



# **c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM 4.0 Installing Guide**

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## Components Installed During Server Setup

This section describes what is installed during c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM Setup.

### c360 Advanced Quote and Order Processing Installed Configuration Components

When c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM is installed on the server, the default folders, listed in the following table, are created.

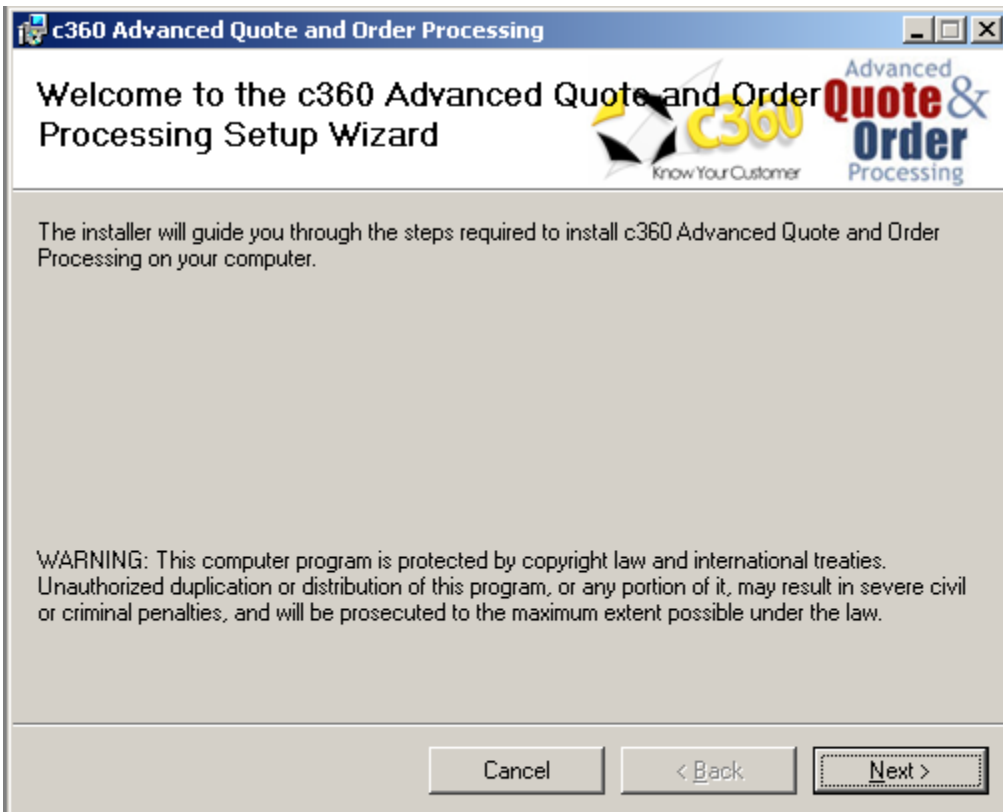
Folder	Comments
<crmwebfolder>:\ISV\AQPv4\	All application program files and resources.
<crmwebfolder>:\ISV\AQPv4\Backup	Backup of all files modified by the installer. For, example entities, configuration Files, etc...
<crmwebfolder>:\ISV\AQPv4\_imgs	Images folder.
<crmwebfolder>:\ISV\AQPv4\entitiesXML	Several entity xml files used during installation.
<crmwebfolder>:\ISV\AQPv4\Install	An Installation tool used during the installation and allows users to install the application to additional organizations at a later time if needed.
<crmwebfolder>:\ISV\AQPv4\pages <crmwebfolder>:\ISV\AQPv4\scripts <crmwebfolder>:\ISV\AQPv4\style	All .aspx pages, style sheets and scripts necessary for the application.
<crmwebfolder>:\ISV\AQPv4\plugin	Used to register plug-ins necessary to run the application.
<crmwebfolder>:\ISV\AQPv4\reports	SQL reporting services .rdl files used to import and publish reports during installation.
<crmwebfolder>:\ISV\AQPv4\Backup	Microsoft Dynamics CRM report services

