



c360 Multi Currency Management Installation and Configuration Guide

Microsoft Dynamics CRM 3.0 compatible

c360 Solutions, Inc.

www.c360.com

Products@c360.com



Table of Contents

| | |
|--------------------------------------------------------------------------------------------------|----|
| c360 Multi Currency Management Installation Guide | 1 |
| Table of Contents | 2 |
| Overview and Notes | 3 |
| Overview | 3 |
| Microsoft CRM Compatibility | 3 |
| c360 Multi Currency Management for Microsoft Dynamics CRM 3.0 | 3 |
| Installation Instructions | 4 |
| Steps to install c360 Multi-Currency Management for Microsoft Dynamics CRM 3.0 | 4 |
| Workflow Process Installation | 8 |
| Steps to fix "Missing Details" in Workflow | 9 |
| Setting Security Privileges for 'Multi-Currency Management' | 12 |
| Steps to install c360 Multi-Currency Management on the Laptop client for Microsoft CRM 3.0 | 13 |
| Additional Configurations | 16 |
| Troubleshooting | 16 |
| Licensing | 17 |
| For fresh installation of c360 Multi Currency Management for Microsoft Dynamics CRM 3.0 | 17 |
| Evaluation Licenses | 17 |
| Demo Licenses | 17 |
| Uninstall Instructions | 18 |
| International Languages | 19 |



Overview and Notes

Overview

This document outlines the process for installing c360 Multi-Currency Management for Microsoft Dynamics CRM 3.0.

Microsoft CRM Compatibility

c360 Multi-Currency Management for Microsoft Dynamics CRM 3.0 is compatible with Microsoft Dynamics CRM version 3.0. For additional product information, please visit <http://www.c360.com/MultiCurrencyManagement.aspx>

c360 Multi Currency Management for Microsoft Dynamics CRM 3.0

c360 Multi-Currency Management is a Microsoft CRM enhancement that offers organizations a dynamics and flexible solution for handling different scenarios of multi-currency requirements within CRM. Organizations will be able to manage different multi-currency scenarios such as:

Multi-currency Price lists: Organizations can maintain a full price list according to CRM logic while defining price lists in different currencies for the same products. The currency symbol will then be determined in the price list level and will automatically propagate into the opportunity/quote/order/invoice calculations

Dynamic Currency Rate conversion: Currency rate conversions can be made on a field level basis. Exchange rates can be inserted manually or programmatically.

By using Multi-Currency Management, Microsoft CRM users will be able to:

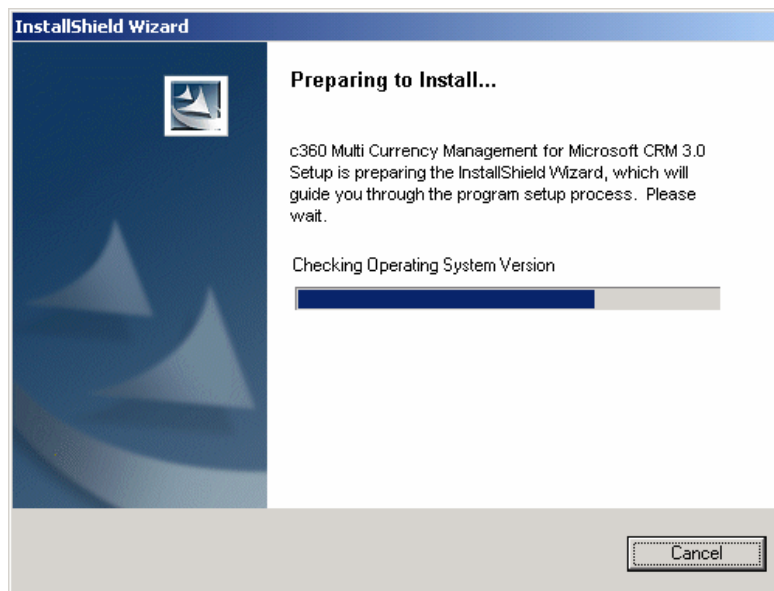
- Manage and edit **unlimited currencies** and related **exchange rates**
- Define default currency for the application
- Maintain currency in record level
- Maintain currency in field level
- Manage currencies for **all entities** (including custom)
- Automatically update Exchange Rate values
- Define multi currency quotes/orders/invoices and opportunities
- Change currency for a record while automatically exchanging all the currency symbols and currency information accordingly

