



c360 Email Link Installation and Configuration Guide

Microsoft Dynamics CRM 3.0 compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Email Link for Microsoft Dynamics CRM 3.0.

Microsoft CRM Compatibility

c360 Email Link 3.0 is compatible with Microsoft Dynamics CRM version 3.0. For additional product information, visit <http://www.c360.com/EmailLink.aspx>

Email Link Functionality

E-mail Link is a Microsoft CRM compatible product that allows Microsoft CRM users to click a button and send a link to a Microsoft CRM record in an e-mail. The recipient of the e-mail can click the link to open the Microsoft CRM record. When a user clicks the Email Link button, a regular (not Microsoft CRM) e-mail will open with one or more links to the record embedded in the body of the e-mail. The user may then add a personal message to the e-mail before sending it. Email Link thus allows Microsoft CRM users to effectively collaborate on CRM records.

Email Link

E-mail Link can be implemented as a button on the following CRM record types:

- Lead
- Contact
- Account
- Opportunity
- Case
- Contract
- Quote
- Order
- Invoice
- Competitor
- Sales Literature

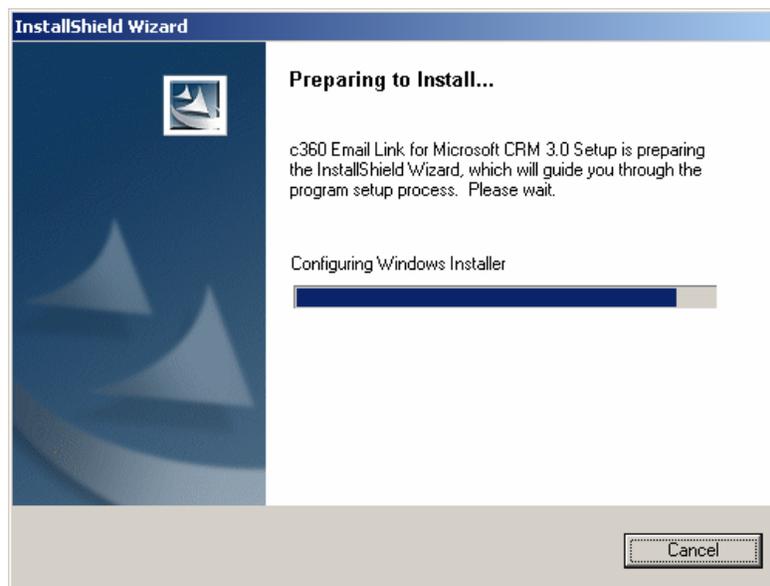


Installation Instructions

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 Email Link for Microsoft CRM 3.0 requires the c360 Email LinkV3.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

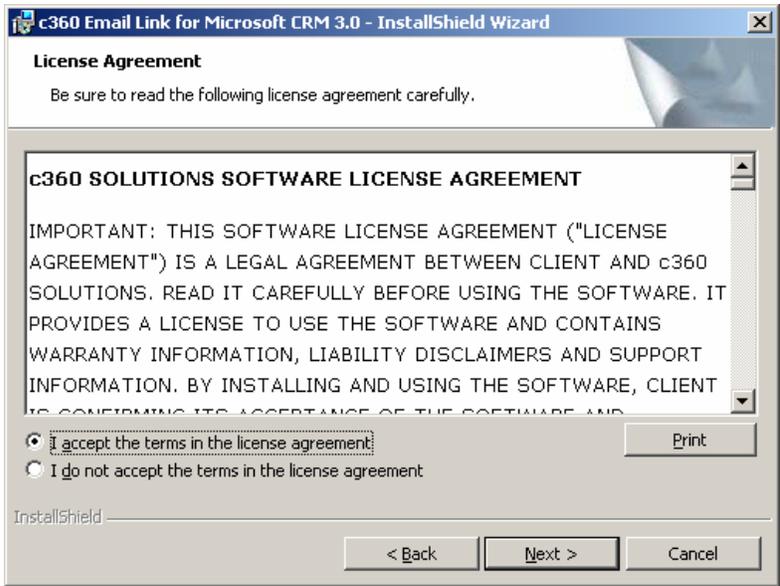
Steps to install c360 Email Link for Microsoft Dynamics CRM 3.0

1. Extract the c360 Email LinkV3.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Email LinkV3.exe' file. You will see the following screens.

