



INSTALLING AND UPDATING RHOLINK03

This article will walk you thru the process to create a new installation of RHOLink03: the RedHorse CRM Outlook Link for Microsoft Office2003. It will also walk you thru the process to update an existing installation.

Please see separate help articles for information about RHOLink07: the RedHorse CRM Outlook Link for Microsoft Office 2007 and RHOLink10: the RedHorse CRM Outlook Link for Microsoft Office 2010.

Prerequisites

RHOLink is compatible with the Standard and Real Estate version of RedHorse CRM. If you are using the Express version, you must upgrade before you may use the Outlook Link.

RHOLink03 is compatible with Microsoft Office 2003. A separate installer is available for each version of Outlook. You must install the correct version of the link for the version of Outlook that you are using.

It is not necessary to have RedHorse CRM running on the machine where Outlook is installed. It is only necessary to have access to the path (local, network or VPN) where RedHorse CRM is installed.

Step 1: Download the Latest Version

Visit www.redhorsesystems.com and log into the website with the username and password with your username and password. If you do not have a login, you may create one by using the Sign Up link at the top right corner of the site. After logging in, use the main website navigation bar to go to the Updates page.

Find the download section for the version of Outlook that you are using. Click the download link and save the file to your computer.

Step 2: Run the Installer

Run the setup.exe file that you downloaded.

If you are asked to install the Microsoft Office Primary Interop Assemblies, click Install. Then continue with the installation. If the RHOLink installation fails during this part of the installation with an error similar to "The following components failed to install: 2003 Microsoft Office Primary Interop Assemblies", check in Add/Remove Programs to see if the Microsoft Primary Interop Assembly is already installed. If so remove it then begin the installation again.

In the installer, browse to the location where you would like to install RedHorse CRM. The default path is c:\Program Files\RedHorse Systems\RHOLink. You must select a local path on the machine.

When the installation completes, click Close.

Step 3: Add Contacts to the Outlook Contacts Group

RHOLink uses a contact group in RedHorse CRM to sync contacts with Outlook, or you may choose to sync all contacts from CRM to Outlook. When syncing a group, the required group is called Outlook Contacts. Each user who will be using RHOLink and syncing by a group must have their own Outlook Contacts group for syncing.

In RedHorse CRM, you may create the group manually by using the Toolbar Button to open the Queries and Groups window. Follow the CRM help instructions to create a query of the desired contacts and convert the query to a group.

Alternately, you may have RedHorse CRM create the group for you. Open the Email Center and click the Settings button. Go to the Settings Tab and the Outlook Link tab. Click the Go button to create the group. Then go to the Queries and Groups window to add contacts to the group.

Step 4: Set Outlook Options

Open Outlook to set the link options. In Outlook, go to Tools, Options, RedHorse CRM Link. First enter the required information on the Login Information tab.

- Enter the path where RedHorse CRM is installed. Valid options include:
 - A local path where RedHorse CRM is installed
 - A shared path on a network to which the workstation is connected
 - A shared path accessible via a VPN connection to the server where RedHorse CRM is installed.
- Enter the Username and Password for the RedHorse user.

After login information is entered, select the desired options for the link on the Contacts, Emails and Calendar tabs. Save and close the options window. See a separate article on Using RHOLink for more information.

Step 5: Choose How to Send Email from Within RedHorse

In a standard RedHorse installation, clicking an email hyperlink on a contact record will launch the Create Email dialog using the internal email client in RedHorse. It is possible, however, to have RedHorse launch the Outlook email dialog instead of the RedHorse internal client when sending individual emails. This setting is found in the

Email Center in RedHorse. Click the Settings button in the toolbar and go to the Settings Tab, Outlook Integration Tab. Check the Send Email Using Outlook checkbox to enable this feature.

Updating to a New Version of the Link

Updating to a new version of RHOLink follows the same process outlined above in Steps 1 and 2. You will download the same setup.exe that is used for a new installation and you will install it to the same location as the previous installation. Your installation will be updated and existing contacts, calendar and email links will not be affected.

Updating to a New Version of Outlook

When updating to a new version of Outlook, you will need to uninstall the existing version of RHOLink and then install the new version of RHOLink that matches the new version of Outlook. Existing contacts and email links will not be affected.

Please contact support if you experience any issues during the installation process.

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www.redhorsesystems.com