



DashBoard for Microsoft CRM 4.0 Server

Version 4.0

Implementation Guide
(How to install/config,..)

The content of this document is subject to change without notice.
"Microsoft" and "Microsoft CRM" are registered trademarks of Microsoft Inc.
All other product- and company names mentioned are trademarks of their respectful owners.

Table of Contents

1 INSTALL DASHBOARD FOR MS CRM 4	3
1.1 INTENDED AUDIENCE:	3
1.2 THE INSTALLATION CONSISTS OF THE FOLLOWING STEPS:.....	3
2 INSTALLING.....	3
2.1 OPEN THE INSTALLER	3
2.2 LICENSE AGREEMENT.....	4
2.3 SELECT YOUR LANGUAGE.....	5
2.4 DESTINATION FOLDER	7
2.5 BEGIN THE INSTALLATION	7
2.6 CONNECT TO THE MS-CRM SERVER.....	9
2.7 DASHBOARDCONFIG LANGUAGE SELECT	10
2.8 IIS RESET	11
2.9 INSTALLATION COMPLETED	11
3 CONFIGURATION OF DASHBOARD	11
3.1 STARTING DASHBOARDCONFIG.....	12
3.2 MANAGE ENTITIES	12
4 RESULTS	13
5 UPGRADE.....	15
6 CONTACT.....	16

1 Install DashBoard for MS CRM 4

Before installing **DashBoard for MS CRM 4**, please read this document and follow the steps carefully.

1.1 *Intended Audience:*

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

1.2 *The installation consists of the following steps:*

Follow each of the following steps, to complete the installation:

1. Installing DashBoard for MS CRM 4
2. Configuring DashBoard for MS CRM 4

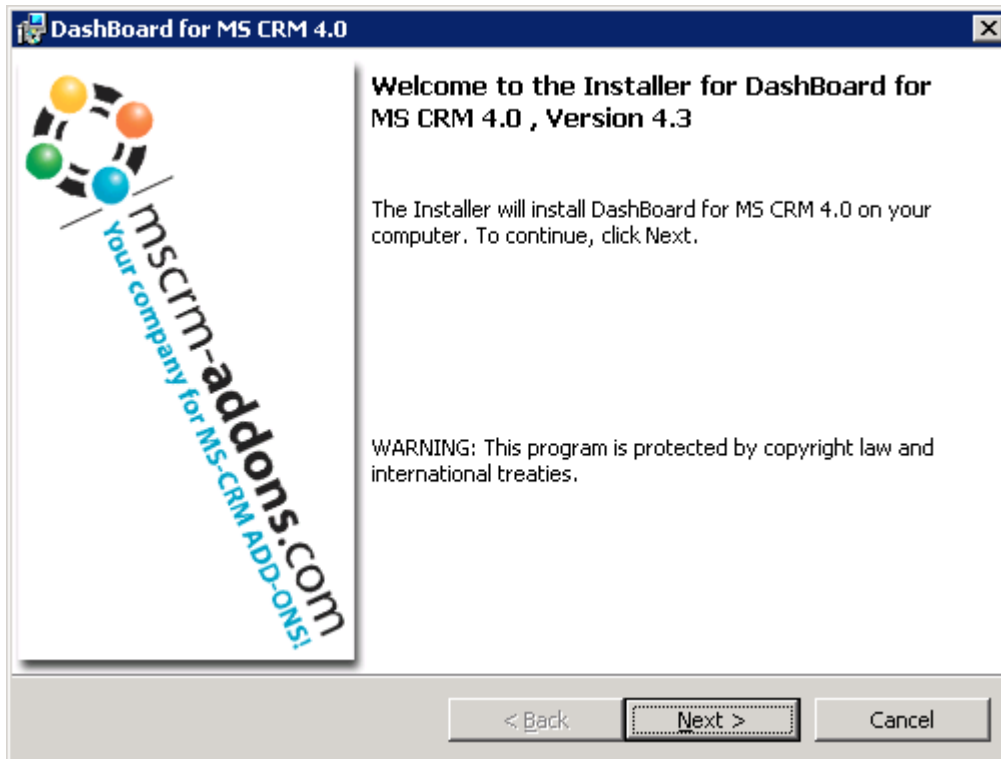
2 Installing

You have to install DashBoard for MS CRM 4 on your **server where MS CRM is running**.

