



c360 Report Wizard Installation Guide

Microsoft Dynamics CRM 3.0 compatible

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Overview and Notes

Overview

This document outlines the process of installing c360 Report Wizard for Microsoft Dynamics CRM 3.0.

Microsoft CRM Compatibility

c360 Report Wizard 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/ReportBuilder.aspx>

System Requirements

c360 Report Wizard for Microsoft Dynamics CRM 3.0 requires SQL Reporting Services 2005

c360 Report Wizard for Microsoft Dynamics CRM 3.0

c360 Report Wizard is a powerful report generator tool that allows Microsoft CRM users to easily and quickly create SQL Reporting Services reports without writing any code. Report Wizard is built for simple end users allowing them to create reports from inside Microsoft CRM application. Reports are automatically generated according to Microsoft CRM style guidelines and preserve the security model of Microsoft CRM. Creating the report query is based on simple Advanced Find like screen without the need to write any SQL scripts. Using the Report Wizard Microsoft CRM end users will be able to create reports in 5 clicks.

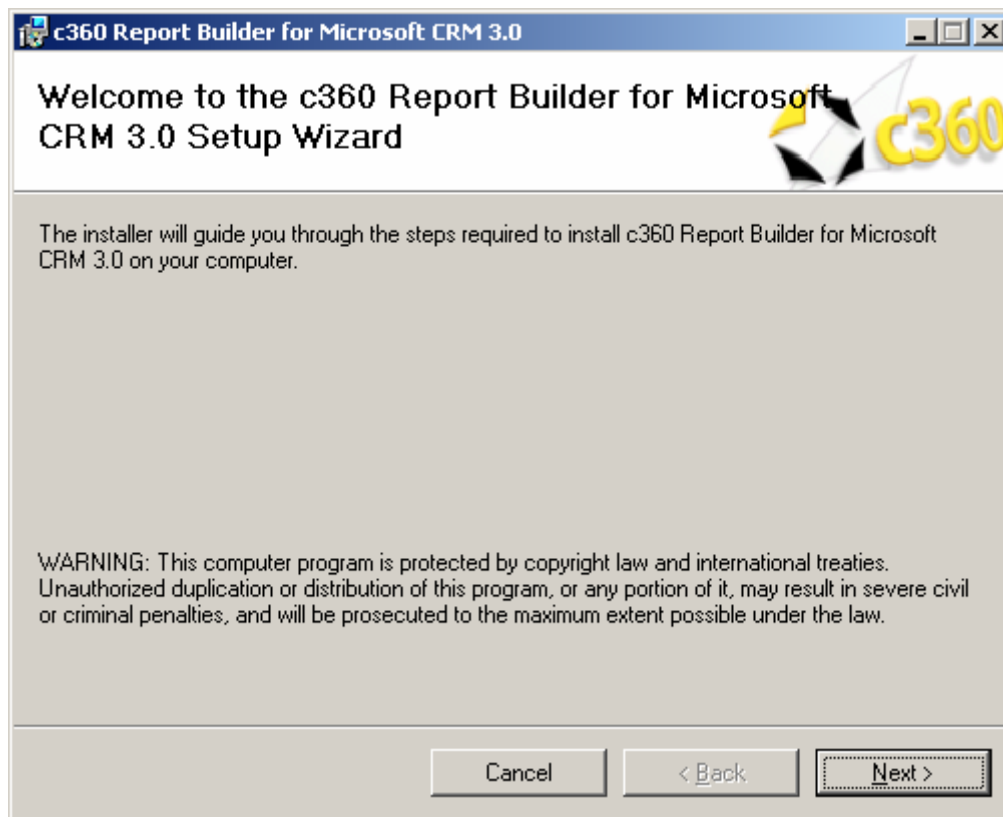


Installation Instructions _____

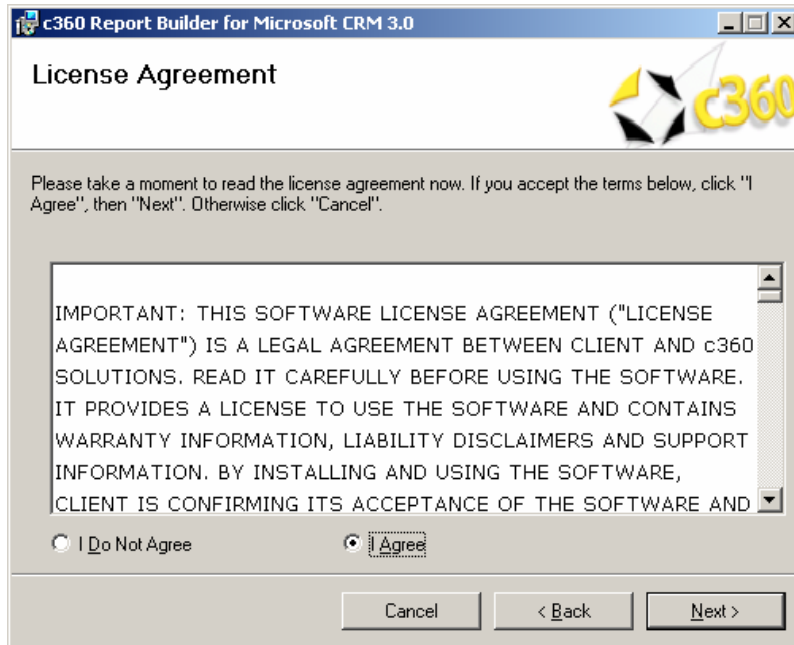
To install the product the installation application must be run on the CRM server by a user with Domain Administrator privileges. The installation of c360 Report Wizard for Microsoft CRM 3.0 requires the c360 Report Wizard V3.msi file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Report Wizard for Microsoft Dynamics CRM 3.0

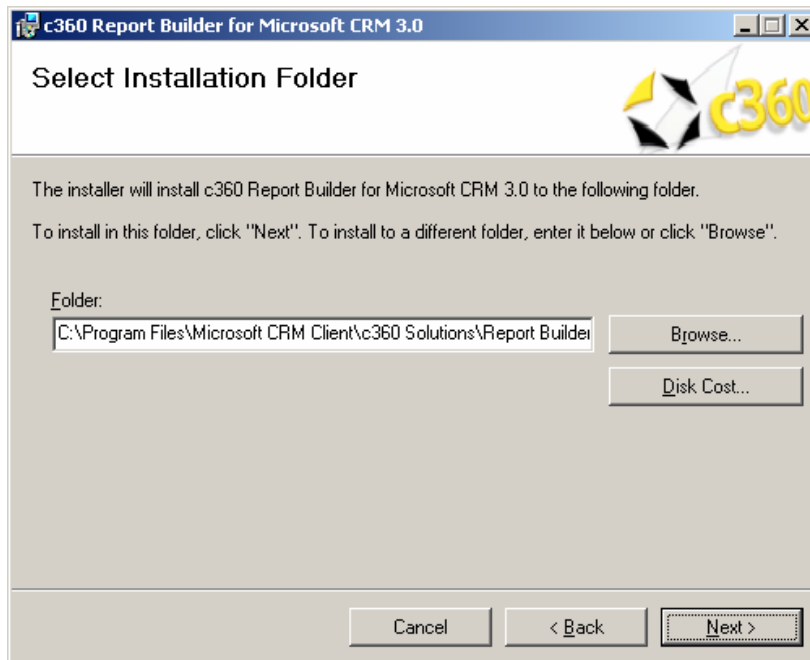
1. Extract the c360 Report Wizard V3.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Report Wizard V3.msi' file. You will see the following screens.



