



c360 Notification Service Installation and Configuration Guide

Microsoft Dynamics CRM 2011 compatible

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Overview and Notes

Overview

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

Microsoft CRM Compatibility

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

Installation Instructions

Requirements

To install c360 Notification Service the installation must be run on the CRM server by a user with Local Administrative privileges and CRM Deployment Manager privileges.

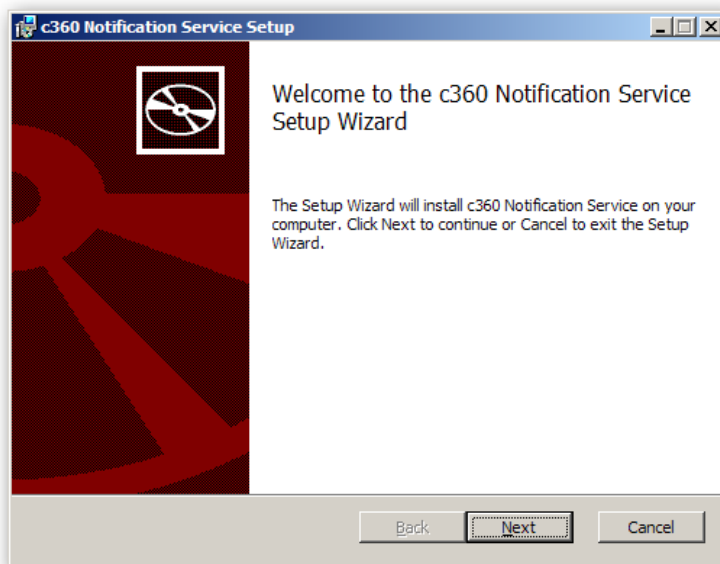
Microsoft .NET framework 3.5 SP1 or above is a pre-requisite for installation.

Note:

- Because an IISReset is required for the product, it is recommended that the installation be postponed until the IISReset action can be performed.
- To uninstall c360 Notification Service the installation must be run on the CRM server by a user with Local Administrative privileges and CRM Deployment Manager privileges.
- C360 Notification Service supports the most recent 2 versions of Microsoft Office or 5 years back.

Steps to install c360 Notification Service for Microsoft Dynamics CRM 2011

1. Extract the c360 Notifications for MSCRM 2011.zip file into a folder on the Microsoft CRM server.
2. Double click the 'c360 Notification Service for Microsoft CRM 2011.exe' file. The following screen will appear:



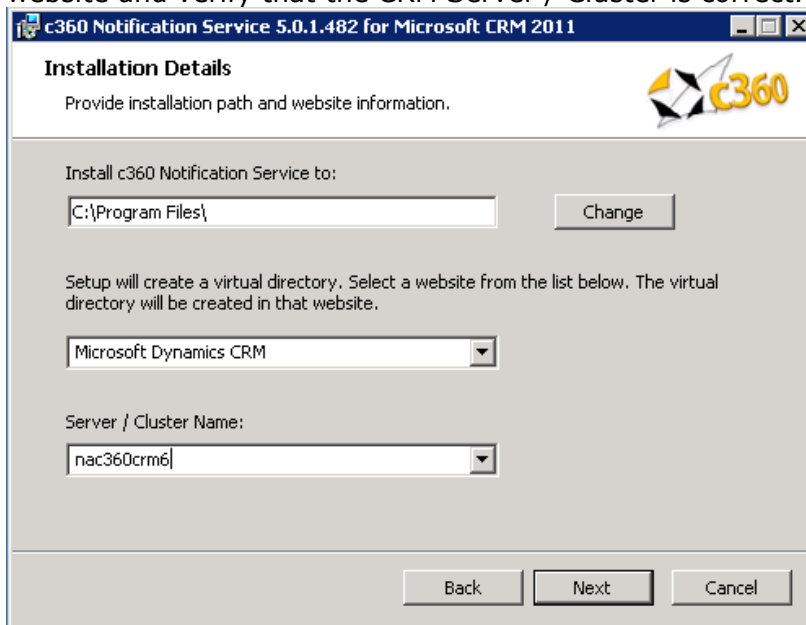
3. Click '**Next**' to begin the installation process.



4. 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**'.



5. 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**'.



Note:

- CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.