Advise: The Windows-registered user who is running this installation, has to be an existing CRM user **with Admin rights in MS-CRM!**

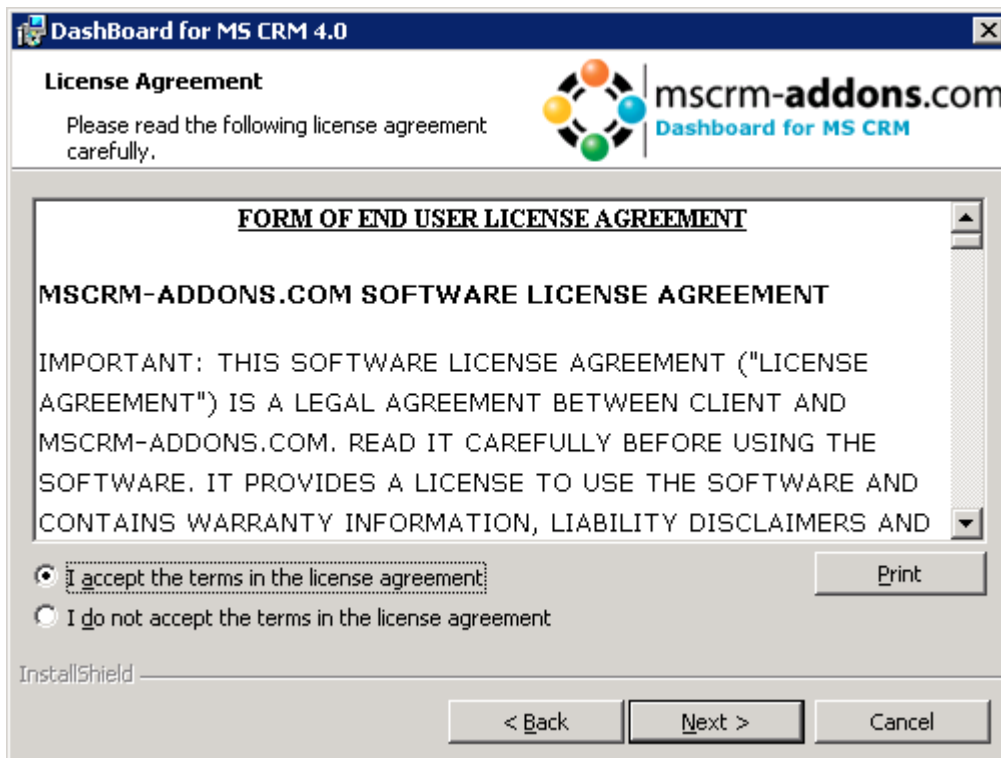
2.1 *Open the Installer*

1. Open the File "DashBoard for MS CRM 4.0.exe"