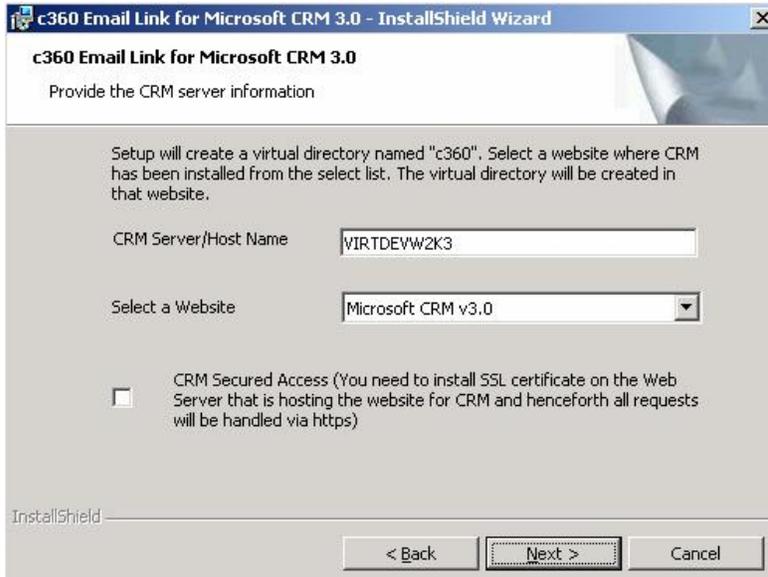




3. Click **'Next'** to begin the installation process.



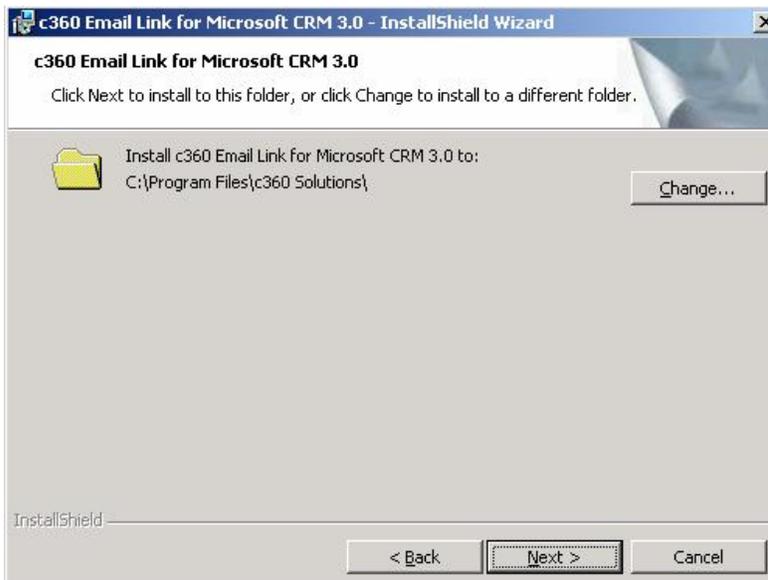
4. If you agree with the terms of the license agreement, select the option- 'I accept the terms in the license agreement' and click **'Next'**.



5. Check if the entries made in these fields by default are correct and click **'Next'**. If not, enter the correct values. Then click **'Next'**.

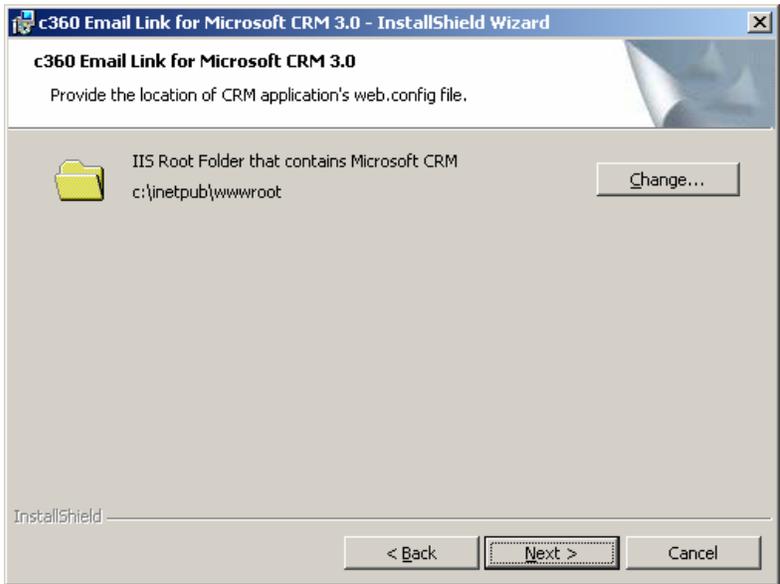
Note:

- CRM Server name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- Website: Name of the Microsoft CRM website.
- Check CRM Secured Access option if it is a secure connection.

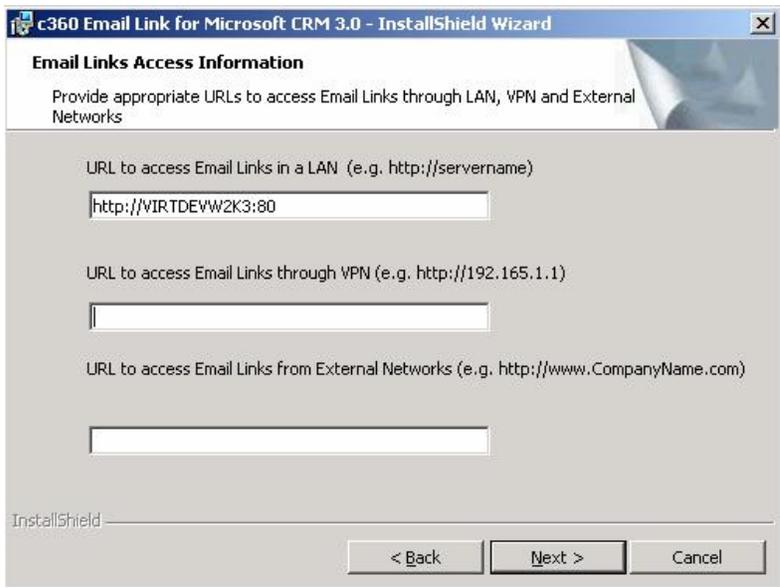


6. Click **'Next'** to install to the folder in the default directory
OR
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

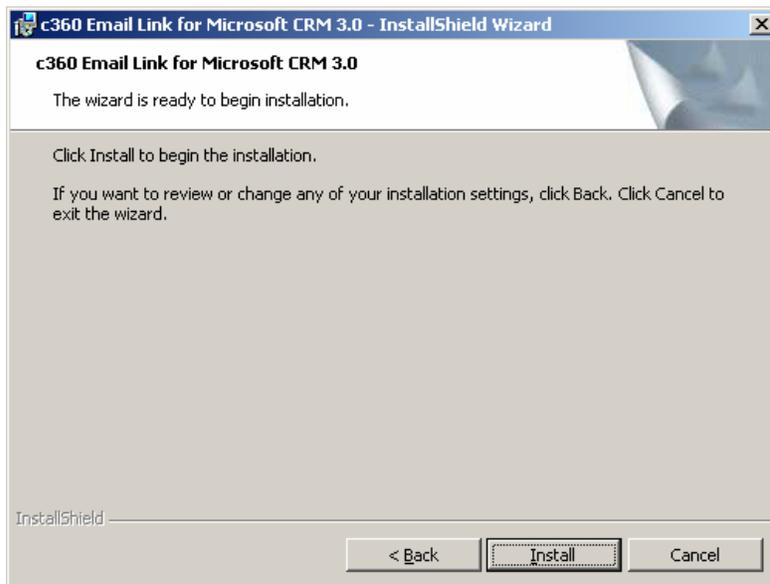
Note: This screen will not appear if c360 virtual directory already exists in the Microsoft CRM3.0 website.



