



c360 Data Quality Center Installation Guide

Microsoft Dynamics CRM 3.0 compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Data Quality Center for Microsoft CRM 3.0.

Microsoft CRM Compatibility

c360 Data Quality Center for Microsoft Dynamics CRM 3.0 is compatible with Microsoft CRM version 3.0. For additional product information, visit <http://www.c360.com/DataQualityCenter.aspx>

c360 Data Quality Center for Microsoft Dynamics CRM 3.0

c360 Solutions Data Quality Center offers organizations a complete solution to validate, manage and keep their valuable customer data clean and up-to date.

The components of the c360 Data Quality Center are

1. Address Validation
2. Duplicate Detection

The **Address Validation** component allows Microsoft CRM users to verify and correct CRM addresses (Lead, Contact, Account, CustomerAddress) using US Postal Code standards.

The features of Address Validation are:

- Real-time verification and standardization of US addresses
- Validate and correct addresses and add ZIP+4 data
- Standardize city names and state names
- Preview Pane (optional) where users can see the old and new address
- Automatic Auto-updating of the verified address during save of the record
- A new optional 'Validate Address' button is also available on the entity toolbar which allows users to trigger the address validation service on-demand

The **Duplicate Detection** component notifies Microsoft CRM users when they are creating a Lead, Contact or Account record that appears to be a duplicate of an existing record.

The features of Duplicate Detection are:

- Compares against Lead, Contact and Account records, using concept of 'individual' (i.e. Lead or Contact) and 'organizational' (i.e. Lead or Account) records to intelligently determine where duplicates exist
- Implements match code technology for rapid detection and display of potential duplicates as users are inserting and updating CRM records
- Allows administrators to define up to 5 match codes per record type (individual/organizational)
- Allows use of partial string, entire field and sound matching (Soundex) comparison options when configuring match codes



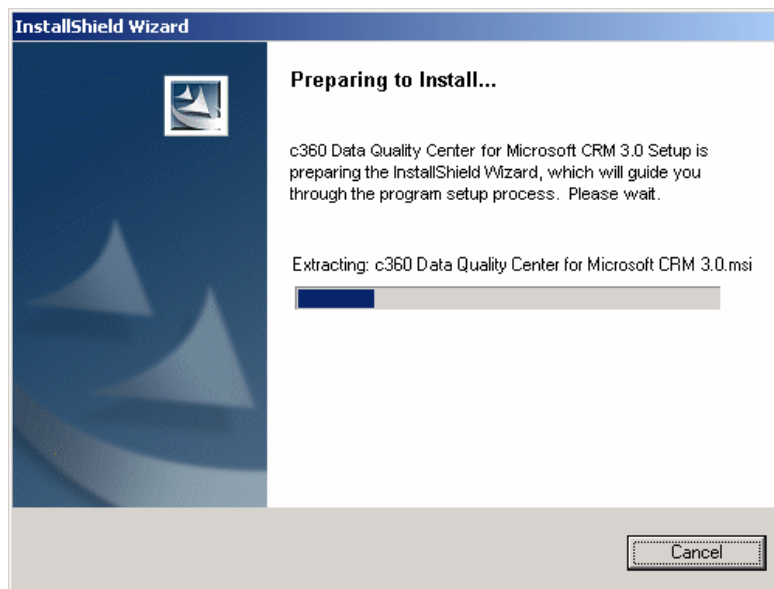
- Alternative Comparison rules can be enforced so names like Bob and Robert or letters like e and é can be compared. These rules are configurable for language and cultural subtleties
- Includes scheduled process for nightly detection of duplicates
- Includes a Potential Duplicates Queue where users can review potential duplicates that have been identified by the scheduled duplicate detection process

