



c360 Web Connect Installation Guide

Microsoft Dynamics CRM 3.0 Compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Web Connect for Microsoft Dynamics CRM 3.0.

Microsoft CRM Compatibility

c360 Web Connect for Microsoft Dynamics CRM 3.0 is compatible with Microsoft Dynamics CRM version 3.0.

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

c360 Web Connect for Microsoft Dynamics CRM 3.0

c360 Web Connect for Microsoft Dynamics CRM 3.0 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. Web Connect will allow organizations to:

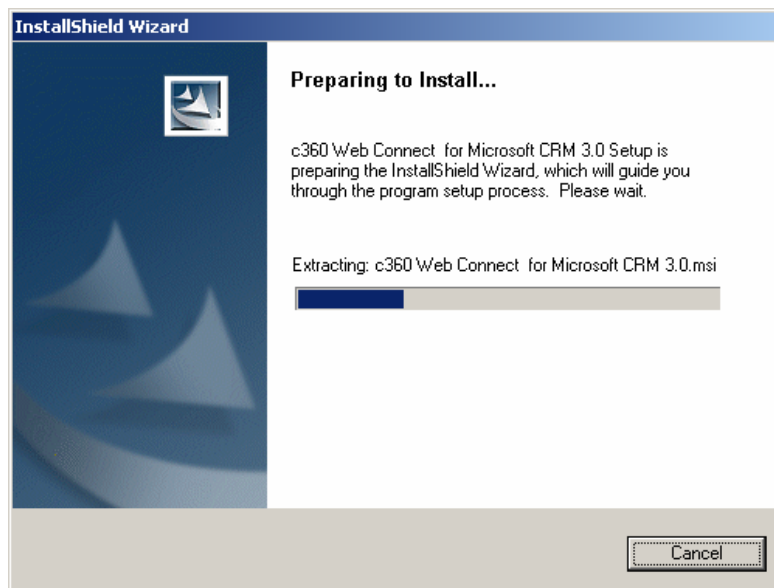
- Link multiple web site forms to CRM to create Lead and Activity records.
- By form, Web Connect can be configured to execute any or all of the following actions:
 - o Email all web form values and actions taken to an SMTP address, record owner, record owner's manager or team in CRM
 - o Match by email address and create new Lead or Activity depending on whether email address was matched to an existing Lead or Contact
 - o Create an additional CRM activity to log form field values and actions taken (same information as sent in email)
 - o Send a configurable HTML or text (administrator may specify) formatted confirmation email to visitor
 - o Specify a URL to which to post one or more of the form field values (e.g. this action may be used for opting visitor into a 3rd party email list)
 - o Run workflow rules in CRM

