



c360 Web Connect Installation Guide

Microsoft Dynamics CRM 2011 compatible

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Overview and Notes

Microsoft CRM Compatibility

c360 Web Connect for Microsoft Dynamics CRM 2011 is compatible with Microsoft Dynamics CRM 2011. For additional product information, please visit <http://www.c360.com/webconnect.aspx>.

Please note that if this installation is on an environment in which c360 Web Connect v3 was installed, you must uninstall the product before continuing with this installation. Please contact support@c360.com for more information.

Prerequisites

Microsoft .Net Framework 2.0 is a prerequisite to install c360 Web Connect on a non-CRM machine.

If you're in a UAC environment you will not be able to publish from outside the domain of your web server so you won't be able to publish Web Connect to your web server. UAC requires a user interaction (can't copy programmatically) to complete the copy of the folders so it prevents the programs from doing those actions if you don't have user intervention.

Note: publish to a local folder and copy it to the remote machine.

c360 Web Connect for Microsoft Dynamics CRM 2011

c360 Web Connect for Microsoft Dynamics CRM 3.0 is a Microsoft CRM compatible component that allows organizations using Microsoft CRM to easily integrate their web site to Microsoft CRM for lead and web visitor activity capture. Web Connect will allow organizations to:

- Link multiple web site forms to CRM to create Lead and Activity records
- By form, Web Connect can be configured to execute any or all of the following actions:
 - Email all web form values and actions taken to an SMTP address, record owner, record owner's manager or team in CRM
 - Match by email address and create new Lead or Activity depending on whether email address was matched to an existing Lead or Contact
 - Create an additional CRM activity to log form field values and actions taken (same information as sent in email)
 - Send a configurable HTML or text (administrator may specify) formatted confirmation email to visitor
 - Specify a URL to which to post one or more of the form field values (e.g. this action may be used for opting visitor into a 3rd party email list)
 - Run workflow rules in CRM

