



c360 Upgrade Process for Microsoft Dynamics CRM 3.0 to CRM 2011

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Upgrade Process

Upgrading c360 Products and Microsoft Dynamics CRM 4.0

The release of Microsoft Dynamics CRM 4.0 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 Dynamics CRM. To prepare customers for the upgrade, we have listed below the steps required for customers upgrading a Microsoft Dynamics CRM installation that includes c360 products:

These steps are only applicable to customers who own the following c360 version 3.0 products that are available for CRM 2011:

- | Core Productivity Pack
 - o Consists of Alerts, Console, Multi-Field Search, Record Editor, Relationship Explorer, Summary
- | Sales Productivity Pack
 - o Consists of Web Connect
- | Service Productivity Pack
 - o Consists of Email To Case, My Workplace
- | Customer Portal

- 1. Download c360 version 4.0 Products:** Go to <http://www.c360.com/DownloadRegister.aspx> to download the c360 version 4.0 of products you currently own. The table below lists the c360 product names for Microsoft Dynamics CRM 4.0

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](mailto: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. **Uninstall the c360 version 3.0 products:** If the c360 version 3.0 products are not uninstalled pre-migration, then in add/remove programs, there will be 2 line items – one for each version (3.0 and 4.0)

a) Backup the configuration folder before performing an uninstall: The configuration folder which contains the database connection strings, relationship tree drill down settings is being backed up mainly as a safety precaution.

The default location of the configuration folder is found at
"C:\Program Files\c360 Solutions\V3\Config"

Note:

All configurations from the configuration folder and other items such as User Preferences (Summary, My Workplace), saved settings (Consoles that have been configured) will be migrated to version 4.0 using the migration tool (Step 6)

b) Uninstall the version 3.0 products from Add/Remove Programs: If the c360 products are not uninstalled prior to CRM version 4.0 upgrade, these would then need to be manually removed (Steps below)

- I. Delete the c360 version 3 folder. The default location is found at "C:\Program Files\c360 Solutions\V3 "
- II. Run the Windows Installer Cleaner to remove the entries from Add/Remove Programs if needed.

4. **Run the 'c360 PreUpgrade Cleanup Tool' by following the steps in [Appendix A: Upgrading CRM 3.0 to 4.0](#)**

Note:

This step is very important and if not done, CRM upgrade will abort. Refer to Appendix A for more details.

5. **Upgrade Microsoft Dynamics CRM from version 3.0 to version 4.0:**
Upgrade Microsoft Dynamics CRM software in accordance with the guidelines published by Microsoft.

6. **Run the Migration tool provided by c360:** This will migrate all configurations and databases to an organization of the user's choosing within the multi-tenanted MSCRM v4 environment.

The migration tool can be found at
[http://www.c360.com/Download/c360.MigrationTool\(v3.0tov4.0\).zip](http://www.c360.com/Download/c360.MigrationTool(v3.0tov4.0).zip)

Note: If you do not run this migration tool, you will NOT be able to upgrade to the c360 version 4 products.



- 7. Install c360 v4.0 Products:** Follow the steps in the installation guide that is included in the download package. In most cases, the setup is a single executable file that will prompt the installer for any necessary information. This step may not be necessary depending on the c360 products you are planning to upgrade. The following products may require installation of version 4.0.10.83 products before continuing with the CRM 2011 upgrade.

Alerts
Audit Analyzer
Console
Relationship Explorer

This is provided the CRM 3.0 database be upgraded to CRM 4.0 and then 2011 as suggested by Microsoft.

<http://www.microsoft.com/download/en/details.aspx?id=3621>

Please review the c360 Product table to help determine if installing the c360 v4 products is necessary

Important Notes about any specific products

Customer Portal:

After installing Customer Portal, the following manual steps need to be performed

- I. The value of the "activity dump path" key in the c360.PortalVisitorEmailService.config must be deleted leaving the key blank
- II. The c360.Portal.Config file must be deleted

- 8. 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 migration process

- 9. 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.

