



Atrio Copy Address

Version 8

Installation and Configuration Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to install the Atrio Copy Address product. It includes step by step instructions on installation, with screenshots.

Atrio Copy Address is a very convenient tool; with one click you can copy Lead, Account or Contact address to the Windows clipboard, permitting you to conveniently paste the address into Word documents, text documents, etc.

Requirements/Compatibility

Atrio Copy Address is compatible with CRM 2013, 2015, and 2016. Version 8.0.0 is only compatible with Internet Explorer.

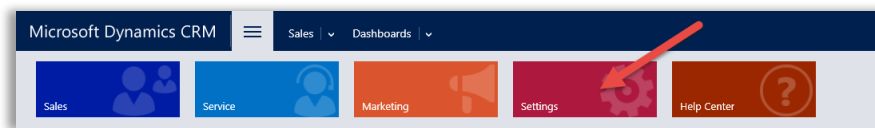
- Internet Explorer 9+

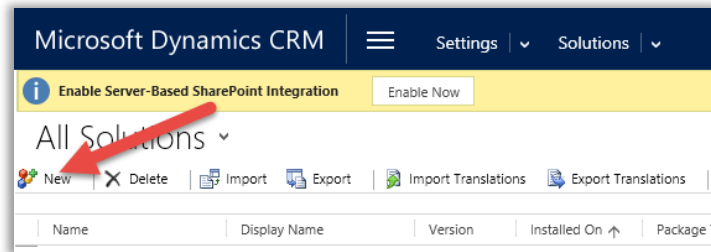
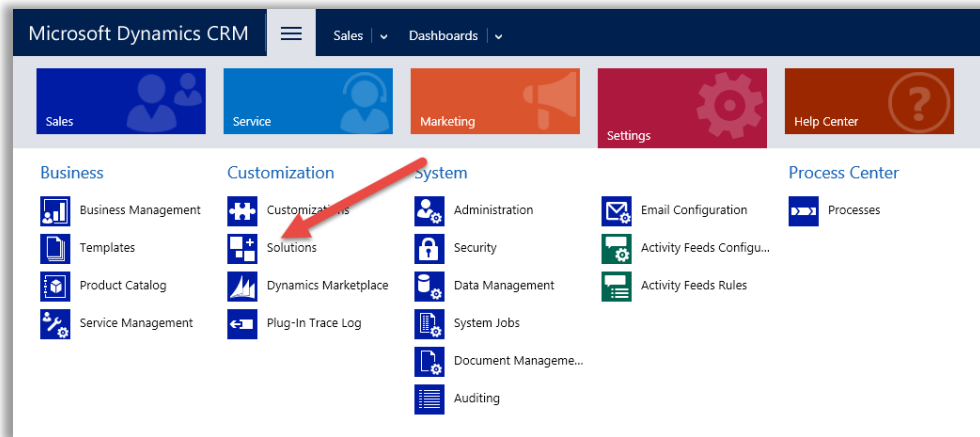
Installing Atrio Copy Address

Backing up Entities

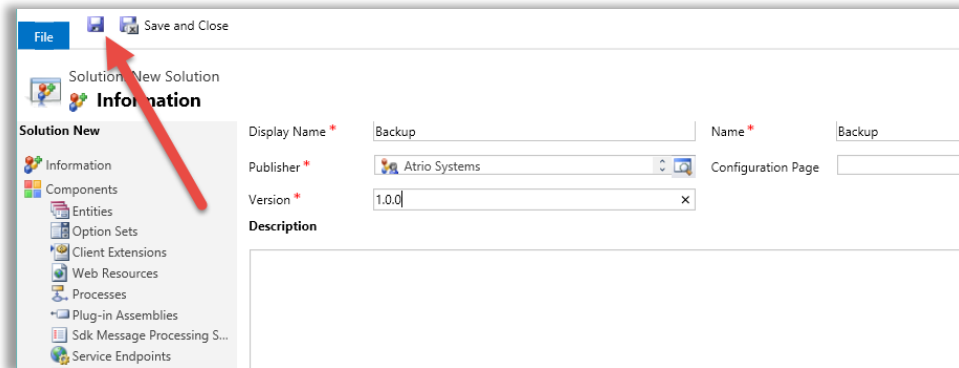
To prevent any customizations on the forms from being changed, back up the Account, Contact and Lead entities in an unmanaged solution.