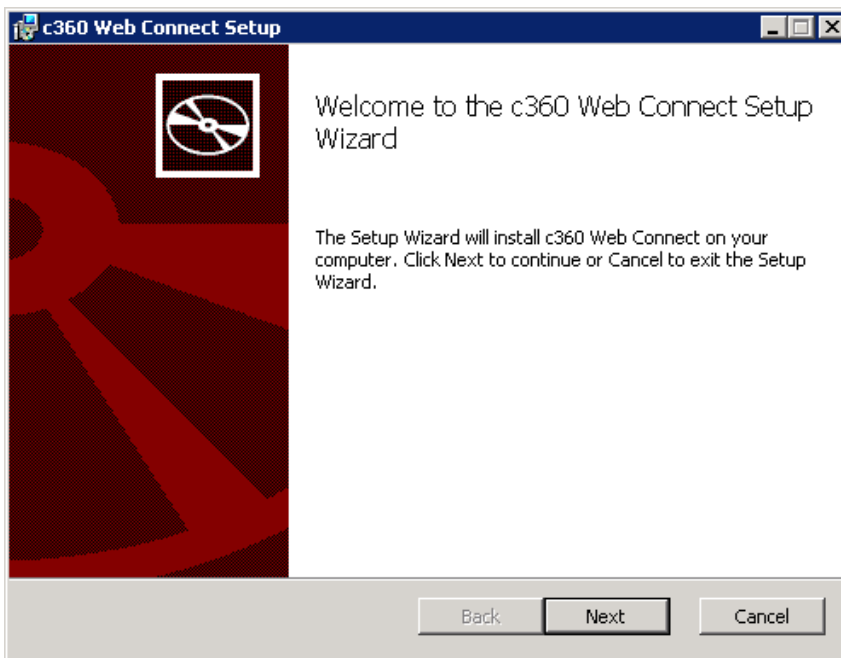


Installation Instructions

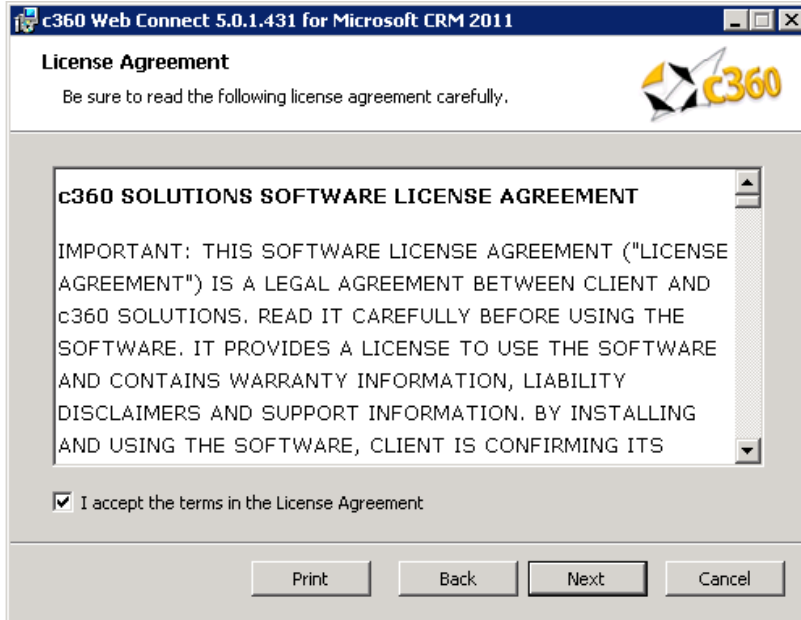
To install the product the installation application must be run on the CRM server by a user with Domain Administrator privileges. The installation of c360 Web Connect for Microsoft CRM 2011 requires the c360 Web Connect crm2011.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Web Connect for Microsoft Dynamics CRM 2011

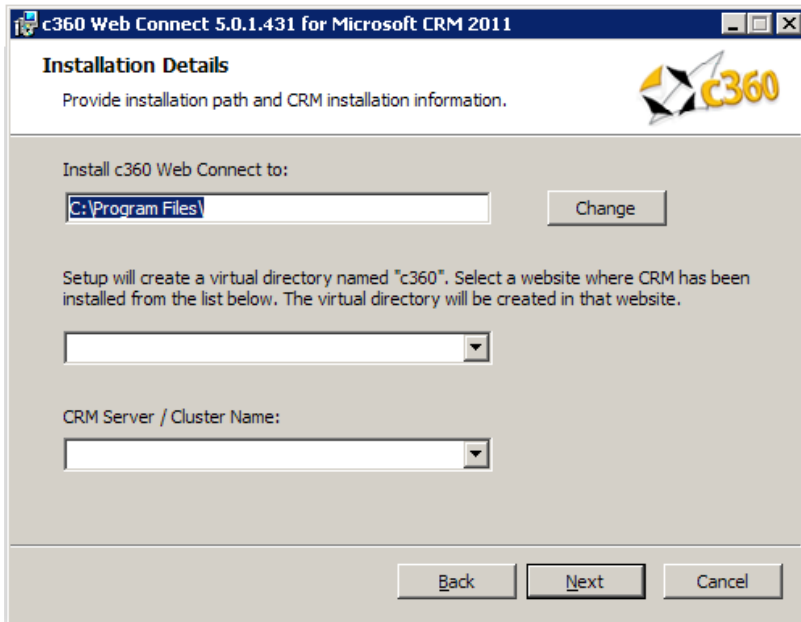
1. Extract the c360 Web Connect crm2011.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Web Connect for Microsoft crm20112011.exe' file. You will see the following screens.



3. Click '**Next**' to begin the installation process.



4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click '**Next**'.



5. Accept the default entry for the installation path or modify. Select the website that will contain the host the c360Service virtual directory and verify that the Server / Cluster is correct. Click '**Next**'.

Notes: Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.



c360 Web Connect 5.0.1.431 for Microsoft CRM 2011

CRM Server Details
Provide CRM Server information.

CRM Server Host:

CRM Server Port:

Secured:

CRM Server information will be used by the setup for communicating with CRM discovery service during installation of the product.

Back Next Cancel

6. Enter the CRM Server Host and Port (e.g. [Http://Url](http://Url)). Check 'Secured' if running https security. Click **'Next'**.

c360 Web Connect 5.0.1.431 for Microsoft CRM 2011

c360 Web Connect Setup
Product to be installed.