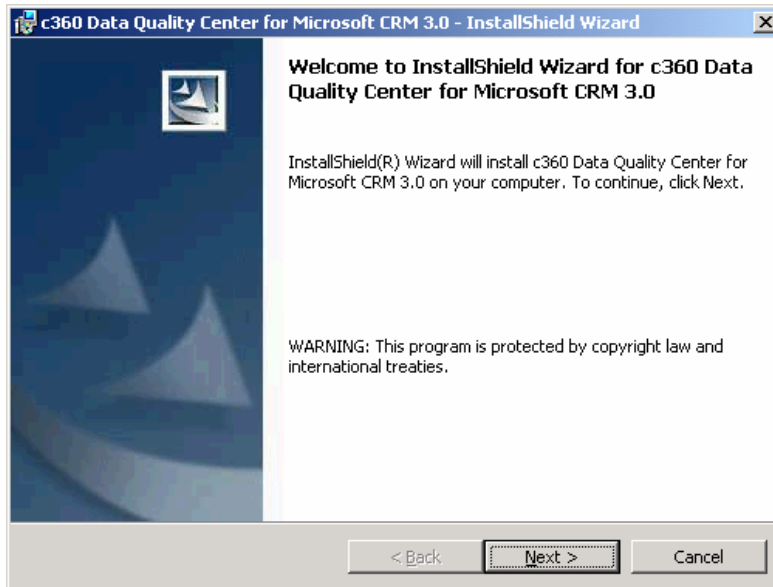
Installation Instructions

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 Data Quality Center for Microsoft CRM 3.0 requires the c360 Data Quality CenterV3.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Data Quality Center for Microsoft CRM 3.0

1. Extract the c360 Data Quality CenterV3.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Data Quality CenterV3.exe' file. You will see the following screens.





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



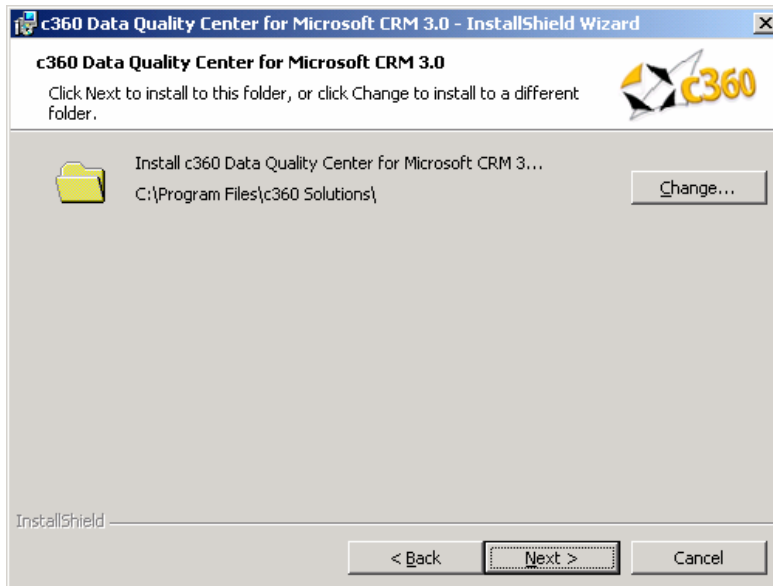
4. If you agree with the terms of the license agreement, select the option- 'I accept the terms in the license agreement' and click '**Next**'.



5. Check if the website selected by default is correct. If not, select the correct website. Then click **'Next'**.

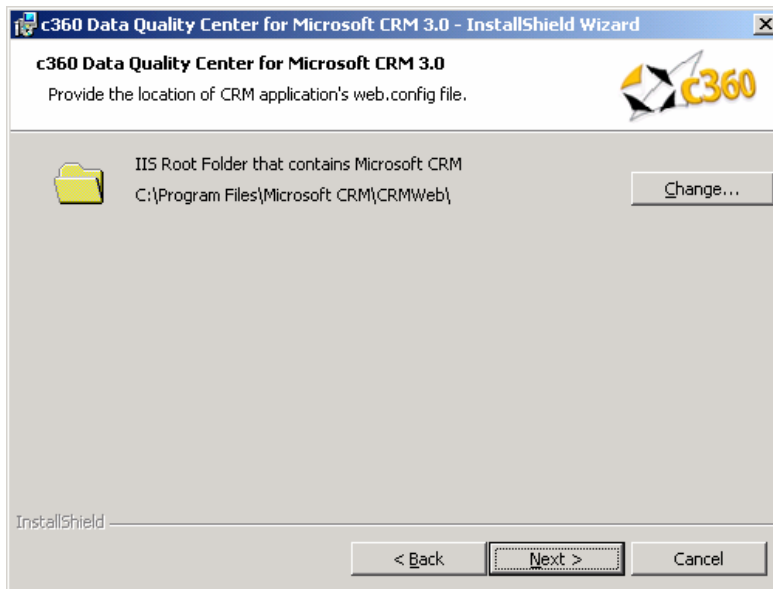
Note:

- Website: Name of the Microsoft CRM website.

