



c360 Notification Service Installation and Configuration Guide

Microsoft Dynamics CRM 4.0 compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Notifications for Reminder for Microsoft Dynamics CRM 4.0.

Microsoft CRM Compatibility

C360 Notifications for Microsoft Dynamics CRM 4.0 is compatible with Microsoft CRM 4.0. For additional product information, please visit <http://www.c360.com/Products.aspx>.

Installation Instructions

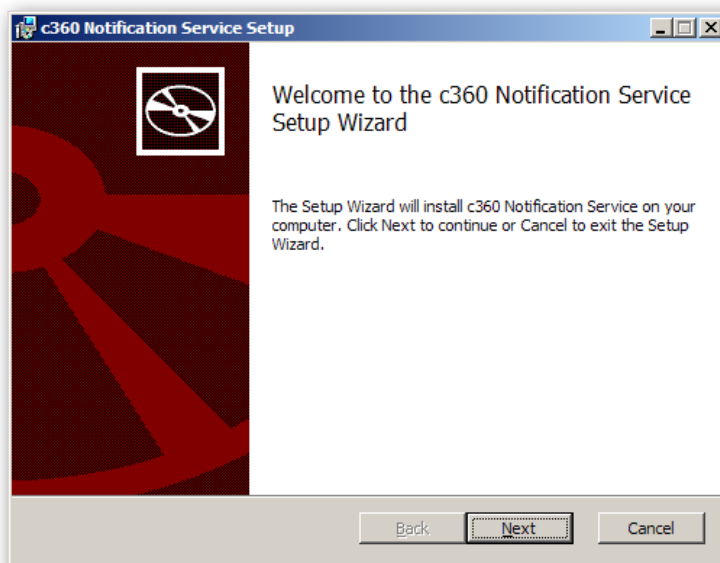
Requirements

To install c360 Notification Service the installation must be run on the CRM server by a user with Local Administrative privileges and CRM Deployment Manager privileges. The user must also be a member of the CRM System Administrator role.

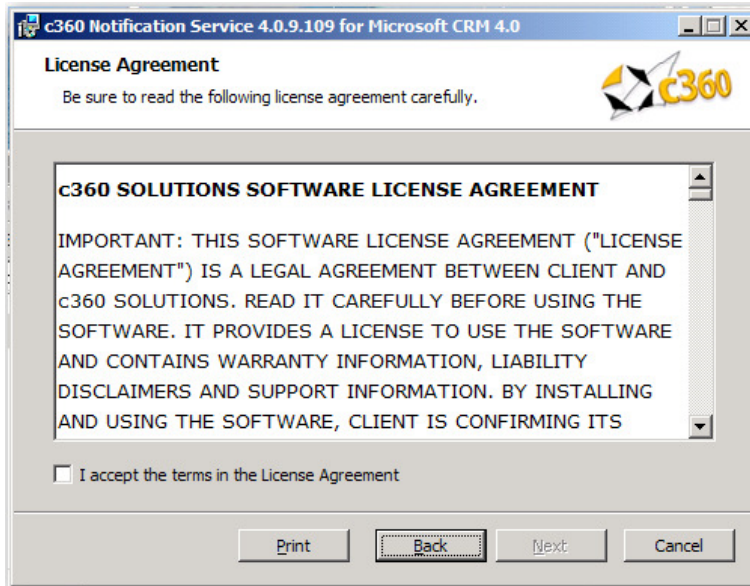
Microsoft .NET framework 3.5 SP1 or above is a pre-requisite for installation.