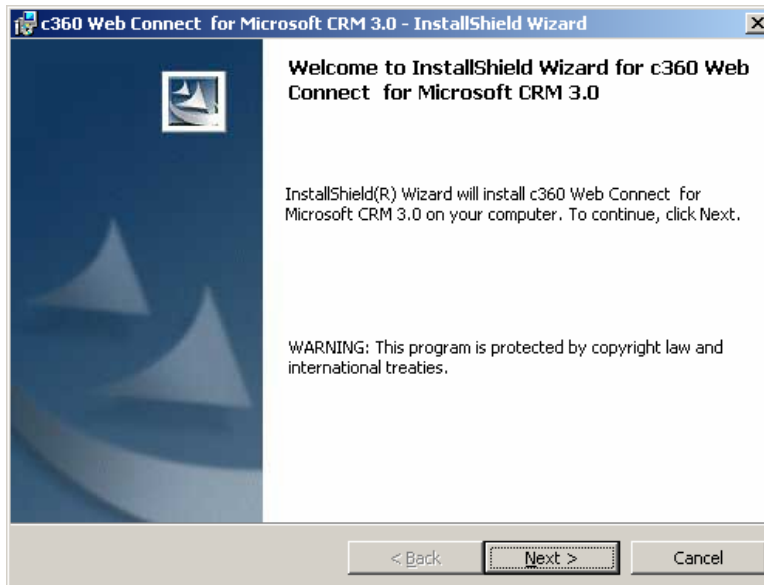
Installation Instructions

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

Steps to install c360 Web Connect for Microsoft Dynamics CRM 3.0

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

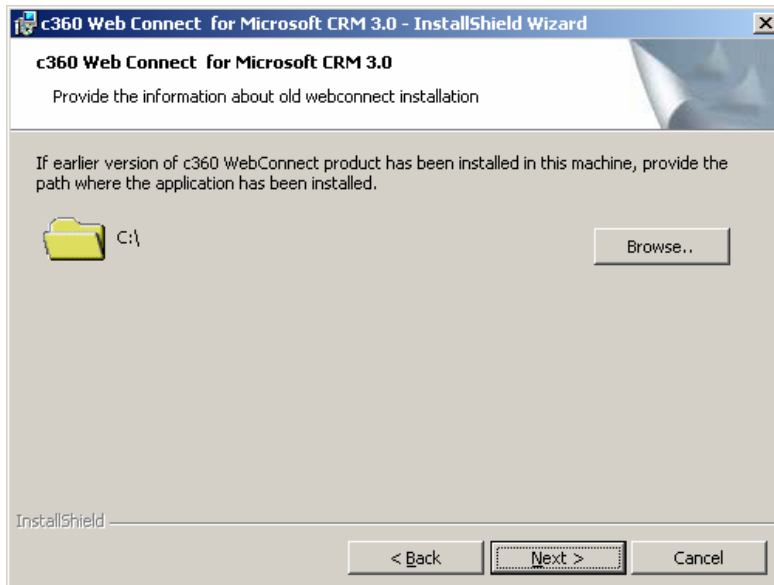




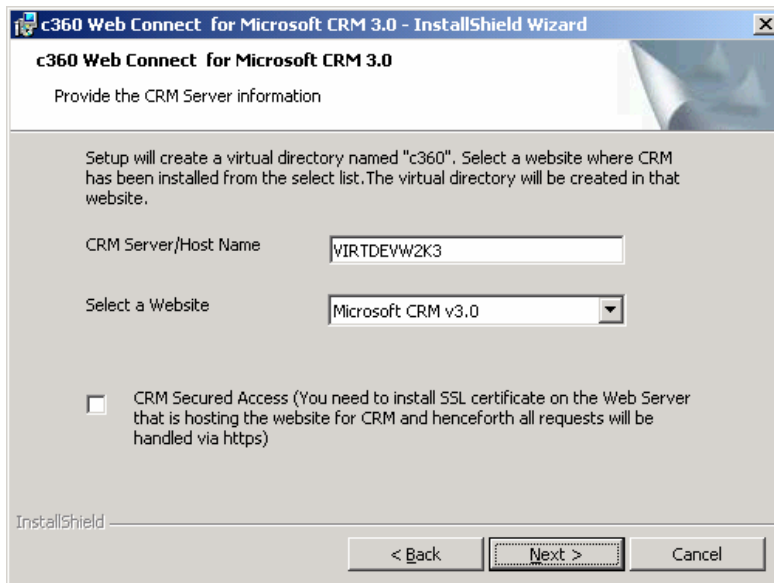
3. Click **'Next'** to begin the installation process.



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



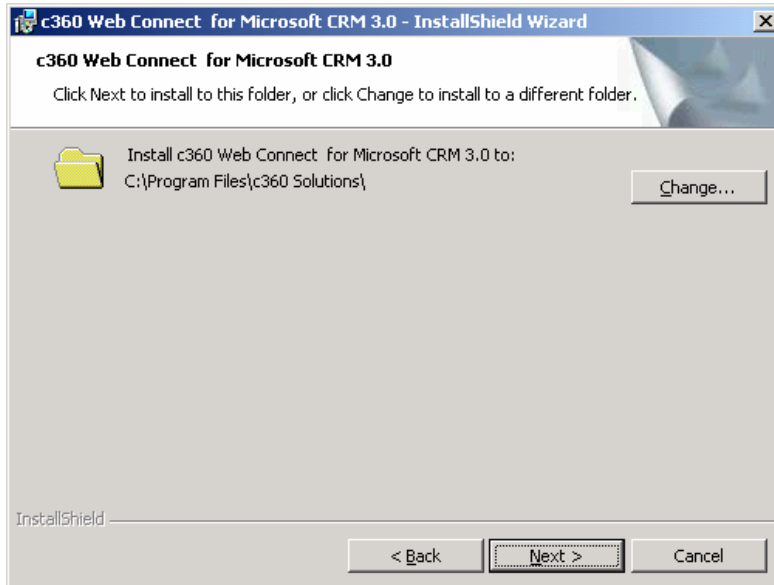
5. Click **'Browse'** to provide the path of the earlier installation of this product, if any, and click **'Next'**. If not, just click **'Next'** to continue.