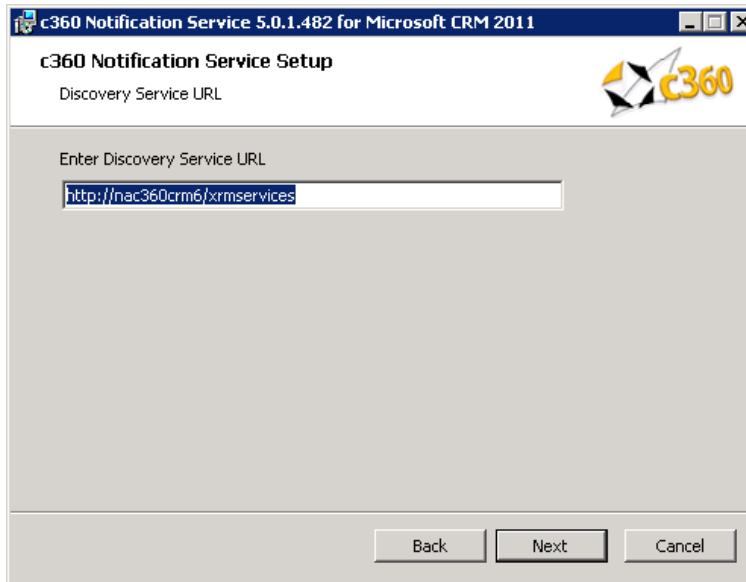
- If any c360 products have previously been installed, this screen will not appear. All configuration settings from the previous install(s) will be used.
- If this is an IFD environment, post-installation ensure that the 'Enable Anonymous Access' setting for the c360 Virtual Directory is disabled.
- You must type in the Server/Cluster Name. There is no lookup.

6. Enter the CRM server information that will be used by setup for communicating with the CRM discovery service during installation. Click **'Next'**.

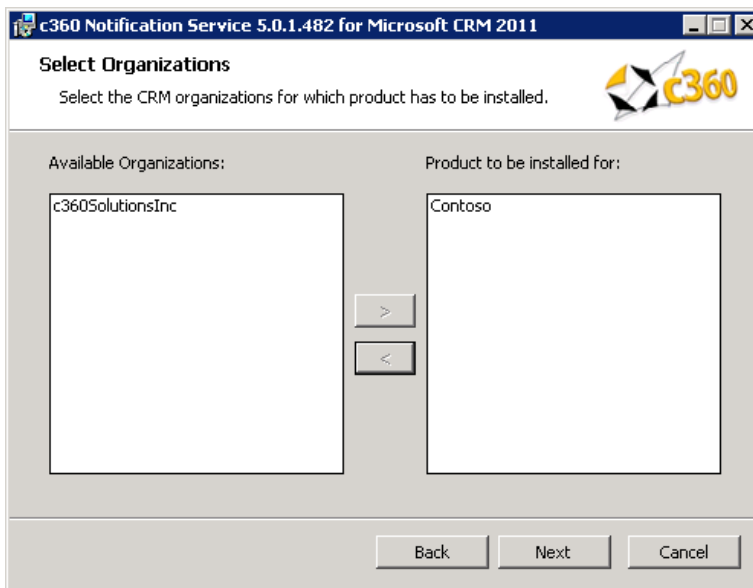
The screenshot shows a dialog box titled "c360 Notification Service 5.0.1.482 for Microsoft CRM 2011". The main heading is "CRM Server Details" with the instruction "Provide CRM Server information." and the c360 logo. There are three input fields: "CRM Server Host:" (a long text box), "CRM Server Port:" (a shorter text box), and "Secured:" (a checkbox). Below the fields is a note: "CRM Server information will be used by the setup for communicating with CRM discovery service during installation of the product." At the bottom are three buttons: "Back", "Next", and "Cancel".

7. Take the default for the service being installed and click **'Next'**.

The screenshot shows a dialog box titled "c360 Notification Service 5.0.1.482 for Microsoft CRM 2011". The main heading is "c360 Notification Service Setup" with the instruction "Product to be installed." and the c360 logo. There is a dropdown menu showing "Reminder Service". Below the dropdown is a large empty rectangular area. At the bottom are three buttons: "Back", "Next", and "Cancel".



