



c360 Summary 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 Summary for Microsoft Dynamics CRM 3.0.

Microsoft CRM Compatibility

c360 Summary for Microsoft Dynamics CRM 3.0 is compatible with Microsoft Dynamics CRM version 3.0.

For additional product information, visit <http://www.c360.com/Summary.aspx>

c360 Summary for Microsoft Dynamics CRM 3.0

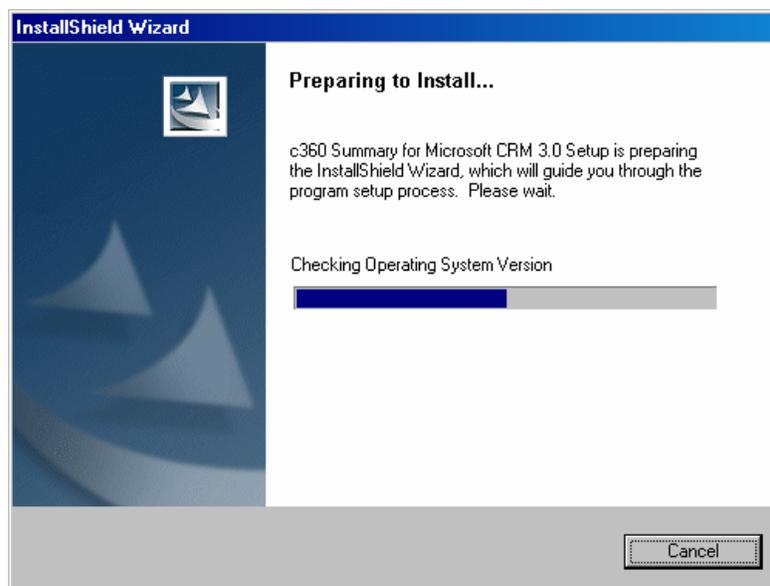
c360 Summary is a Microsoft CRM enhancement that provides Microsoft CRM users with an integrated screen displaying all open and closed Activities, Notes and CRM records associated with all major Microsoft CRM objects.

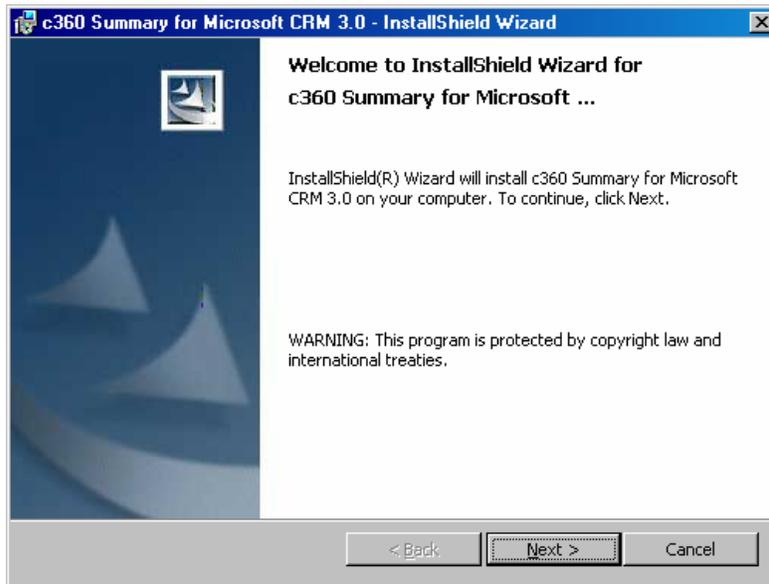
Installation Instructions

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 Summary for Microsoft CRM 3.0 requires the c360 Summary V3.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Summary for Microsoft Dynamics CRM 3.0

1. Extract the c360 Summary V3.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Summary V3.exe' file. You will see the following screens.