2. Wait until the installer is loaded.



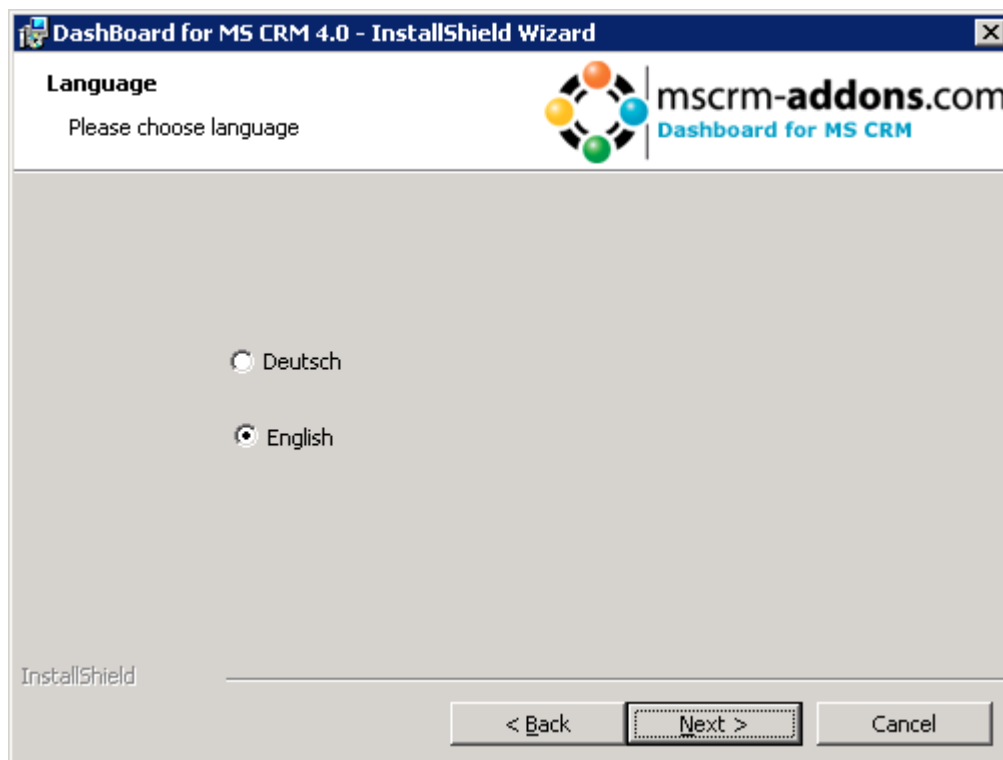
Click on „Next>“

2.2 License Agreement



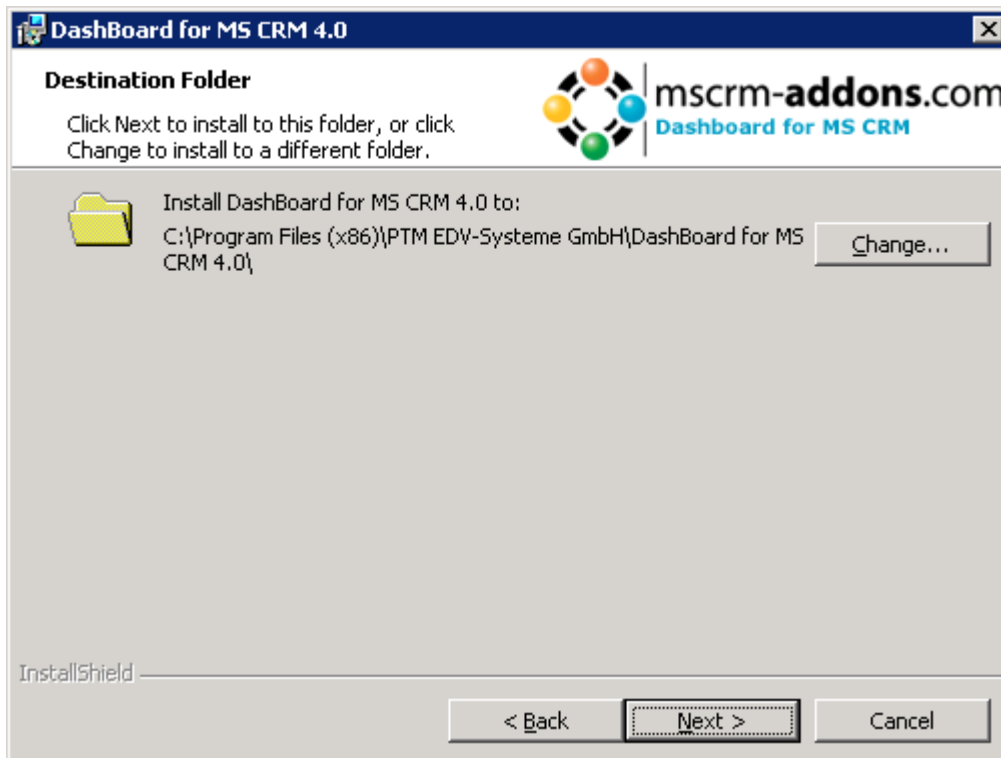
Click on „I accept the terms in the license agreement“ and then to „Next“.