Steps to install c360 Notification Service for Microsoft Dynamics CRM 4.0

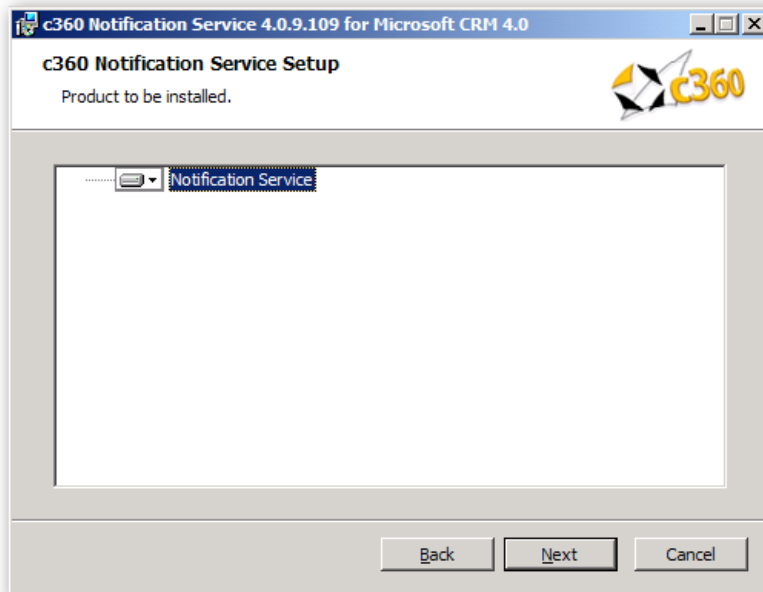
1. Extract the c360 Notifications for MSCRM v4.zip file into a folder on the Microsoft CRM server.
2. Double click the 'c360 Notification Service for Microsoft CRM 4.0.exe' file. The following screen will appear:



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



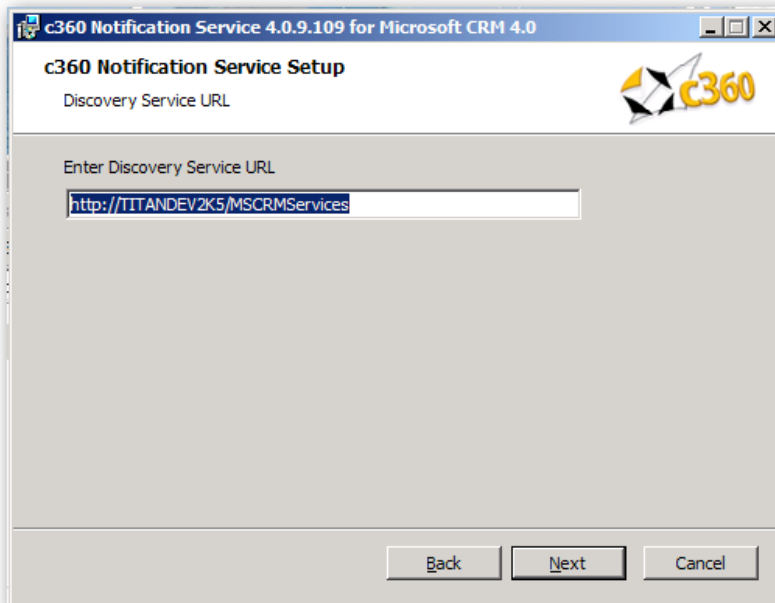
4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click 'Next'.



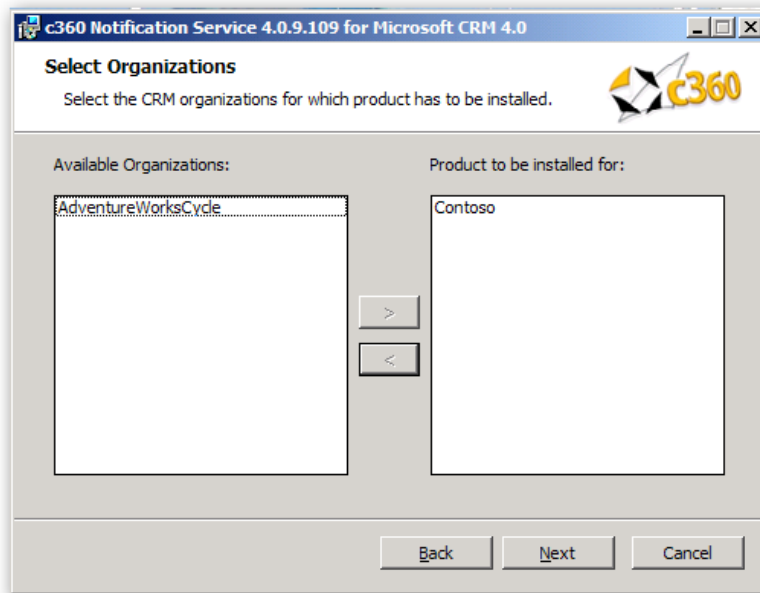
5. Accept the default entry for the installation path or modify. Select the CRM website and verify that the CRM Server / Cluster is correct. Click 'Next'.