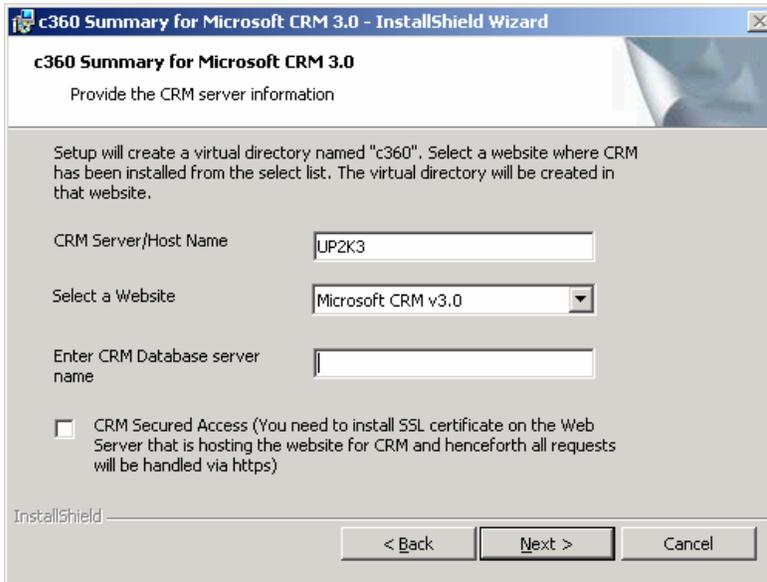




3. Click '**Next**' to begin the installation process.



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. If not, enter the correct values. Enter the CRM Database Server name and 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.
- CRM Database server:
 - a. Name of the server where the CRM Database exists (CRM Database may exist on the CRM machine itself or on a separate machine).

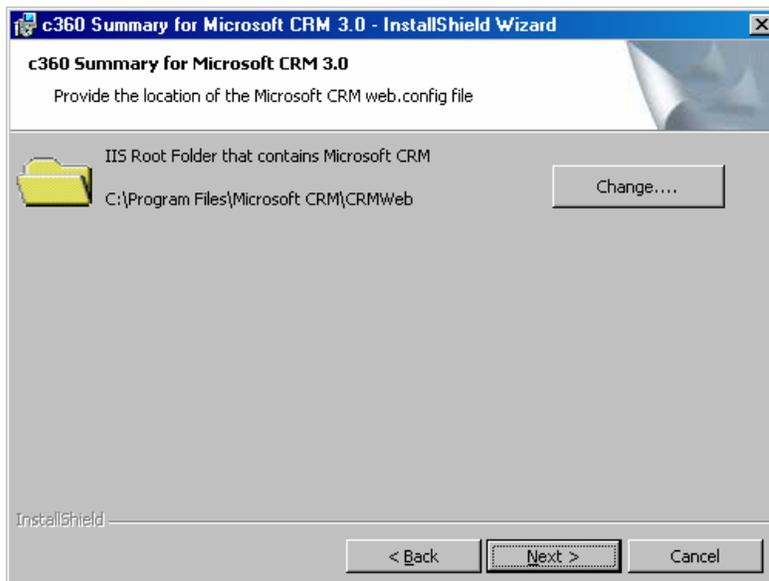
OR

- b. SQL instance name where the CRM Database exists on an instance of SQL server on the CRM machine itself or on another machine.
- Check CRM Secured Access option if it is a secure connection.