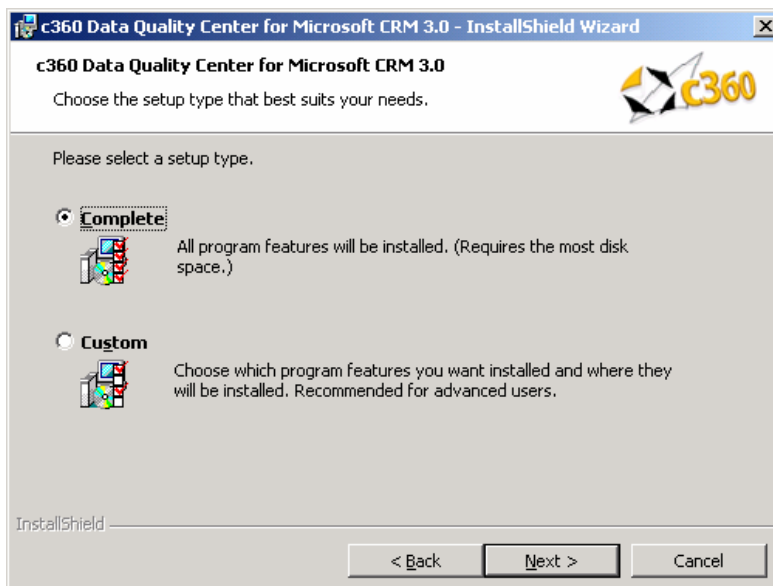


6. Click **'Next'** to install to the folder in the default directory **OR** Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

Note: This screen will not appear if c360 virtual directory already exists in the Microsoft CRM 3.0 website.



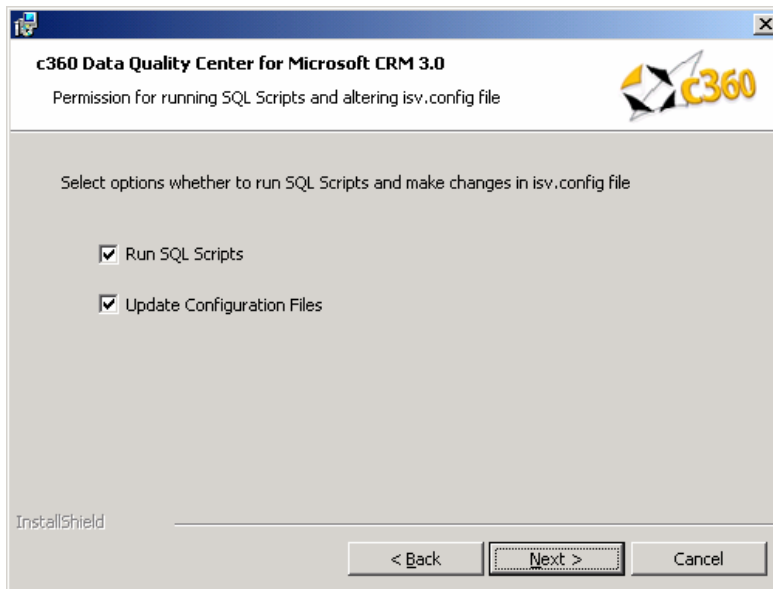
7. Verify that the Microsoft CRM web.config file is located in the default directory and click **'Next'**.
OR
Click **'Change'** and select the correct location of the Microsoft CRM web.config file. Then click **'Next'**.



8. Select **'Complete'** to install both Address Validation and Duplicate detection and click **'Next'**.
OR
Select **'Custom'** to install only one of the components and click **'Next'**.