2.3 *Select your Language*



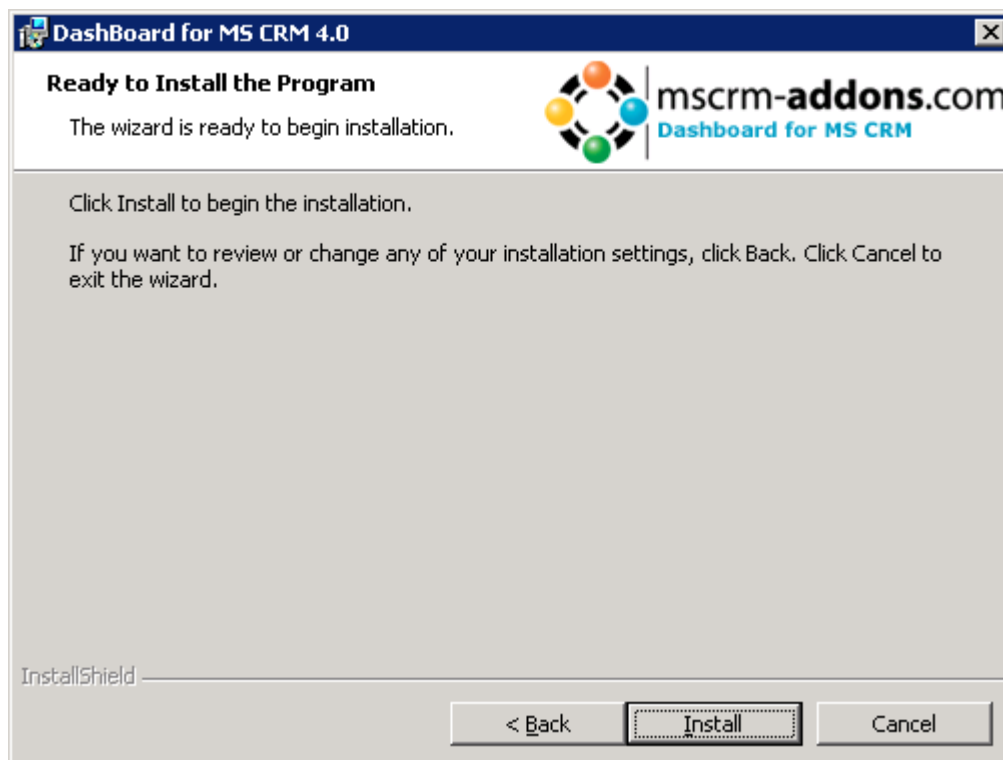
2.4 Destination Folder

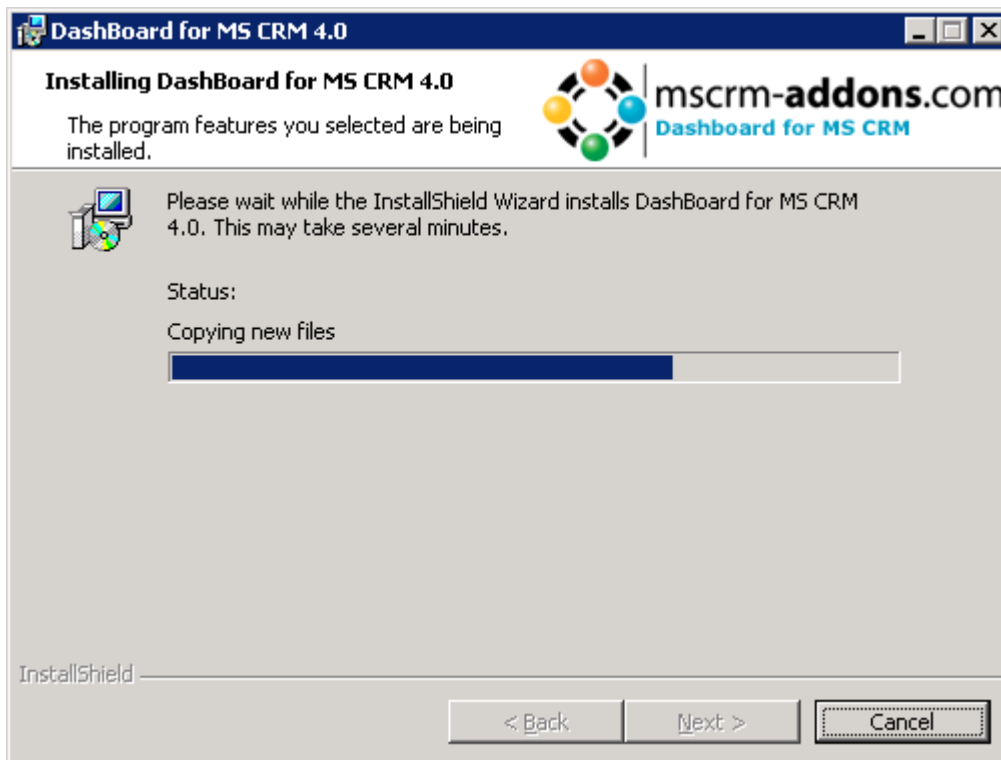
Click Next to install to this folder, or click Change to install to a different folder.



