



c360 Portal Installation Guide

Microsoft Dynamics CRM 2011 compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Portal for Microsoft Dynamics CRM 2011.

Microsoft CRM Compatibility

c360 Console for Microsoft Dynamics CRM 2011 is compatible with Microsoft Dynamics CRM 2011. For additional product information, please visit <http://www.c360.com/console.aspx>.

Please note that if this installation is on an environment in which c360 Console v3 was installed, you must uninstall the product before continuing with this installation. Please contact support@c360.com for more information.

c360 Portal for Microsoft Dynamics CRM 2011

The c360 Customer Portal allows organizations using Microsoft CRM to extend their customer service and support functions to the web to achieve more efficient support and service as well as higher customer satisfaction and self sufficiency. The c360 Customer Portal will allow organizations to quickly and easily create a web self service presence that is fully integrated into their Microsoft CRM solution.

Using the c360 Customer Portal, an organization's customers will be able to

- Authenticate and become authorized to perform specific actions including:
- Create new Customer Service Cases
- View Service Case Activity History and update existing Service Cases
- Attach documents when working with Service Cases
- Update Contact record details to keep personal data up to date
- Search and view selectively published CRM knowledge base articles
- Access additional modules developed either by the customer or their implementation partner

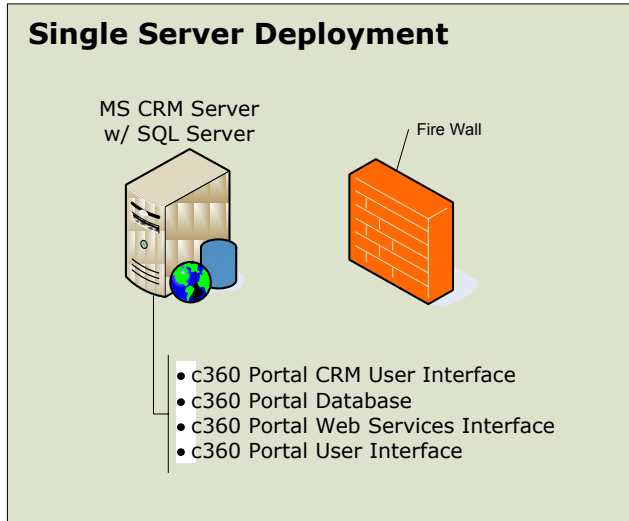
The c360 Customer Portal is fully and easily configurable to suit your business needs. By using the Customer Portal, an organization will be able to:

- Selectively publish CRM Knowledge base articles based on keywords and subject items with Notes and their attachments available to users
- Configure the Portal screens in terms of which fields to display, the display order and so forth
- Selectively publish the activity types that gets displayed to the Portal user
- Configure the Service Case entry form and the Case View and Details screen
- Create personalized email templates for customer communication and setup automated notifications
- Allow different users access to different parts of the Customer Portal based on their security level
- Access data from a 3rd party system to display in the Portal by developing custom modules
- Provide world class customer service over the web

Deployment Scenarios

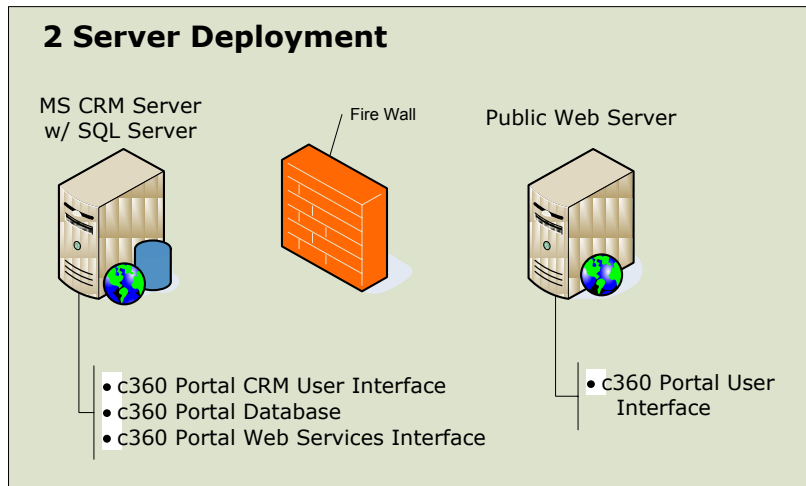
Single Server Deployment

In a single server deployment, all three installations are done on the same physical machine.



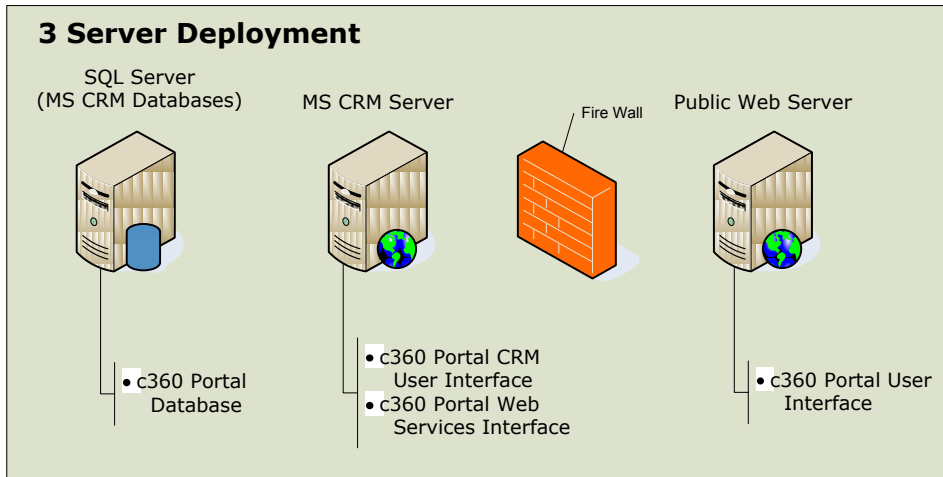
Two Server Deployment

In a two server deployment scenario, the c360 Customer Portal-Customer Interface is installed on a machine outside the corporate LAN while the remaining components are installed on a single server inside the LAN.



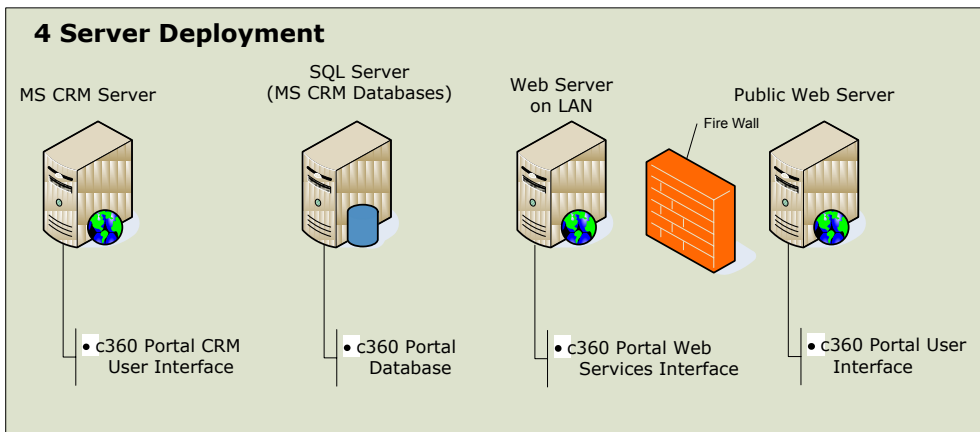
Three Server Deployment

In a three server deployment scenario, the c360 Customer Portal-Customer Interface is installed on a machine outside the corporate LAN while the remaining web server components are installed on a web server inside the LAN. The 'c360 Portal Database' created by the c360 Customer Portal-CRM Interface setup exists on a separate database server.



Four Server Deployment

In a four server deployment scenario, the c360 Customer Portal-Customer Interface is installed on a machine outside the corporate LAN while the remaining c360 Customer Portal components are each installed on separate servers inside the LAN.