## Install c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM Server.

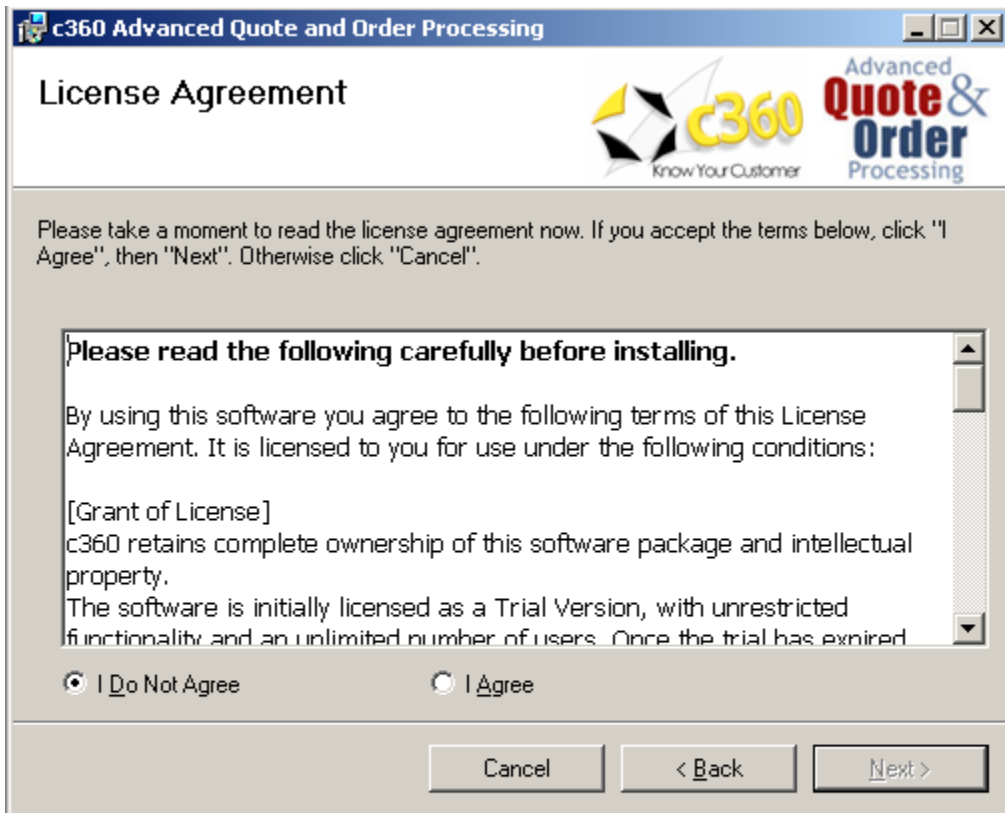
### Important

We strongly recommend that you back up your existing Microsoft Dynamics CRM data, including all reports and customizations, before you run Setup.