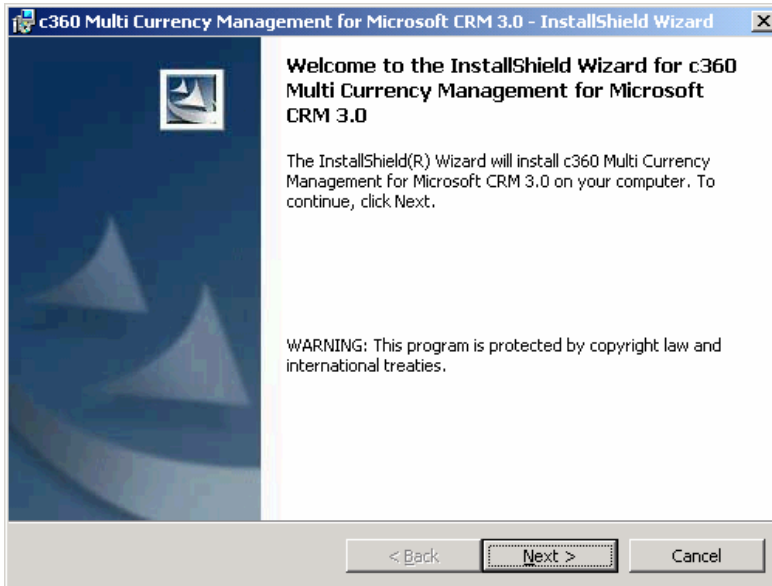
Installation Instructions

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 Multi-Currency Management for Microsoft CRM 3.0 requires the c360 Multi-Currency Management V3.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

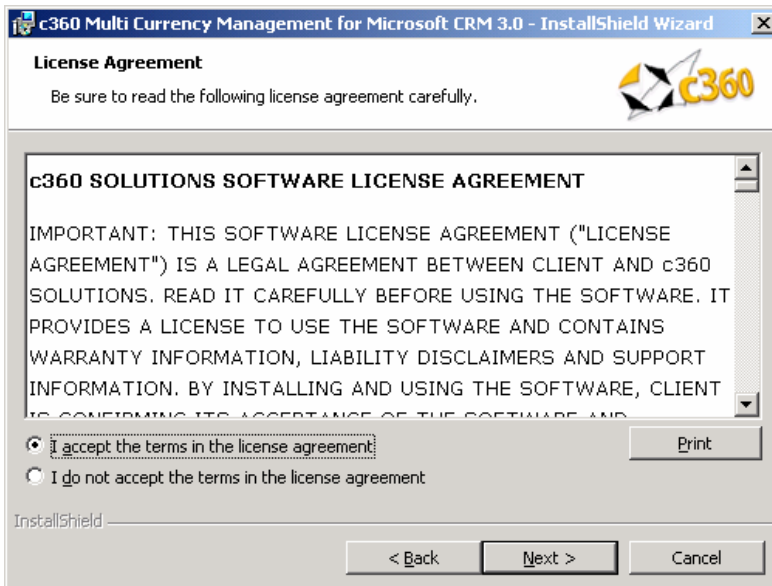
Steps to install c360 Multi-Currency Management for Microsoft Dynamics CRM 3.0

1. Extract the c360 Multi-Currency Management V3.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Multi-Currency Management V3.exe' file. You will see the following screens.

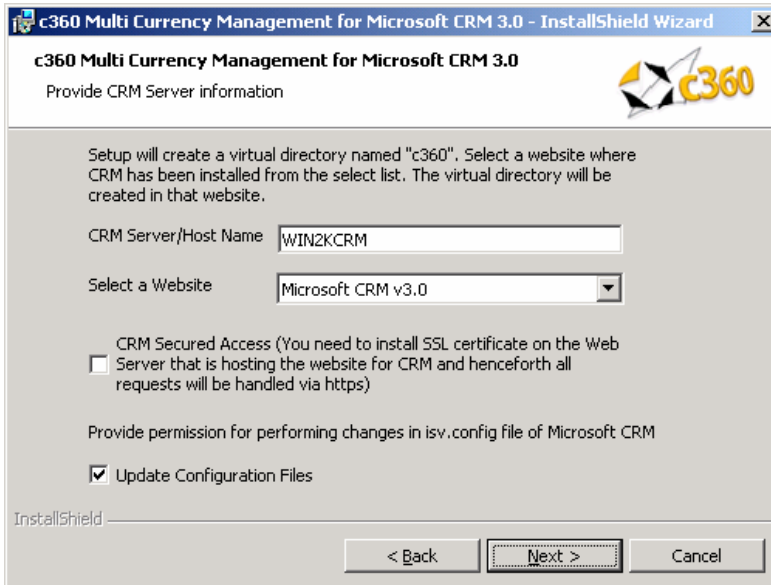




3. Click **'Next'** to begin the installation process.



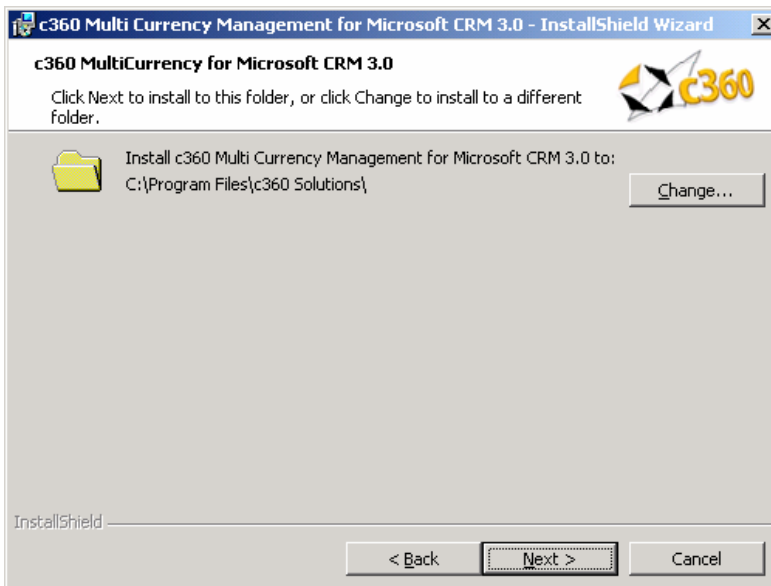
4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click **'Next'**.