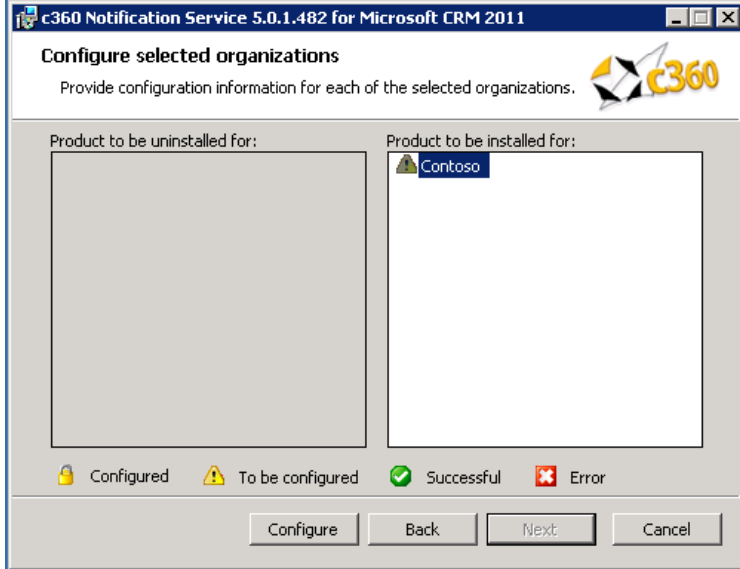
8. Accept the default entry for the MSCRM Discovery Service URL or modify. Click **'Next'**.



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

Note:

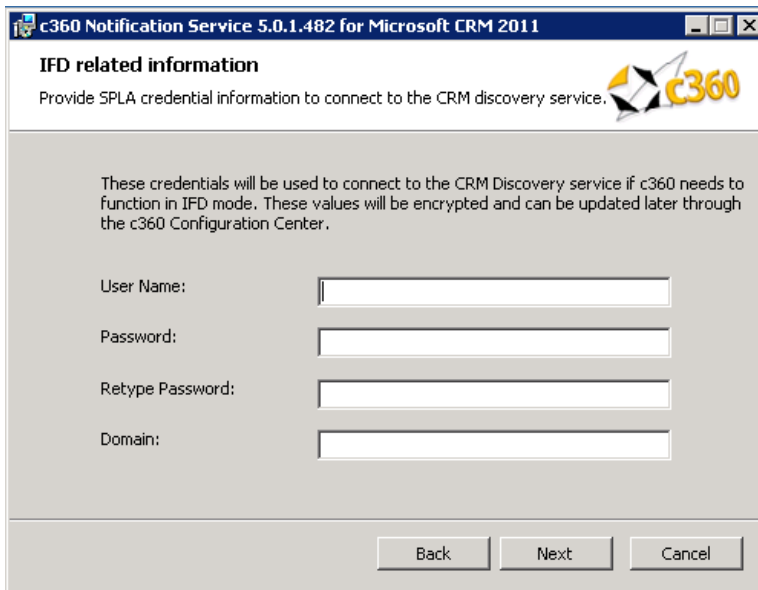
- Only One organization can be selected.
- Next Button will be disabled if organization is not selected.



10. Highlight the organization to be configured. Click **'Next'**.

Note:

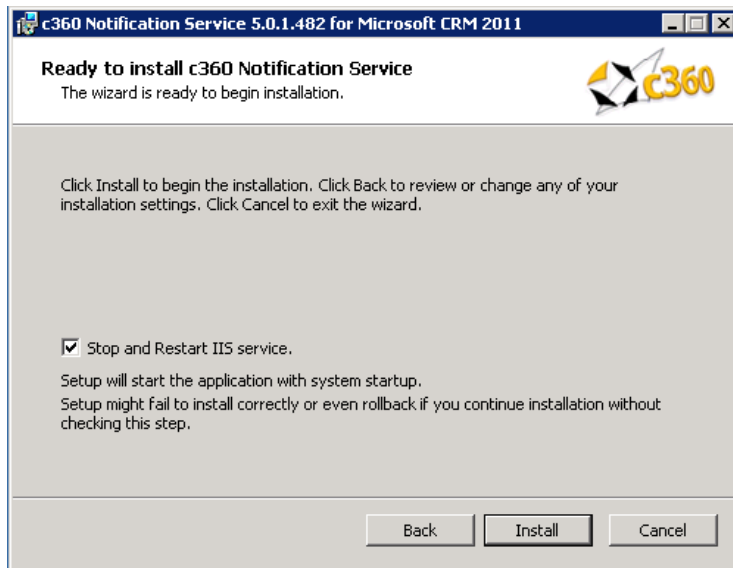
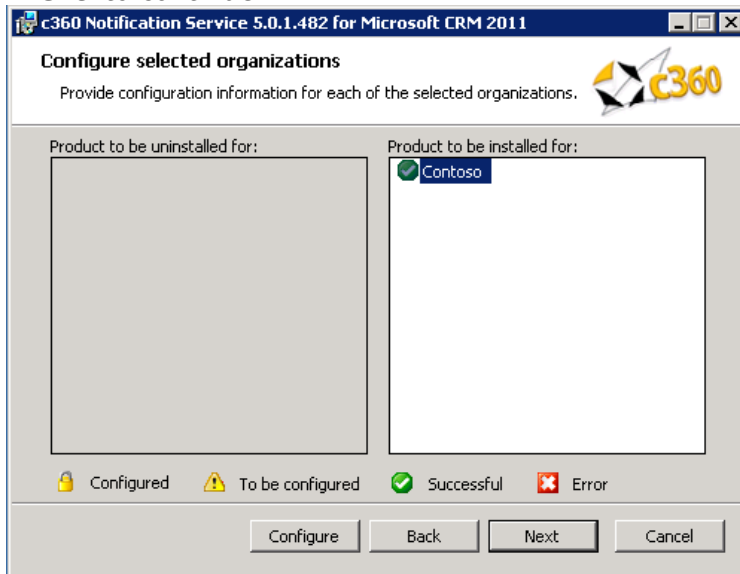
- **To be configured:** The organization has not been configured for installation.
- **Successful:** The organization has been configured and configuration settings have been validated. The product is ready to be installed for the organization.
- **Error:** There has been an error in validating the configuration 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.



11. Enter the IFD URL to configure the Organization. Click **'Next'**.



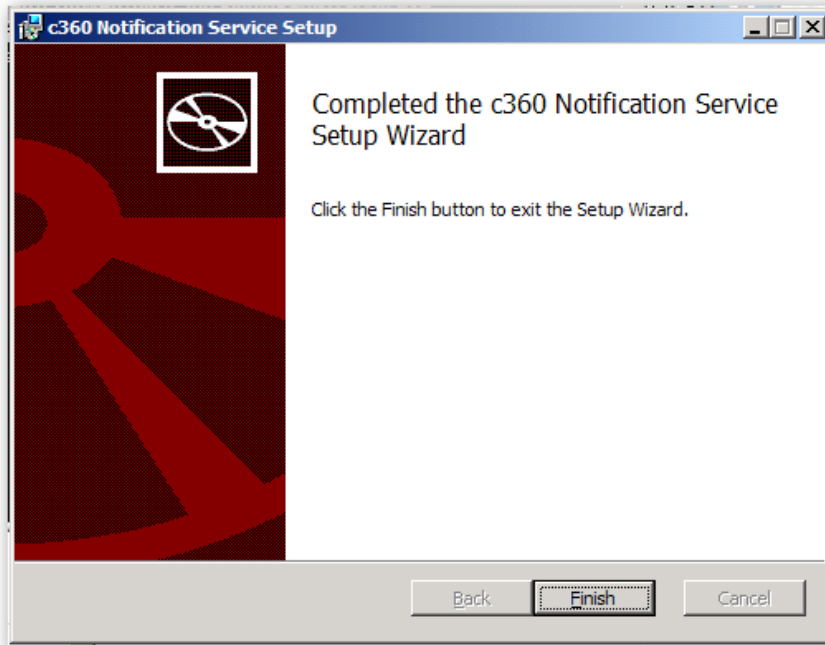
12. The organization is now configured and will display a green check mark. Click **'Next'** to continue.



13. Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install the c360 Service Productivity Pack 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.