1. Navigate to **Settings** -> **Solutions** and create a new Solution.

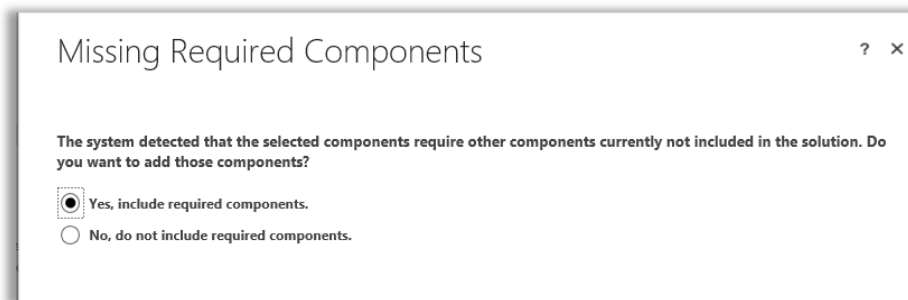
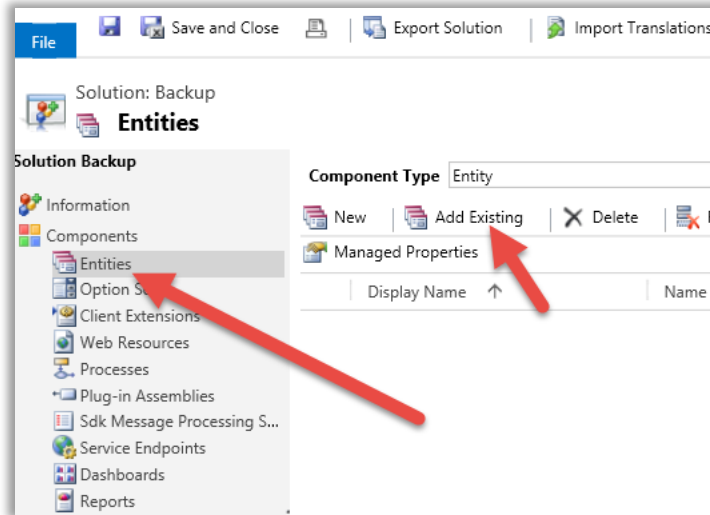




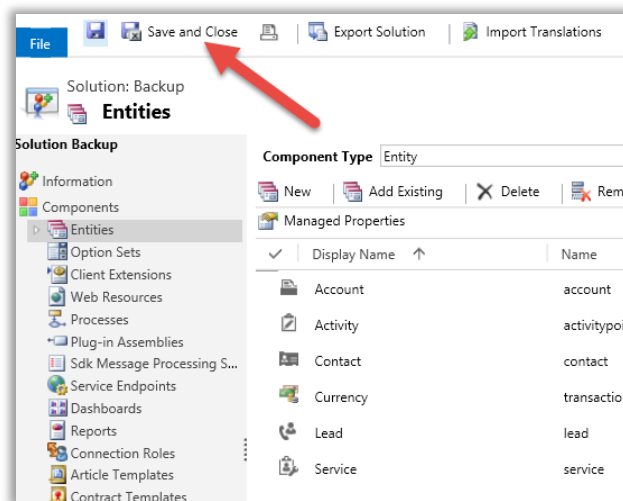
2. Add values to all required fields and click **save**.

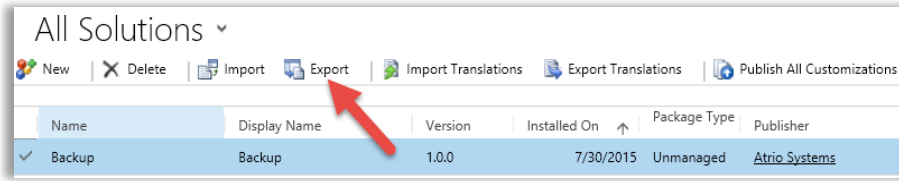


3. Select **Entities**, then **Add Existing**, and select **Account, Contact and Lead**. Select **Yes, include required components**.