5. Check if the option selected in this field by default is correct and click **'Next'**. If not, select the correct value. Then click **'Next'**.

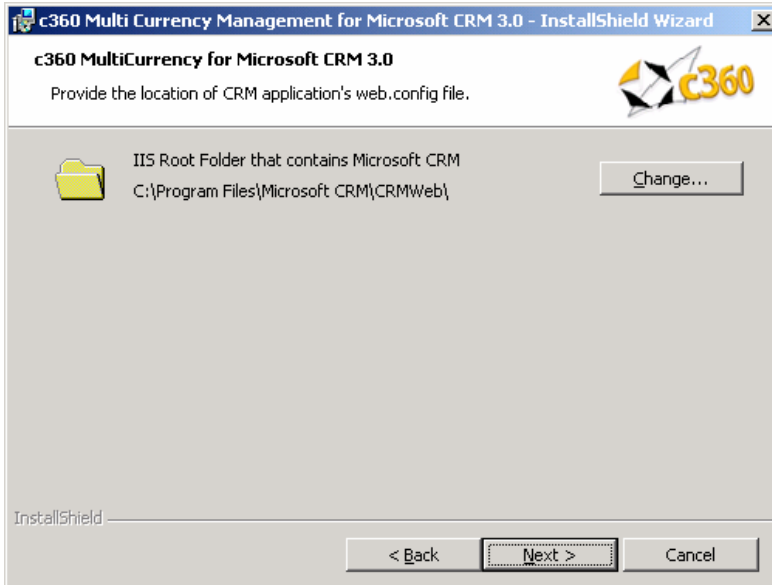
Note:

- CRM Server name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- Website: Name of the Microsoft CRM website.
- Check CRM Secured Access option if it is a secure connection.
- Update Configuration files: Updates CRM's sitemap and isv.config file for integration of the c360 product with Microsoft CRM.

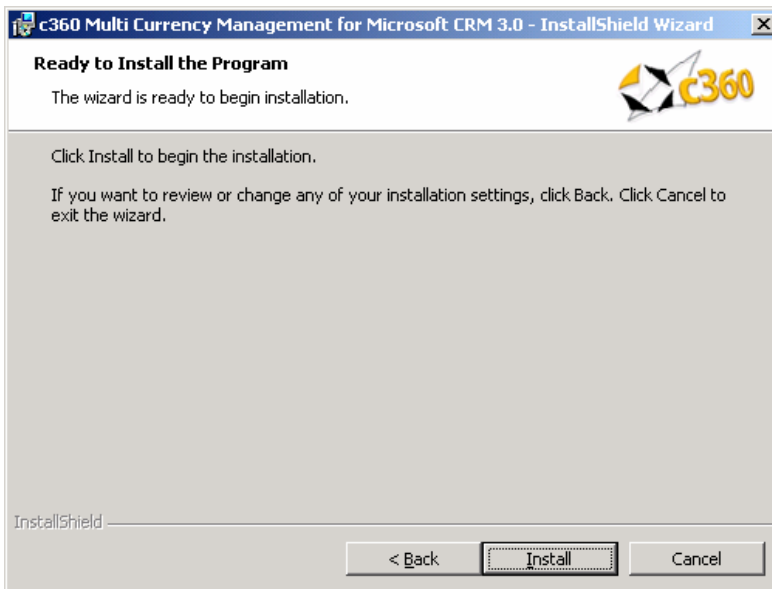


6. Click **'Next'** to install to the folder in the default directory
OR
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

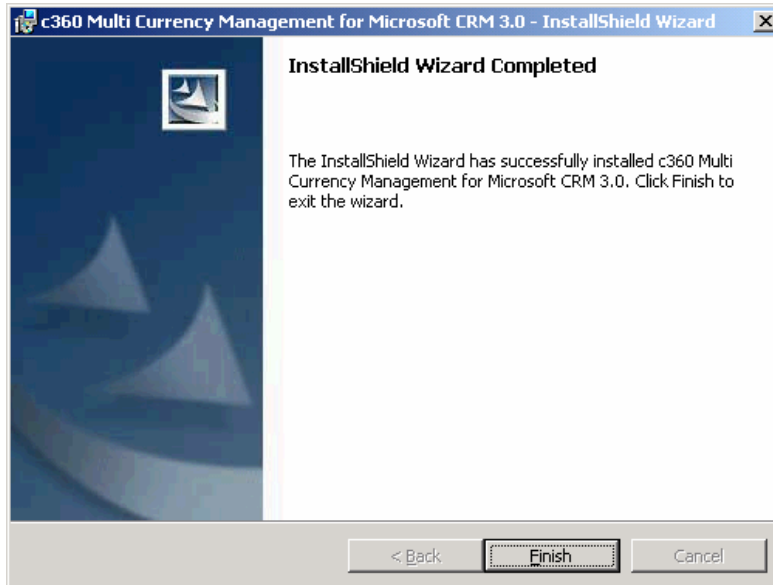
Note: This screen will not appear if c360 virtual directory already exists in the Microsoft CRM3.0 website.