Note:

- CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- If any c360 products have previously been installed, this screen will not appear. All configuration settings from the previous install(s) will be used.
- If this is an IFD environment, post-installation ensure that the 'Enable Anonymous Access' setting for the c360 Virtual Directory is disabled.



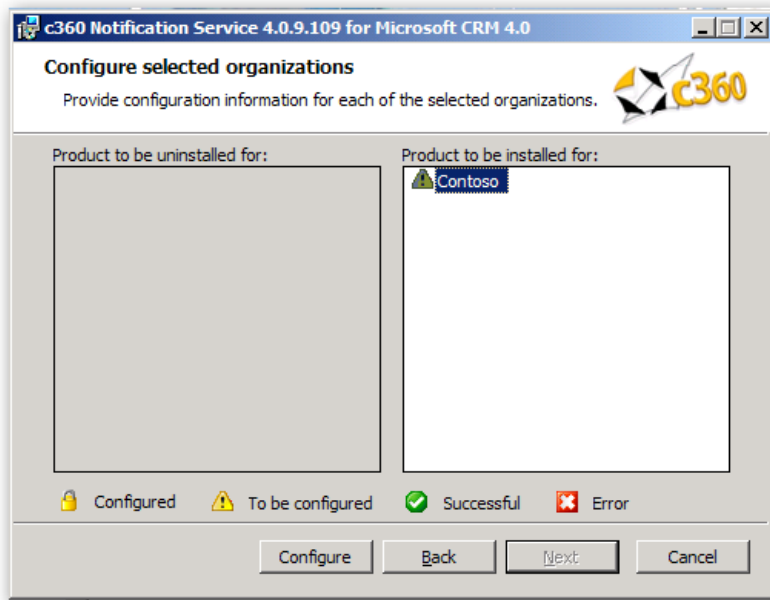
6. Accept the default entry for the MSCRM Discovery Service URL or modify. Click **'Next'**.



7. Select the Organization for which the product is to be installed. Then click **'Next'**.

Note:

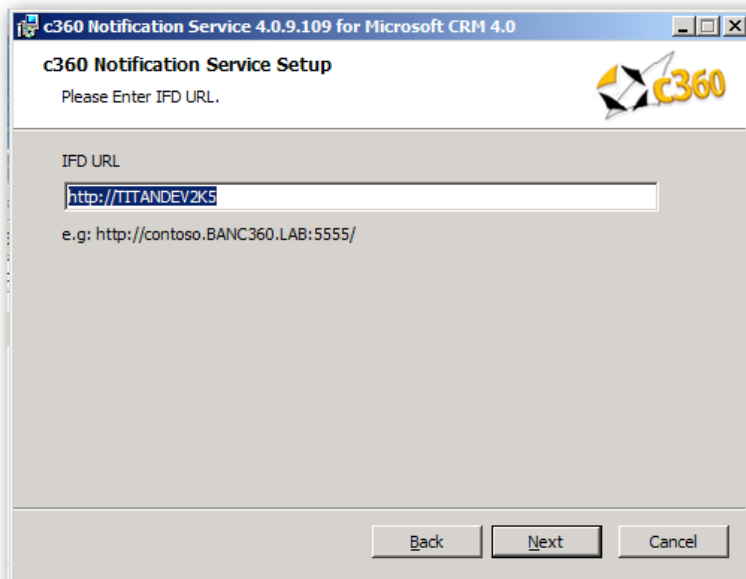
- Only One organization can be selected.
- Next Button will be disabled if organization is not selected.