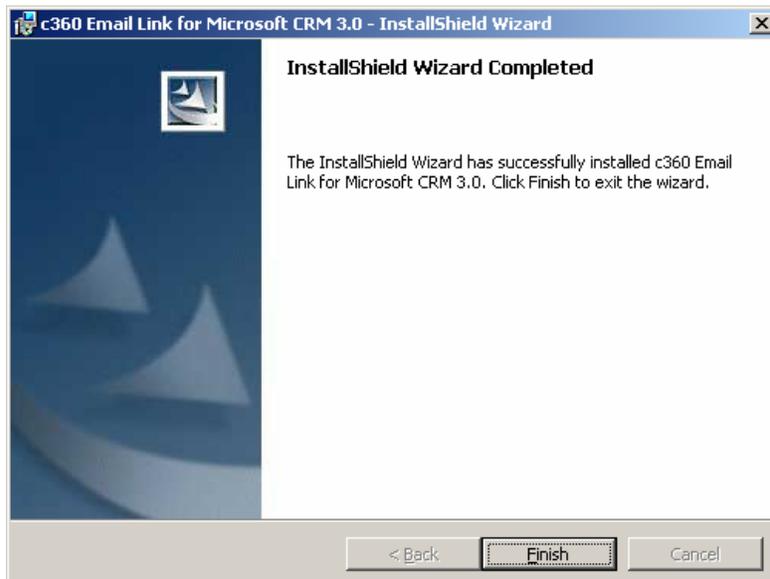
- 7. Verify that the Microsoft CRM web.config file is located in the default directory and click **'Next'**.
OR
Click **'Change'** and select the correct location of the Microsoft CRM web.config file. Then click **'Next'**.



- 8. Check if the entry made in this field by default is correct. Enter values in the other 2 fields, if required and click **'Next'**.



9. Click '**Install**' to install c360 Email Link for Microsoft CRM 3.0.



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



11. Setting 'ISV Extensions' Security Privilege

Microsoft CRM 3.0 has introduced a new security privilege named 'ISV Extensions'. In several of the standard roles, this value is set to the 'None Selected' (a red circle with a blank center is displayed) by default. This privilege must be set to the 'Organization' value (a solid green circle is displayed) in order for users to see c360 tabs and screens that are linked to entity forms.

The screenshot shows a web browser window titled "http://192.168.66.134:5555 - Role: Salesperson - Microsoft Internet Explorer provided by c360 Solutions". The page displays the configuration for the "Role: Salesperson". The "Customization" tab is active, showing a table of permissions for various entities. The "ISV Extensions" privilege is set to "Organization", indicated by a green circle.

Entity	Create	Read	Write	Delete
Entity	○	○	○	○
Attribute	○	○	○	○
Relationship	○	○	○	○
Form		●	○	
View	○	●	○	○
Process	○	●	○	○
Process Instance	◐	●	○	○

Miscellaneous Privileges

ISV Extensions	●
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Key

- None Selected
- ◐ User
- ◑ Business Unit
- Parent: Child Business Units
- Organization

Steps for setting 'ISV Extensions' Security Privilege

1. Go to CRM Settings > Business unit settings > Security roles.
2. Open a security role and click on 'Customization' tab.
3. Set the 'ISV Extensions' value to 'Organization' if the value is 'None Selected'.
4. Save and Close.

The installation of c360 Email Link for Microsoft CRM 3.0 is now complete. For the product to be accessed, a valid license file must be installed if it is not already present. For questions about obtaining and/or installing a valid license file please refer to the section of this document titled 'Licensing'.



Additional Configuration

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 Email Link 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 \V3\ 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'.

Troubleshooting

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



Licensing

For c360 Email Link v1.2 with a valid license

Installation application will copy the existing Email Link v1.2 license file to the appropriate directory while installing c360 Email Link for Microsoft CRM 3.0. The product will be installed successfully and it will work with existing license.

For c360 Email Link v1.2 with invalid license or fresh installation of c360 Email Link for Microsoft Dynamics CRM 3.0

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 in the appropriate directory.

Demo Licenses

To download "demo licenses" for one of the sample Microsoft Dynamics CRM 3.0 installations for organization names 'Adventure Works Cycle Demo', 'Adventure Works Cycle' or 'Microsoft CRM', please visit our website at <http://www.c360.com/Licenses.aspx>



Uninstall Instructions ---

Steps to uninstall c360 Email Link for Microsoft Dynamics CRM 3.0:

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Email Link for Microsoft CRM 3.0 from the list of the currently installed programs.
3. Click 'Remove'.
4. Click 'Yes' in the confirmation message box to begin the uninstall process.



International Languages ---

c360 Email Link for Microsoft CRM 3.0 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 file.