Additional Scenarios BEFORE Installation:

1. **When Portal Web Service and Portal Customer Interface are on a non-CRM Website:** Windows authentication and Anonymous Authentication should be enabled and ASP.NET impersonation should be disabled for the website.
2. **CRMAppPool and Webites AppPool** (where webservice or customer interface are installed) should be the same.
3. **For the web service on a non-CRM box:** Microsoft.IdentityModel.dll of version 3.5.0.0 should be present in assembly before the installation begins



Installation Instructions

The Portal product consists of three separate installations. It is necessary to install the components in the sequence listed below due to various interdependencies between them. The installation applications must be run by a user with Local Administrator privileges. The installation of c360 Customer Portal for Microsoft CRM 4.0 requires the c360 Customer Portal CRM2011.zip file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Note: Because an IISReset is required for the product, it is recommended that the installation be postponed until the IISReset action can be performed.

c360 Customer Portal-CRM Interface CRM2011.exe: Portal CRM Interface must be installed on the same website as Microsoft CRM. In addition to the CRM Interface files, this setup creates the Portal Database. The installing user must be a CRM Deployment manager and be a member of the CRM System Administrator role.

c360 Customer Portal-Web Services CRM2011.exe: In addition to the Web Services, this setup will automatically launch the WSE2.0 SP3 setup if it is not already present on your machine.(Web Services Enhancement 2.0 is required to support the 'send attachments' functionality). If this component is installed on the CRM server, then the virtual directory should NOT be located under the CRM website, as it requires that anonymous access be enabled.

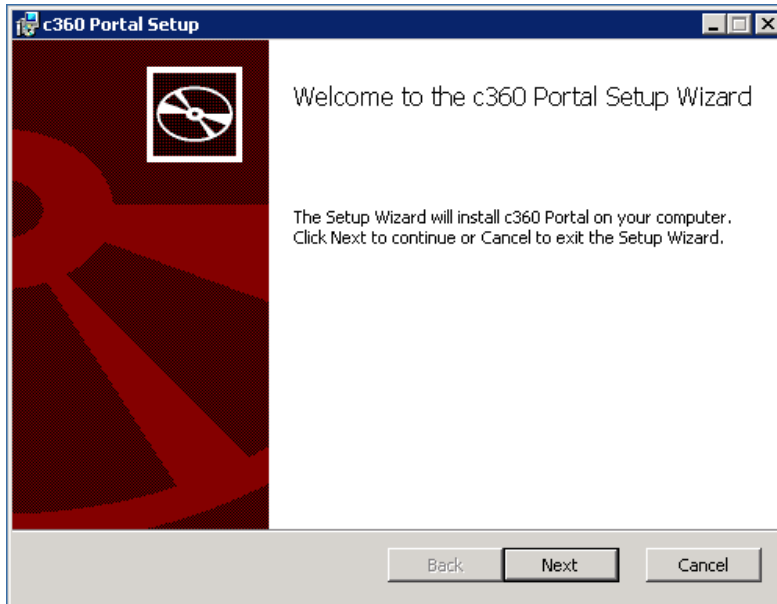
c360 Customer Portal-Customer Interface CRM2011.exe: This setup installs the Portal user interface. This setup will also launches the WSE2.0 SP3 setup if it is not already present on the machine where the Portal Customer Interface is being installed.



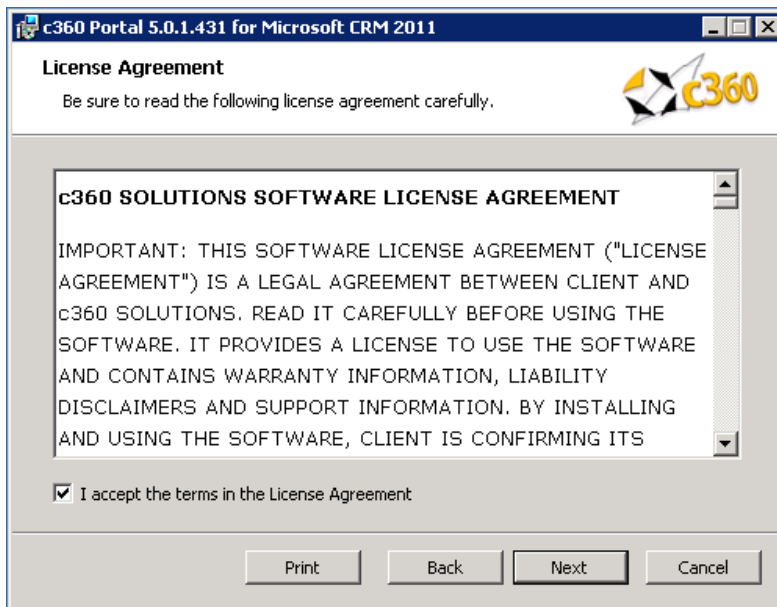
Steps to install c360 Customer Portal – CRM Interface for Microsoft Dynamics CRM 2011

Extract the c360 Portal CRM2011.zip file into a folder on the Microsoft CRM server machine.

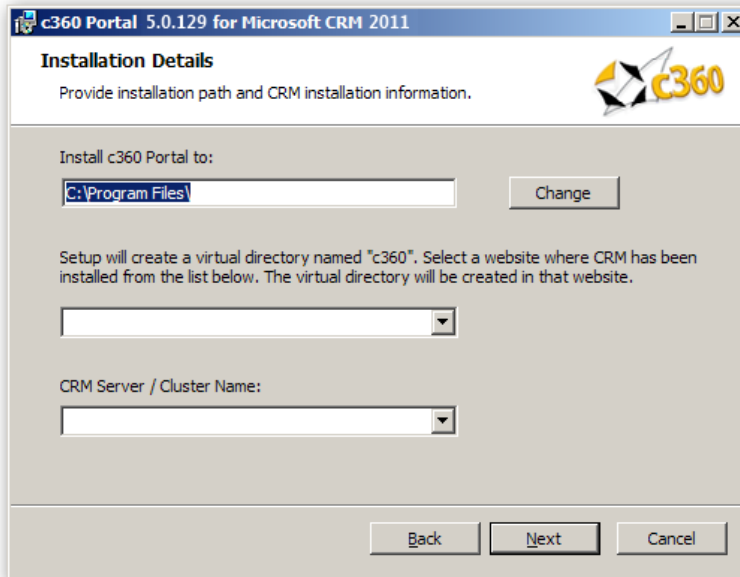
Double click the 'c360 Portal for Microsoft CRM2011.exe' file. You will see the following screens.



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



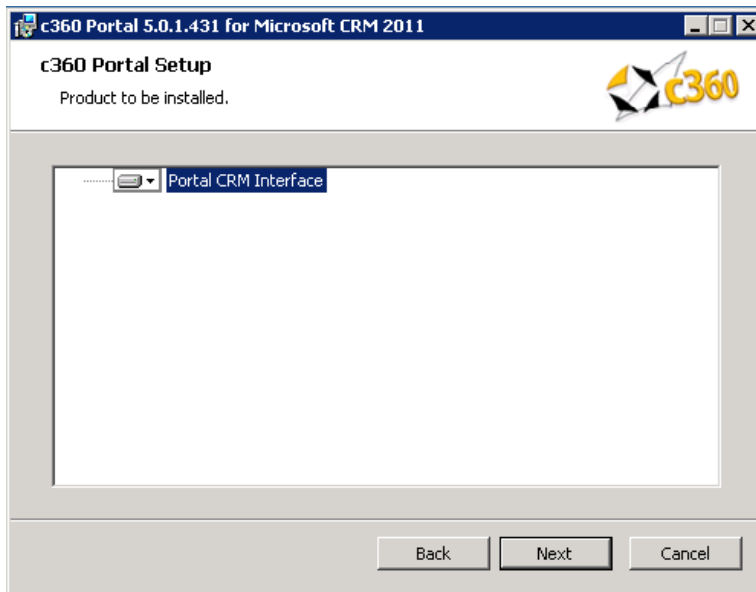
If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click **'Next'**.



Accept the default entry for the installation path or modify. Select the CRM website and verify that the CRM Server / Cluster is correct. Click **'Next'**.

Notes:

CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
If any c360 products have previously been installed, this screen will not appear. All configuration settings from the previous install(s) will be used.
If this is an IFD environment, post-installation ensure that the 'Enable Anonymous Access' setting for the c360 Virtual Directory is disabled.



Click **'Next'**.



c360 Portal Setup
Discovery Service URL

Enter Discovery Service URL

User Name:

Password:

Retype Password:

Domain:

Back Next Cancel

1. Accept the default entry for the MSCRM Discovery Service URL or modify. Enter the credentials and Click '**Next**'. These credentials will be used to execute the discovery service methods.
For an IFD Enabled system, fully qualified domain name which has been used for configuring IFD in CRM needs to be entered in Discovery Service URL.



c360 Portal Setup
Provide Portal Customer Interface virtual directory information.