Note:

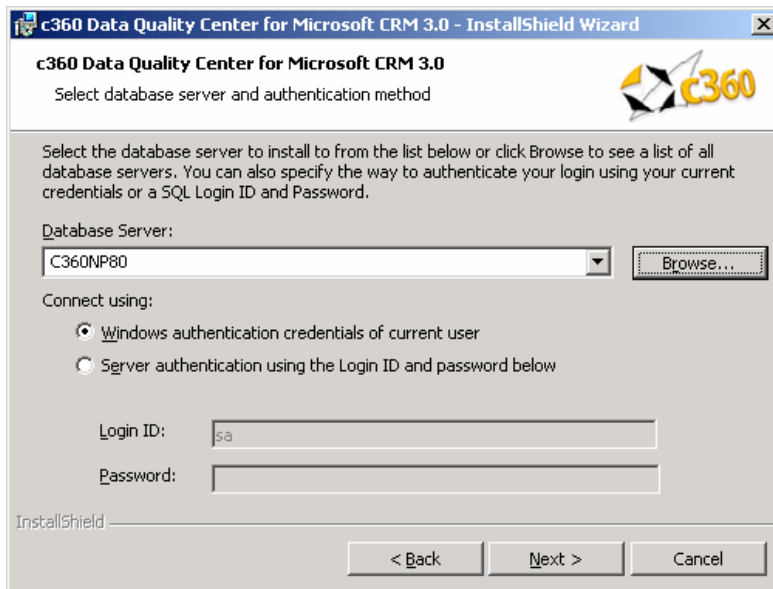
For instructions regarding custom installation, please refer to the section of this document titled **'Custom Installation'**.



9. Click '**Next**' if you want to 'Run SQL scripts' and 'Update Configuration files'. If not, uncheck the option(s) not required and then click 'Next'.

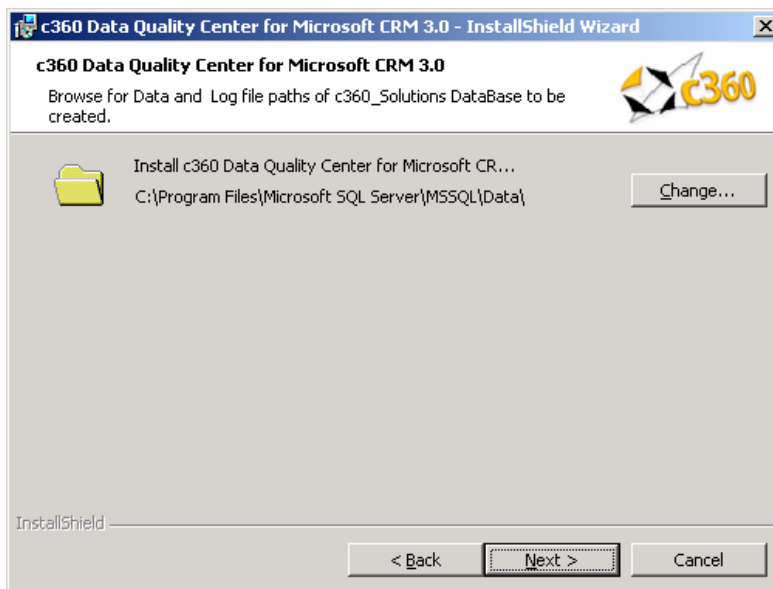
Note:

- **Run SQL scripts:** Installs the c360_Solutions Database (if not already existing), creates the product specific tables and populates them with default values. If unchecked, the SQL scripts can be run post installation. You will have to contact c360 Support for additional information regarding this.
- **Update Configuration files:** Updates CRM's sitemap and isv.config file for integration of the c360 product with Microsoft CRM. If unchecked, this customization can be implemented post installation. For this, in CRM, navigate to c360 Settings > c360 Configuration Center **OR** access the url <http://crmserver:port/c360/Toolkit/Configuration/Configurator.aspx> and click on the 'Integrate' button for the product.



10. Select the SQL server to install the c360_Solutions database by clicking on '**Browse**' and click '**Next**'.

Note: You must provide your user ID and password if you choose SQL server authentication.



11. Click '**Next**' if the Data and Log file path of c360_Solutions Database is to be the default one.
OR
Click 'Change' and browse to select a different path. Then click '**Next**'.

Note: This screen will not appear if the c360_Solutions database already exists on the SQL server selected on the previous screen. Instead an alert informing that the database already exists will appear.



c360 Data Quality Center for Microsoft CRM 3.0
Provide CRM administrator credentials. These credentials will also be used for Windows service logon.

CRM Server/Host Name: C360NP80
Port Number: 5555
CRM User Name:
CRM Password:
Retype CRM Password:
CRM Domain: NP80DOMAIN

InstallShield

< Back Next > Cancel

12. Check if the entries made in these fields by default are correct. If not, enter the correct values. Enter the CRM user name and password. Then click **'Next'**.