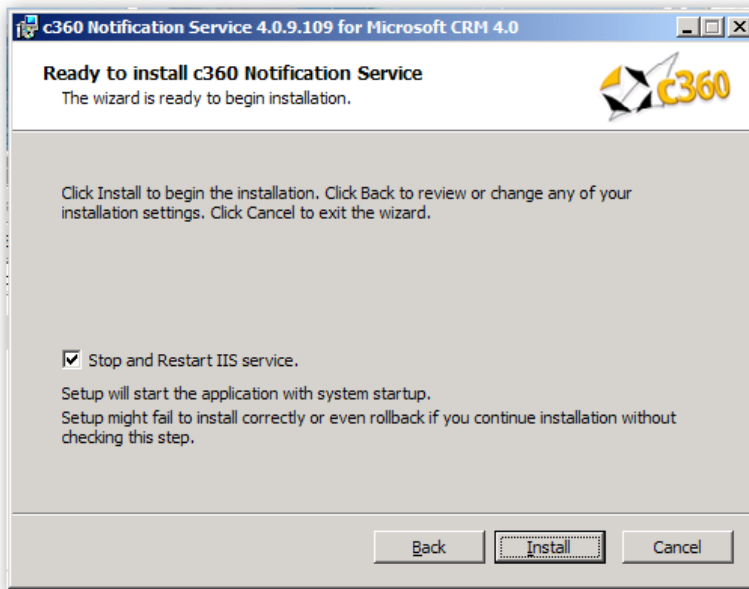
8. The organization is configured. Click 'Next'.

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.

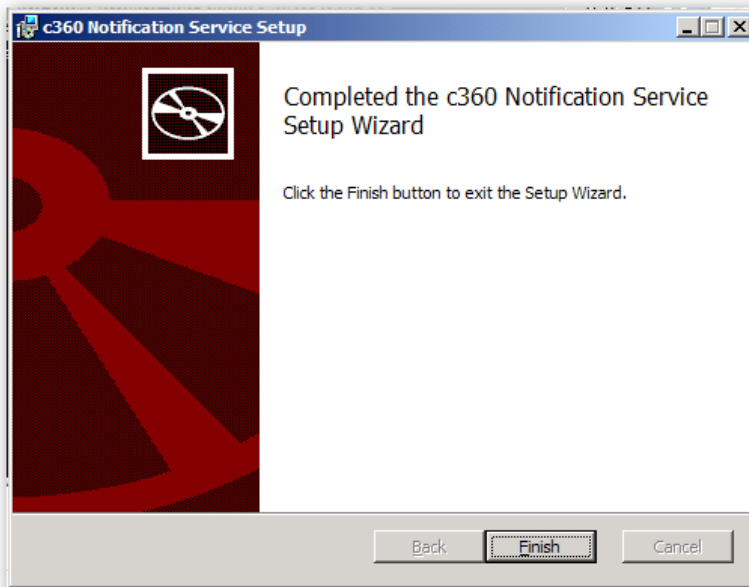


9. Enter the IFD URL to configure the Organization. Click 'Next'.



10. Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install the c360 Service Productivity Pack for Microsoft CRM 4.0.

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



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



Product : c360 Notification Service

Contoso

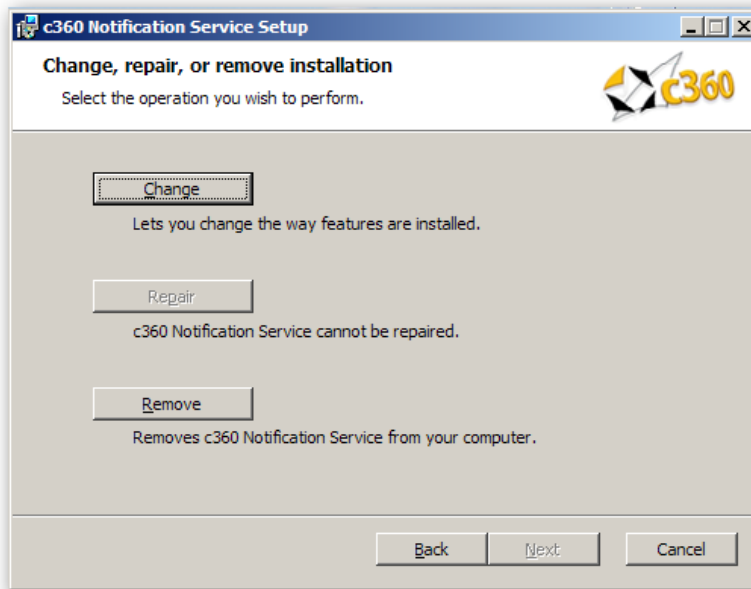
Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	
Update c360 Config	Successful	
Update Config Files	Successful	Successfully updated the config file.
EnableISVIntegration	Successful	Successfully enabled the ISV integration