Portal Customer Interface Location(Machine Name or IP Address).
 (Eg: CRMSERVER)

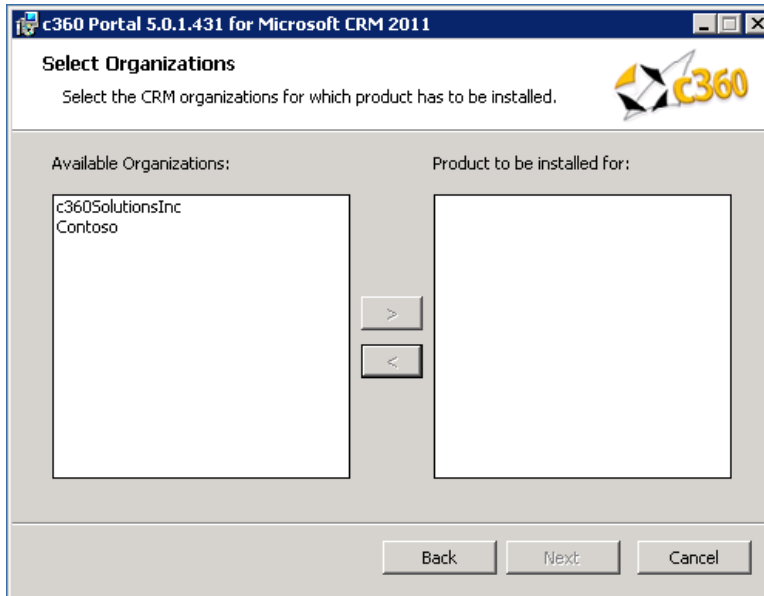
Provide the port number of Portal Customer Interface location.

Secured Access(You need to install SSL certificate on ther Web Server(s) that are hosting the websites for Portal Web Services and henceforth all requests will be handled via https).

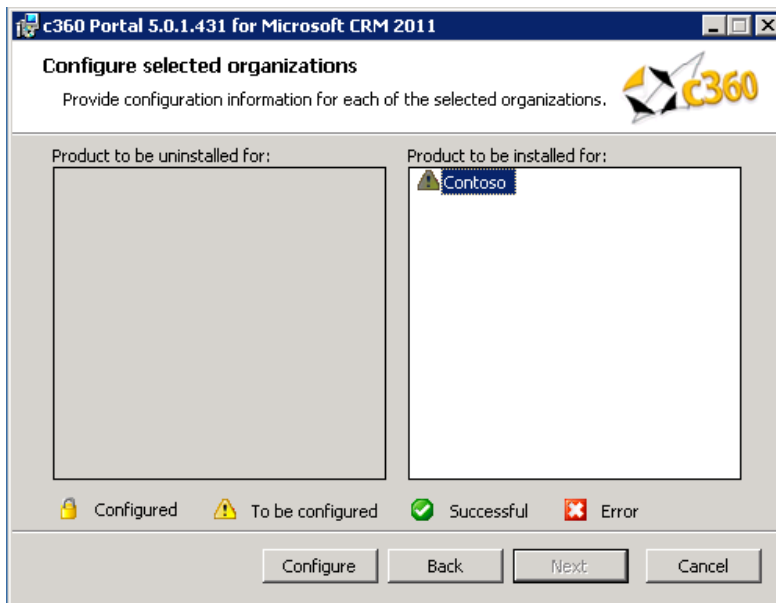
Specify the name of the virtual directory for Portal Customer Interface. Make sure that the name given here should be given as the actual virtual directory used for Portal. This can be changed later using the Portal Settings page.

Back Next Cancel

Enter the machine name and the port number of server onto which *Portal Customer Interface* will be installed. Specify the virtual directory for the *Portal Customer Interface*. Click **'Next'**.



Select the Organization(s) for which the product is to be installed. Then click **'Next'**.



Select one Organization for which the product is to be configured (In this case, 'Adventure Works Cycle'). Then click **'Configure'**.

Note:

To be configured: The organization has not been configured for installation.

Successful: The organization has been configured and configuration settings have been validated. The product is ready to be installed for the organization.

Error: There has been an error in validating the configuration settings for the organization. Settings need to be reviewed for accuracy and corrected. (There will be an error on the configuration screen deemed to have invalid entries)

Configured: The Product has been configured and installed for this organization. It cannot be reconfigured but only uninstalled.



c360 Portal Setup - Contoso

Provide credentials having privilege to export entity customizations.

These credentials will only be used to export entity customizations while running the product. Setup will encrypt these values and update c360.Config with encrypted values. These can be edited later from c360 Configuration Center.

CRM Administrator Username: c360administrator

CRM Administrator Password:

Retype CRM Administrator Password:

Domain Name: c360

These credentials are to be used for AD management as well.

Back Next Cancel

Enter the name, password and domain for the CRM user who has privileges to export entity customizations for the organization being configured.

Click **'Next'**.

Note: if you check the box for AD credentials, you will skip step 12.

c360 Portal Setup - Contoso

Provide credentials having privileges to add / remove users in AD.

These credentials will be used to manage the Active Directory Group created by c360. This group is used to apply database security. These values will be encrypted and can be modified later through the c360 configuration center.

AD Administrator Username:

AD Administrator Password:

Retype AD Administrator Password:

Domain Name:

Back Next Cancel

Enter the name, password and domain for the user who has rights to create and manage groups in Active Directory.

Click **'Next'**.



Enter the SQL server instance in which the c360 database for the organization will be installed, or click browse to choose from the list of available SQL server instances.

Choose Windows or SQL authentication. Click **'Next'**.

Note:

If you are supporting an IFD deployed environment, post installation you must modify the c360 and CRM connection strings to use SQL Authentication. These strings are located in the c360 global configuration area.

Select the path to install the database files.

Select the desired collation for the c360 database. Click **'Next'**.

Note:

This screen will not show if another c360 product with a database has been installed on the same SQL server

If installing on a clustered environment or a named SQL server instance, manual installation of the database is required and no entries are required on this screen.



c360 Portal Setup - Contoso
Select the actions that have to be performed.

Run CRM Integration Perform Schema Validation

Update isv.config and sitemap to integrate c360 Portal with CRM. This will enable user to view c360 product links in the CRM navbar, toolbar and left pane within entity record as applicable.

Run SQL Scripts

Run sql scripts required for c360 Portal. This will create c360 database if not present and create required tables, functions, procedure etc in this database.

Back Next Cancel

Select options to be performed during installation for the selected organization. Click **“Next”**.

Note: If installing on a clustered environment, uncheck 'Run SQL Scripts'. The installation will have to be performed manually. Please contact support@c360.com for assistance. If installing on a load-balanced environment, please see 'Additional Configurations'.

c360 Portal Setup - Contoso
Provide the SMTP configuration details.

SMTP Server:
(Eg: mail.mycompany.com)

Authentication required

SMTP Server Username:

SMTP Server Password:

'From' Email Address:
(Eg: name@mycompany.com)

Back Next Cancel

Enter the values for SMTP server name, Username, Password and the Email address from which customers will receive Customer Portal related email notifications. Click **“Next”**.



IFD related information
Provide SPLA credential information to connect to the CRM discovery service.

These credentials will be used to connect to the CRM Discovery service if c360 needs to function in IFD mode. These values will be encrypted and can be updated later through the c360 Configuration Center.

User Name:

Password:

Retype Password:

Domain:

Back Next Cancel

Enter SPLA credentials for IFD mode. If c360 Customer Portal ever needs to operate in IFD mode, these credentials will be used to connect to the CRM discovery service.

Click **'Next'**.

Configure selected organizations
Provide configuration information for each of the selected organizations.