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



15. A summary of the installation will appear.

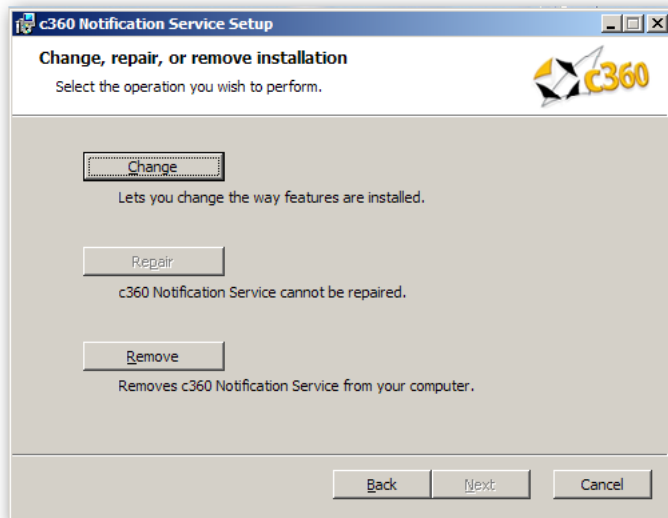
Product : c360 Notification Service

Contoso

Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	
Update c360 Config	Successful	
Update Config Files	Successful	Successfully updated the config file.
EnableISVIntegration	Successful	Successfully enabled the ISV integration

Adding and Removing Additional Organizations

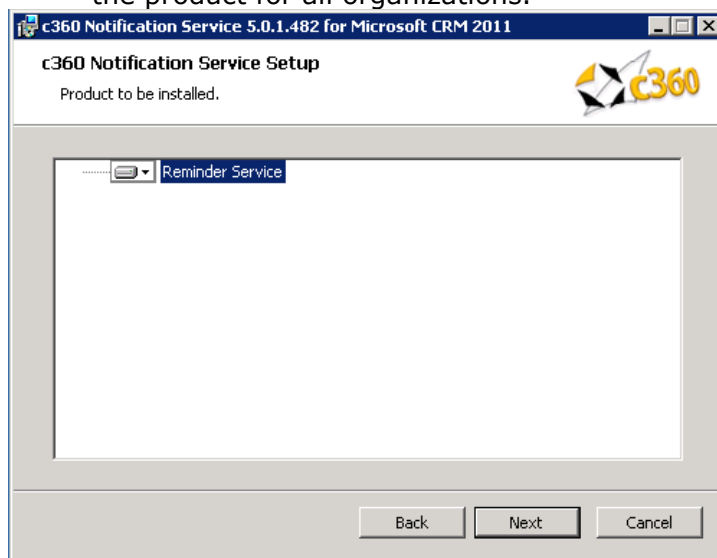
To install an additional organization, double click on the c360 Notification Service for 'c360 Notification Service for Microsoft CRM 2011.exe' once again.



1. Click '**Change**'.

Note:

- The Repair Button will be disabled.
- Change Button is for installation/un-installation of organizations.
- Remove Button is to uninstall the c360 Notification Service. This will uninstall the product for all organizations.



2. Click '**Next**'.

3. Follow steps 9 through 12 as outlined in the above installation instructions.
4. Continue the process as described in the rest of the installation instructions.



Licensing

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 valid license files 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>



Uninstalling c360 Notification Service _____

Steps to uninstall c360 Alerts for Microsoft Dynamics CRM 2011

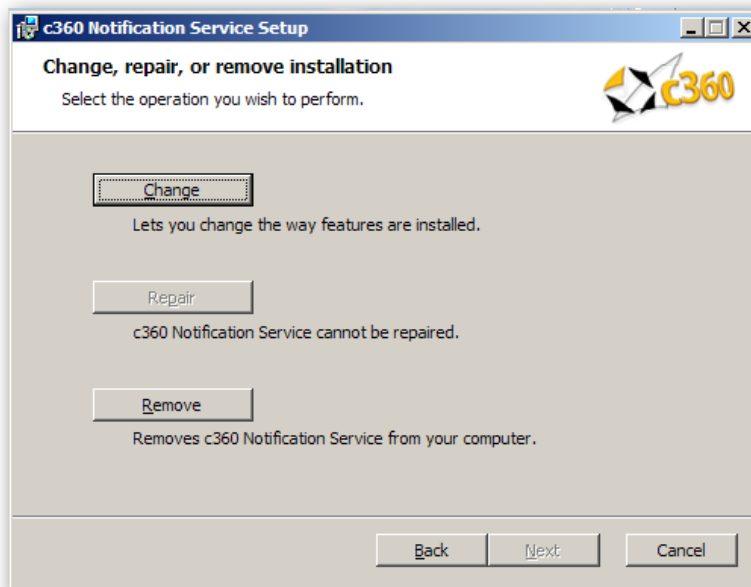
To uninstall all pieces of c360 Notification Service, you must be a local Administrator on the server as well as a member of the System Administrator security role in CRM. This user must be the same user that installed c360 Alerts.