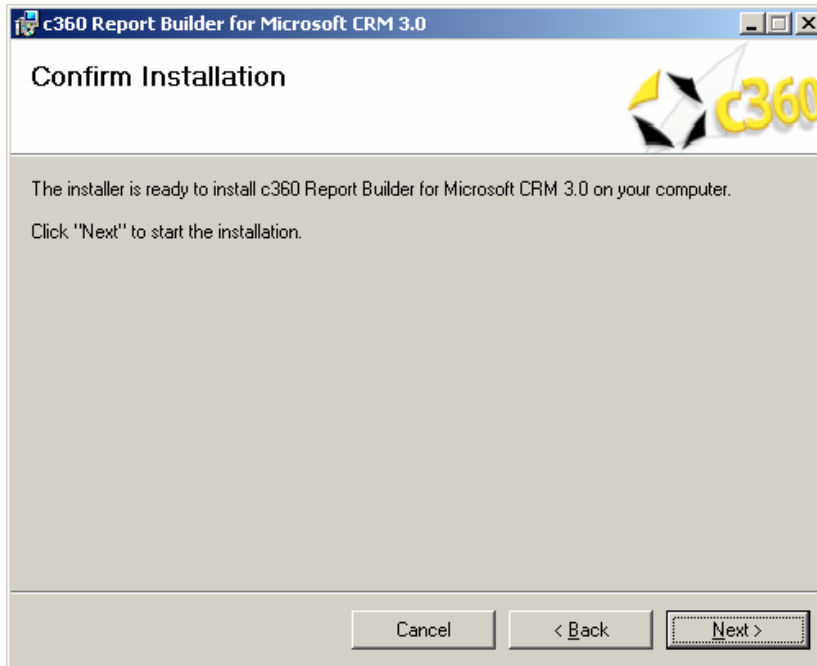
3. Click '**Next**' to begin the installation process.



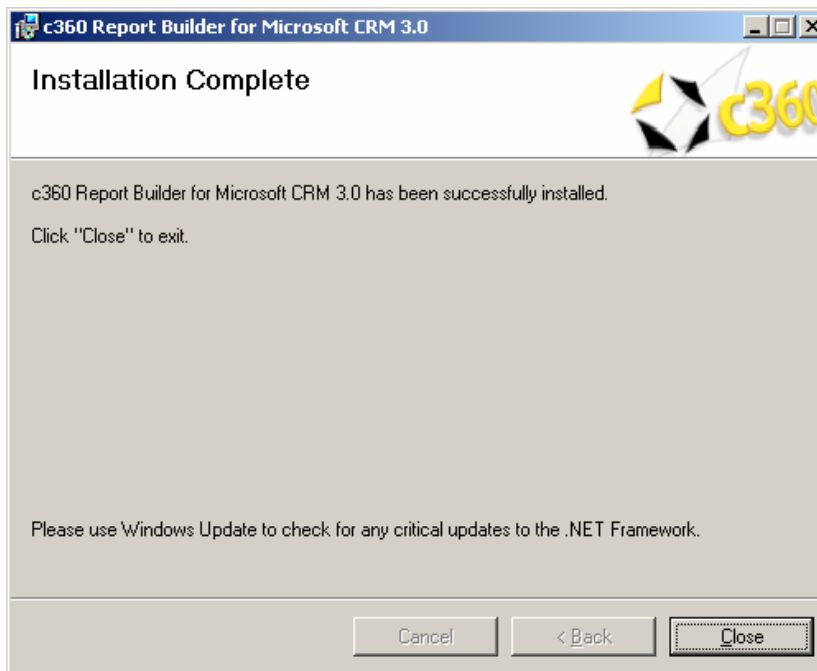
4. If you agree with the terms of the license agreement, select the option labeled 'I Agree' and click **'Next'**.



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



6. Click **'Next'** to install c360 Report Wizard for Microsoft CRM 3.0.



7. Click **'Close'** to exit the installation wizard.

The installation of c360 Report Wizard 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'.



Licensing

For fresh installation of c360 Report Wizard for Microsoft Dynamics CRM 3.0

License file can be obtained from c360 Solutions Inc upon request.

Evaluation Licenses

To request a 15 day production evaluation license go to our web site at

<http://www.c360.com/Evaluation.aspx>.

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>

License file installation

Copy the License file to directory specified during the setup process.



Uninstall Instructions ---

Steps to uninstall c360 Report Wizard 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 Report Wizard 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.