Product to be uninstalled for:

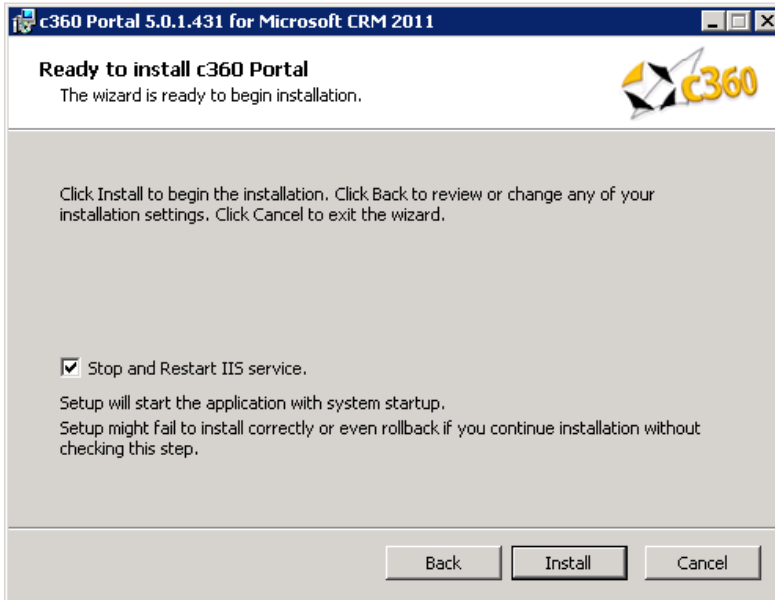
Product to be installed for:

Contoso

Configured To be configured Successful Error

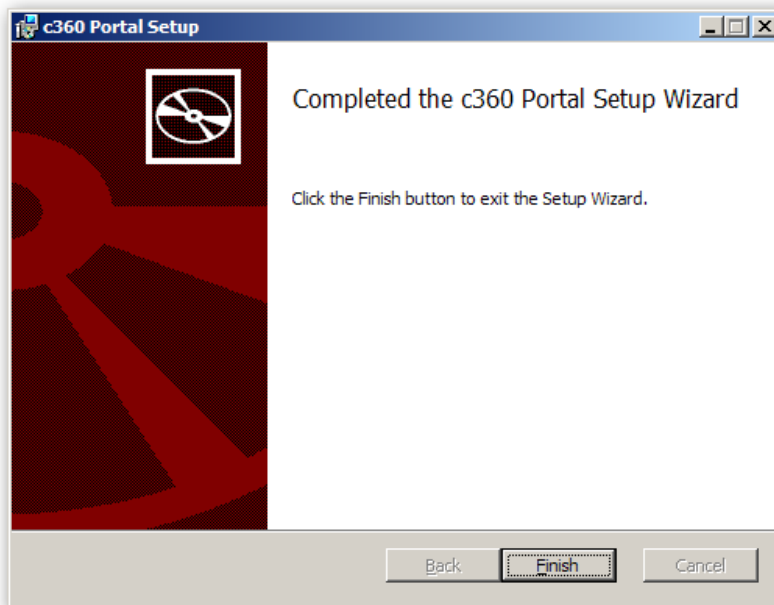
Configure Back Next Cancel

Repeat steps 9 – 18 until all organizations have been successfully configured. Then click **'Next'**.

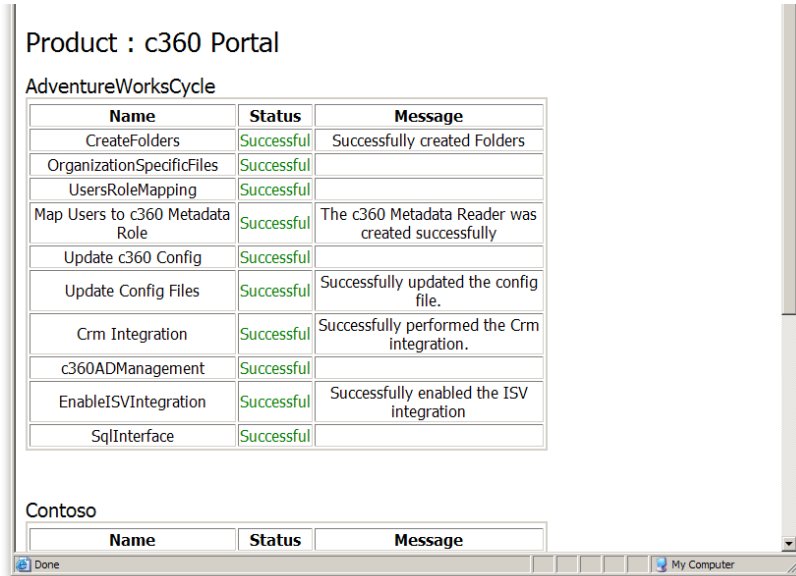


Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install c360 Portal for Microsoft CRM 2011.

Note: Because an IISReset is required for the product, it is recommended that the installation be postponed until the IISReset action can be performed.



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

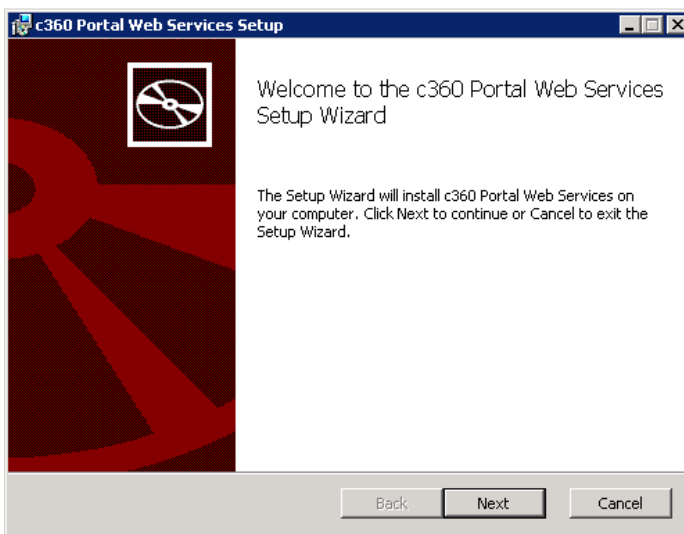


A summary of the installation will appear.

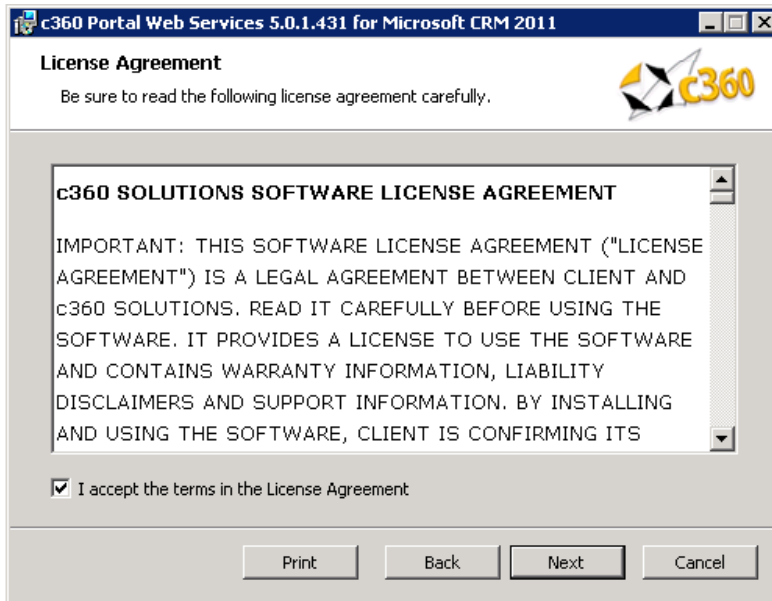
Steps to install c360 Customer Portal – Web Services for Microsoft Dynamics CRM 2011

Extract the c360 Portal Web Services CRM2011.zip file into a folder on the target server.

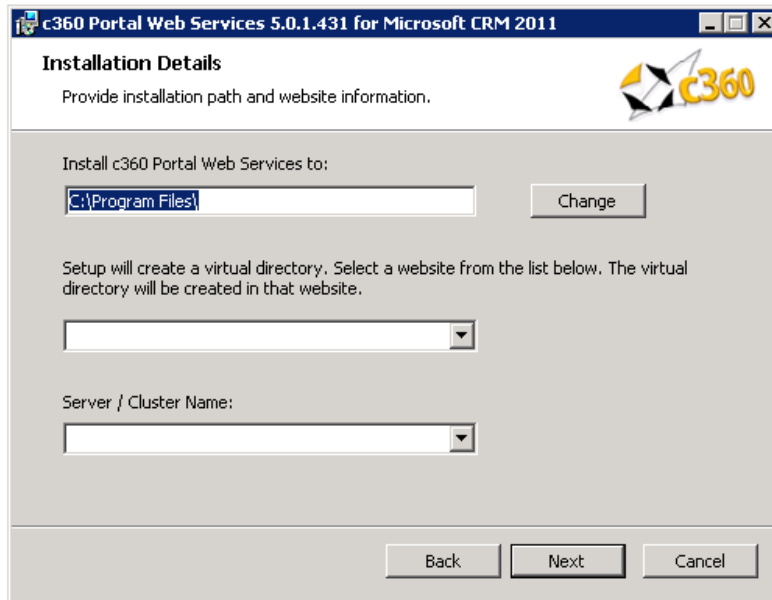
Double click the 'c360 Portal for Microsoft CRM2011.exe' file. You will see the following screens.