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. Click **'Install'** to install c360 Multi Currency Management for Microsoft CRM 3.0.



9. Click '**Finish**' to exit the InstallShield wizard.

Currency List

After the installation you can define the currencies manually. Alternatively you can use **MultiCurrencyData.exe** file for importing a list of currencies. This tool can be found in the folder "**C:\Program Files\c360 Solutions\V3\Web\CRMWeb\Bin**"

Note:

It is recommended to deactivate all the currencies that are not used at all.

Workflow Process Installation

Steps to install the workflow process:

1. Stop **Microsoft CRM Workflow Service**
2. Copy the contents of the **Workflow.Config.txt** file into Microsoft CRM's **workflow.config** (located at C:\Program Files\Microsoft CRM Server\Server\bin\assembly)
Note: "Workflow.Config.txt" can be found in the folder "C:\Program Files\Microsoft CRM Server\Server\bin\assembly"
3. Run Microsoft CRM's **Import Workflow Wizard** utility and import definition from **workflow.xml** file
Note: "workflow.xml" can be found in the folder "C:\Program Files\Microsoft CRM Server\Server\bin\assembly"

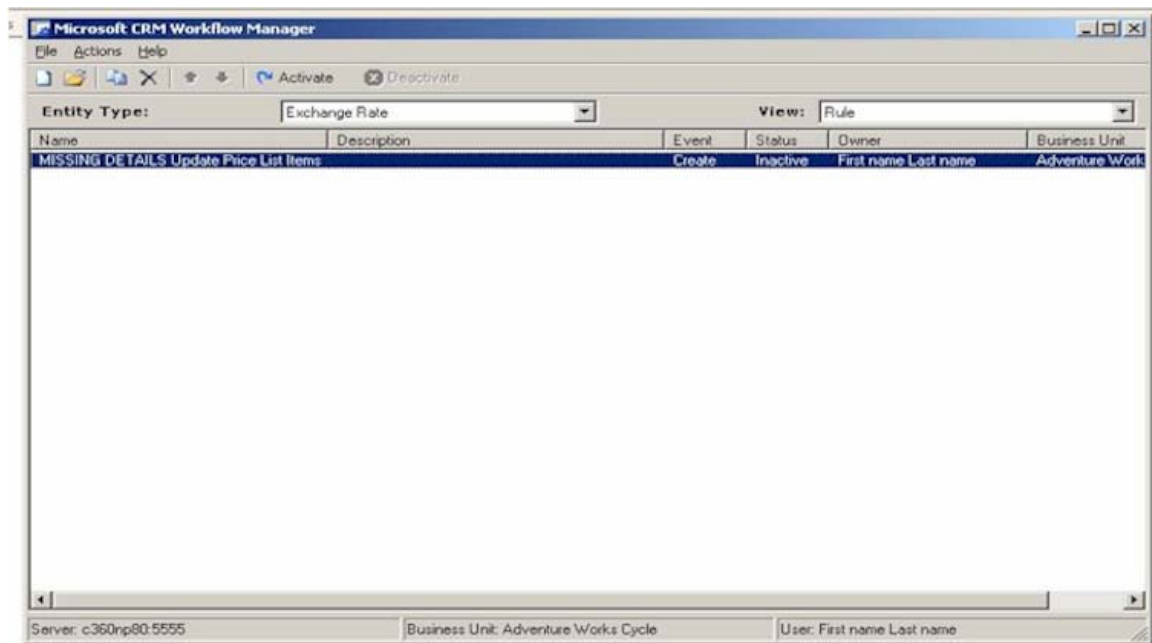
Please read below about if you see "Missing Details" in the Workflow name

4. Start **Microsoft CRM Workflow Service**
5. Run Microsoft CRM's **Workflow Manager**
6. Activate workflow process named **Update Price List Items**