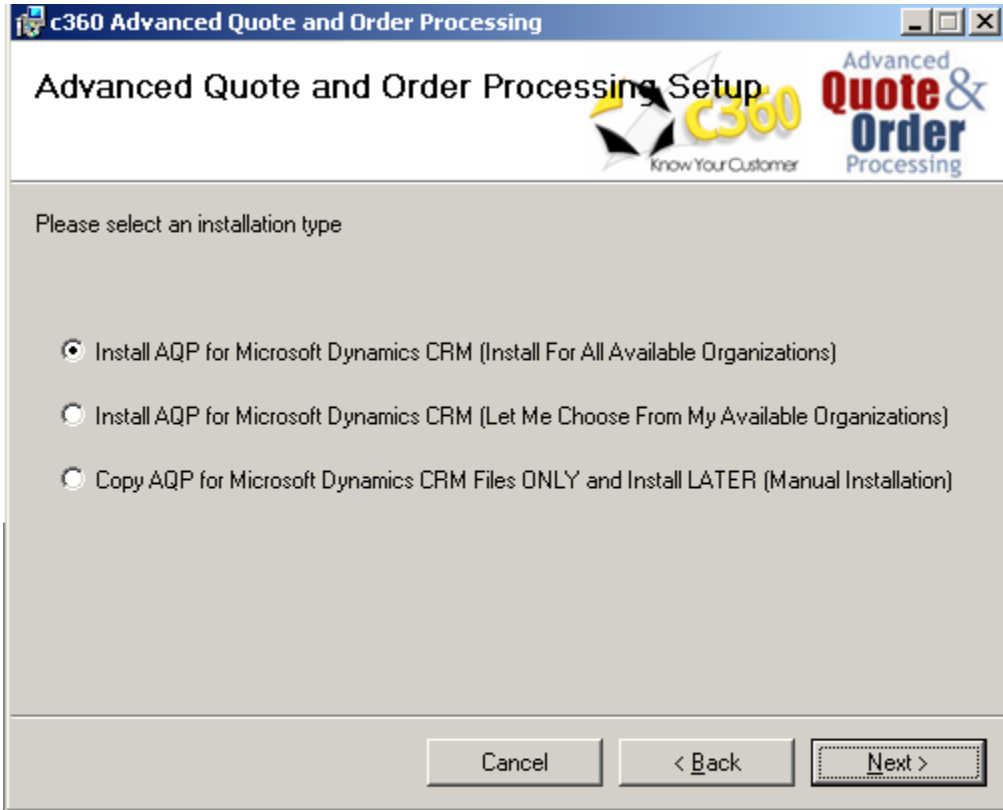
1. You must complete Microsoft Dynamics CRM 4.0 Server Setup before you run c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM 4.0 Setup.
2. Log on to the Microsoft Dynamics CRM server as a user who has administrator-level privileges and who is a member of the Administrators group on the local computer.
3. In the folder where the c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM setup files are located, double-click **Server.msi**.
4. On the **Welcome Setup** page, click **Next**.



5. On the **License Agreement** page, review the information and if you accept the license agreement click **I Agree**, and then click **Next**.



6. On the **Installation Type** page, select your installation option, and then click **Next**.



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**Note**

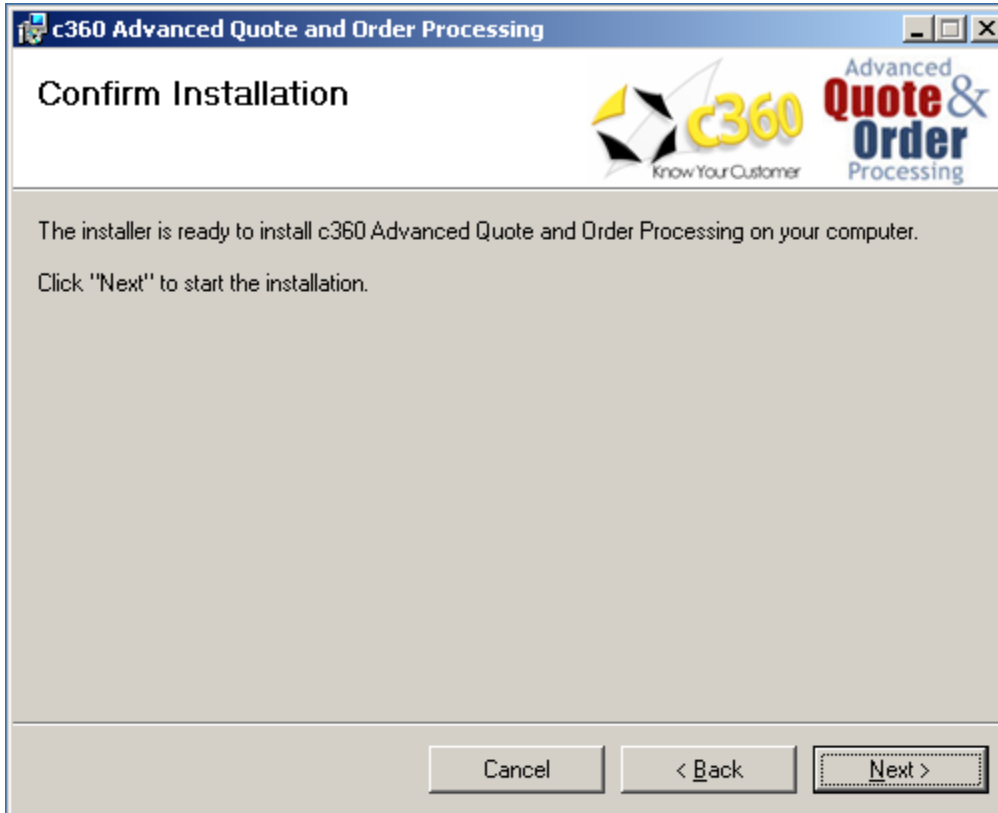
Choosing the first option (Install for all Available Organizations) will install c360 Advanced Quote and Order Processing on all existing Microsoft CRM organizations.