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



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'**.



Accept the default entry for the installation path or modify. Select the website and verify that the Server / Cluster is correct. Click **'Next'**.

Notes:

CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
If Installing Portal Customer Interface on a website outside of the CRM domain or under a site configured for anonymous access, then Portal Web Services must be installed under a site configured for anonymous access on the same domain as CRM.



c360 Portal Web Services 5.0.1.431 for Microsoft CRM 2011

CRM Server Details

Provide CRM Server information.

CRM Server Host:

CRM Server Port:

Secured:

CRM Server information will be used by the setup for communicating with CRM discovery service during installation of the product.

Back Next Cancel

Enter the CRM Server Host and Port Number. Click **'Next'**.

c360 Portal Web Services 5.0.1.431 for Microsoft CRM 2011

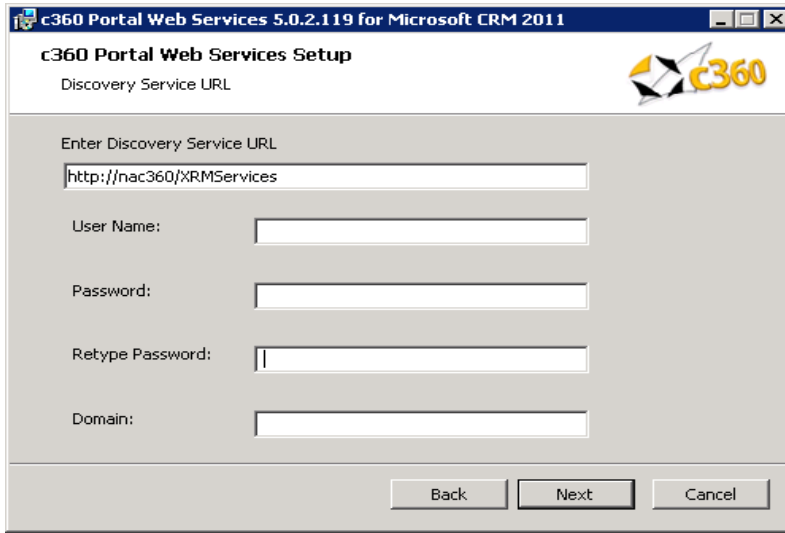
c360 Portal Web Services Setup

Product to be installed.

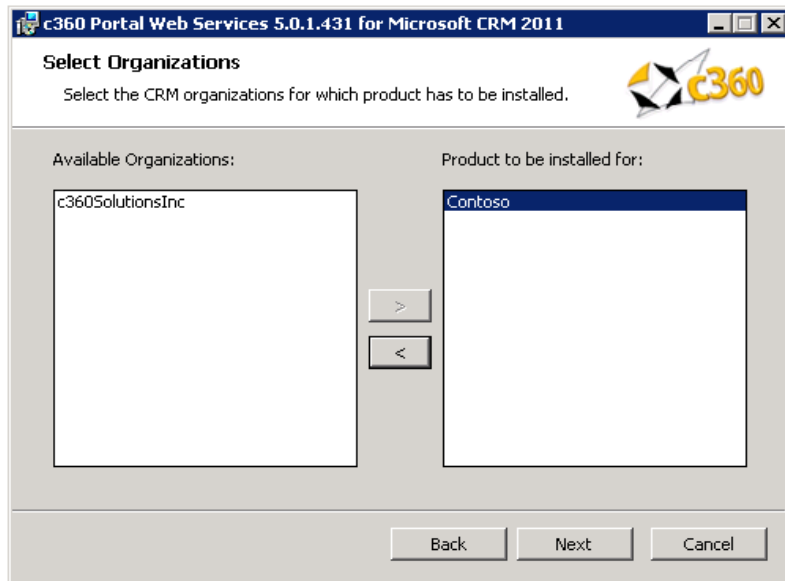
Portal WebServices

Back Next Cancel

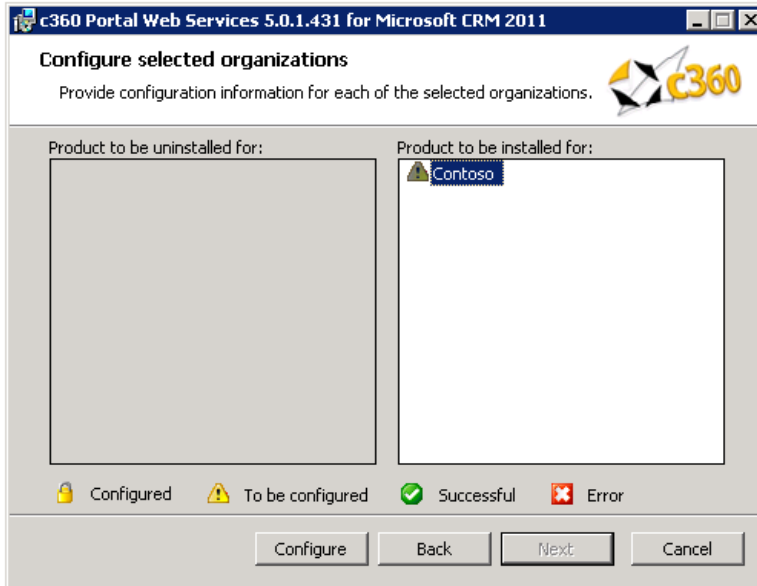
Click **'Next'**.



2. Accept the default entry for the MSCRM Discovery Service URL or modify. Enter the credentials and Click 'Next'. These credentials will be used to execute the discovery service methods.
For an IFD Enabled system, fully qualified domain name which has been used for configuring IFD in CRM needs to be entered in Discovery Service URL.
Enter the Discover Service URL. Click '**Next**'.



Select the Organization(s) for which the product is to be installed. Then click '**Next**'.



Select one Organization for which the product is to be configured (In this case, 'Adventure Works Cycle'). Then click **'Configure'**.

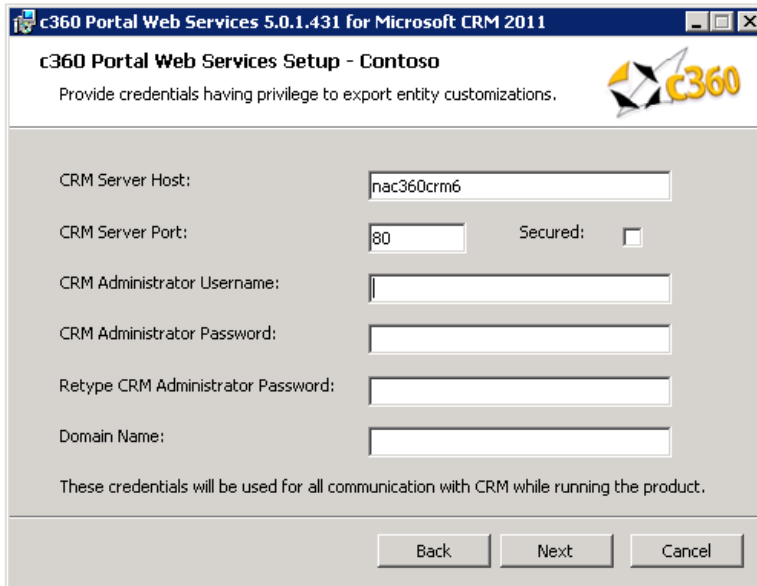
Note:

To be configured: The organization has not been configured for installation.

Successful: The organization has been configured and configuration settings have been validated. The product is ready to be installed for the organization.

Error: There has been an error in validating the configuration settings for the organization. Settings need to be reviewed for accuracy and corrected. (There will be an error on the configuration screen deemed to have invalid entries)

Configured: The Product has been configured and installed for this organization. It cannot be reconfigured but only uninstalled.



Enter the name, password and domain for the CRM user who has privileges to export entity customizations for the organization being configured.

Click **'Next'**.



c360 Portal Web Services Setup-Contoso
Provide information related to SQL Server.

