

RED Offline – Deployment Instruction

Prerequisite:

1. Microsoft Dynamics CRM should be installed on the server and should be accessible.
2. Microsoft Dynamics CRM outlook plugin should be installed on the notebook client.
3. Microsoft Dynamics CRM should be accessible from the notebook client through browser and outlook.
4. Outlook should be able to go offline and online without any error from Microsoft Dynamics CRM.
5. Data synchronization should be performed in outlook online mode.

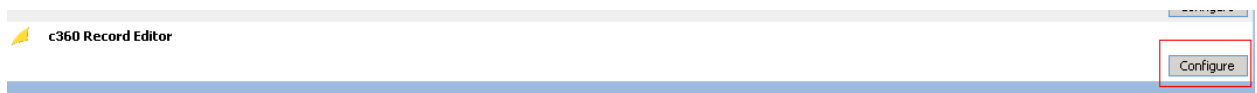
Steps:

General verification:

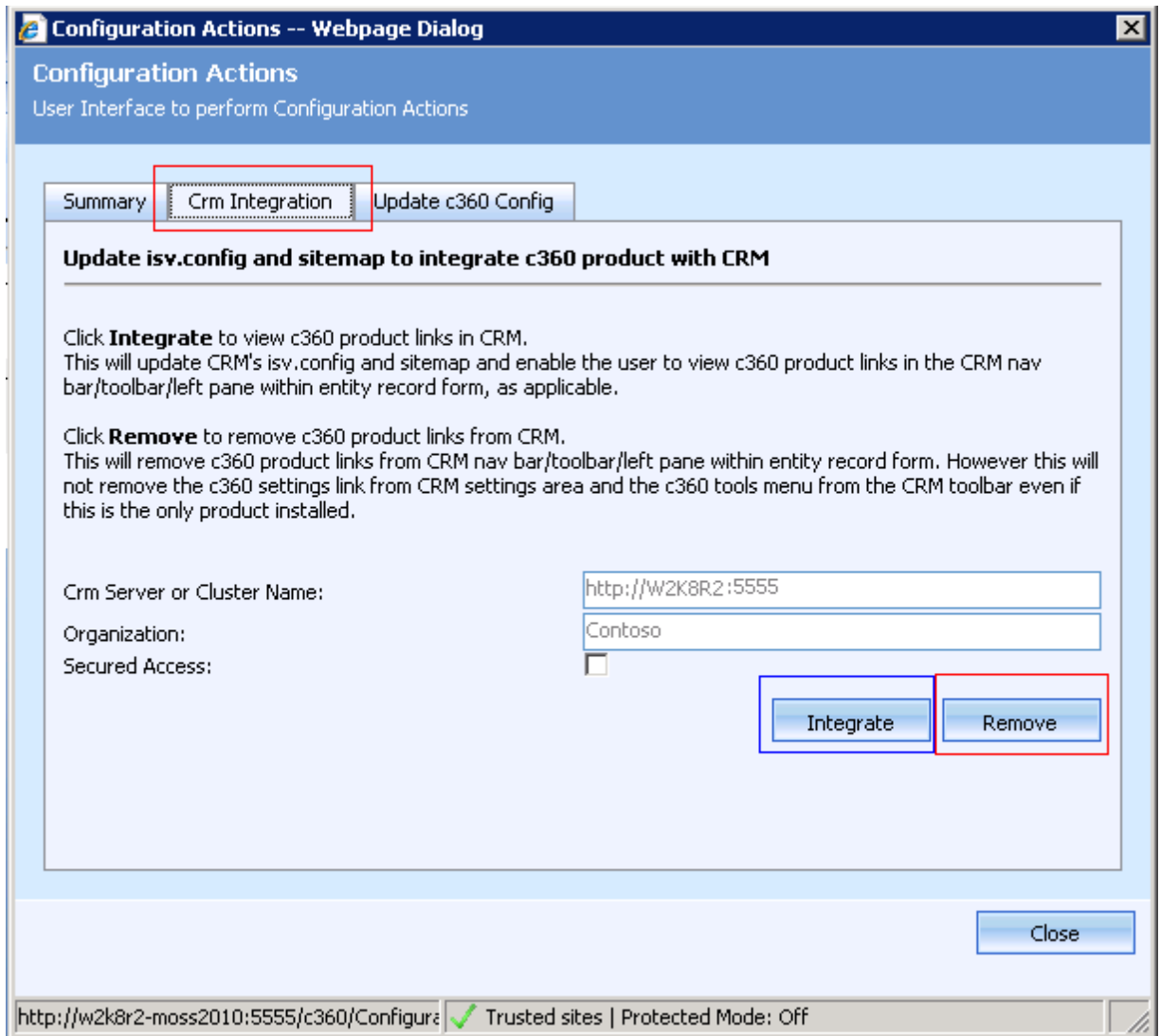
1. Install c360 RED x64 bit on the server. Please find the installation guide and c360 RED x64 bit installer from the zip file sent along with this guide.
2. Deploy the license for c360 RED in the “C:\Program Files\c360 Solutions\V4\Organizations\<Organization Name>\Licenses” folder.
3. Make sure RED offline is working on the server.
4. Access the MSCRM URL on the notebook client in online mode and make sure the RED work on the notebook using browser client.
5. Access RED from the outlook client and make sure RED is working from the outlook client in online mode.