12. A summary of the installation will appear.



Adding and Removing Additional Organizations

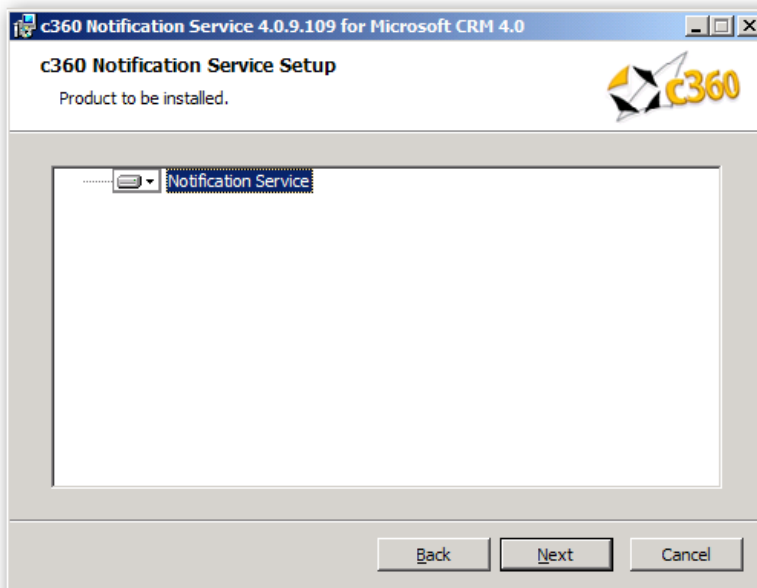
To install an additional organization, double click on the c360 Notification Service for Microsoft 4.0.exe once again.



1. Click '**Change**'.

Note:

- The Repair Button will be disabled.
- Change Button is for installation/un-installation of organizations.
- Remove Button is to uninstall the c360 Notification Service. This will uninstall the product for all organizations.



2. Click '**Next**'.



3. Follow steps 7 through 13 as outlined in the above installation instructions.
4. On step 9, choose the organization to install/uninstall.
5. Continue the process as described in the rest of the installation instructions.



Licensing

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 valid license files in the appropriate directory.

Demo Licenses

To download "demo licenses" for one of the sample Microsoft Dynamics CRM 4.0 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>

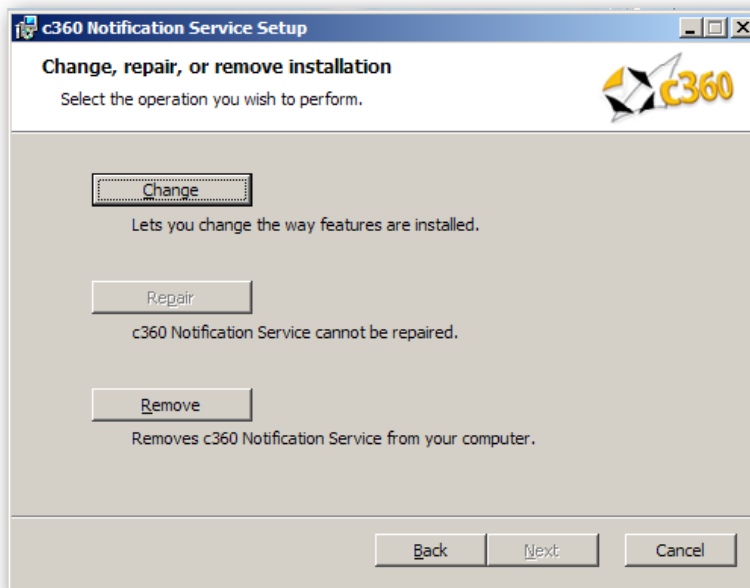


Uninstalling c360 Notification Service _____

Uninstalling c360 Notification Service

Double click on c360 Notification Service for Microsoft CRM 4.0.exe. It will go to Maintenance mode as follows.