SQL Server:
[Text Box] [Browse]

Enter the SQL Server name to install to or click Browse to see a list of all SQL Servers.

Connect using:

- Windows authentication credentials of current user.
- SQL Server authentication using the user name and password below:

User Name: [Text Box]
Password: [Text Box]

[Back] [Next] [Cancel]

Enter the SQL server instance in which the c360 database for the organization will be installed, or click browse to choose from the list of available SQL server instances.

Choose Windows or SQL authentication. Click **'Next'**.

Note:

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

c360 Portal Web Services 5.0.1.431 for Microsoft CRM 2011

IFD related information
Provide SPLA credential information to connect to the CRM discovery service.

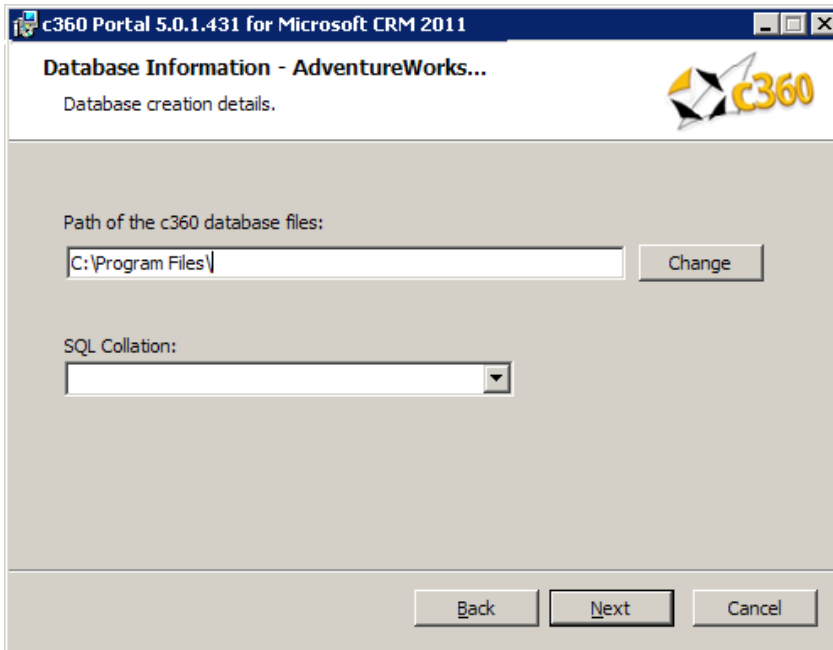
These credentials will be used to connect to the CRM Discovery service if c360 needs to function in IFD mode. These values will be encrypted and can be updated later through the c360 Configuration Center.

User Name: [Text Box]
Password: [Text Box]
Retype Password: [Text Box]
Domain: [Text Box]

[Back] [Next] [Cancel]

Enter SPLA credentials for IFD mode. If c360 Customer Portal ever needs to operate in IFD mode, these credentials will be used to connect to the CRM discovery service.

Click **'Next'**.



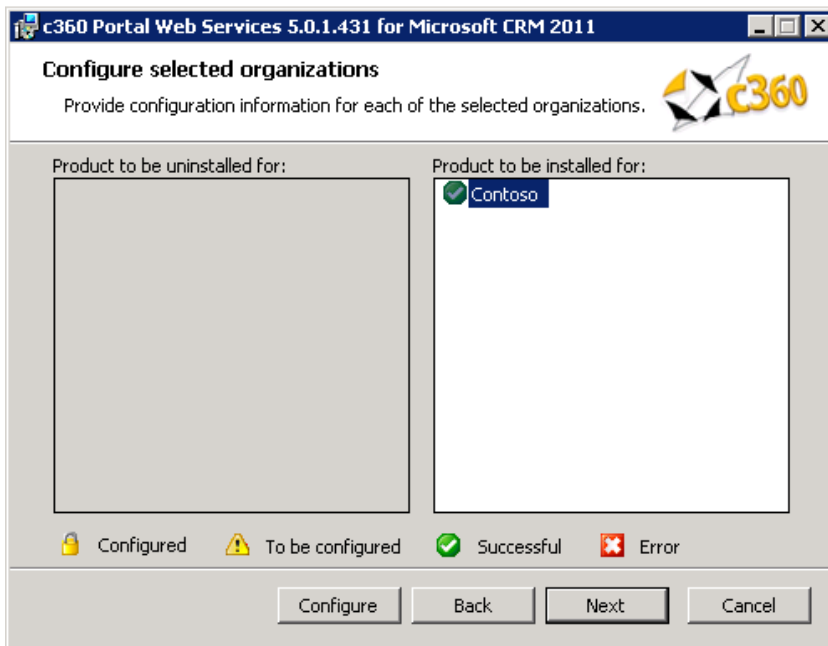
Select the path to install the database files.

Select the desired collation for the c360 database. Click **'Next'**.

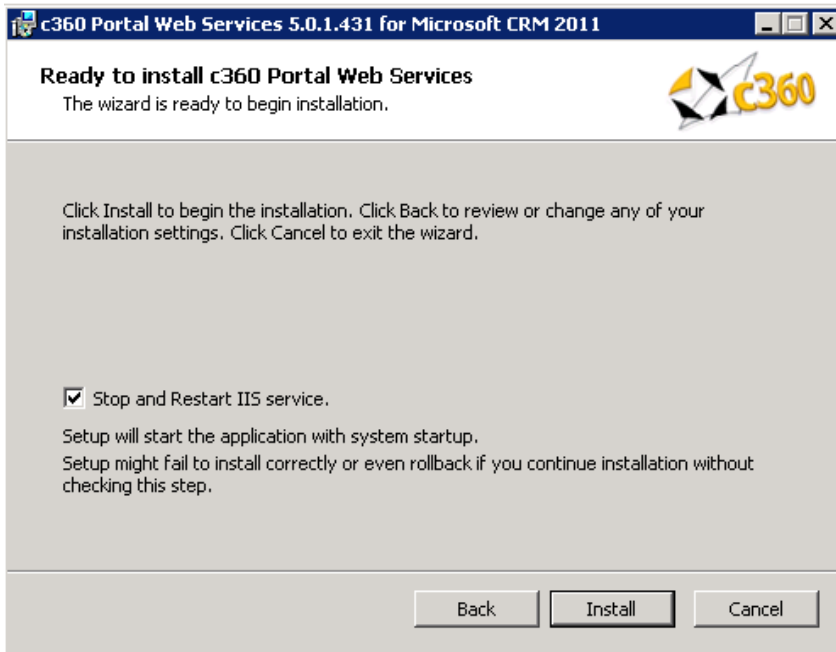
Note:

This screen will not show if another c360 product with a database has been installed on the same SQL server

If installing on a clustered environment or a named instance of SQL Server, manual installation of the database is required and no entries are required on this screen.



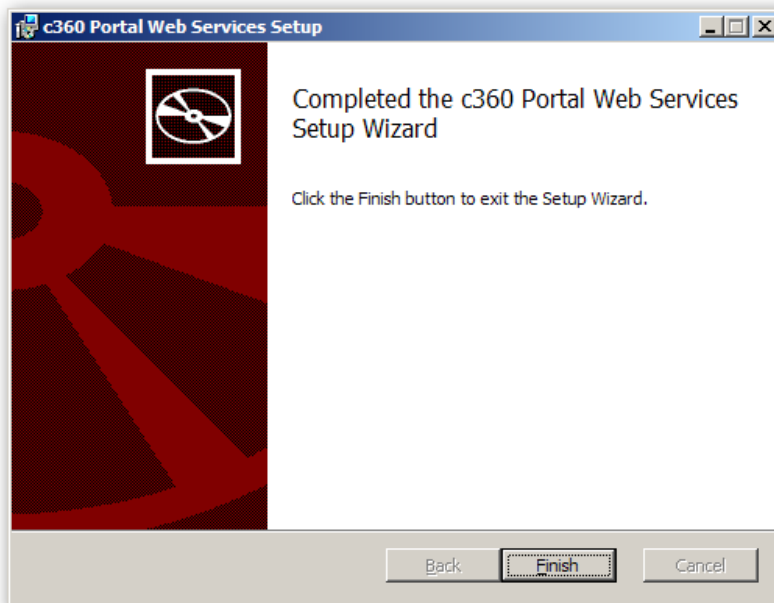
Repeat steps 10 – 17 until all organizations have been successfully configured. Then click **'Next'**.



Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install c360 Portal Web Services for Microsoft CRM 2011.

