



Customer Relationship  
Management

# CRM ServiceClient Installation Guide

Version 14.1



# Notices

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# Preface

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For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

## About this documentation

This guide is part of the documentation set for Aurea CRM.

## Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	Fixed-width font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
<b>Bold Fixed-width</b>	<b>Bold Fixed-width</b> font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
<b>Bold Sans serif</b>	<b>Bold sans serif</b> typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter <code>-LOGF</code> .
[ ]	Brackets enclose optional arguments.
{ a   b   c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

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Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
<b>Menu &gt; Choice</b>	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation <b>File &gt; &gt; Exit</b> means: "Open the <b>File</b> menu and choose <b>Exit</b> ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

## Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).

## 1

## Introduction

This online help system describes the installation of CRM.service client.

Services are classes that provide access to the features of the Aurea CRM suite (records, catalogs, campaign management, etc.). They provide a level of abstraction that hides the innards of the system from the application developer. Services do not have user interfaces.

All services of the Aurea CRM web framework can be accessed via the singleton instance `u8.services` of type `u8.Base.Services`. This class acts as a service manager.

```
// getting the instance of the crud service.
var crud = u8.services.crud;
```

Service Name	Description
<code>u8.services.crud</code>	Allows to Create Read Update or Delete records.
<code>u8.services.catalogs</code>	Provides access to catalogs.
<code>u8.services.texts</code>	Accesses localized texts from the designer database.
<code>u8.services.notification</code>	Formats and dispatches notifications (messages, warnings, errors ...) in the system.
<code>u8.services.navigation</code>	Navigates to pages.
<code>u8.services.actions</code>	Executes actions configured in CRM.designer (page calls, JavaScript calls ...).
<code>u8.services.reporting</code>	Creates reports.
<code>u8.services.queries</code>	Executes queries.

# 2

## Setup and installation

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In order for CRM.service client to be installed successfully, the minimum system requirements must be met and the installation process must be followed.

In order to install CRM.service client:

- Log on to Windows with administrator privileges.
- Free disk space required: approx 250 MB.
- An additional 130 MB of disk space is required by the installation process and for copying files.
- Ensure you are using a supported operating system.

### Installing CRM.service client

If you need the setup for CRM.service client, contact your update representative.

To install CRM.service client:

1. Copy `CRM.service_client_<vertical>_<version number>.exe` to your local drive and start it.

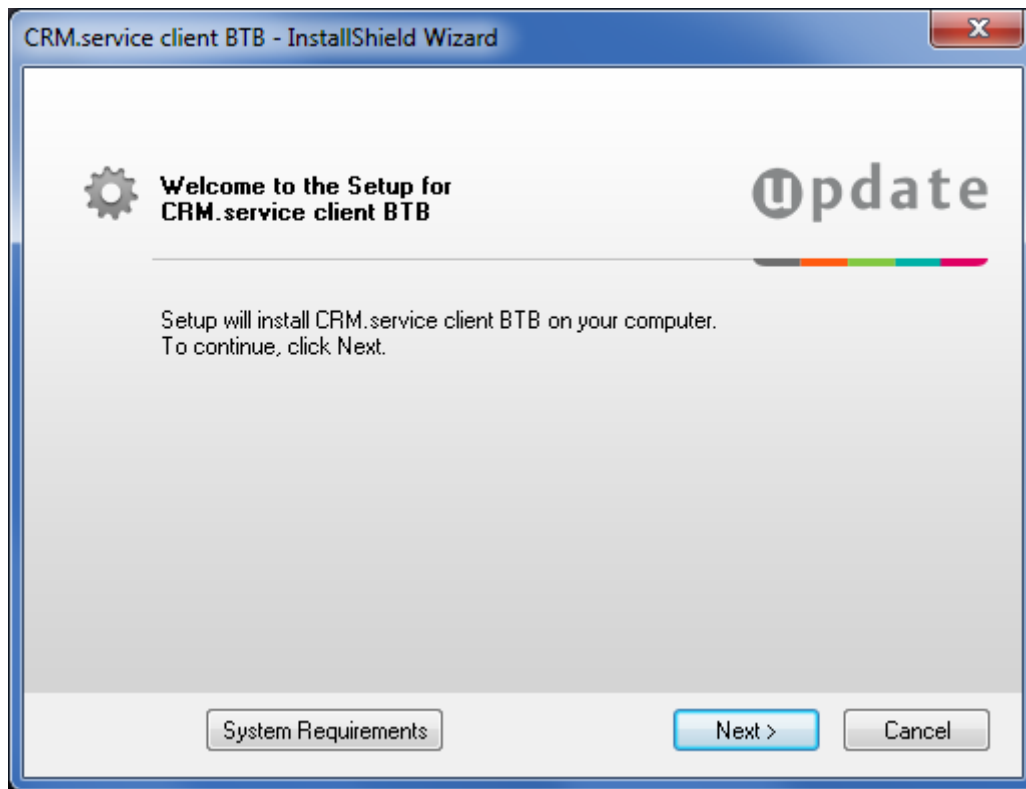
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**Note:** Do not start the file from a network drive.

