> E-mail Access Configuration

Configuration - Outlook Client for incoming E-mail

- Default user setting on new Installs
- Advantages
  - Does not require the Microsoft Dynamics CRM E-mail Router
  - There are no user passwords to maintain for access to Microsoft Dynamics CRM 2011 or to the user's mailboxes
- Disadvantages
  - The Microsoft Dynamics CRM Client for Outlook must be installed and running for e-mails to be sent and tracked in Microsoft Dynamics CRM.
  - The e-mails will be queued until Outlook is launched and connects to the Microsoft Dynamics CRM server and to the mail server
  - The E-mail Router is required for users or queues that do not use Microsoft Dynamics CRM for Outlook

Configuration - Router selected for Incoming E-mail

- Advantages
  - Connects to the users Inbox Directly to promote E-mails to CRM
  - Can be used in deployments where the Microsoft Dynamics CRM Client for Outlook is not installed
  - No need to deploy the forwarding rule to the users.
- Disadvantages
  - For POP3 accounts, you must create an incoming profile for each POP3 account and you must enter the password for each POP3 account
  - Requires a computer to install the E-mail Router on
  - The Account specified in the Access Credentials field on the incoming profile will need Full access to all users that are configured to use the Router option for incoming
  - If you have a large amount of users, this can cause more traffic from the server that has the E-mail Router installed on to the Exchange and CRM Server. This is because the Exchange Router Service will connect to each user's inbox directly instead of one inbox as when using the forward mailbox option.

Configuration - Forward mailbox for incoming E-mail

- Advantages
  - Reduces the number of incoming profiles that must be created and managed for organizations that monitor a large number of user's mailboxes
  - One central mailbox to monitor
- Disadvantages
  - E-mail provider must have the ability to forward as an attachment. This is required to forward e-mails to a central mailbox that is monitored by the Microsoft Dynamics CRM E-mail Router
  - A mailbox rule must be deployed to each user to forward e-mails to the central mailbox
  - Requires a computer to install the E-mail Router on

Configuration - Outlook Client for Outgoing

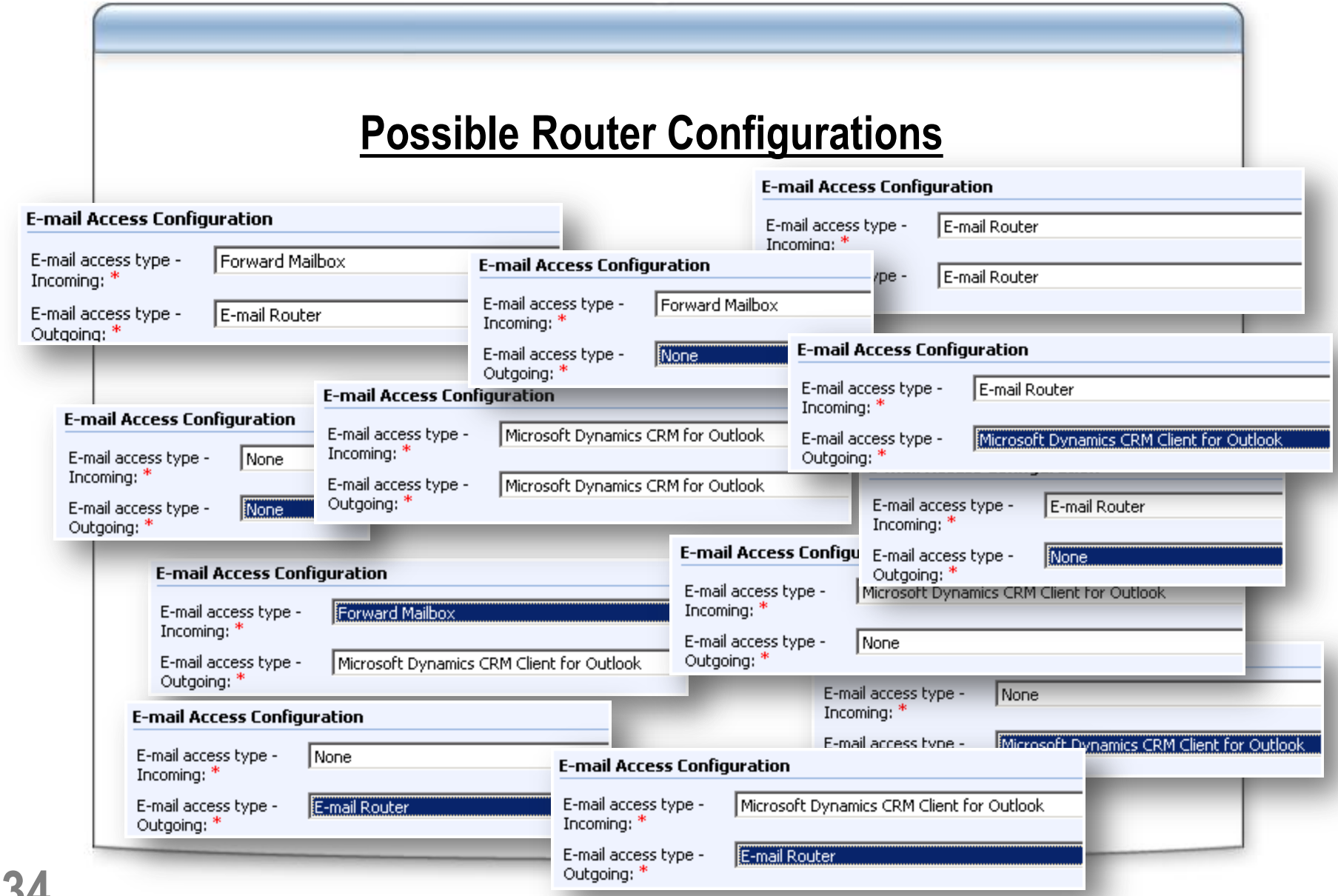
- Default user setting on new Installs
- Advantages
  - Ability to send e-mail for each user whether the user sends it from within Outlook or within the CRM Web Client, as well as receive and track e-mail in Microsoft Dynamics CRM 2011
- Disadvantages
  - The Microsoft Dynamics CRM Client for Outlook must be installed and running for e-mails to be sent and tracked in Microsoft Dynamics CRM.
  - The E-mail Router is required for users or queues that do not use Microsoft Dynamics CRM for Outlook
  - You will get prompt in Outlook if you are sending an e-mail from the Web Client

Configuration - Router for Outgoing

- Advantages
  - No need to have outlook client install for the user
  - E-mails get sent out from web client without getting prompts in Outlook.
- Disadvantages
  - Must have a valid server that is running SMTP and that can be configure to allow e-mail relays from the machine that the E-mail Router is installed on.
  - Requires a computer to install the E-mail Router on

User Configuration

Possible Router Configurations



Smart Matching

- What is “Smart Matching”?
  - CRM’s ability to track CRM e-mail without the use of tokens
  - Uses hash values to track e-mails
    - Hash value can be seen as a digital fingerprint
    - Hash value is created by evaluating the subject and party list
    - Hash values are stored in the EmailHashBase table

  - Evaluates the e-mail during promotion
  - Turned on by default in new installation and upgrades

Summary

- Features
- Prerequisites
- Install Scenarios
- Installation & Upgrade
- Configure the Router
- Configure the User
- Smart Matching

Router Lab

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