Steps on MSCRM Application Server:

1. Open MSCRM and click on **Settings-> c360 Settings** on left Navigation bar.
2. Click on **c360 Configuration Center** in the content area.
3. Click on **Configure** button adjacent to **c360 Record Editor** Text.



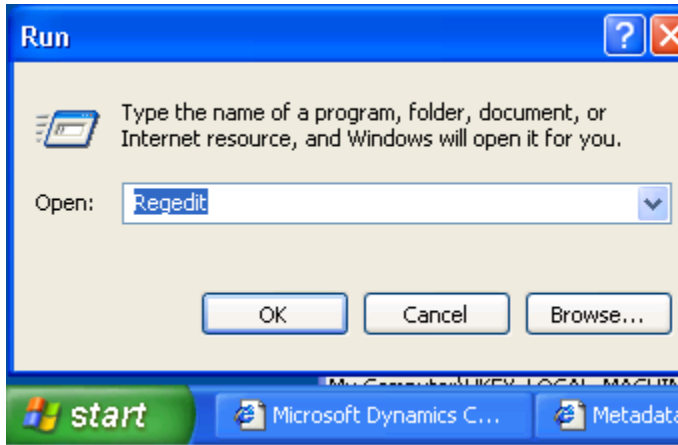
4. A dialog will appear after few seconds. Click on **Crm Integration** tab.
5. Click on **Remove** button.



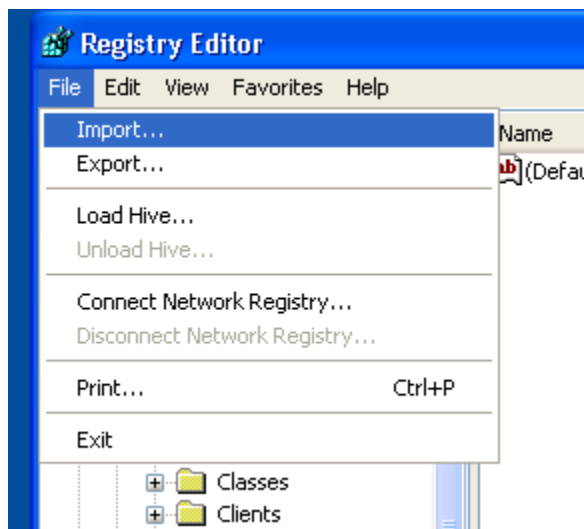
6. Replace the file '**c360.RecordEditor.Config**' from the "**Application Server**" folder of the given zip file, into **c:\Program Files\c360Solutions\v4\Install** folder. Considering the MSCRM is installed under c:\Program files.
7. Click on **Integrate** button of the same dialog above.
8. Copy the Files in the folder **ServerAssemblies** from the "**Application Server**" folder of the given zip file, into **c:\Program Files\c360Solutions\v4\web\crmweb\bin** folder. Considering the MSCRM is installed under c:\Program files.
9. Copy the file in **ASPXPages** folder from the "**Application Server**" folder of the given zip file, into **c:\Program Files\c360Solutions\v4\web\crmweb\RecordEditor** folder. Considering the MSCRM is installed under c:\Program files.

Steps on MSCRM Outlook Client Machine (Notebook):

1. Copy the folder **c360** from the **Outlook Client** into "**C:\Program Files\Microsoft Dynamics CRM\Client\res\web**" location. Considering the MSCRM outlook plug-in is installed under c:\Program files.
2. Copy the files from '**Client Assemblies**' folder of the given zip file into "**C:\Program Files\Microsoft Dynamics CRM\Client\res\web\bin**" location. Considering the MSCRM outlook plug-in is installed under c:\Program files.
3. Copy the '**c360Solutions**' folder from the given zip file into "**c:\Program Files**".
4. In the path "C:\Program Files\c360 Solutions\V4\Organizations\Contoso" Change the organization name from **Contoso** to the organization of the client environment.
5. Import the registry key c360 into "HKEY_LOCAL_MACHINE\SOFTWARE". Change the values of the key CRMServerUrl to Servermachine url.
 - a. Open Registry editor using **Regedit** command from the **run** menu of the **Start** button.



- b. Select **HKEY_LOCAL_MACHINE\SOFTWARE** and click on **import**



- c. Select the Registry file given in the zip file.

- d. Change the **CRMServerUrl** key to actual CRM server Url.
- e. Change the **c360LaptopProduct** key to the path where c360 product should be installed.