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2. The installation files are unpacked (per default into `c:\temp\CRM.service client <vertical>`). The setup program should start automatically. If the installation does not begin automatically, run `setup.exe` manually.

The installation starts and the **Welcome** dialog box is displayed.



3. Click on **Next**.

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**Note:** Setup tests whether CRM.service client is already installed. If the corresponding Windows registry entries are found, setup is cancelled.

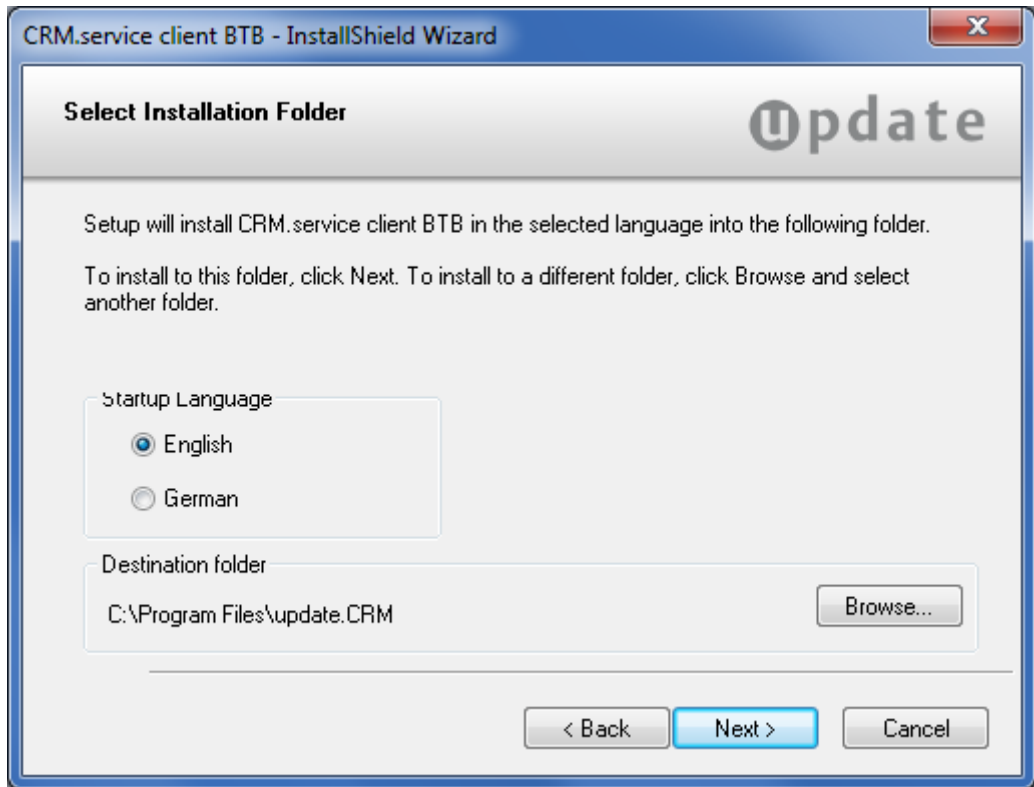
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The **Select Installation Folder** dialog box is displayed.

