

VBA Project Installation Guide

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Purpose

The installed Save to CRM Outlook macro came with a digital signature (or certificate) to prevent the standard Microsoft Outlook security warnings displaying when using macros. These certificates are only valid for one year before renewal and therefore need renewing annually.

This document will guide you through removing the old VBA Project file and installing the new one.

Preparation

Please make sure you have Downloaded the new VBA Project file from the following location:-

http://www.prospectsoft.com/crm/services/crm_solutions_downloads_updates.htm#crmmacro

On the page that loads up, you will see a link under 'Other' called 'Save To CRM Certificate'. By clicking on the link you will start to download the file. Please make sure you Save this file in a safe place.

Please ensure Microsoft Outlook is closed.

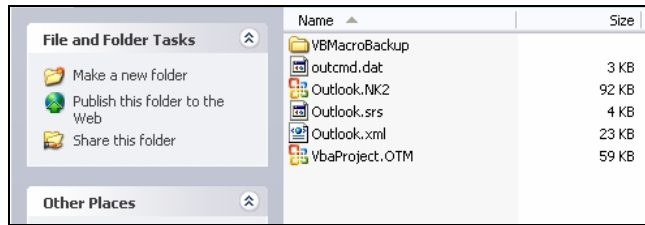
Installing the new VBA Project

Removing the Old VBA Project

Before beginning please make sure you have Hidden Files and Folders turned on, as follows:-

- **Select My Computer / Tools / Folder Options**
- **Choose the View Tab**
- **Select Show Hidden Files and Folder**
- **Browse to the following directory:-**

C:\documents and setting\userid\Application Data\Microsoft\Outlook



NOTE: Some files may vary to the ones shown above, but this not significant

- **Copy** the existing VBA Project file and place it in a backup folder.

Applying the new VBA Project

- **Copy** the new VBA Project file to the following location:-

C:\documents and setting\userid\Application Data\Microsoft\Outlook

- **Choose** yes to overwrite the existing version
- **Open** Microsoft Outlook

From the toolbar select:-

Tools / Macro / Security

- **Ensure** this is set to High
- **Select** an email and **Select** the Save To CRM

The following security warning will appear



- **Tick** the Always trust macros from this publisher box,
- **Click** Enable Macros

You have now successfully updated your VBA Project file and you should no longer be prompted with further security warnings when using the Save to CRM button.

Revision History

Date	Software Version	Doc. Revision	Author	Review	Remarks
9 Feb .06	v5.xx	1.00	RJW	SDM	Original document