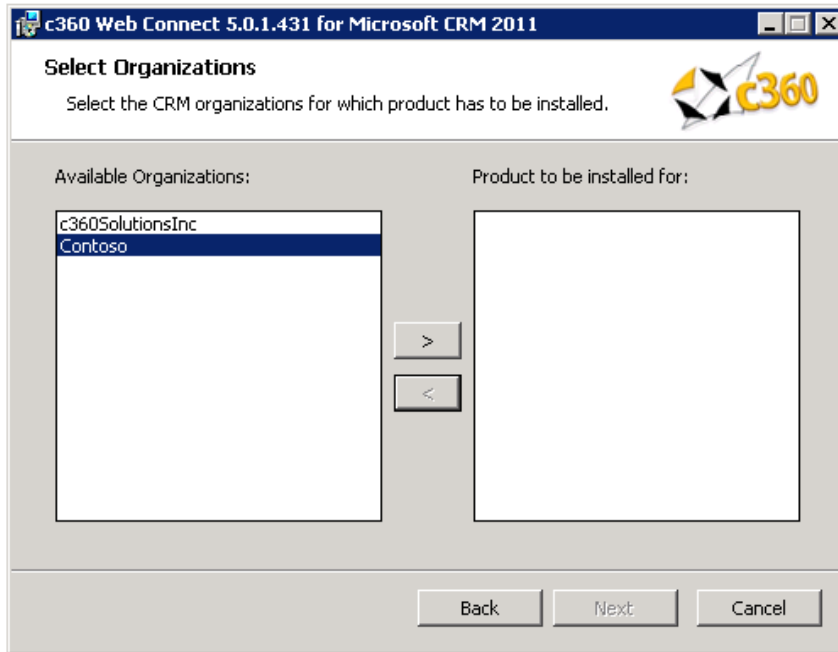
Web Connect

Back Next Cancel

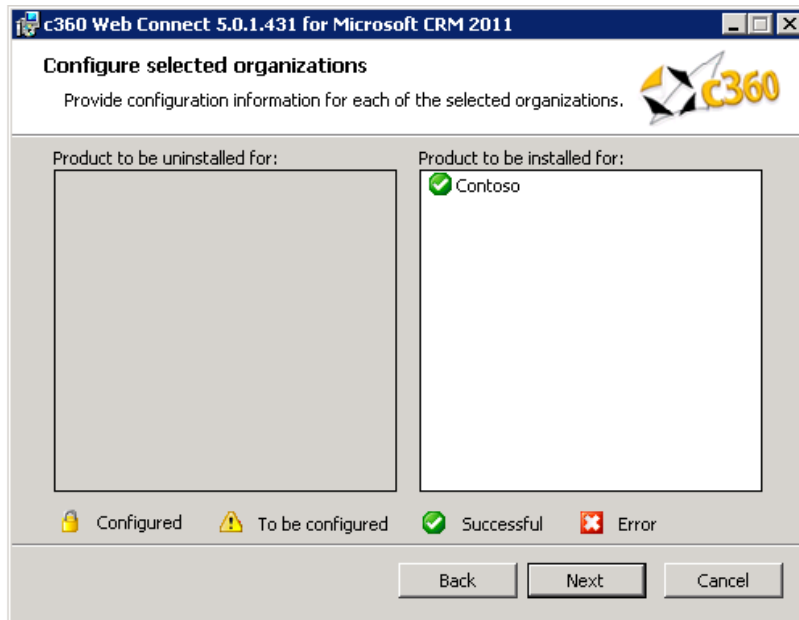
7. Click **'Next'**.

A screenshot of the 'c360 Web Connect Setup' dialog box. The title bar reads 'c360 Web Connect 5.0.2.119 for Microsoft CRM 2011'. The main title is 'c360 Web Connect Setup' and the subtitle is 'Discovery Service URL'. The dialog contains a text box for 'Enter Discovery Service URL' with the value 'http://na360crm5/XRMServices'. Below this are four more text boxes labeled 'User Name:', 'Password:', 'Retype Password:', and 'Domain:'. At the bottom are three buttons: 'Back', 'Next', and 'Cancel'. The c360 logo is in the top right corner of the dialog.

8. Accept the default entry for the MSCRM Discovery Service URL or modify. Enter the credentials and Click 'Next'. These credentials will be used to execute the discovery service methods.
For an IFD Enabled system, fully qualified domain name which has been used for configuring IFD in CRM needs to be entered in Discovery Service URL.