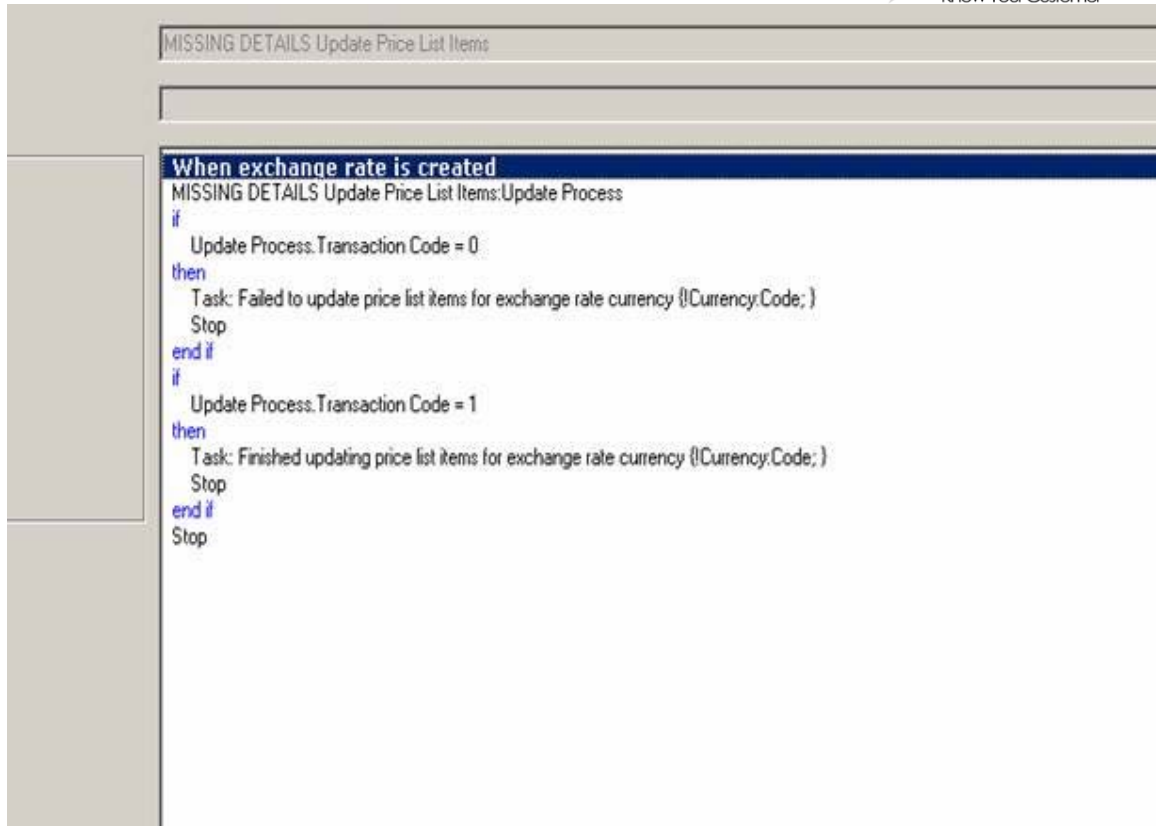
The installation of c360 Multi Currency Management for Microsoft CRM 3.0 is now complete. To access the product and use it a valid license file must be installed if it is not already present. For questions about obtaining and/or installing a valid license file please refer to the section of this document titled 'Licensing'.

Steps to fix "Missing Details" in Workflow

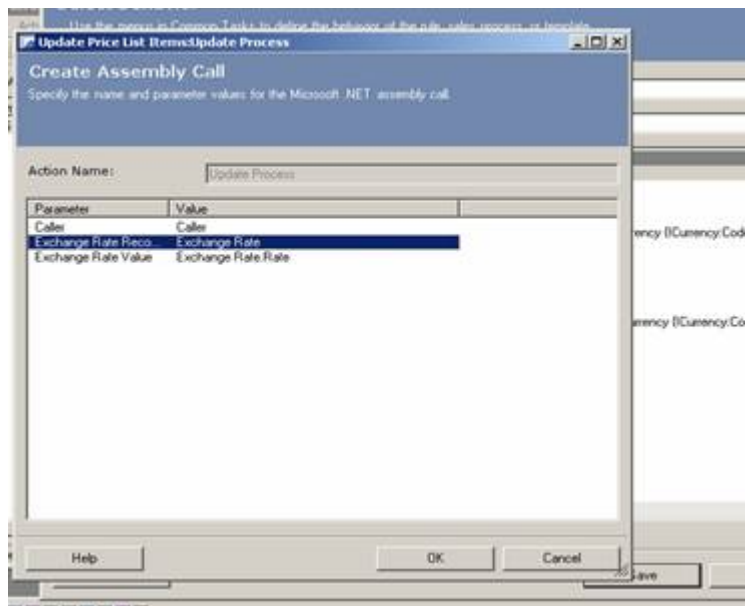
1. The "Missing Details" is getting appended before the name of rule because one parameter of the rule "Exchange Rate Record ID" is not correctly set. Actually when workflow rule is created for the first time, "Exchange Rate Record ID" comes "null".



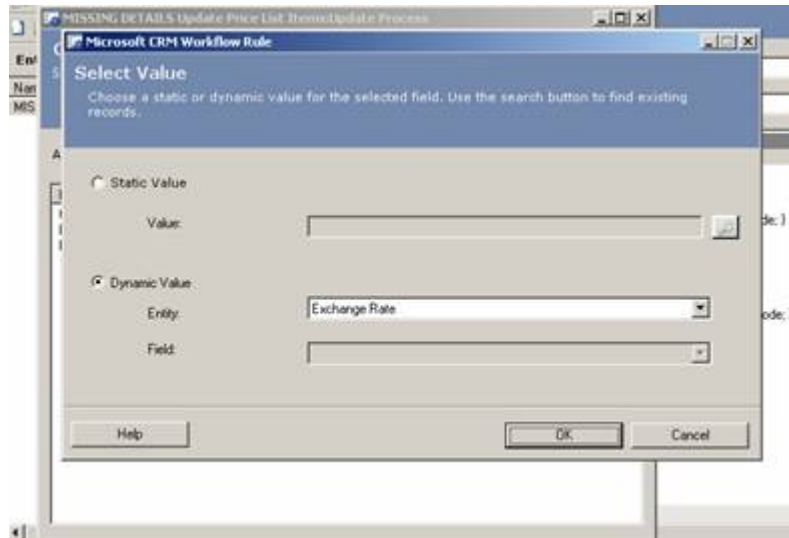
2. Open the rule by double clicking it. You will see below screen shot.



