NUSOFT CRM FOR M&A 2016

INSTALLATION GUIDE

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# Introduction

## COMPATIBILITY

NuSoft CRM for M&A is available for most of today’s platforms. It can be used with Outlook 2010, Outlook 2013, and Outlook 2016 as well as through multiple browsers for laptops and desktops. Apps are also readily available to provide access to mobile phones and tablets.

Compatible Browsers:

* Internet Explorer on Windows
* Firefox on Windows
* Safari on Mac OS X
* Chrome on Windows or Google Nexus 10

Mobile Devices with a CRM App:

* Microsoft Dynamics CRM for iPad
* Microsoft Dynamics CRM for Windows 8
* Dynamics CRM for Android Tablets

Supported Phone OS:

* iOS 7.x and 8.x
* Android 4.4
* Windows Phone 8.1

For a full list of supported hardware visit; <https://technet.microsoft.com/en-us/library/dn531131.aspx>

## Incompatibility with free version of NUSOFT Alert

Uninstall free version of NuSoft Alert

NUSOFT CRM for M&A Featured pack already contains a field called NuSoft\_AlertNote on Acount, Contact, Lead and Opportunities. If you previously installed the free version of NuSoft Alert, please unistall it before proceeding with the installation of this solution.

# Installing NUSOFT CRM for M&A

## Installing NUSOFT CRM for M&A

1. Navigate to **Settings -> Solutions**







1. Click  **Import,** then select the downloaded NuSoft CRM for M&A managed solution file.



Click next to continue with installation



1. Leave box checked and click **Import** and the import wizard will finish installing NuSoft CRM for M&A.



1. A dialogue box will open. Hit **Close.** NuSoft CRM for M&A will be properly installed when the NuSoft CRM for M&A solution shows up on the **All Solutions** page.



1. NuSoft Common solution is required for NuSoft CRM for M&A and will be included when you purchase the product. To install NuSoft Common solution, repeat the steps above as you did with NuSoft CRM for M&A.

# Assign User Roles

Anyone who needs to see NuSoft CRM for M&A needs the **NuSoft CRM for M&A** security role.

1. Navigate to **Settings->Security->Users**.



1. Select the users whom you wish to use NuSoft CRM for M&A.
2. Select **Manage Roles** in the ribbon.



1. Choose the a role according to the user’s position and select **OK**.



# Product Key

After 30 days of use, NuSoft CRM for M&A Pro trial will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **NuSoft CRM for M&A** solution.



1. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from NuSoft and click **Submit**. If you do not have a product key, contact NuSoft at support@nusoftsolutions.com to receive one.



# Support

Please send any product issues or suggestions to support@nusoftsolutions.com.

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