Note:

- CRM Server name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- Port Number: TCP port number of the CRM website.
- CRM User Name: Name of the CRM user with administrative privileges.
- CRM Password: The CRM Password for the above mentioned user.
- Retype CRM Password: Confirmation of the CRM password.
- CRM Domain: Domain name of the CRM server machine.



c360 Data Quality Center for Microsoft CRM 3.0
Provide the following configuration values.

SMTP Server
(Eg : mail.mycompany.com)

SMTP Server Username

SMTP Server Password

'From' Email Address
(the email address from which CRM user's will receive Duplicate Detection related email notifications)
(Eg : name@mycompany.com)

InstallShield

< Back Next > Cancel

13. Enter the values for SMTP server name, Username, Password and the Email address from which users will receive Duplicate Detection related email notifications. Click **'Next'**.

c360 Data Quality Center for Microsoft CRM 3.0
Duplicate Detection Match Code Generation

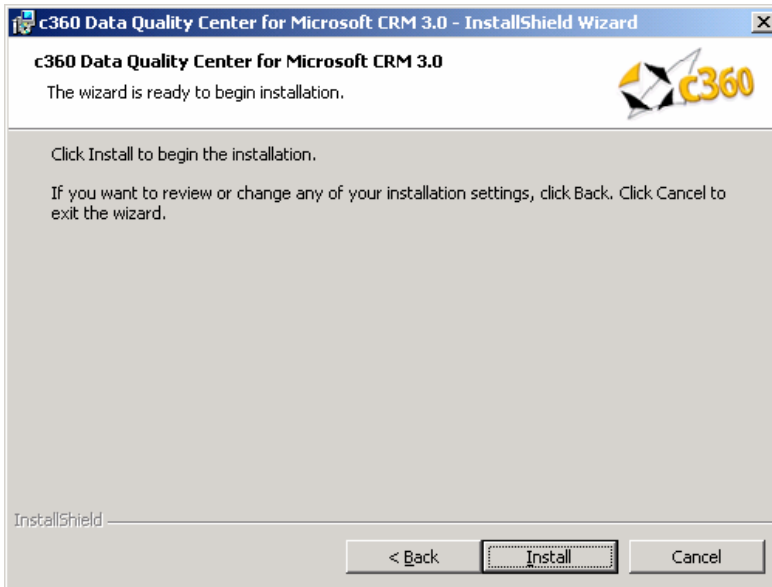
Would you like c360 Duplicate Detection to generate default matching information for your existing CRM records? This process will run in the background on the CRM server. If you select 'No' you may schedule this process at a later time by accessing CRM as a System Administrator and navigating to c360 Settings > Duplicate Detection Settings > Schedule or Run Match Code Generation page.

Yes
 No

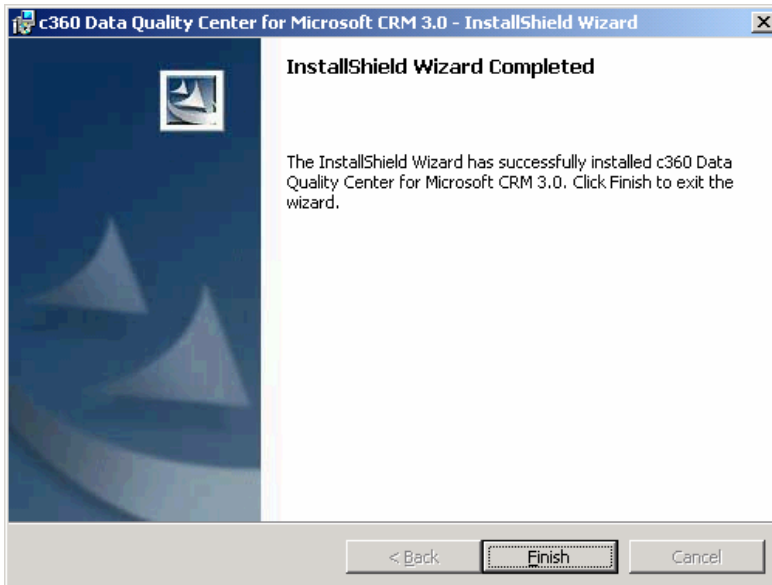
InstallShield

< Back Next > Cancel

14. Click 'Next' if you want to run match code generation for existing CRM records. If not, select 'No' and then click 'Next'.