- Now double click "MISSING DETAILS Update Price List Items:Update Process". It will open the following window.

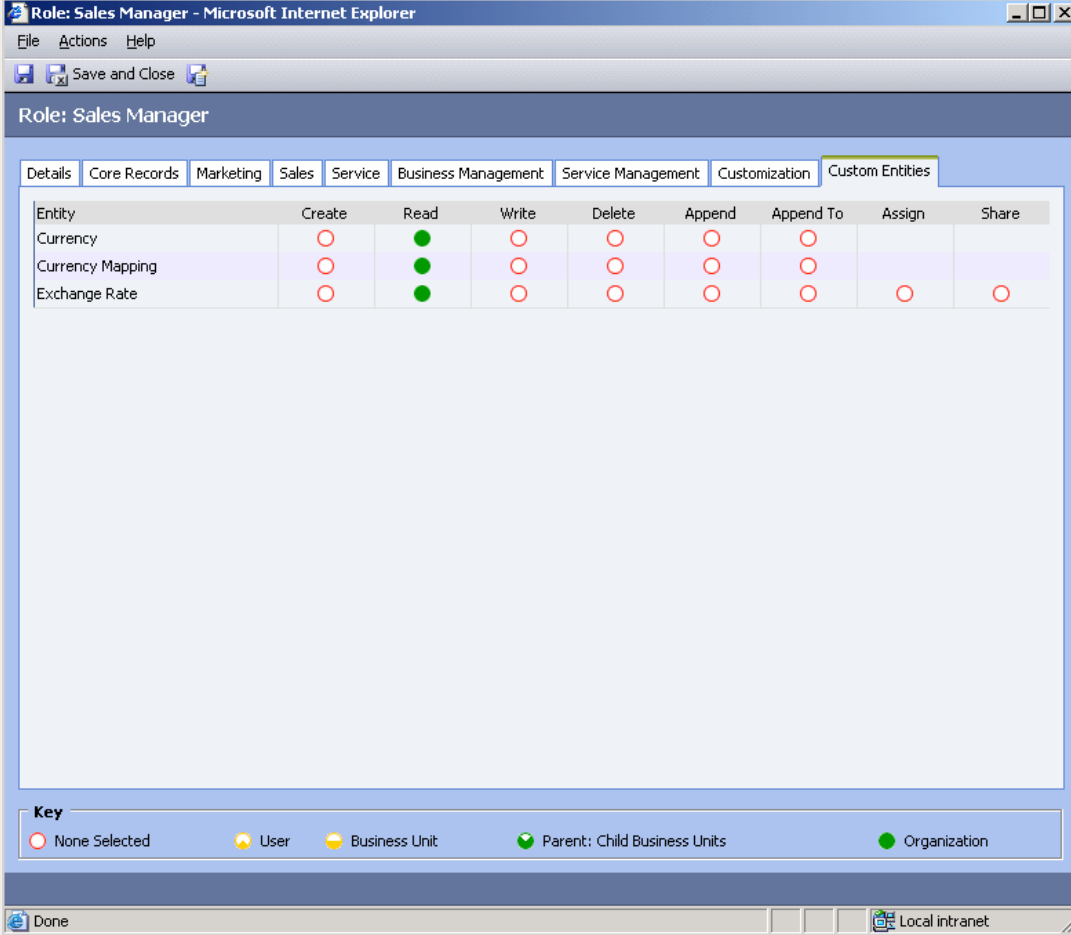


4. The “Missing Details” message is coming because “Exchange Rate Record ID” is not being correctly set. Double click it, set its entity in **Dynamic Value** option to “Exchange Rate” as seen in following screen shot.



Setting Security Privileges for 'Multi-Currency Management'

In order to enable all CRM users to view and use 'Multi-Currency Management', the Custom Entities security privileges for 'Multi-Currency Management' must be set in all the CRM roles.



| Entity | Create | Read | Write | Delete | Append | Append To | Assign | Share |
|------------------|-----------------------|----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Currency | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Currency Mapping | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Exchange Rate | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