Option 1: From Add/Remove Programs

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Notification Service from the list of the currently installed programs
3. Click '**Remove**'
4. Click '**Yes**' in the confirmation message box to begin the uninstall process.
5. Note this will uninstall for all organizations

Option 2: From the c360 Alerts .exe

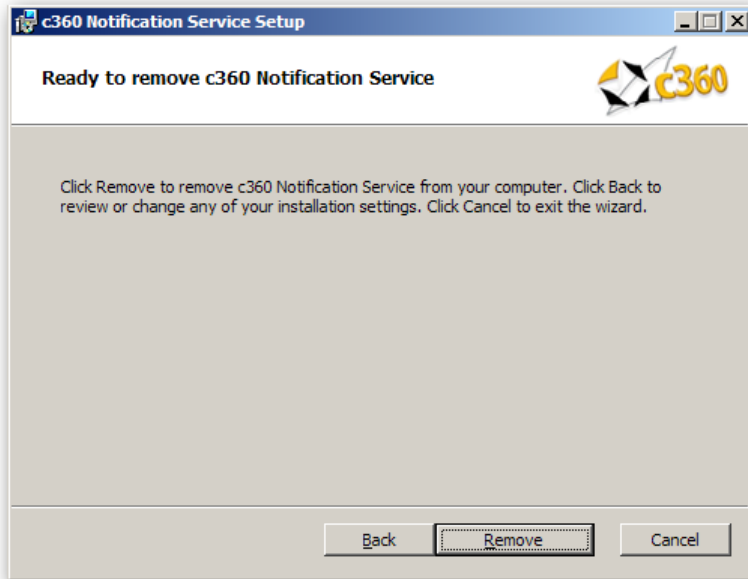
1. On the server, double click the c360 Notification Service installer
2. On the 'Change, repair, or remove installation' screen, click '**Remove**'
3. On the next screen, click '**Remove**' and the executable will uninstall c360 Notification Service



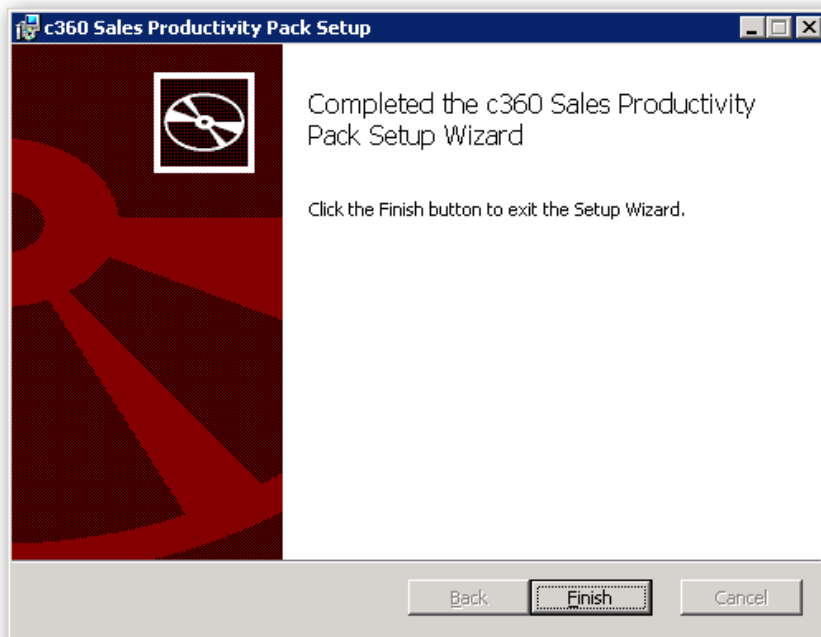
1. Click '**Remove**'.

Notes:

- The Repair Button will be disabled.
- Change Button is for installation/un-installation of products.
- Remove Button is to uninstall c360 Notification Service. This will uninstall the product for all organizations.



2. Click **'Remove'**.



3. Click **'Finish'** to complete un-installation of the c360 Sales Productivity Pack.



International Languages

c360 Sales Productivity Pack 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.