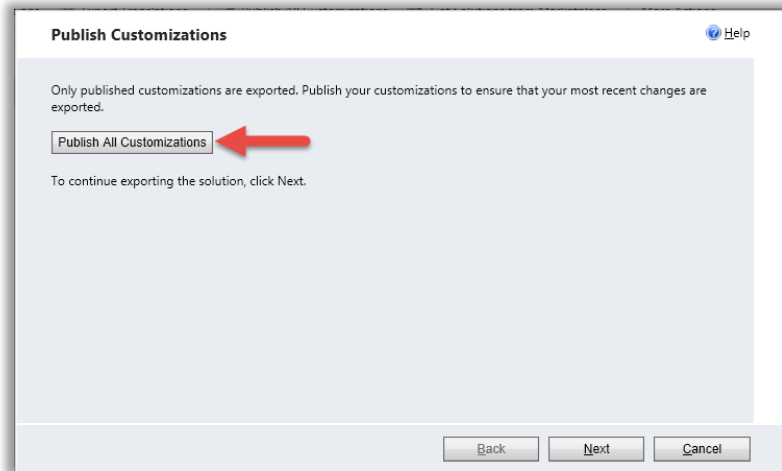


4. **Save and Close** the solution and click **Export**.

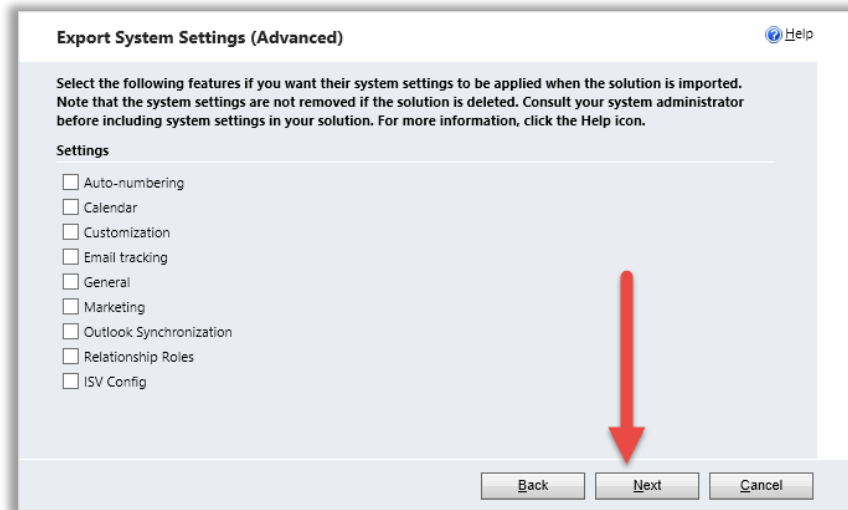




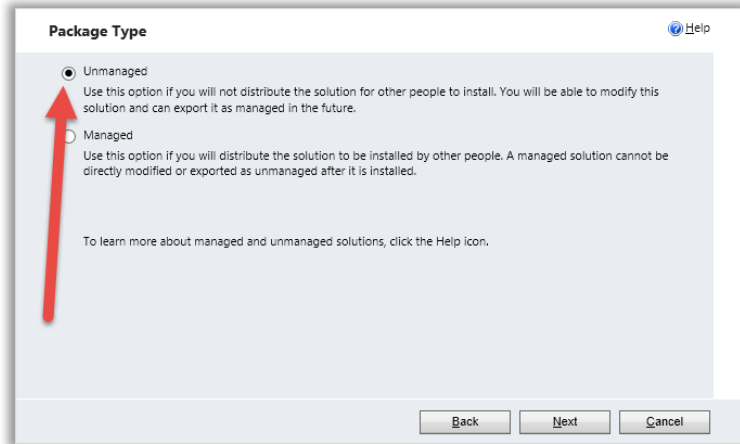
5. Click **Publish All Customizations**, and then **Next**.