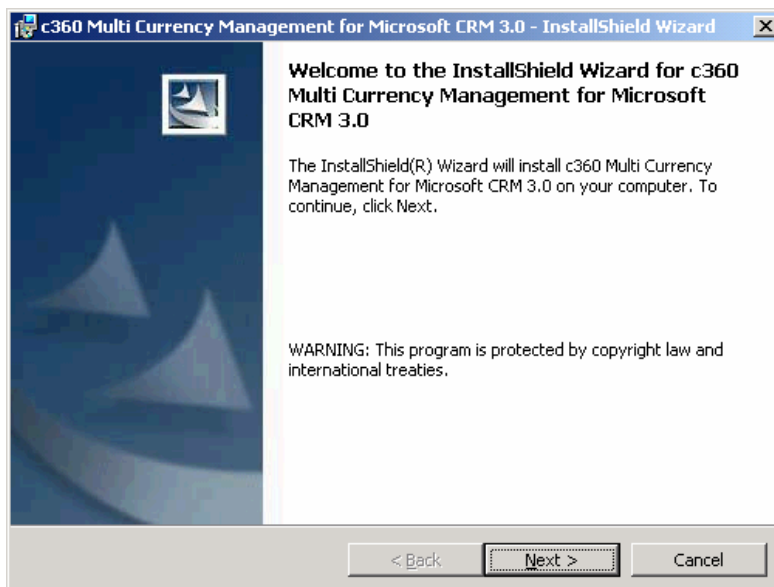
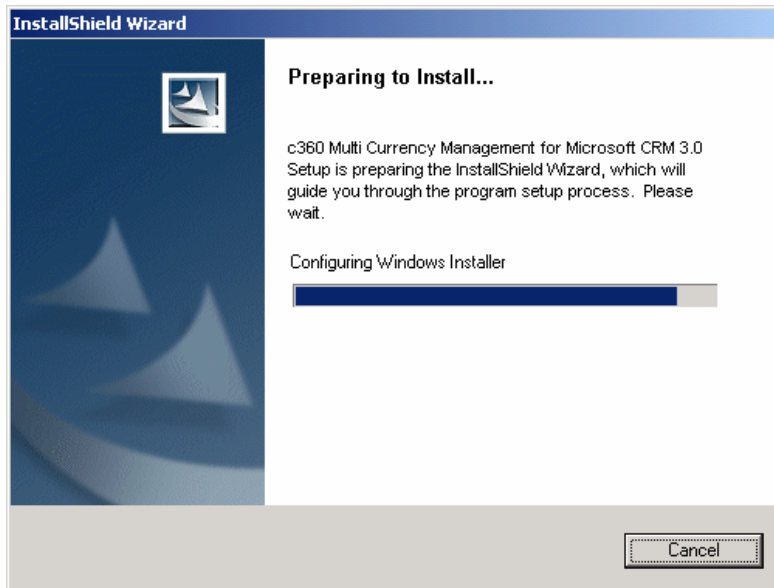
Steps for setting Security Privileges for 'Multi-Currency Management'

1. Go to CRM Settings > Business unit settings > Security roles.
2. Open a security role and click on the 'Custom Entities' tab.
3. Set the 'Read' value for 'Currency', 'Currency Mapping' and 'Exchange Rate' to 'Organization'.
4. Save and Close.

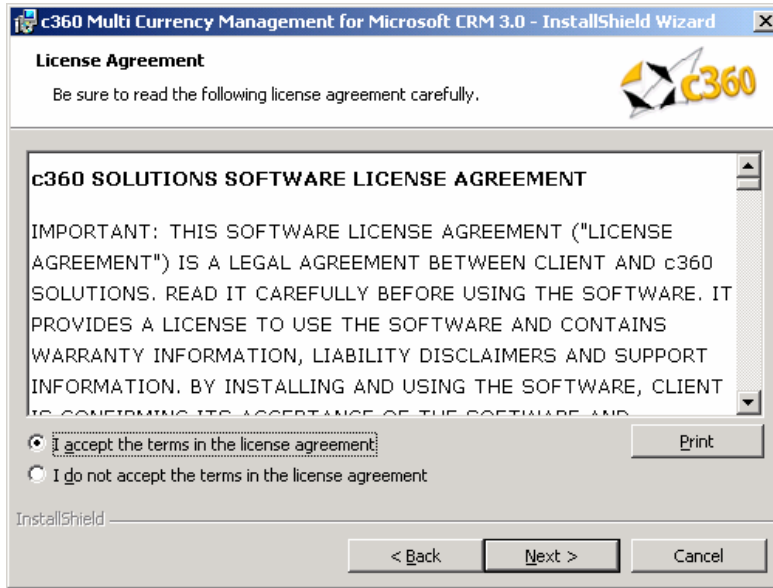
Note: Repeat the above (steps 2 to 4) for all the CRM roles.

Steps to install c360 Multi-Currency Management on the Laptop client for Microsoft CRM 3.0

