



INSTALLING AND UPDATING REDHORSE CRM LINKS TO MICROSOFT OFFICE

This article will walk you thru the process to create a new installation of the following products:

- RHOLink07: the RedHorse CRM Outlook Link for Microsoft Office 2007
- RHOLink10: the RedHorse CRM Outlook Link for Microsoft Office 2010
- RHWLink07: the RedHorse CRM Word Link for Microsoft Office 2007
- RHWLink10: the RedHorse CRM Word Link for Microsoft Office 2010

This article will also walk you thru the process to update an existing installation.

Please see separate help articles for information about RHOLink03: the RedHorse CRM Outlook Link for Microsoft Office 2003.

Prerequisites

RHOLink and RHWLink are 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.

RHOLink07 and RHWLink07 are compatible with Microsoft Office 2007. RHOLink10 and RHWLink10 are compatible with Microsoft Office 2010. A separate installer is available for each version of Microsoft Office. You must install the correct version of the link for the version of Microsoft Office that you are using. If you upgrade from an earlier version of Microsoft Office, you must first uninstall any previous version of RHOLink and RHWLink before installing a new version.

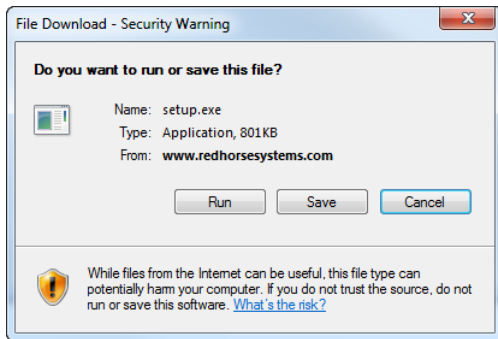
RHOLink07 and RHOLink10 Only: It is not necessary to have RedHorse CRM running on the machine where Outlook is installed. It is only necessary to have access to the path (local, network or VPN) where RedHorse CRM is installed.

Installing RHOLink

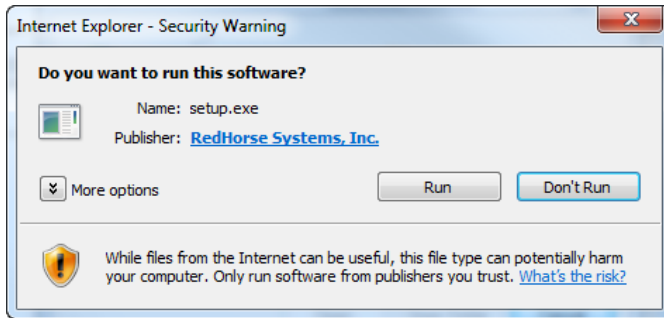
Visit www.redhorsesystems.com and log into the website with the username and password with your username and password. If you do not have a login, you may create one by using the Sign Up link at the top right corner of the site. After logging in, use the main website navigation bar to go to the Updates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

Find the download section for the version of Microsoft Office that you are using. Enter your RedHorse CRM license number and click the Install link.

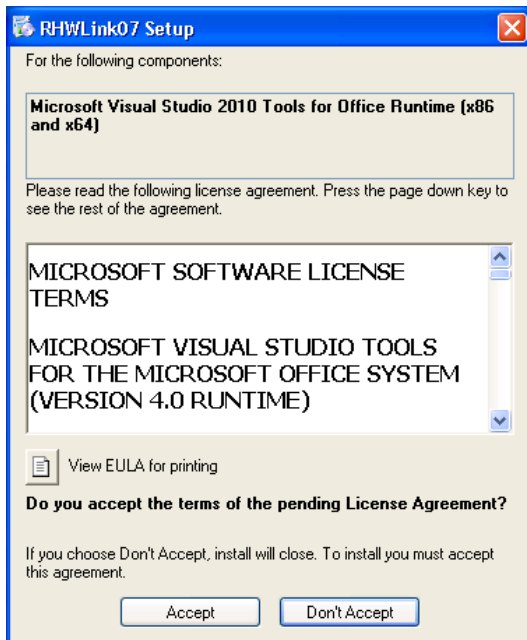
When prompted whether to run or save this file, click Run.