Note: Because an IISReset is required for the product, it is recommended that

the installation be postponed until the IISReset action can be performed.



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

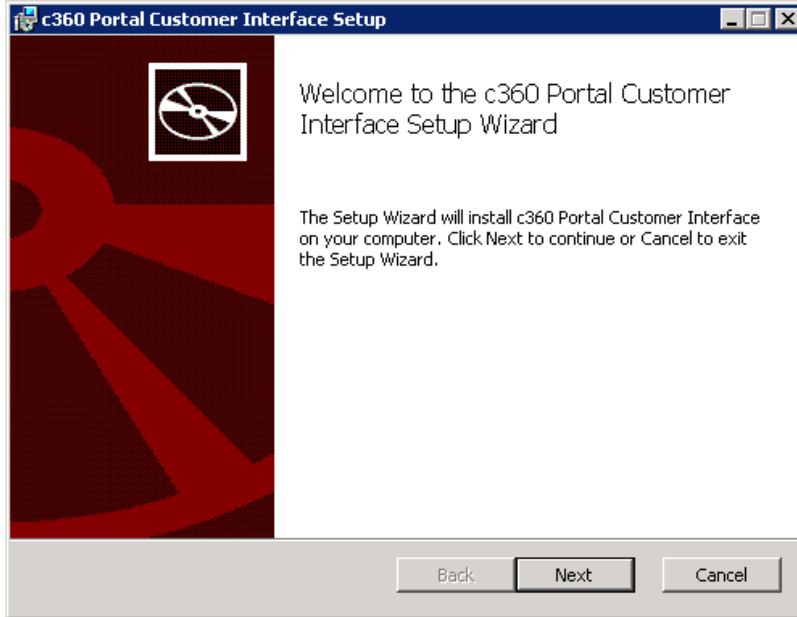
Steps to install c360 Customer Portal -

Customer Interface

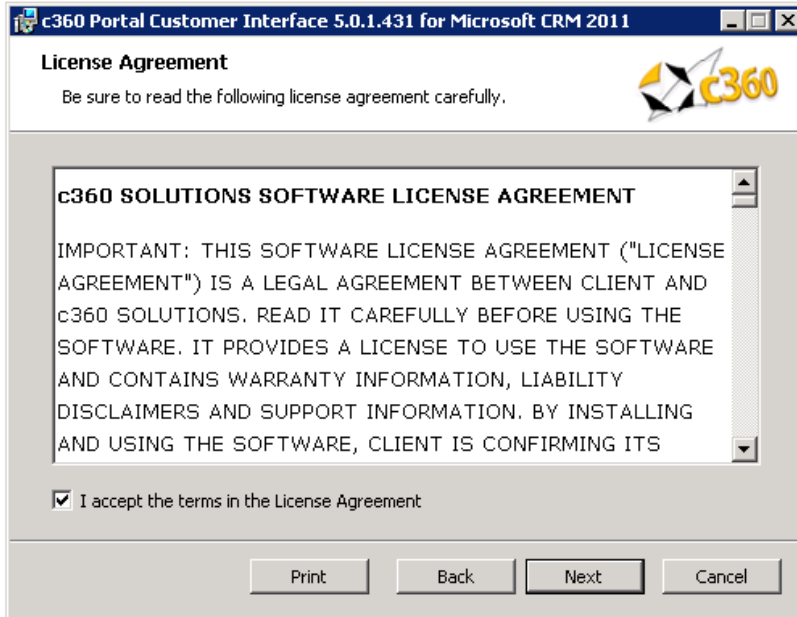
Extract the c360 Portal Customer Interface CRM2011.zip file into a folder on the target server.



Double click the 'c360 Portal for Microsoft CRM2011.exe' file. You will see the following screens.



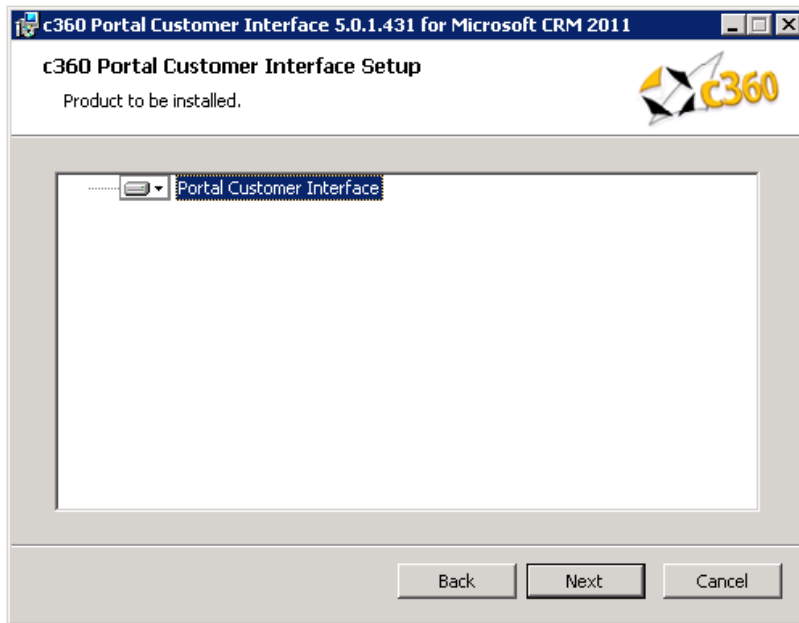
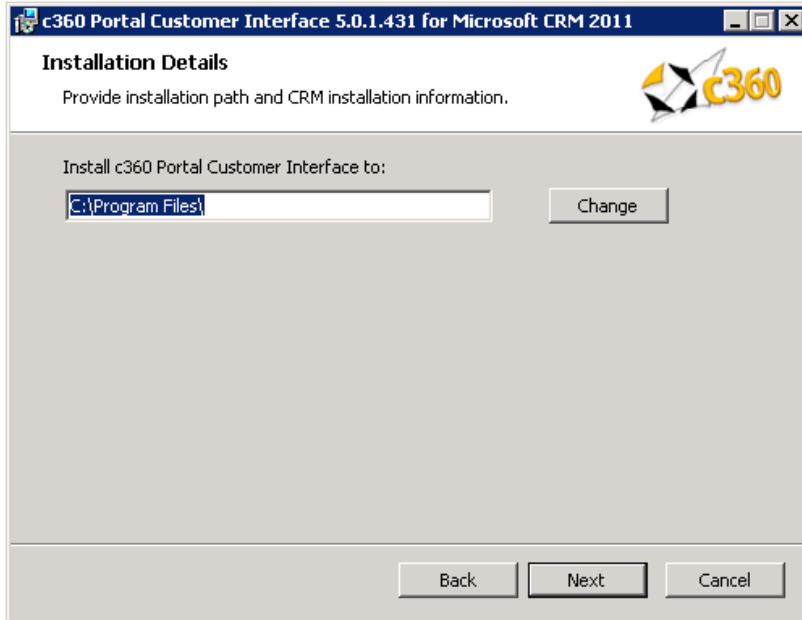
Click **'Next'** to begin the installation process.



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'**.



Accept the default entry for the installation path or modify. **'Next'**.



Click **'Next'**.



c360 Portal Customer Interface Setup
Portal Web Services installation details.

Provide server name or IP Address/host name on which c360 Portal Webservices are installed.

Server / Host name
(Eg: CRMSEVER)

Port Number

Secured Access(You need to install SSL certificate on ther Web Server(s) that are hosting the websites for Portal Web Services and henceforth all requests will be handled via https).

Back Next Cancel

Enter the Server Name on which the c360 Portal Web Services are installed. Click **'Next'**.

c360 Portal Customer Interface Setup
Portal virtual directory information.

Setup will create a virtual directory.Select a website from the list. Virtual directory will be created in that website only.