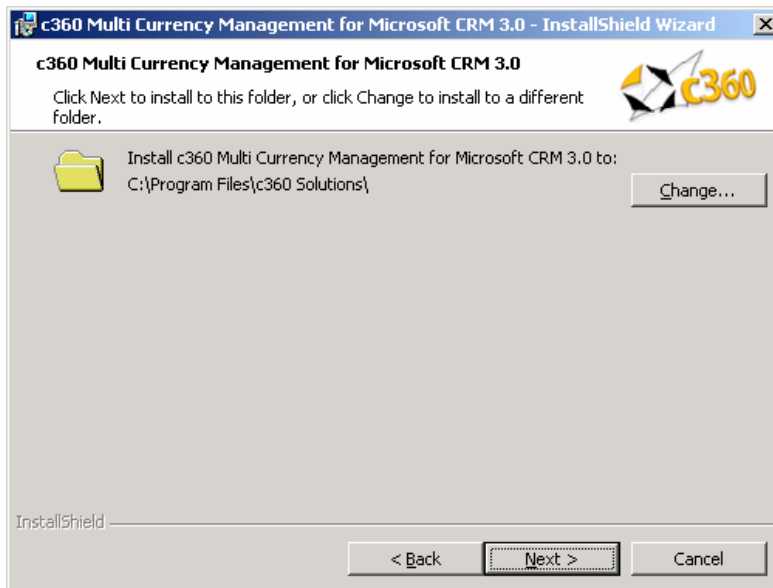
1. Extract the c360 Multi-Currency Management V3.zip file into a folder on the Laptop client for Microsoft CRM 3.0.
2. Double click the 'c360 Multi-Currency Management V3.exe' file. You will see the following screens.



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

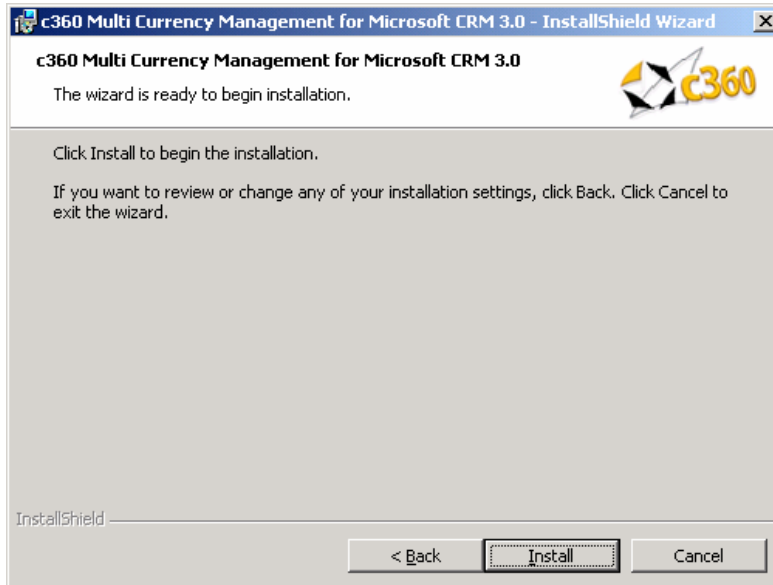


4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click **'Next'**.

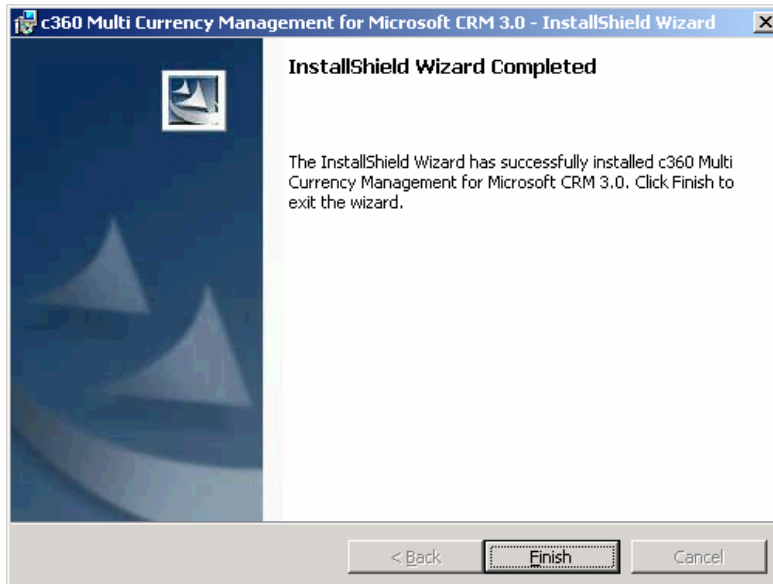


5. Click **'Next'** to install to the folder in the default directory
OR
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

Note: This screen will not appear if V3 folder already exists on the client machine. (For instance: when FLS is already installed on the laptop client machine).



6. Click **'Install'** to install Multi-Currency Management on the Laptop client machine.



7. Click **'Finish'** to exit the InstallShield wizard.

The installation of Multi-Currency Management on the Laptop client machine is now complete.

NOTE:

In order to get MCM working on the client, you need to do the following:

1. On the Laptop client machine, Open Outlook, go to the CRM menu > Local Data
2. Add three new entities: 'Currency', 'Exchange Rate' and 'Currency Mapping', one for each of the MCM custom entities.



Additional Configurations

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 Multi Currency Management 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 \\3\ 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'.

Troubleshooting

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



Licensing

For fresh installation of c360 Multi Currency Management for Microsoft Dynamics 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.

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 Multi Currency Management 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 Multi Currency Management 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.

Steps to uninstall c360 Multi Currency Management from the Laptop client machine

1. On the Laptop client for Microsoft CRM where you installed the product, navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Multi Currency Management 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 Multi Currency Management for Microsoft Dynamics 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.