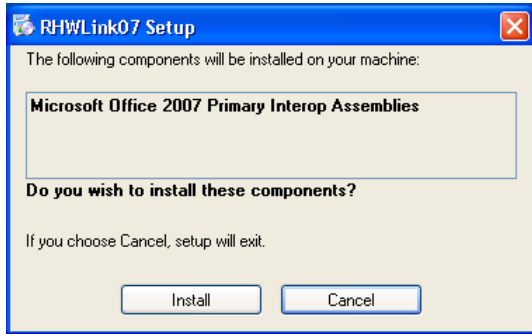
When asked if you want to run the software, click Run.



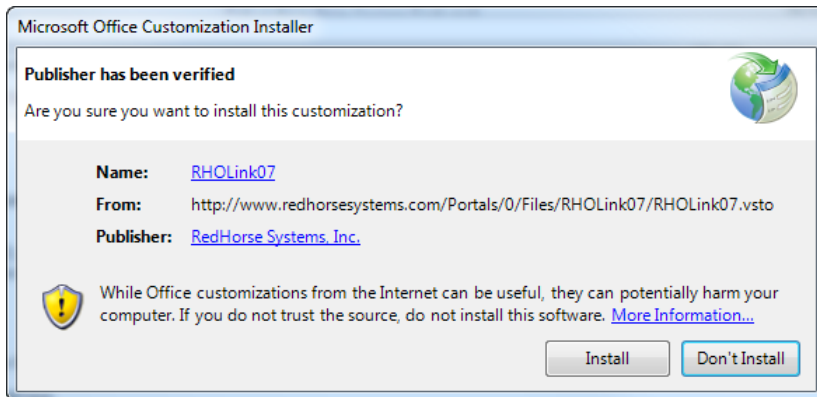
If you receive a message to install Microsoft Visual Studio 2010 Tools for Office Runtime, click Accept. If you do not receive this message, the tools are already installed on your computer and this message will not display.



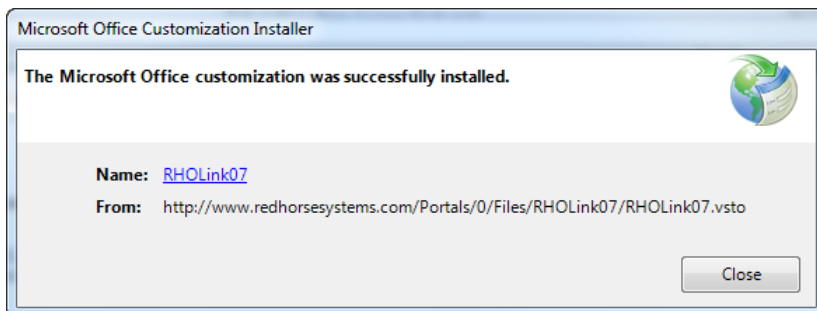
If you receive a message to install Microsoft Office 2007 Primary Interop Assemblies, click Install. If you do not receive this message, the assemblies are already installed on your computer and this message will not display.



When notified the publisher has been verified, click Install.



When the installation completes, click Close.



Troubleshooting

If the installation fails during this part of the installation with an error similar to "The following components failed to install: 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.

If the installation appears to have been successful but you open Word or Outlook and cannot find the link, check Add/Remove Programs to see if the Microsoft Primary Interop Assembly is installed. If it is, remove it then begin the installation again. If it is not in the list of installed programs, try installing the Microsoft Primary Interop Assembly manually using this download link for both Office 2007 and 2010:

[Office Primary Interop Assemblies Installer](#)

Updating RHOLink and RHWLink

When Outlook is opened, it will check automatically for updates to RHOLink. When Word is opened, it will check automatically for updates to RHWLink. If an update is available, it will be installed for you. No action should be required by you during this process. You may manually update the link by installing the link again from the website updates page, following the same instructions above. You will be notified if you are already on the latest version of RHOLink and RHWLink or prompted to install the update.

Using RHOLink and RHWLink

Full help files detailing the use of RedHorse CRM Links to Microsoft Office are found here:

RHOLink07 and RHOLink10:

<http://www.redhorsesystems.com/redhorsecrmhelp/rholink07help>

RHWLink07 and RHWLink10:

<http://www.redhorsesystems.com/redhorsecrmhelp/mergedocshelp>

Updating to a New Version of Microsoft Office

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

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

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