- 10. 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



Table 1: c360 Products for Microsoft CRM versions 2011, 4.0 and 3.0

Microsoft CRM version 2011 Product	Microsoft CRM version 4.0 Product	Microsoft CRM version 3.0	V 4 Description	2011 Description	License
Core Productivity					
n/a	Explorer (CRM Engine)	n/a	New Product! – Core Productivity Customers current on	Discontinued	Request license from c360¹
n/a	CRM/SharePoint	n/a	New Product! – Core Productivity Customers current on	Discontinued	Request license from c360¹
Record Editor	Record Editor	Record Editor	Product upgraded	Product upgraded	Setup will discover and use existing Record Editor
Console	Console	Console	Product upgraded and improved	Product upgraded and integrated with CRM Dashboards	Setup will discover and use existing Console license
Summary	Summary	Summary	Product renamed and improved	Product upgraded	Setup will use discover and use existing Summary
Relationship Explorer/Charting	Relationship Explorer/Charting	Relationship Explorer	Product improved and renamed	Product upgraded and integrated with CRM Connections	Setup will discover and use existing Relationship Explorer license
Alerts	Alerts	Alerts	Product upgraded	Product upgraded	Setup will discover and use existing Alerts
Multi-Field Search	Multi-Field Search	Multi-Field Search	Product upgraded and improved	Product upgraded	Setup will discover and use existing Multi-Field Search license
n/a	Address Validation	Data Quality Center	Product renamed	Discontinued	
Sales					
n/a	Forecast Manager	Forecast Manager	Product upgraded	Discontinued	Forecast Manager license
Web Connect	Web Connect	Web Connect	Product upgraded	Product upgraded	Setup will discover and
Service					
Email To Case	Email To Case	Email To Case	Product improved	Product upgraded	Setup will discover and
My Workplace	My Workplace	My Workplace	Product upgraded	Product upgraded	Setup will discover and
Other					
Customer Portal	Customer Portal	Customer	Product improved	Product upgraded and	Setup will



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		Portal		improved	discover and use existing
Audit Analyzer (views previously audited v4 data only)	Audit	Audit	Product upgraded	Must be upgraded to Audit 4.0.10.83 to view previously audited data in CRM 2011	Setup will discover and use existing Audit license
n/a	Field Level	Field Level Security	Product upgraded	Discontinued	Setup will discover and use existing
n/a	n/a	Multi Currency	Discontinued	Discontinued	
Reminder	Reminder	n/a		New Product! -	Request license from c360¹

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.

Review our [2011 Customer Migration Plan documents](#) along with this document while planning your CRM 3.0 to CRM 2011 upgrade with c360 products.



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 Console, c360 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 will happen to user preferences when our c360 applications are upgraded?

For your convenience, any configuration that was set in the version 3.0 of the c360 product will be migrated to the 4.0 version. For instance, the database connection string for Console, the system default values in Summary and the user preferences in My Workplace will be migrated.



Appendix A: Upgrading CRM 3.0 to CRM 4.0_____

c360 Solutions has identified a problem with upgrading Microsoft Dynamics CRM 3.0 to Microsoft Dynamics CRM 4.0 if c360 Field-level Security and/or c360 Multi-currency Management are installed. The presence of these products may cause the CRM version 3.0 to CRM version 4.0 upgrade process to fail when it is at about 90% close to completion.

Likewise, if c360 Alerts, Data Quality Center (Address Validation and/or Duplicate Detection components) have been installed, the Microsoft CRM upgrade process will succeed. However, the CRM application will report errors when navigating to entity records in the form view after the upgrade is completed. *Example: when opening an Account form*

If you are in the process of upgrading CRM version 3.0 to CRM version 4.0 and have any of the previously mentioned products installed on your system please run the '**c360 PreUpgrade Cleanup Tool**' **prior** to the upgrade.

This tool can be found at

<http://www.c360.com/Download/c360.CRMv4PreUpgradeCleanupTool.zip>

Remove Multi Currency Management Custom Entities

If you have c360 Multi Currency Management installed on your CRM 3.0 system, you also have to remove the custom entities

- 1) Navigate to customizations in MSCRM (Settings - > Customization - > Customize Entities) and delete the following custom entities **IN ORDER:**
 - a. Currency Mapping
 - b. Exchange Rate
 - c. Currency
- 2) Publish All Customizations (More actions -> Publish All Customizations)