Choosing the second option (Let me choose from My Available Organizations) will give you the option to select, from your existing Microsoft CRM organizations, the organizations for which to install c360 Advanced Quote and Order Processing.

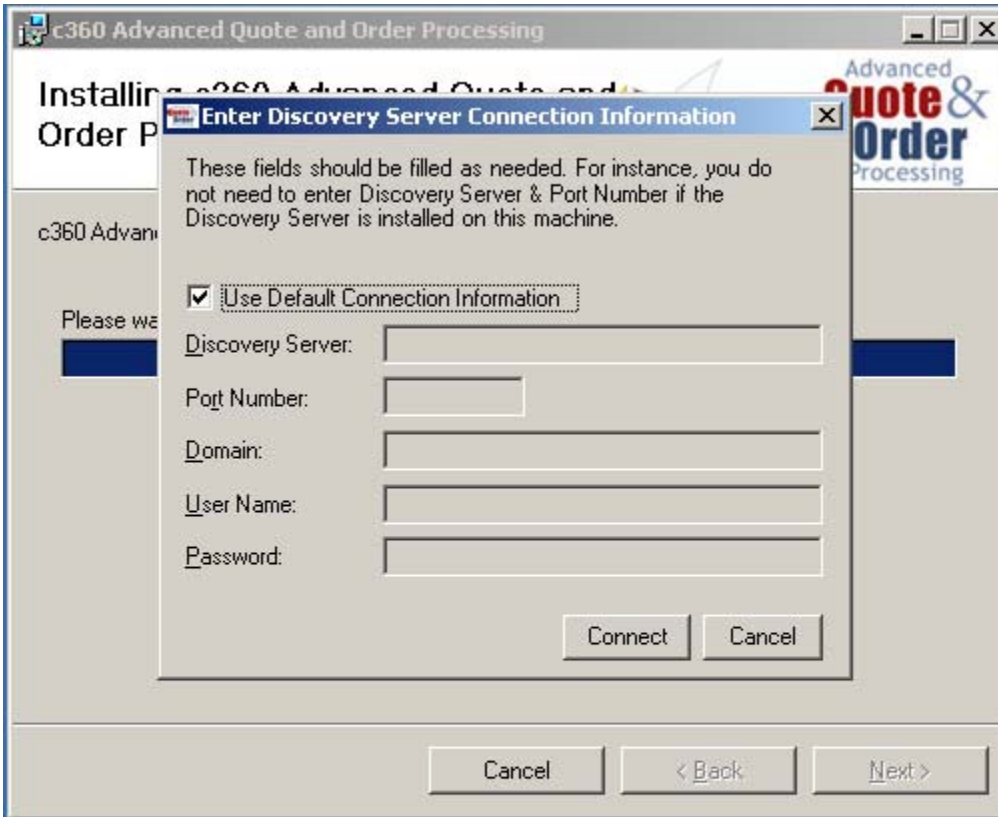
Choosing the third option (Manual Installation) will just copy all files required to install c360 Advanced Quote and Order Processing at a later time. Please read the Installing additional organizations section of this document.

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5. On the **Confirm Installation** page, click **Next** to install.



6. On the **Enter Discovery Server Connection Information** page, enter the **Discovery Server connection information**, and then click **Connect**.