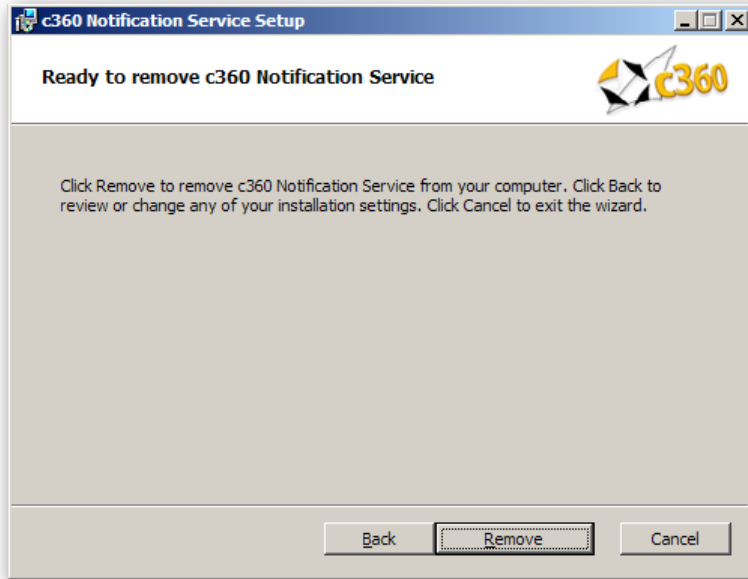
This will uninstall the product for all the organizations.



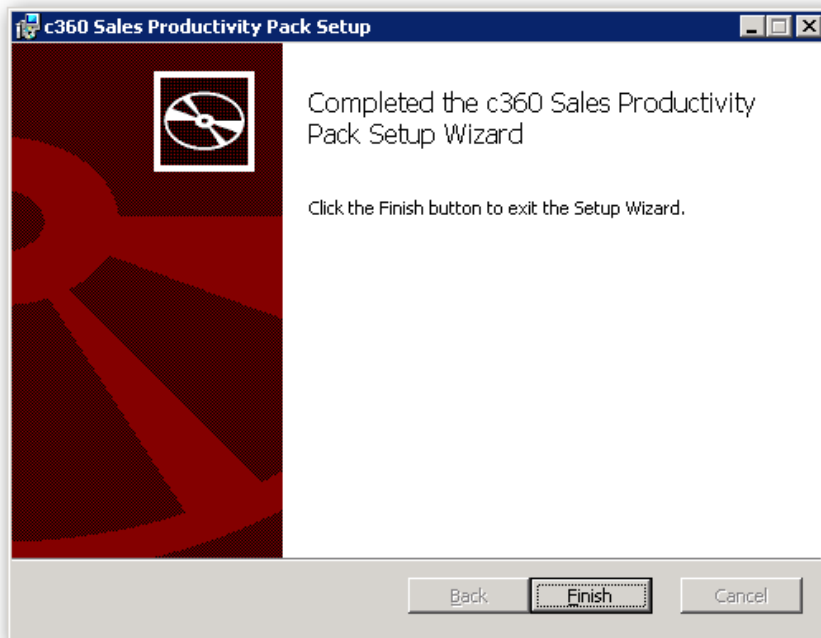
6. Click '**Remove**'.

Notes:

- The Repair Button will be disabled.
- Change Button is for installation/un-installation of products.
- Remove Button is to uninstall c360 Notification Service. This will uninstall the product for all organizations.



7. Click '**Remove**'.



8. Click '**Finish**' to complete un-installation of the c360 Sales Productivity Pack.



International Languages ---

c360 Sales Productivity Pack for Microsoft Dynamics CRM 4.0 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.