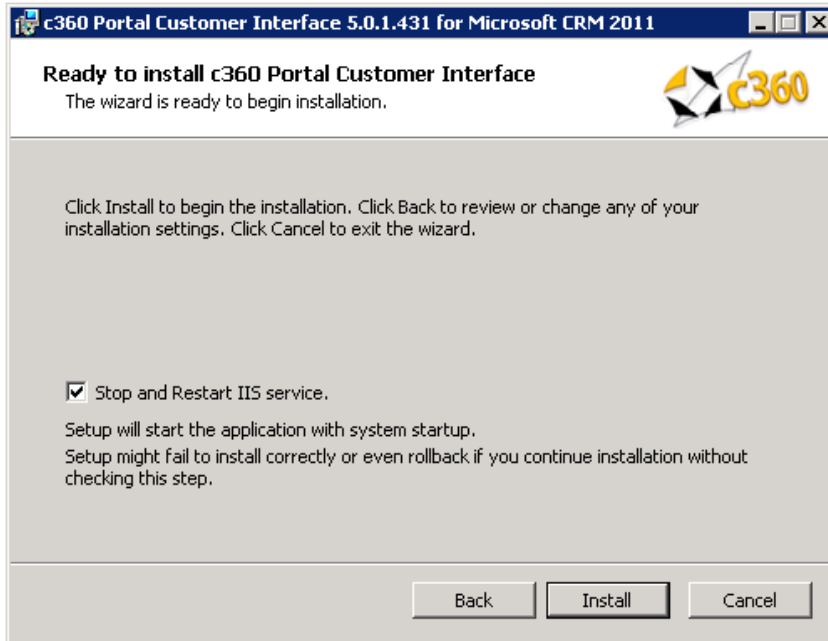
Select web site

Enter Portal virtual directory name. Ensure that this name should match the name which has been entered during installation of Portal CRM.

Portal virtual directory name

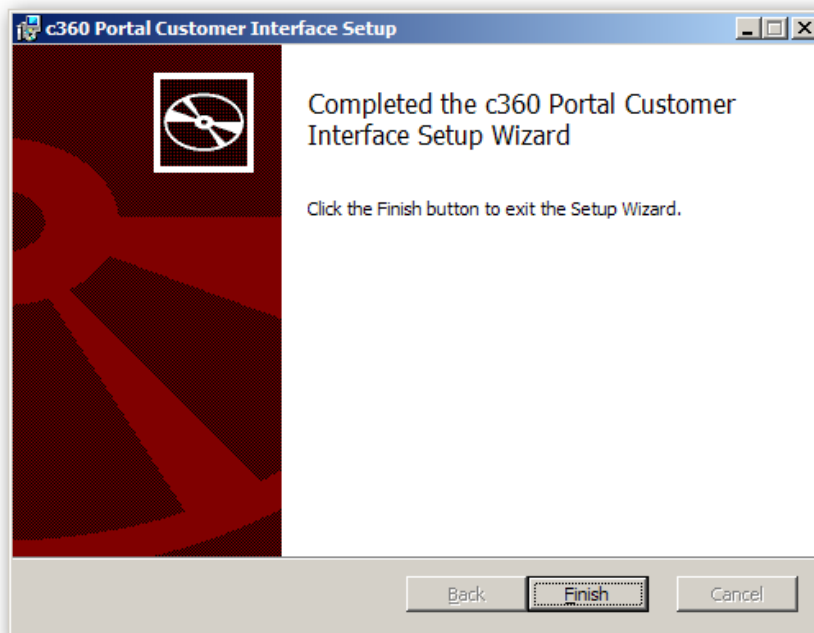
Back Next Cancel

Select the Website in which the c360 Portal Customer Interface virtual directory will be installed. Click **'Next'**.



Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install c360 Portal Customer Interface for Microsoft CRM 2011.

Note: Because an IISReset is required for the product, it is recommended that the installation be postponed until the IISReset action can be performed.



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



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 Portal 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:

Open the c360.Config file located in \\V5\Organizations\[OrganizationName]\ Config folder in the default directory (C:\Program Files\c360 Solutions) or in the directory selected by you during installation

```
<add key='WebServicesUrl'  
value='http://myservername:8000/MSCRMServices'/>
```

Replace 'myservername' with the actual name of your CRM server or the hostname if your site is configured to use hostname.

Replace '8000' with the TCP port number your CRM website is using.

Replace 'http' with 'https' if you have enabled 'CRM secured access'.

Load-Balanced Environments

To support a load-balanced environment, the installer must be run on all load-balancing nodes.

When installing on every node after the first, the check-boxes for running CRM Integrations and the SQL scripts should be un-selected.

The Portal Email Service should be disabled for all nodes but one (considered the 'primary').

The configuration key for the activities path node "B" should point to the UNC path for node "A".

It is recommended that all user preference, and license folders be synced across nodes, as well as the c360 config file.



Administrator Impersonation

In order to override the standard permission check performed by Portal, take the following action:

Modify the "Administrator Role" key in the c360.config file, the value of which can take either the form of a GUID or a role name.

If the role name contains special characters, the role name must be encoded before adding it to this key.

A user belonging to the specified role or GUID will be considered as an administrator when attempting to access secure areas in Portal. *Note that this will not override the CRM security model.

Turning off Self-Registration on Portal Customer Interface

In order to prevent a user from having the ability to self-register on the Customer Interface, change the "SelfRegistration" key value to 'False' in web.config file in the Portal Customer Interface virtual directory. If this value is false, then the 'New User – Sign Up' link will not be shown on the index page. By default the value of this will be 'True'.

Troubleshooting

Search the c360 Knowledge Base for any errors you receive during or after installation. www.c360.com/support.



Licensing

Upgrading c360 Customer Portal

It is not possible to migrate from Console v3.0 to Console for CRM 2011. Your system must have Console v4.0 or higher in order to upgrade to c360 Console for CRM 2011.

If c360 Console for CRM 4.0 is already installed with valid licenses, those licenses will be valid for Customer Portal for CRM 2011. If you no longer have a valid license, or if this is a fresh installation of c360 Console for CRM 2011, 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 2011 installations for organization names 'Adventure Works Cycle Demo', 'Adventure Works Cycle', 'Contoso' or 'Microsoft CRM', please visit our website at <http://www.c360.com/Licenses.aspx>



Installing where SQL is on a different Box

1. When SQL Server is on a different Box , install the components where CRM is installed
 1. Microsoft SQL Server 2008 Management Objects X86 (32 Bit)
 2. Microsoft SQL Server System CLR Types X86 (32 Bit)

These Components can be downloaded from the link mentioned
<http://www.microsoft.com/downloads/en/details.aspx?FamilyId=C6C3E9EF-BA29-4A43-8D69-A2BED18FE73C&displaylang=en>

This will be applicable for 5.0.1 Release.



Installing additional organizations _____

Steps to install additional organizations for c360 Portal for Microsoft Dynamics CRM 2011

Re-run the 'c360 Customer Portal-CRM Interface CRM2011.exe'. Follow the process as described in Installation Instructions

On step 9, select the addition organization(s) to be installed

Continue the process as described in the rest of the Installation Instructions

Re-run the 'c360 Customer Portal-Web Services CRM2011.exe'. Follow the process as described in Installation Instructions

On step 9, select the addition organization(s) to be installed

Continue the process as described in the rest of the Installation Instructions

Once installation is complete, restart the 'Portal Visitor Email Service'



Uninstall Instructions

Please note that you must be a local administrator on the CRM server as well as a member of the System Administrator security role in CRM in order to successfully uninstall ALL bits of c360 Console cells.

Steps to uninstall c360 Customer Portal for Microsoft Dynamics CRM 2011
To uninstall all pieces of c360 Customer Portal, you must be a local Administrator on the server as well as a member of the System Administrator security role in CRM. This user must be the same user that installed c360 Customer Portal.

Option 1: From Add/Remove Programs

On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'

Select c360 Customer Portal from the list of the currently installed programs

Click 'Remove'

Click '**Yes**' in the confirmation message box to begin the uninstall process.

Note this will uninstall for all organizations.

Option 2: From the c360 Customer Portal .exe

On the server, double click the c360 Customer Portal installer

On the 'Change, repair, or remove installation' screen, click '**Remove**'

On the next screen, click '**Remove**' and the executable will uninstall c360 Customer Portal

Steps to uninstall an organization for c360 Portal for Microsoft Dynamics CRM 2011

Re-run the 'c360 Customer Portal-CRM Interface CRM2011.exe' file

Select the modify option

De-select any configured organizations. Click '**Next**'

Click '**Yes**' in the confirmation message box to begin the uninstall process

Re-run the 'c360 Customer Portal-Web Services CRM2011.exe' file

Select the modify option

De-select any configured organizations. Click '**Next**'

Click '**Yes**' in the confirmation message box to begin the uninstall process

Once uninstall is complete, restart the 'Portal Visitor Email Service'

Note: multiple organizations can be uninstalled at once.



International Languages _____

c360 Portal for Microsoft Dynamics CRM 2011 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.