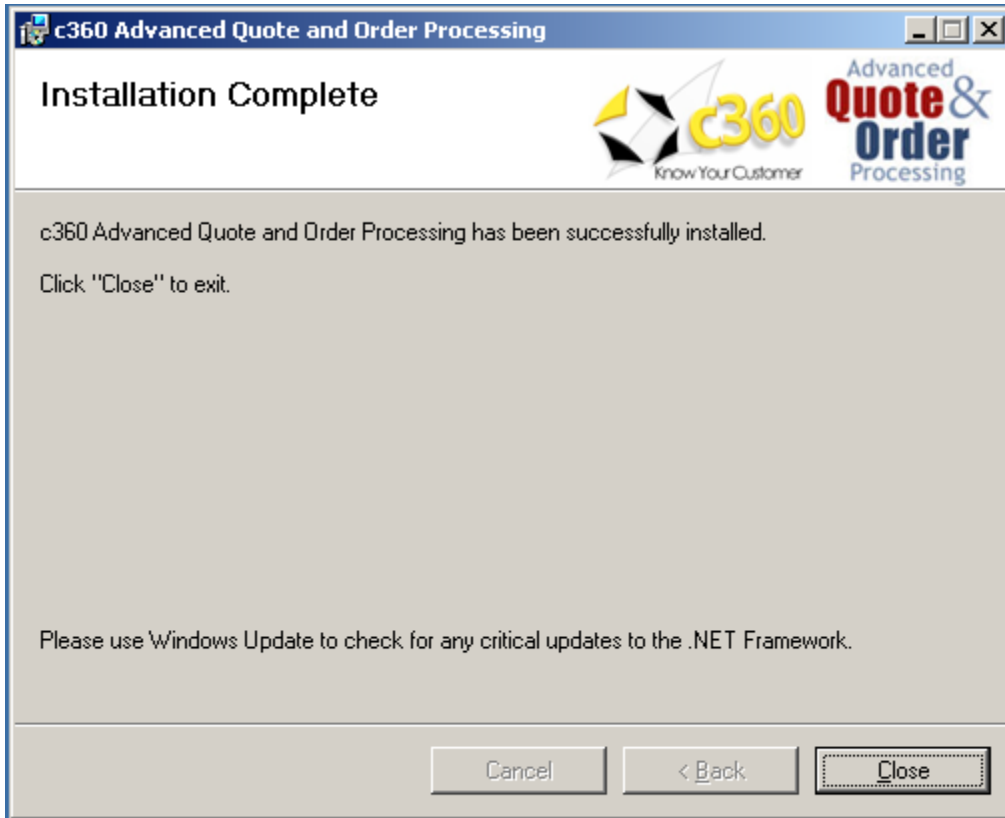


**Important**

If the **Discovery Service** is installed on the same machine, you can leave the **Use Default Connection Information checked**. You are required to supply the connection information **ONLY** if the Discovery Service is installed on another machine or on different port number than the Microsoft CRM web application.



8. When Setup completes successfully, the c360 Advanced Quote and Order Processing **Installation Complete** page appears. Click **Close**.