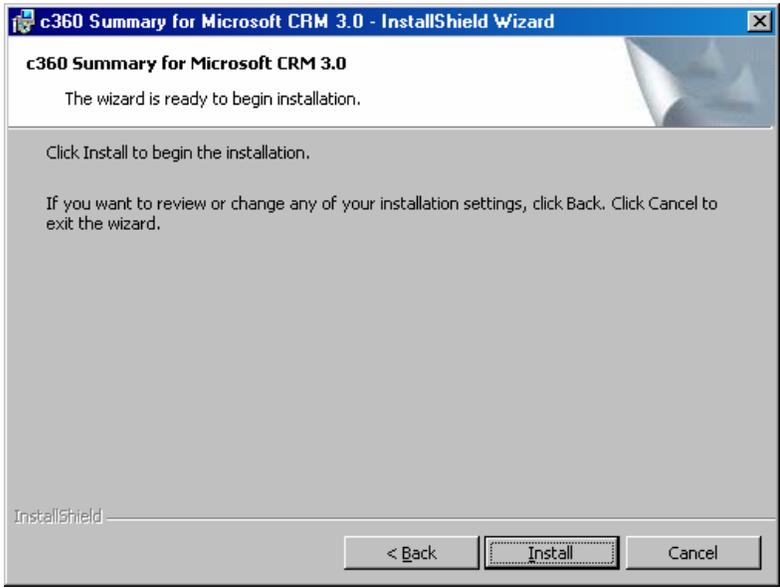


6. Click **'Next'** to install to the folder in the default directory
OR
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

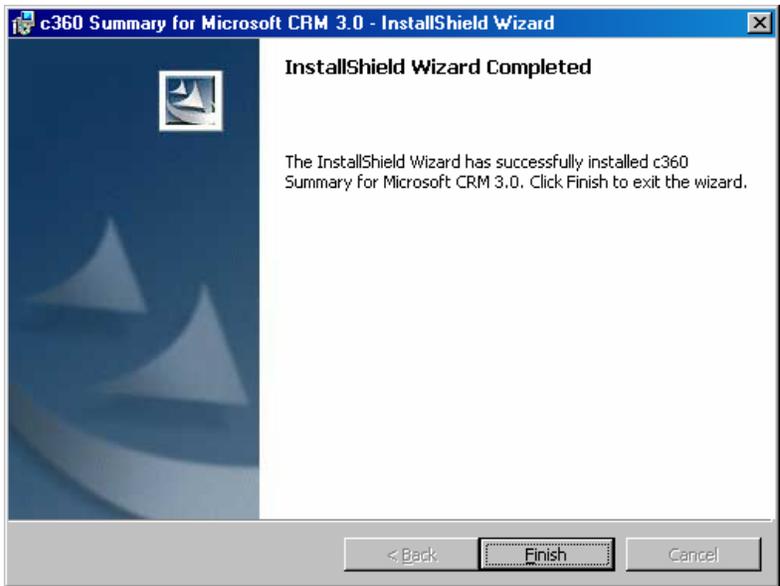
Note: This screen will not appear if c360 Virtual Directory already exists in the Microsoft CRM3.0 website. Product will be installed to the directory already assigned to the c360 Virtual Directory.



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'**.



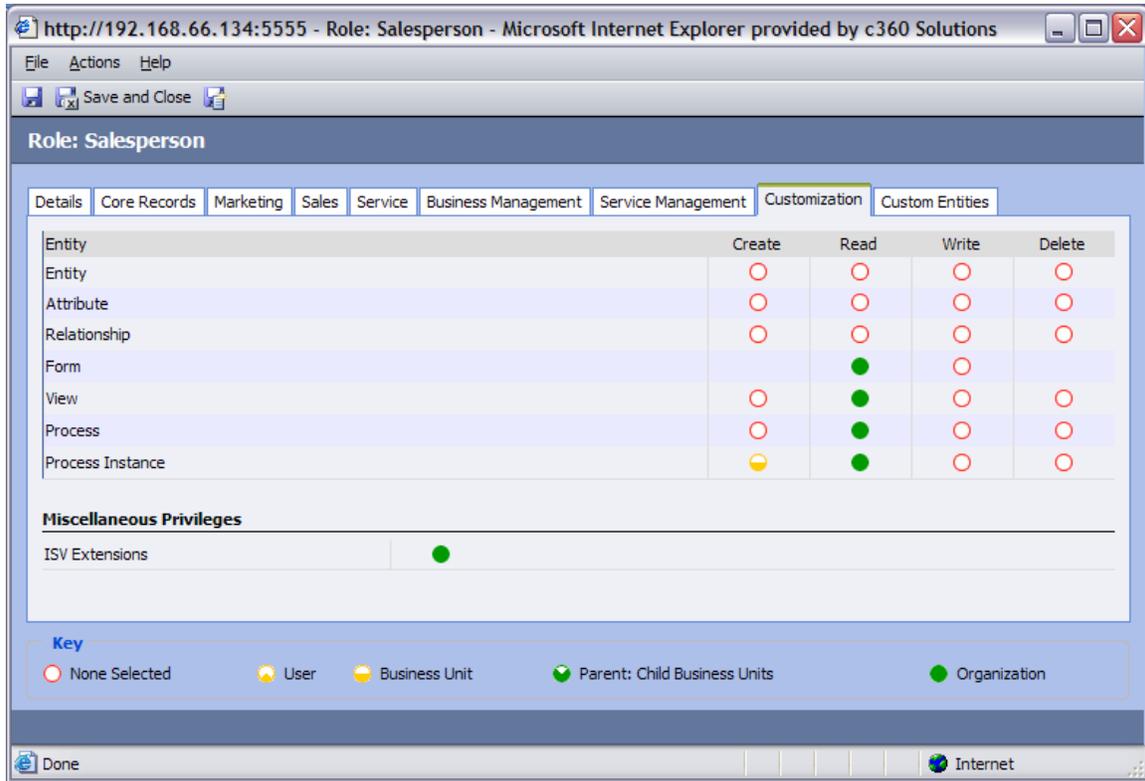
8. Click **'Install'** to install c360 Summary for Microsoft CRM 3.0.