2.5 Begin the installation

Click on „Install“ to begin the installation.



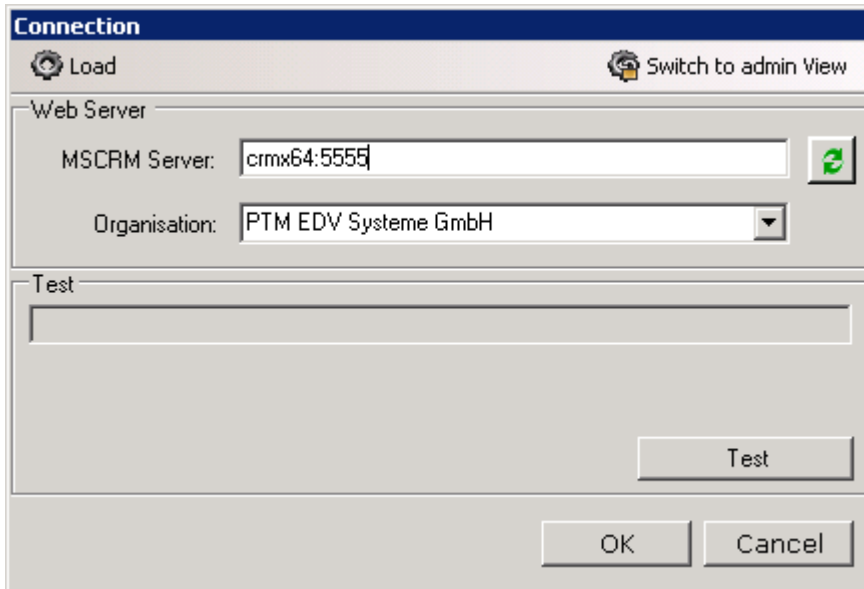


DashBoard being installed...

2.6 **Connect to the MS-CRM Server**

During the installation process you will be prompted for MS-CRM server settings.

Here you have to define the webservice settings:



The image shows a 'Connection' dialog box with a blue title bar. It contains a 'Load' button with a gear icon and a 'Switch to admin View' button with a person icon. The 'Web Server' section has a text field for 'MSCRM Server' containing 'crm64:5555' and a dropdown for 'Organisation' set to 'PTM EDV Systeme GmbH'. A 'Test' button is located to the right of the text field. Below this is a large empty text area with a 'Test' button at the bottom right. At the very bottom are 'OK' and 'Cancel' buttons.

Server: the name of your MSCRM-Server witch you use in your Internet Explorer, without the http://

If the port is not standard http-port(80) you have to mention the portnumber as well.

e.g. in our example the servername is crmx64 and CRM-port is 5555

Organisation: Select an organisation name.

Advice: The Windows-registered user who is running this installation, has to be an existing CRM user.

Click on „OK“ to proceed the installation.

2.7 DashBoardConfig language select

Choose a language which should be used in the administration-tool DashBoardConfig.



The image shows a 'Choose Language' dialog box with a blue title bar. It features a dropdown menu with 'German' selected and an 'OK' button.

Now, the installer starts the administration-tool DashBoardConfig.