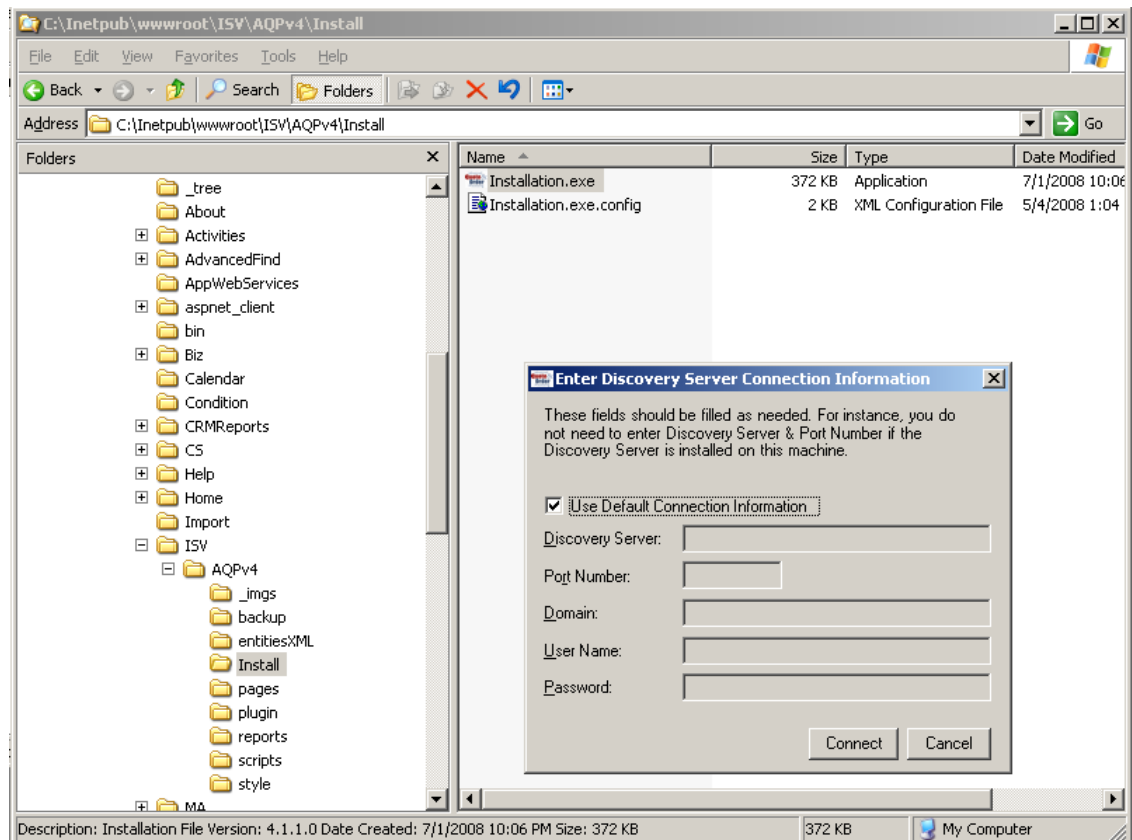
## Installing Additional Organizations

This section describes how to install c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM 4.0 on additional and new organizations

### Important

We strongly recommend that you back up your existing Microsoft Dynamics CRM data, including all reports and customizations, before you run Setup.

1. You must complete Microsoft Dynamics CRM 4.0 Server Setup and c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM 4.0 Setup before running this utility.
2. Log on to the Microsoft Dynamics CRM server as a user who has administrator-level privileges and who is a member of the Administrators group on the local computer.
3. In the Install folder where the c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM is installed, <crmwebfolder>:\ISV\AQPv4\Install, double-click **Installation.exe**.



4. On the **Enter Discovery Server Connection Information** page, enter the **Discovery Server connection information**, and then click **Connect**.

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**Important**

If the **Discovery Service** is installed on the same machine, you can leave the **Use Default Connection Information checked**. You are required to supply the connection information **ONLY** if the Discovery Service is installed on another machine or on different port number than the Microsoft CRM web application.

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5. On the **Organizations** page, select the organizations where you want the c360 Advanced Quote and Order Processing to be installed into, and then click **Install**.

## Troubleshooting Installation

This section describes how to troubleshoot installation issues.

### Log Files

Setup creates a log file that can be reviewed and used for troubleshooting. By default, the log file is located on the User's desktop, where *User* is the account of the user who ran Setup, and named as follows:

AQP\_INSTALLATION\_ERROR\_[GUID].txt

For example,

AQP\_INSTALLATION\_ERROR\_e5f212c1-ee3e-4ba0-b96d-ce4a8ea1ff78.txt

## Components Installed During Client Setup

This section describes what is installed during c360 Advanced Quote and Order Processing for Outlook Client Setup.