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

10. 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 the 'Role: Salesperson' configuration page in Microsoft Internet Explorer. The 'Customization' tab is selected, and 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

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

The installation of c360 Summary 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'.

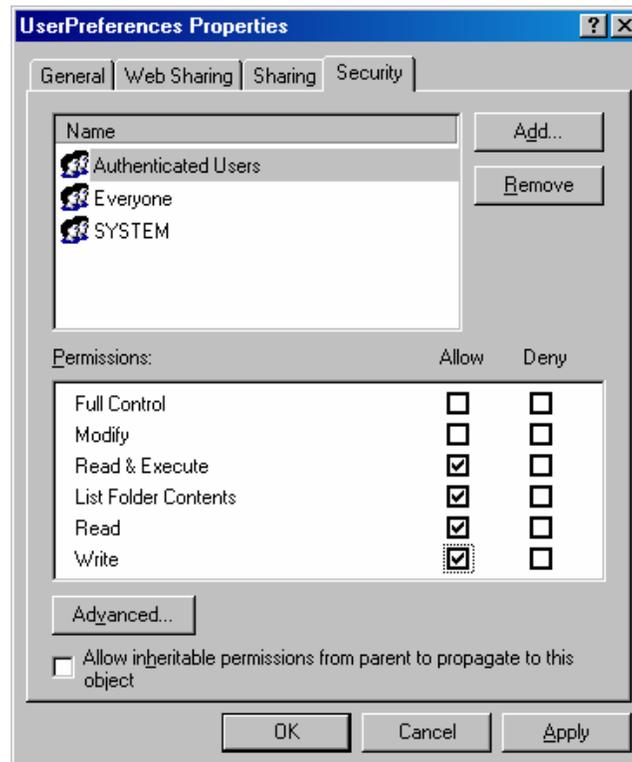
Additional Configurations

User Preferences

Individual user preferences are stored in config files located in \\V3\UserPreferences folder in the default directory (C:\Program Files\c360 Solutions) or in the directory selected by you during installation. In order for users to save their preferences, they must have 'write' permission for that folder.

To assign 'Write' permission for Authenticated Users on 'UserPreferences' folder:

1. In Windows explorer, right click on 'UserPreferences' folder and click on 'properties'.
2. Click the 'Security' tab. If 'Authenticated Users' is not already listed, click 'Add' and type 'Authenticated Users' in the window and click OK.
3. Ensure that Read & Execute, List Folder Contents, Read, and Write permissions are checked for 'Authenticated Users'.





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 Summary 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 Activity Summary v1.2 with a valid license

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

For c360 Activity Summary v1.2 with invalid license or fresh installation of c360 Summary 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 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 Summary 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 Summary 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 Summary for Microsoft CRM 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.