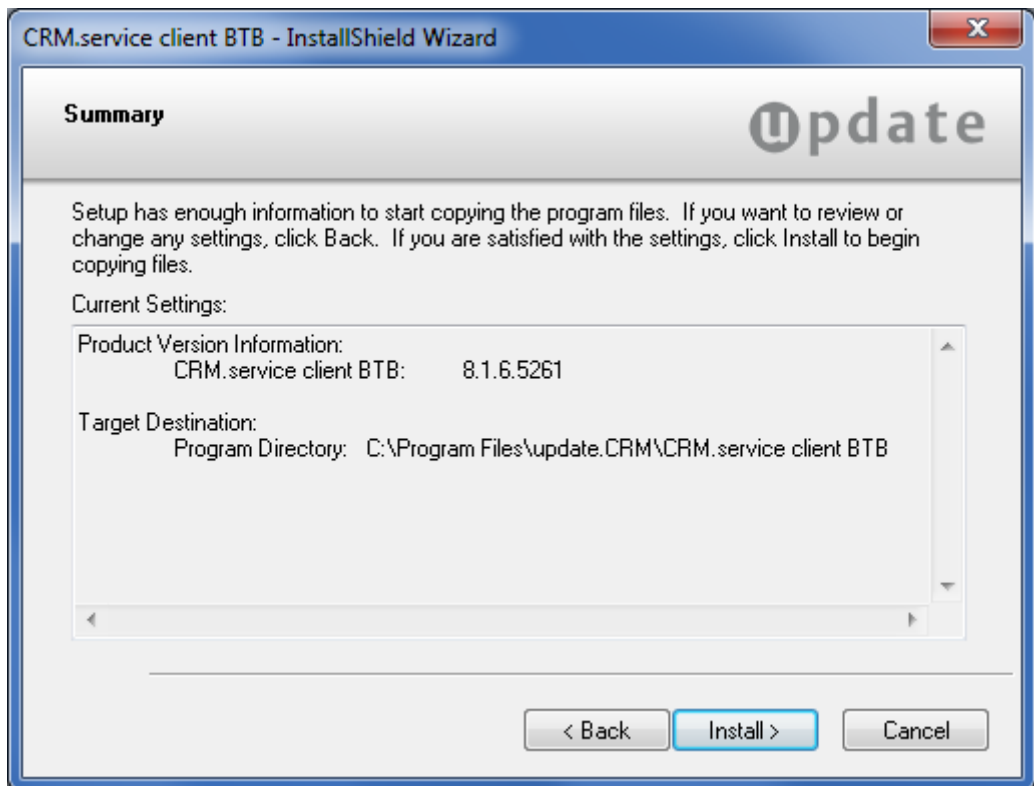
By default, CRM.service client is installed in the following directory:

`C:\Program Files\update.CRM`





4. Select the desired language (**English** or **German**). To select another directory, click on **Browse**.
5. Click on **Next**. The **Installation Summary** dialog box is displayed.



6. Verify your settings. Click **Back** to change your installation settings.
7. Click **Install** to start the installation process.  
Setup copies the program files to the directory you have specified.
8. Click **Finish** to end the installation.

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**Note:** CRM.service client setup installs .NET Framework 4.5 automatically.

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### Installing Hotfixes

See the *Installing Hotfixes* document available from <https://help.aurea.com/crm/> for details on installing hotfixes.