### c360 Advanced Quote and Order Processing for Outlook Client Installed Configuration Components

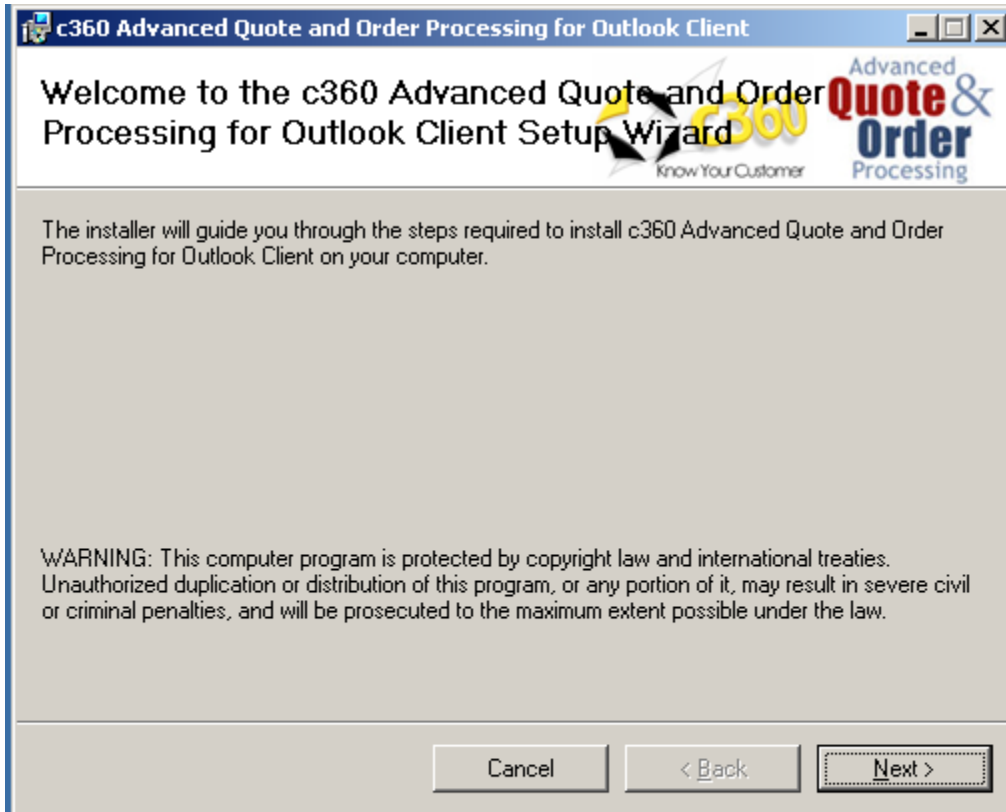
When c360 Advanced Quote and Order Processing for Outlook Client is installed on the client machine, the default folders, listed in the following table, are created.

Folder	Comments
<crmclientwebfolder>:\ISV\AQPv4\	All application program files and resources.
<crmclientwebfolder>:\ISV\AQPv4\pages	All .aspx pages, style sheets, images and scripts necessary for the application.
<crmclientwebfolder>:\ISV\AQPv4\scripts	
<crmclientwebfolder>:\ISV\AQPv4\style	
<crmclientwebfolder>:\ISV\AQPv4\_imgs	

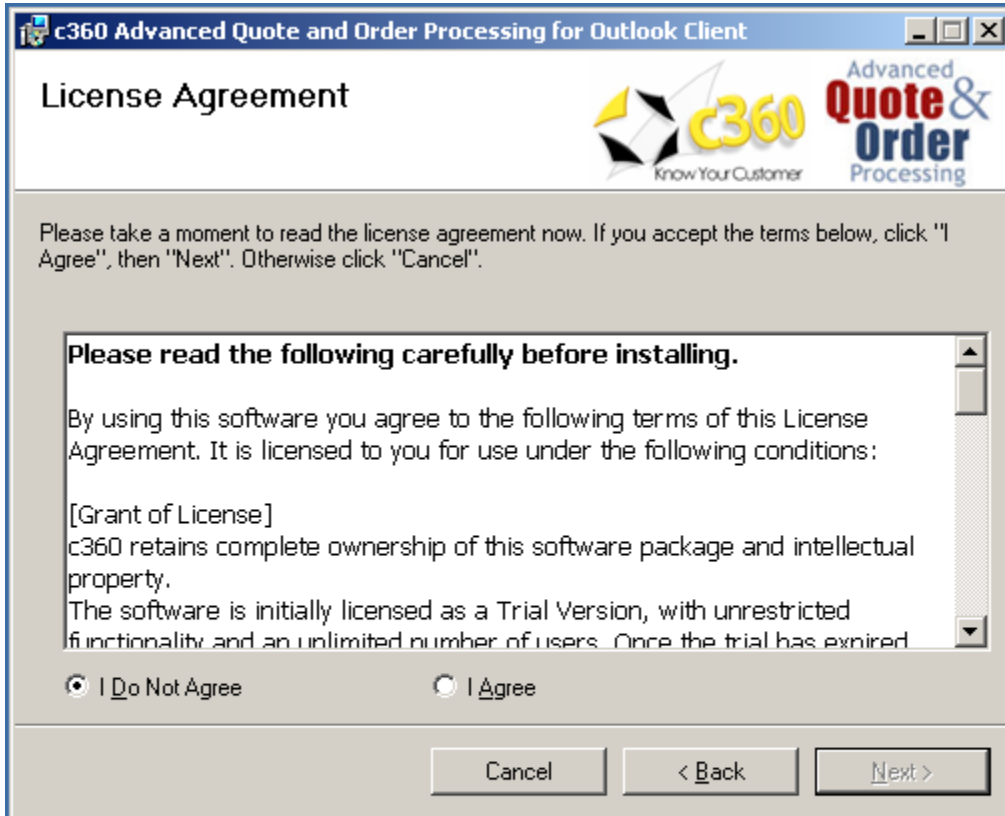
## Install c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM for Outlook with offline access.