9. Select the Organization(s) for which the product is to be installed. Then click **'Next'**.



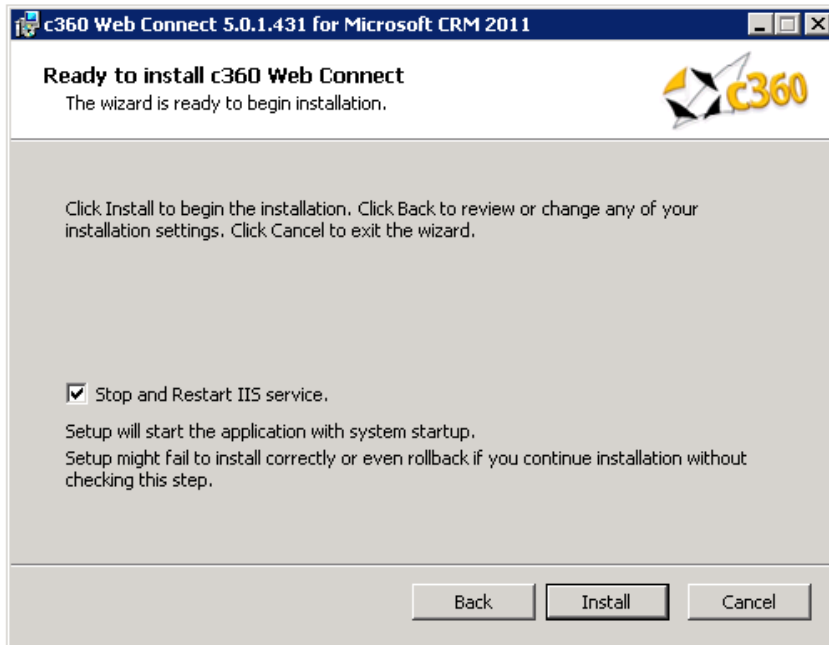
10. There is no additional configuration needed. Click **'Next'**.

Note:

- **To be configured:** The organization has not been configured for installation.
- **Successful:** The organization has been configured and configuration settings have been validated. The product is ready to be installed for the organization.

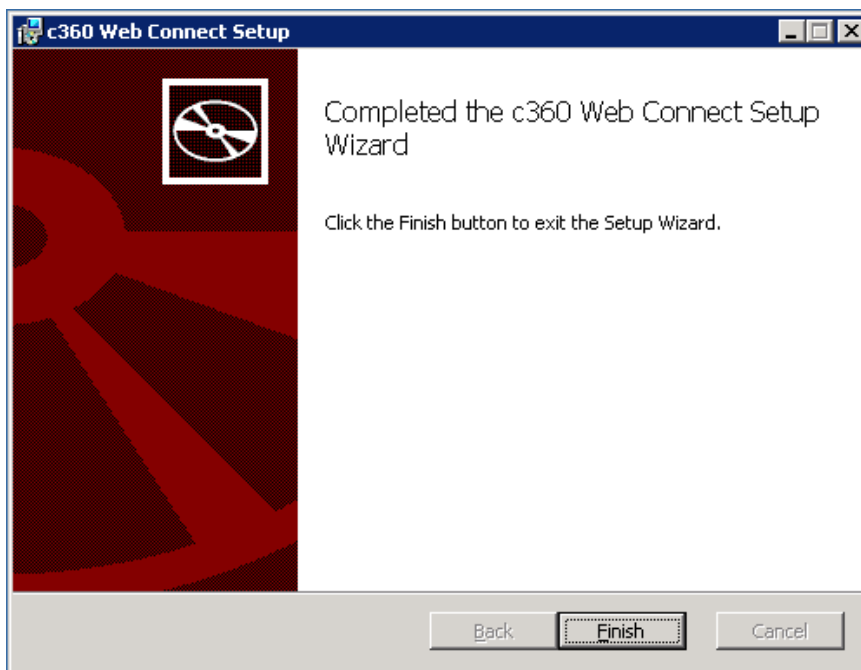


- **Error:** There has been an error in validating the configuration settings for the organization. Settings need to be reviewed for accuracy and corrected. (There will be an error on the configuration screen deemed to have invalid entries)
- **Configured:** The Product has been configured and installed for this organization. It cannot be reconfigured but only uninstalled.



11. Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install c360 Web Connect for Microsoft CRM 2011.

Note: Because an IISReset is required for the product, it is recommended that the installation be postponed until the IISReset action can be performed.



12. Click **'Finish'** to exit the installation wizard.



C:\Program Files\c360 Solutions\W5\Organizations\c360_Web_Connect_InstallationSummary_3_2_2011_ - Mic...

C:\Program Files\c360 Solutions\W5\Organizations

Bing

Created On : 3/2/2011 2:38:18 PM

Product : c360 Web Connect

Contoso

Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	

Done Computer | Protected Mode: Off 100%

13. A summary of the installation will appear.



Additional Configurations

Web Services URL

If the Microsoft CRM web site is running with 'non-default' configuration, it will be necessary to add a key to a c360 Configuration file. Examples of non-default installations are:

- CRM website using a non default port number.
- CRM website is configured to use a hostname.
- CRM secured access is enabled (https connection required).