15. Click **'Install'** to install the selected features of c360 Data Quality Center for Microsoft CRM 3.0.



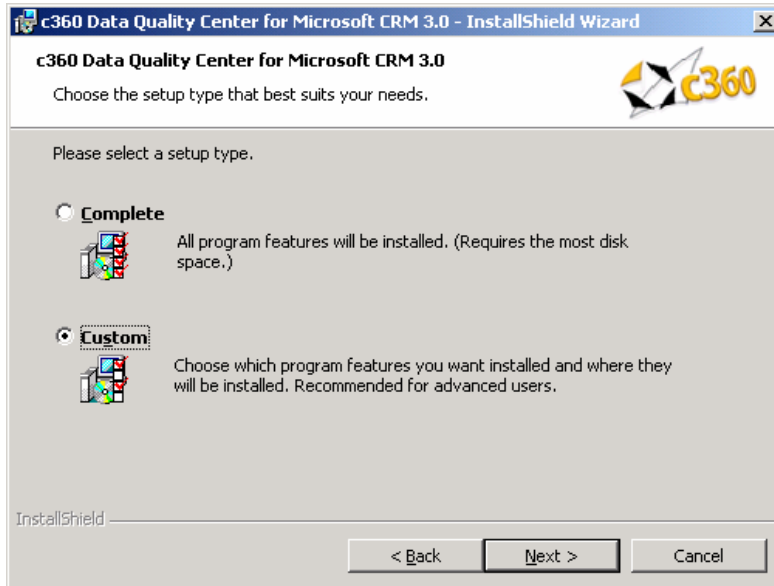
16. Click **'Finish'** to exit the installation wizard.

The installation of c360 Data Quality Center for Microsoft 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'.

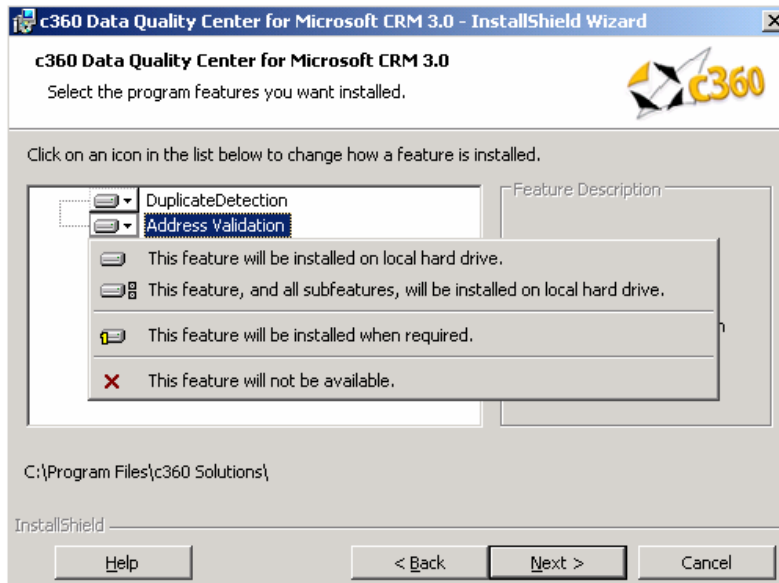


Custom installation

The following screens will appear if 'Custom' is selected in the setup type screen.



- Select 'Custom' to install any one of the components and click 'Next'.

