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MS CRM Notifications

Version 1

23.08.2011

Оглавление

About

The program is intended to inform participants of upcoming events, created in MS CRM. An event refers to instances of appointments and tasks created in CRM 4.0 and CRM 2011. By these means users participating in the facility as a meeting:

- owner
- organizer
- Required participants
- Optional participants.

Before running

The application consists of two parts: server and client. The server component is designed as a web service, the client part is designed as a desktop application.

Server configuration

On a Web site CRM need to create a virtual directory named **notification** and copy files service. to configure a virtual directory Windows authentication and disable anonymous authentication.

Authentication settings in the management console web server should look like this:

To configure the server-side to open the web.config file and make the following corrections. Service configuration:

```xml
<appSettings>

  <!—Do not modify-->
  <add key="Type" value=" Mintfix.Web.Crm.DataHandler, Mintfix.Web.Crm"/>
  <!-- Do not modify -->
  <add key="MinutesBefore" value="15" />

  <!—- MS CRM SQL Server connection string  -->
  <add key="Crm" value="server=localhost; Initial catalog=demo_mscrm; integrated security=true"/>

  <!-— url address format  to open appointment form  -->
  <add key="UrlVisit" value="http://mscrm/demo/userdefined.aspx?entityname=appointment&id={0}" />
  <!—- url address format  to open task form  -->
  <add key="UrlTask" value="http://mscrm/demo/userdefined.aspx?entityname=task&id={0}" />
</appSettings>
```
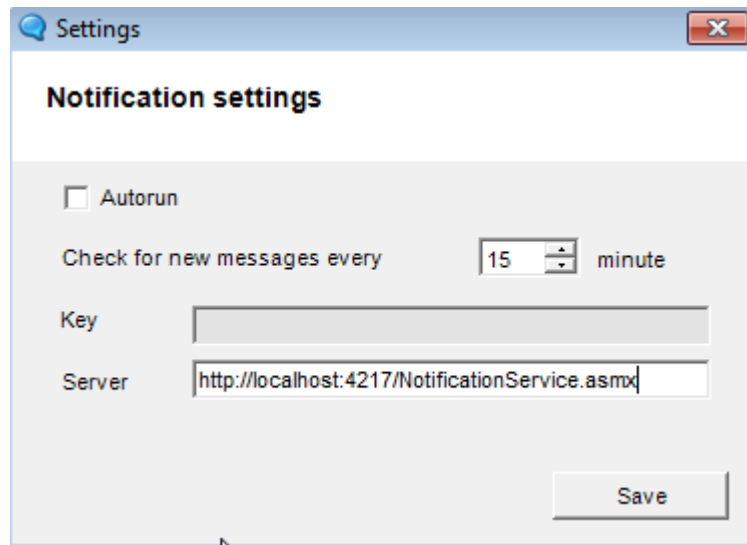
Parameter   Type – Do not modify

         Crm – MS CRM SQL Server connection string.

         MinutesBefore – minutes before event

         UrlVisit – url address format to open appointment form

         UrlTask – url address format to open task form

Example shown MSCRM 4.0 address format. If you planning use application with MS CRM 2011 you must change url format.

After configuration completed, you have ready to use it.

Application usage

Application requires installed . NET Framework 2.0 or later. The application was tested on Windows Vista and Windows 7. When you run the application displays the settings window:
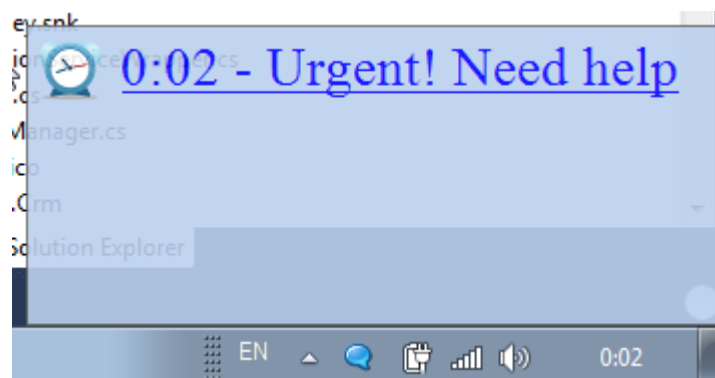
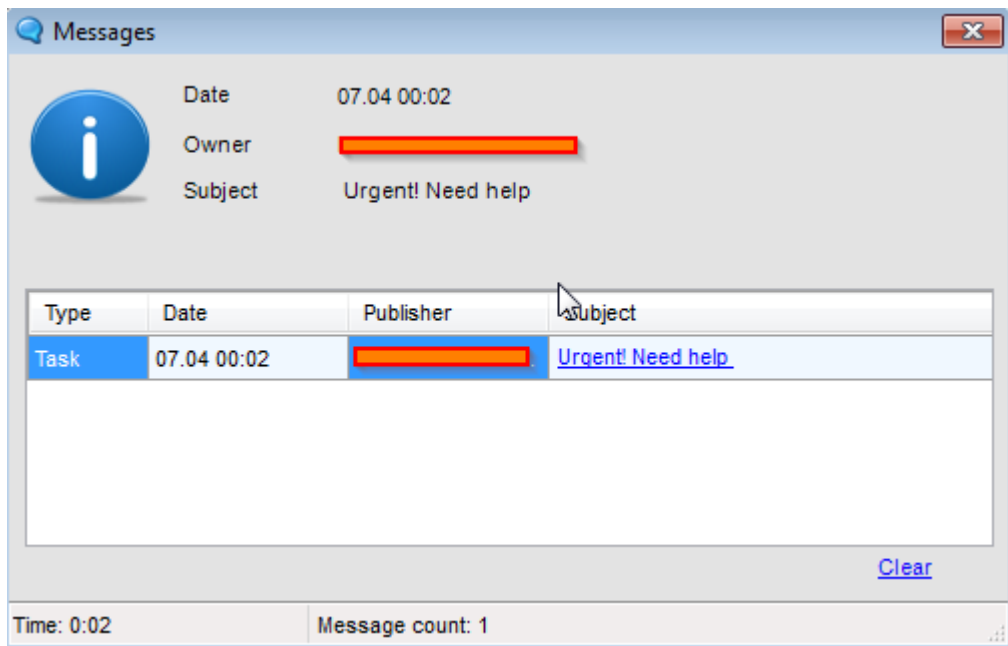

You must fill fields and click to Save.

When you run the application, it is minimized to tray and polls the server in the background.
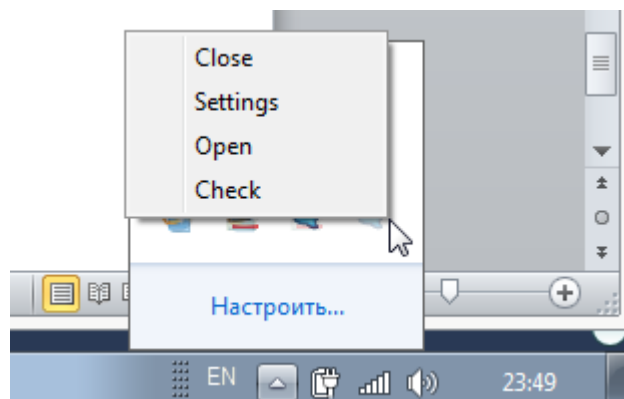

When a notification received, a special window appears in the lower right corner of the notification area will appear with the ability to open a card meeting.

If you have a few events to shows you have seen a full with all items.

When you right-click on the icon to open the settings window:

On the settings form, you can change the notification interval, and setup an application to windows auto start.