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

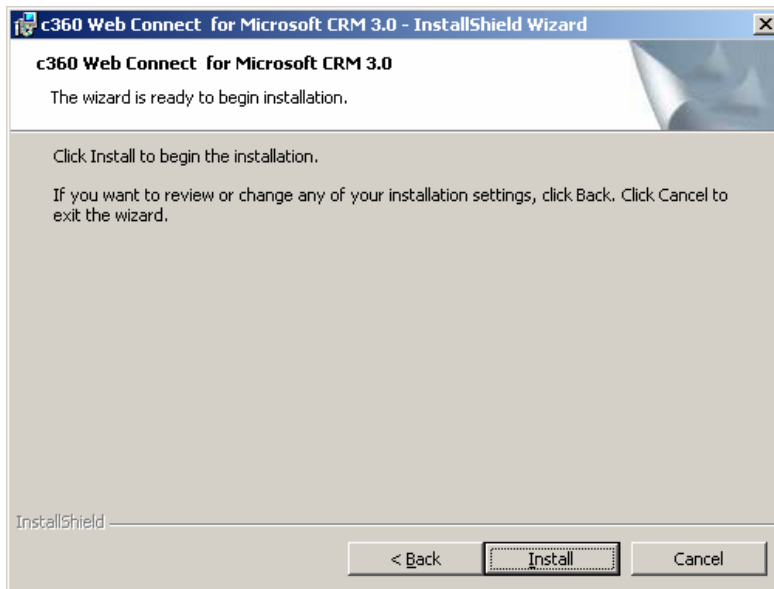
Note:

- 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.

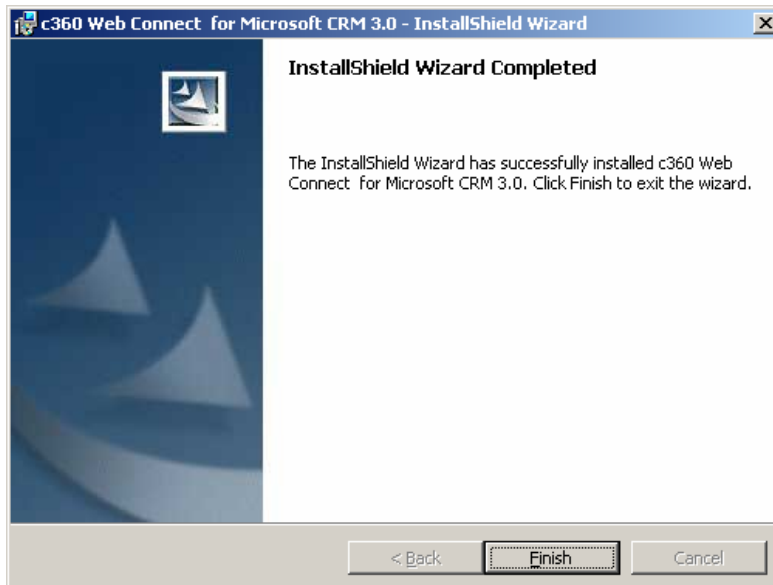


7. Click **'Next'** to install to the folder in the default directory
OR
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

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



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



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

The installation of c360 Web Connect for Microsoft Dynamics CRM 3.0 is now complete. For the product to be accessed, a valid license file must be installed. For questions about obtaining and/or installing a valid license file please refer to the section of this document titled 'Licensing'.



Additional Configurations

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 Web Connect 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 Web Connect v1.2 with a valid license

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

For c360 Web Connect v1.2 with invalid license or fresh installation of c360 Web Connect 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 Web Connect 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 Web Connect 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 Web Connect for Microsoft Dynamics 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.