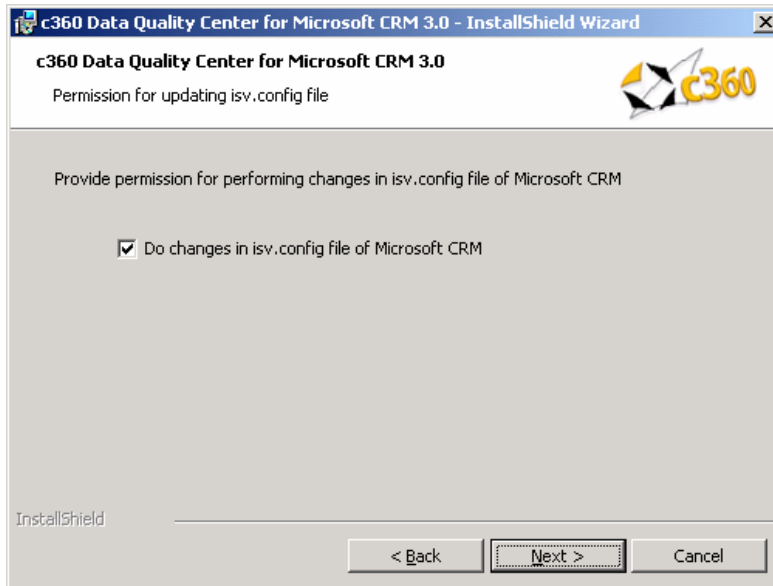


- Deselect the component not required by clicking on the node beside it choosing the option 'This feature will not be available'. Then click 'Next'.



Note:

The following screen will appear if only c360 Address Validation is selected for installation. During installation of c360 Duplicate Detection you will see the same screens that appear during 'Complete' installation.



- Click 'Next' if you want to 'Update Configuration files'. If not, uncheck the option and then click 'Next'.

- Click on 'Install' in the next screen.
- After successful installation, click 'Finish' to exit the installation wizard.

Modification of the product post installation

To modify the product at a later date (install/ remove any component):

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Data Quality Center for Microsoft CRM 3.0 from the list of the currently installed programs.
3. Click 'Change'.
4. On the install wizard screen that appears, select 'Modify' and click 'Next'.
5. The following screens will be similar to those appearing during 'Custom' installation.
6. Select the feature to be installed/removed and complete the installation process by following the instructions mentioned in the Custom installation section.



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 Data Quality Center 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'.



Licensing

For fresh installation of c360 Data Quality Center for Microsoft 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.

For existing c360 Duplicate Detection for Microsoft CRM 3.0

Product will use the existing license for c360 Duplicate Detection for Microsoft Dynamics CRM 3.0.

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 Data Quality Centre 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 Data Quality Center 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.

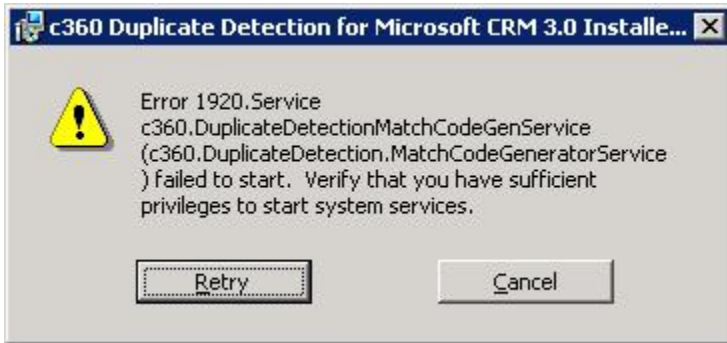


International Languages ---

c360 Data Quality Center for Microsoft 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.

Troubleshooting

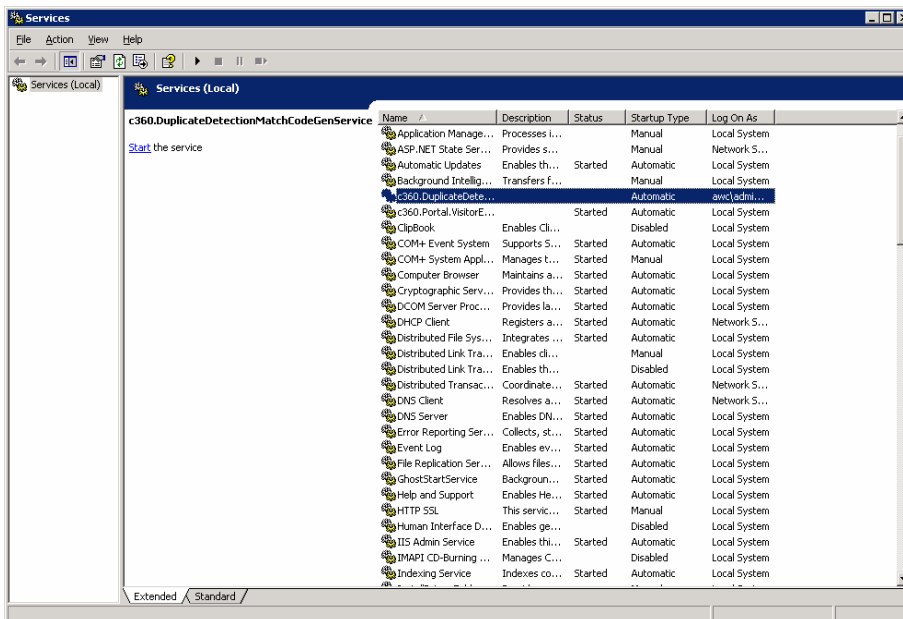
Q: Data Quality Center stops during install with message stating that the 'c360.DuplicateDetectionMatchCodeGenService' service failed to start (See install error screen below)



