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c360 Upgrade Process for Microsoft CRM 3.0

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Upgrade Process _____

Upgrading c360 Products and Microsoft CRM 3.0

The release of Microsoft Dynamics CRM 3.0 represents significant change in the functionality and architecture of the Microsoft CRM product. As such, c360 is releasing new versions of existing products, as well as new products to enhance Microsoft CRM. To prepare customers for the upgrade, we have listed below the steps required for customers upgrading a Microsoft CRM installation that includes c360 products:

1. **Download c360 v3.0 Products**: Go to http://www.c360.com/DownloadRegister.aspx to download the c360 3.0 versions of products you currently own. The table below lists the c360 product names for Microsoft CRM 3.0.
   Note: Customers who have purchased Productivity Packs and are current on maintenance will be entitled to both newer versions of existing c360 products as well as new products that have been added to the c360 Productivity Packs
2. **Request c360 Licenses**: For products which have been added to the c360 Productivity Packs, you will need to request a license from c360. you can do so by emailing licensing@c360.com For existing products, your existing license will be used. See Table 1 for details on which products will require new licenses.
3. **Upgrade Microsoft CRM**: Upgrade Microsoft CRM software in accordance with the guidelines published by Microsoft. It is not necessary to uninstall or modify the c360 products prior to the upgrade.
   Note: After you upgrade Microsoft CRM, you will not see links to any of the c360 products that were installed prior to the upgrade. This is expected because Microsoft CRM turns off all links to third party tools during the upgrade process and does not restore them at the end of the process. These links will be individually restored when you upgrade each c360 product.
4. **Install c360 v3.0 Products**: For each c360 product you downloaded in step 1 follow the steps in the installation guide that is included in the download package. In most cases, the setup is a single executable file named setup.exe that will prompt the installer for any necessary information.
5. **Install c360 licenses for new products**: After requesting licenses in step 2, c360 will send you a license setup application. This application is an executable file designed to be run on the CRM server. Copy it to the CRM server, double click it to run the application and it will automatically place the license files in the appropriate directories. Note that this applies only to new c360 products. As outlined in the step number 4, license files for installed products will automatically be transferred during the setup process.

6. **Launch Microsoft CRM**: You will see the c360 product links in the left navigation area, as well as on the entity forms where applicable. The upgrade is now complete.
7. **Test the c360 Products:** Click on all the links to all the c360 products to verify that they all work as expected. If you experience any problem, please review our online knowledge base at www.c360.com/Support and click on the "Ask a question" link if you don't find a solution to the problem you are experiencing.

Table 1: c360 Products for Microsoft CRM versions 1.2 and 3.0

Microsoft CRM v3.0 Product	Microsoft CRM v1.2 Product	Description	License
Core Productivity Pack			
Duplicate Detection	n/a	**New Product!** – Core Productivity Customers current on maintenance receive this at no additional charge	**Request license from c360[1]**
Console	Dashboard	Product renamed and improved	Setup will discover and use existing Dashboard license
Summary	Activity Summary	Product renamed and improved	Setup will discover and use existing Activity Summary license
Alerts	n/a	**New Product!** – Core Productivity Customers current on maintenance receive this at no additional charge	**Request license from c360[1]**
Multi-Field Search	SearchPac	Product renamed	Setup will discover and use existing SearchPac license
Email Link	Email Link	Product upgraded	No change
Sales Productivity Pack			
Forecast Manager	Forecast Manager	Product upgraded	Setup will discover and use existing Forecast Manager license
Relationship Explorer	Relationship Chart	Product renamed and improved	Setup will discover and use existing Relationship Chart license
Web Connect	Web Connect	Product improved	Setup will discover and use existing Web Connect license
Service Productivity Pack			
Email To Case	Email To Case	Product improved	Setup will discover and use existing Email To Case license
My Workplace	My Workplace	Product upgraded	Setup will discover and use existing My Workplace license
Other			
Customer Portal	Customer Portal	Product improved	Setup will discover and use existing Customer Portal license

1 - You can request licenses in one of two ways: by navigating to the license request page on c360's web site (http://www.c360.com/Evaluation.aspx) or by clicking on the "Request evaluation licenses" link in the "About c360" window which you can reach via the "c360 Tools" menu on the main CRM window.

Frequently Asked Questions_____

Why do I have to install new versions of c360 products?
Microsoft has made significant changes and improvements to Microsoft CRM. These changes extend to their supported Application Programming Interface (API) that c360 applications use to communicate with Microsoft CRM. c360 products have been updated to recognize these changes. Additionally, c360 products have been updated to include new functionality now enabled by the improvements in Microsoft CRM.

Will I need new c360 licenses?
Please refer to Table 1 included in this document. For products that c360 is adding to our Productivity Packs, you will need to request licenses. For existing products where the customer is current on c360 maintenance, the existing product licenses will not need to be replaced.

Some of the c360 products we are running have installed a c360 Database on our SQL Server. What will happen with that?
c360 Dashboard (now named Console), c360 Relationship Chart (now named Relationship Explorer) and c360 Customer Portal install a separate c360 database. The new versions of c360 products will recognize and attach to this database and the data stored in it will be used by the new products.

How do I contact c360 Technical Support if I have issues?
To contact c360 Technical Support, go to http://www.c360.com/Support where you can browse our Knowledge Base and submit a Case using the 'Ask a Question' function. Alternatively, you may also send an email to Support@c360.com. Customers that have purchased Premium Support have been provided with a phone number that they can use to call our technicians directly. To inquire about upgrading to Premium Support email Sales@c360.com.

What is the functionality of the new c360 products and upgraded products?
The table listed at http://www.c360.com/c360Versions.aspx provides links to both the version 1.2 and 3.0 products for comparison.

What will happen to user preferences when our c360 applications are upgraded?
For your convenience, any configuration that was set in the version 1.2 of the c360 product will be migrated to the 3.0 version. For instance, the database connection string for Relationship Chart, the system default values in Activity Summary and the user preferences in My Workplace will be migrated.