6. Follow the wizard instructions and add any required components if required and ignore the advanced settings.

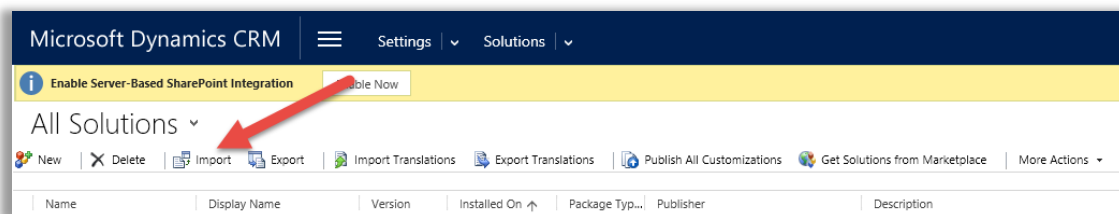
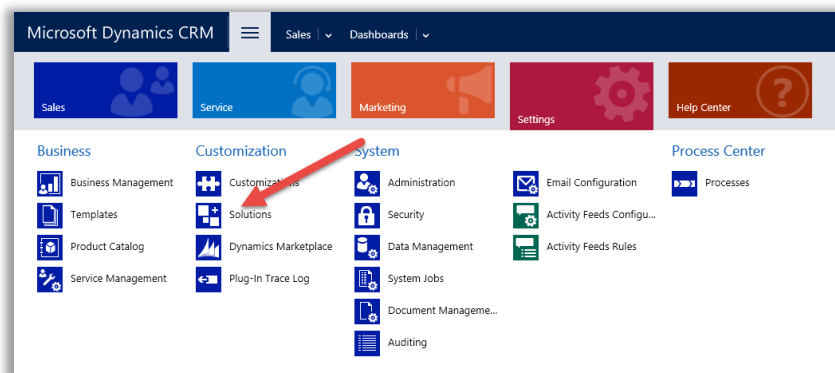
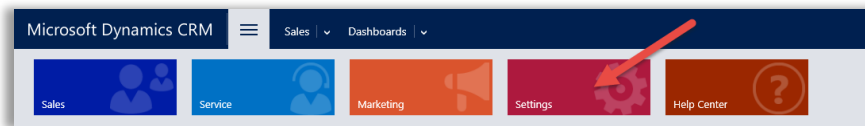


7. Export as an **unmanaged solution** and your current CRM version.

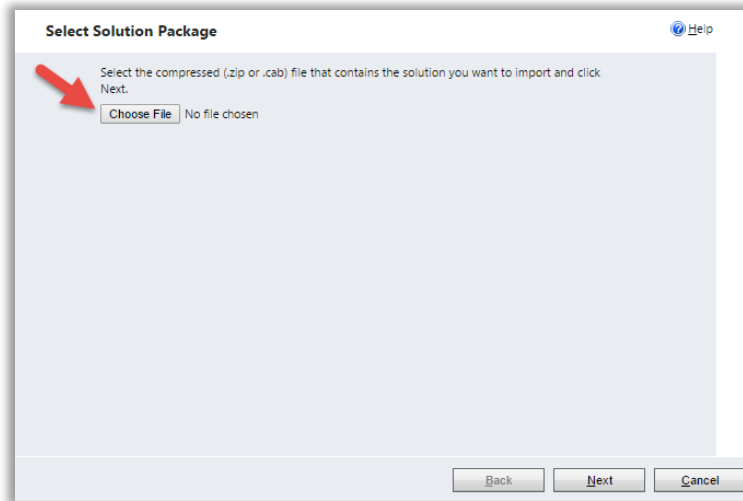


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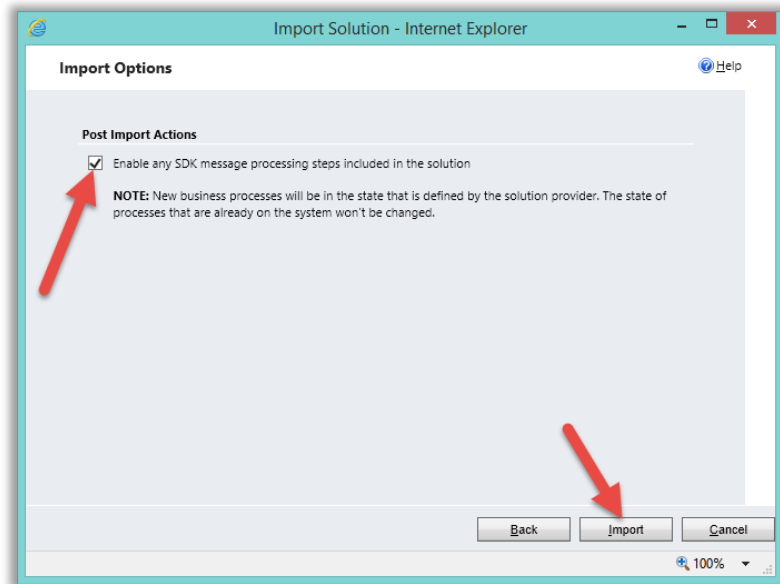
1. Navigate to **Settings -> Solutions** and click **Import**.



2. Select Atrio Copy Address Solution file.



3. Leave box checked and click **Import**.



Reimporting Entities

If your CRM views or forms become modified after importing Atrio Copy Address and publishing all customizations, import your backup unmanaged solution created above in the “Backing Up Entities” section.

Support

Please send any product issues and suggestions to support@atriosystems.com.

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