c360 Forecast Manager Installation and Configuration Guide

Forecast Manager Version 1.2.3 – Microsoft CRM 1.2 Compatible

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Installation Instructions _____

Overview

c360 Forecast Manager requires an installshield install. The steps to install Forecast Manager through the setup are listed in the following section.

Forecast Manager Activity Summary

Forecast Manager will display a special icon to launch c360 Activity Summary if Activity Summary is installed. If Activity Summary is not installed, no icon will be displayed and the Activity Summary screen will not be available. For information on purchasing Activity Summary go to www.c360.com/ActivitySummary.asp.

Note: If you were running a previous version of Forecast Manager, the directory C:\inetpub\wwwroot\Custom\c360\ActivityHistory will exist and can be safely removed. In addition, the file c360.ActivityHistory.dll found in the C:\inetpub\wwwroot\bin directory is no longer needed and can be removed.

Installation Instructions

You will need to have your c360 Forecast Manager license file on hand if you are doing a fresh install of the product, to complete the installation. A license file for Adventure Works Cycle has been included in the c360.ForecastManager (MSCRMv1.2).zip file.
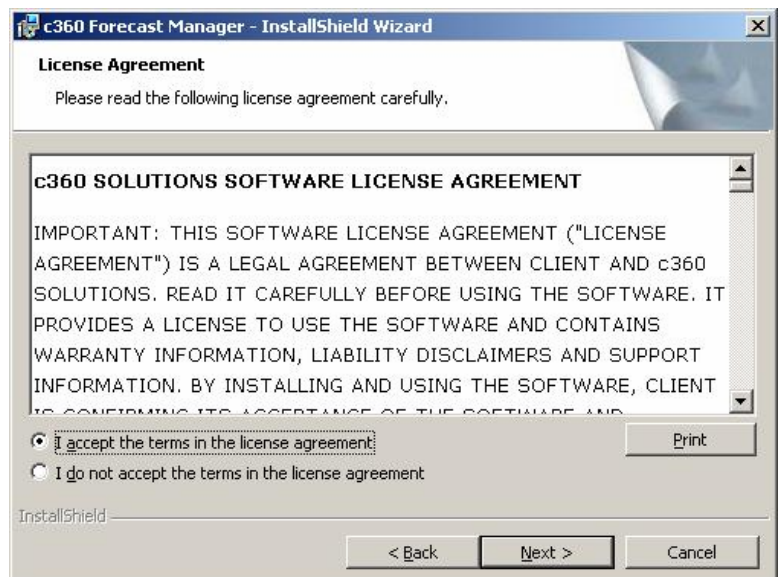
Follow these steps to install Forecast Manager:

1. Extract the c360.ForecastManager(MSCRMv1.2).zip file into a folder on the Microsoft CRM server computer.

2. Double click the 'c360.ForecastManager.exe' file.

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

4. Accept the License Agreement and click *Next*.

5. Verify the location of Microsoft CRM web application files. Select *Change...* if Microsoft CRM is installed in a different location. This folder should contain the 'web.config' file for Microsoft CRM web application.
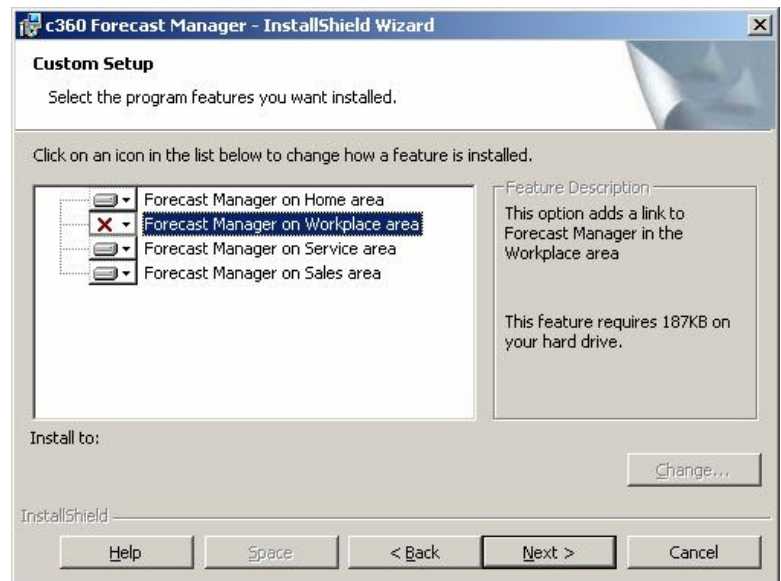
6. Select *Complete* to install all the links in CRM with Forecast Manager or select *Custom* to have the opportunity to selectively enable or disable some of the links. Click *Next*.
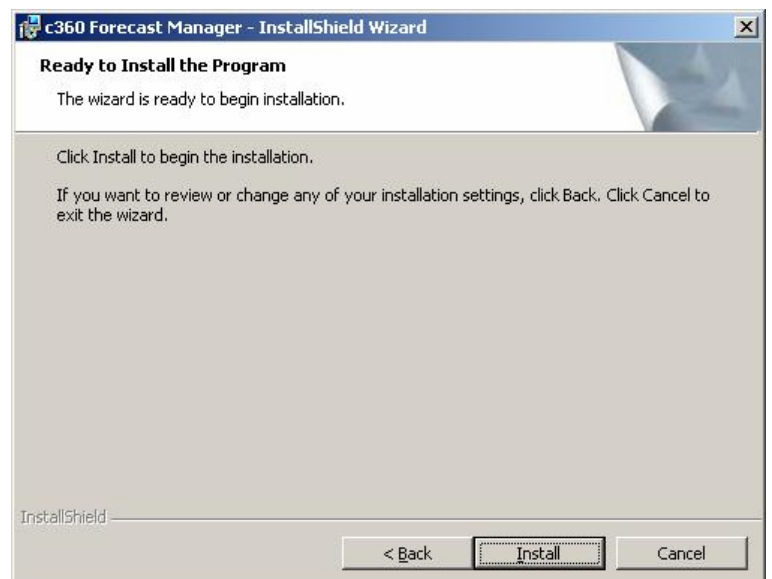
7. If you selected Custom in the previous screen, you must choose the options you want to enable and those you want to disable.
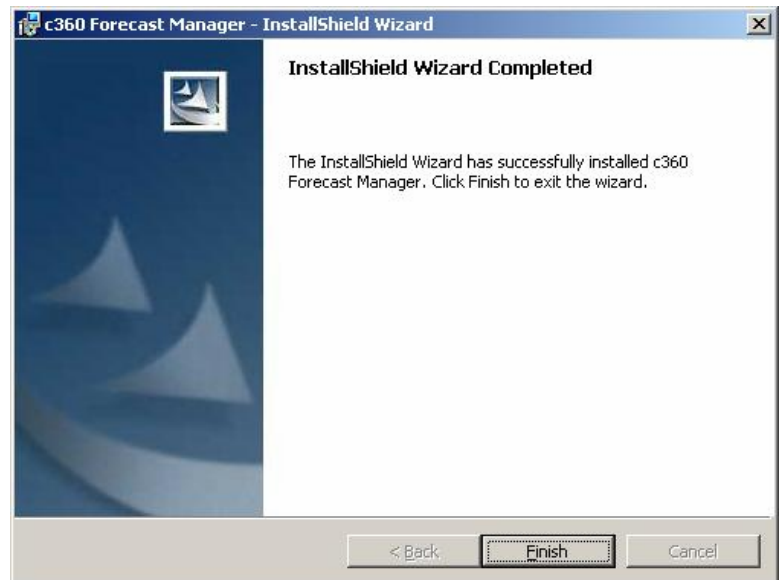

8. Click *Install* to install c360 ForecastManager.

9. Click *Finish* to complete the Setup Wizard.

10. **This step outlines how to deploy Forecast Manager in the Microsoft CRM Sales for Outlook client**. Version 1.2 of Microsoft CRM employs a configuration file titled OutlookClient.xml. This file is the Outlook Client equivalent of the isv.config file and utilizes the exact same structure. Adding the isv.config entries listed in this guide will allow users to launch Forecast Manager directly from the Outlook client. It is important to note that the Outlook Client does not have a left navigation bar. Forecast Manager must be launched from the c360 Tools menu in the Outlook client. In addition, the server name must be specified in OutlookClient.xml. For example, the following entry in isv.config:

```
<MenuItem Title="Forecast Manager"
Url="/Custom/c360/ForecastManager/ForecastManager/redirect.htm"
WinMode="0" />
```

must be implemented as:

```
<MenuItem Title=" Forecast Manager "
Url="http://server/Custom/c360/ForecastManager/ForecastManager/redirect.htm"
WinMode="0" />
```

in OutlookClient.xml. In this example you would replace the text 'server' with the name of your CRM server.

A Forecast Manager configured copy of OutlookClient.xml is included in the Forecast Manager download file. You may open it in a text editor like notepad and use the search and replace function to quickly replace the word 'server' with your CRM server name. Once you have modified the OutlookClient.xml it should be placed in the c:\inetpub\wwwroot_Resources folder on the CRM server. Once users have gone offline for the first time a copy of the OutlookClient.xml will be copied to the c:\Program Files\Microsoft CRM\Client\res\Web_Resources folder.

If you wish to provide the Forecast Manager functionality to Outlook client users who have not or do not intend to go offline you may manually copy the OutlookClient.xml file to their computers.

Licensing _____

Copy either the Adventure Works Cycle license file or the c360 ForecastManager license file received from c360 Solutions into the "C:\inetpub\wwwroot\Custom\c360\ForecastManager\Licenses" folder.

To request a 15 day production evaluation license go to our web site at http://www.c360.com/Evaluation.aspx

When you receive your license file, you will have to save it in the "C:\inetpub\wwwroot\Custom\c360\ForecastManager\Licenses" folder

Uninstall Instructions _____

Follow these steps to uninstall ForecastManager:

1. Open 'Add or Remove Programs' from the Control Panel.

2. Select c360 ForecastManager from list of the currently installed programs.

3. Click *Remove.*

4. Select *Yes* to begin the uninstall process.