c360 Web Connect Installation Guide

Web Connect Version 1.2.4 – Microsoft CRM 1.2 Compatible

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Overview and Notes_____

Overview

c360 Web Connect for Microsoft CRM is a Microsoft CRM compatible component that allows organizations using Microsoft CRM to easily integrate their web site to Microsoft CRM for lead and web visitor activity capture.

This document describes the steps necessary to install the Web Connect configuration tool. For information regarding configuration, please refer to the configuration guide, *c360WebConnectConfigurationGuide(MSCRMv1.2).pdf*.

Microsoft CRM Compatibility

c360 Web Connect is compatible with Microsoft CRM version 1.2.

Important Upgrade Notice

Prior to extracting the latest c.360.WebConnect files, copies should be made of the "c360.WebConnect.config" and "c360.WebConnect.lic" files.

Care should be taken not to extract the "c360.WebConnect.config" and "c360.WebConnect.lic" files from the "c360.WebConnect(MSCRMv1.2).zip" file when upgrading c360.WebConnect.

Installation Instructions _____

Installation Instructions

Follow these steps to install Web Connect:

1. Extract the c360.WebConnect(MSCRMv1.2).zip file on the computer where you would like to run the Web Connect configuration tool. This may be any PC or Server that is on the same domain as the Microsoft CRM server.

2. On the machine where you want the Web Connect configuration tool to reside create a folder to house the Web Connect configuration tool application and related files. c360 suggests that you install Web Connect in a directory named C:\Program Files\c360 Solutions\c360.WebConnect. This directory must be created manually. Once the directory has been created, copy the extracted Web Connect files to it.

3. Installing a production license - Web Connect ships with an unlimited use license for the 6 user Adventure Works Cycle sample database. If you have purchased Web Connect and received a permanent production license file copy this file to the \Licenses directory in your installation.

   Web Connect licensing is based on the number of assigned Microsoft CRM licenses in your installation. If the number of assigned Microsoft CRM licenses exceeds the number of Web Connect licenses an administrator (as configured in the configuration tool) will receive a notification via email. In this scenario, you can contact c360 at Products@c360.com to acquire more licenses.

4. In order to use the sample forms included with c360 Web Connect, copy the contents of the \SampleForms directory to the web file location for the web server. The web file location is determined by where your web server is located and in which directory you wish to have these forms reside.

5. Double click the file named c360.WebConnect.exe to begin using the Web Connect configuration tool.

Removal Instructions_____

Removal Instructions

Follow these steps to remove Web Connect:

1. Remove the Web Connect directory from its installation location
2. Remove the Web Connect files from the web directory where Web Connect was published.

Web Connect Files _____

c360 Web Connect includes the following files:

- **C:\Program Files\c360 Solutions\c360.WebConnect**
    - o C360.WebConnect.dll
    - o c360.WebConnect.exe
    - o c360.WebConnect.config
    - o Error.aspx
    - o WebConnect.aspx
    - o Microsoft.CRM.Platform.Proxy.dll
    - o Microsoft.CRM.Platform.Types.dll
    - o **\Documentation**
        - ▪ c360WebConnectConfigurationGuide(MSCRMv1.2).pdf
        - ▪ c360WebConnectInstallationGuide(MSCRMv1.2).pdf
    - o **\Licenses**
        - ▪ c360.WebConnect Version 1.lic
    - o **\Languages**
        - ▪ English.xml
    - o **\SampleForms**
        - ▪ AllCRMLeadsFields.htm
        - ▪ ContactUs.htm
        - ▪ SimpleInfo.htm
        - ▪ ThankYou.htm
    - o **\WebAppLanguages**
        - ▪ English.xml

Note: The installation path listed here can be modified.

International Languages _____

c360 Web Connect 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.