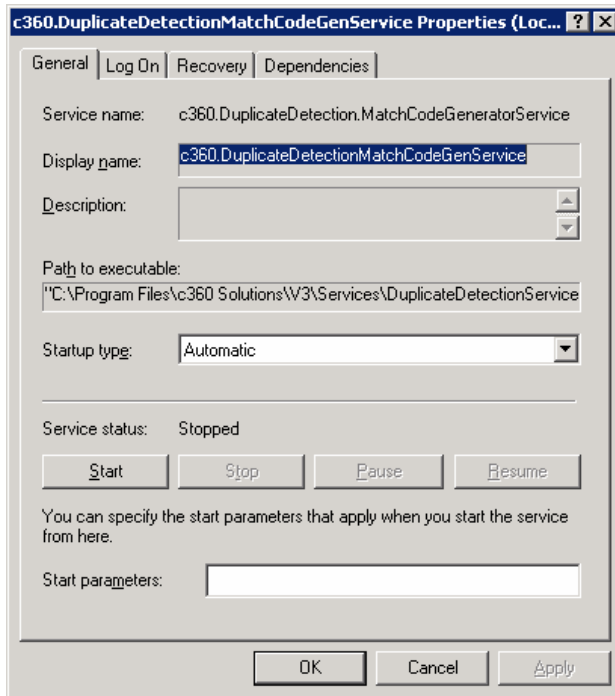
Answer:

Data Quality Center requires that the user account installing Data Quality Center have privileges to start system services. When you see the above screen, start the 'c360.DuplicateDetectionMatchCodeGenService' service manually as outlined below. After the service has started, you can continue with the installation by coming back to the install error screen and clicking on 'Retry'

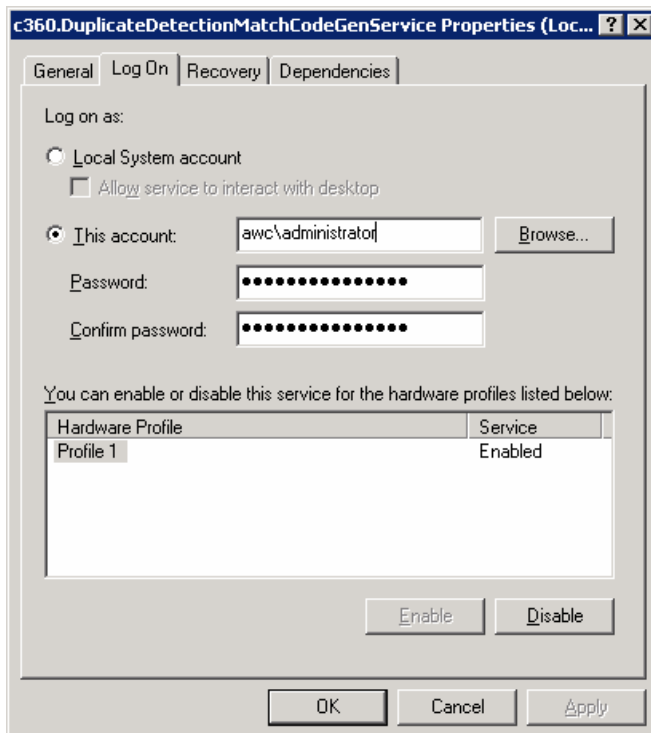
1. Open Windows Services by going to Start -> Administrative Tools -> Services



- Open the c360.DuplicateDetectionMatchCodGenService



- Click on the "Log On" tab and re-enter the administrator login/password similar to below screen.





4. Start the "c360.DuplicateDetectionMatchCodeGenService' service. You should see the below screen while the service starts up. Once the service has started, you can carry on with the installation process