1. You must complete Microsoft Dynamics CRM 4.0 for Outlook with offline access Setup before you run c360 Advanced Quote and Order Processing for Outlook Client Setup.
2. Log on to the computer as a user who has Local Administrator privileges
3. In the folder where the c360 Advanced Quote and Order Processing for Outlook client setup files are located, double-click **Client.msi**.

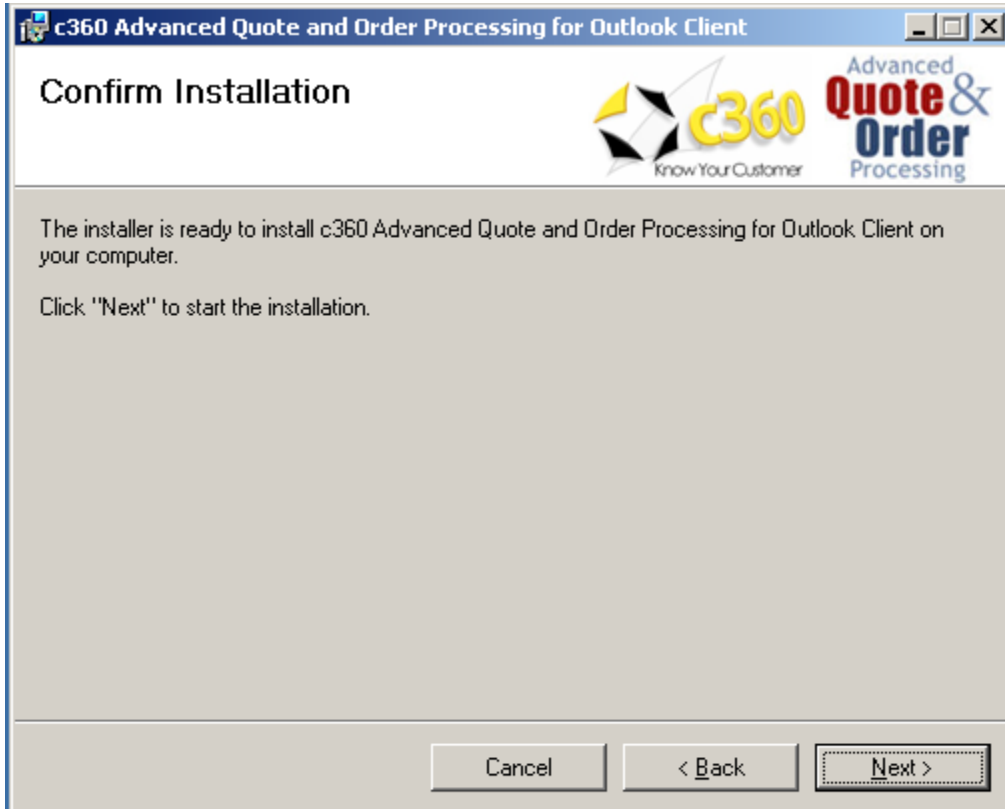
4. On the **Welcome Setup** page, click **Next**.



5. On the **License Agreement** page, review the information and if you accept the license agreement click **I Agree**, and then click **Next**.



6. On the **Confirm Installation** page, click **Next** to install.



7. When Setup completes successfully, the c360 Advanced Quote and Order Processing **Installation Complete** page appears. Click **Close**.