If any of these conditions is true, c360 Web Connect will be unable to contact your CRM system because it attempts to connect using the following default connection string: <http://machinename/MSCRMServices>. To remedy this situation do the following:

1. Open the c360.Config file located in \\V5\Organizations\[OrganizationName]\Config folder in the default directory (C:\Program Files\c360 Solutions) or in the directory selected by you during installation
2. `<add key='WebServicesUrl'
value='http://myservername:8000/MSCRMServices'/>`
3. Replace 'myservername' with the actual name of your CRM server or the hostname if your site is configured to use hostname.
4. Replace '8000' with the TCP port number your CRM website is using.
5. Replace 'http' with 'https' if you have enabled 'CRM secured access'.

Load-Balanced Environments

To support a load-balanced environment, the installer must be run on only one load-balancing node.



Administrator Impersonation

In order to override the standard permission check performed by Web Connect, take the following action:

1. Modify the "AdministratorRole" key in the c360.config file, the value of which can take either the form of a GUID or a role name.
2. If the role name contains special characters, the role name must be encoded before adding it to this key.

A user belonging to the specified role or GUID will be considered as an administrator when attempting to access secure areas in Web Connect.

***Note** that this will not override the CRM security model.

Troubleshooting

Search the c360 Knowledge Base for any errors you receive during or after installation. www.c360.com/support.



Licensing

Upgrading c360 Web Connect

It is not possible to migrate from Web Connect v3.0 to Web Connect for CRM 2011. Your system must have Web Connect v4.0 or higher in order to upgrade to c360 Web Connect for CRM 2011.

If c360 Web Connect for CRM 4.0 is already installed with valid licenses, those licenses will be valid for Web Connect for CRM 2011. If you no longer have a valid license, or if this is a fresh installation of c360 Web Connect for CRM 2011, license setup application can be obtained from c360 Solutions Inc upon request. This application is an executable file designed to be run on the CRM server.

Copy the License setup application to the CRM server and double click it to run the application. It will automatically place the license file in the appropriate directory.

Evaluation Licenses

To request a 15 day production evaluation license go to our web site at <http://www.c360.com/Evaluation.aspx>. You will be emailed a licensing application that, when run, will place a valid license file in the appropriate directory.

Demo Licenses

To download "demo licenses" for one of the sample Microsoft Dynamics CRM 2011 installations for organization names 'Adventure Works Cycle Demo', 'Adventure Works Cycle', 'Contoso' or 'Microsoft CRM', please visit our website at <http://www.c360.com/Licenses.aspx>



Installing additional organizations _____

Steps to install additional organizations for c360 Web Connect for Microsoft Dynamics CRM 2011

1. Re-run the c360 Web Connect for Microsoft CRM crm2011.exe. Follow the process as described in Installation Instructions.
2. On step 8, note select the addition organization(s) to be installed.
3. Continue the process as described in the rest of the Installation Instructions.



Uninstall Instructions

Steps to uninstall c360 Web Connect for Microsoft Dynamics CRM 2011

To uninstall all pieces of c360 Web Connect, you must be a local Administrator on the server as well as a member of the System Administrator security role in CRM. This user must be the same user that installed c360 Web Connect.

Option 1: From Add/Remove Programs

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Web Connect from the list of the currently installed programs
3. Click '**Remove**'
4. Click '**Yes**' in the confirmation message box to begin the uninstall process.

Note: this will uninstall for all organizations.

Option 2: From the c360 Web Connect.exe

1. On the server, double click the c360 Web Connect installer
2. On the 'Change, repair, or remove installation' screen, click '**Remove**'
3. On the next screen, click '**Remove**' and the executable will uninstall c360 Web Connect

Steps to uninstall an organization for c360 Web Connect for Microsoft Dynamics CRM 2011

1. Re-run the 'c360 Web Connect for Microsoft CRM crm2011.exe' file.
2. Select the modify option.
3. De-select any configured organizations. Click '**Next**'.
4. Click '**Yes**' in the confirmation message box to begin the uninstall process.

Note: multiple organizations can be uninstalled at once.



International Languages _____

c360 Web Connect for Microsoft Dynamics CRM 2011 includes language translation files which allows you to select the language displayed to the user (German, French etc).

Please go to our language product page <http://www.c360.com/Language.aspx> to obtain instructions for installing and configuring the language translation.