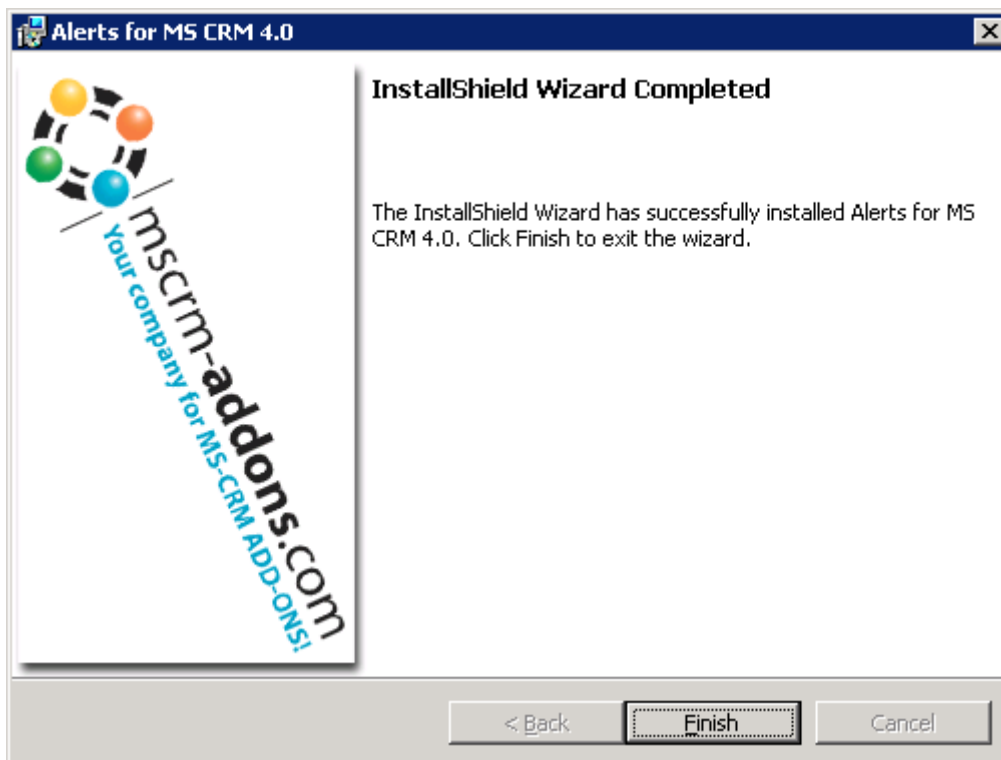
For more information, see Chapter 2 (Configuration of DashBoard)

2.8 IIS Reset

At the moment, it's not necessary to execute IISReset, click „No“.

2.9 Installation completed

After the installation click on „Finish“ to exit the wizard.



3 Configuration of DashBoard

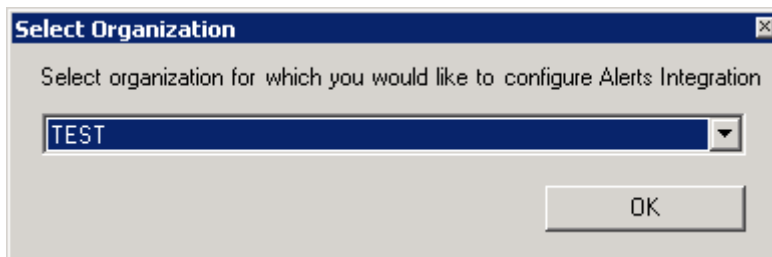
3.1 **Starting DashboardConfig**

At the installation of DashBoard, DashBoardConfig will start automatically. For a manual start go to the install folder and start DashBoardConfig.exe.

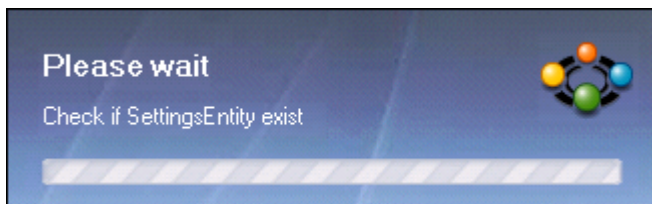
(C:\Program Files (x86)\PTM EDV-Systeme GmbH\DashBoard for MSCRM 4.0\DashBoardConfig\DashBoardConfig.exe)

Select the desired organization for configuration.

(Do you want to configure more organizations, start DashBoardConfig again)

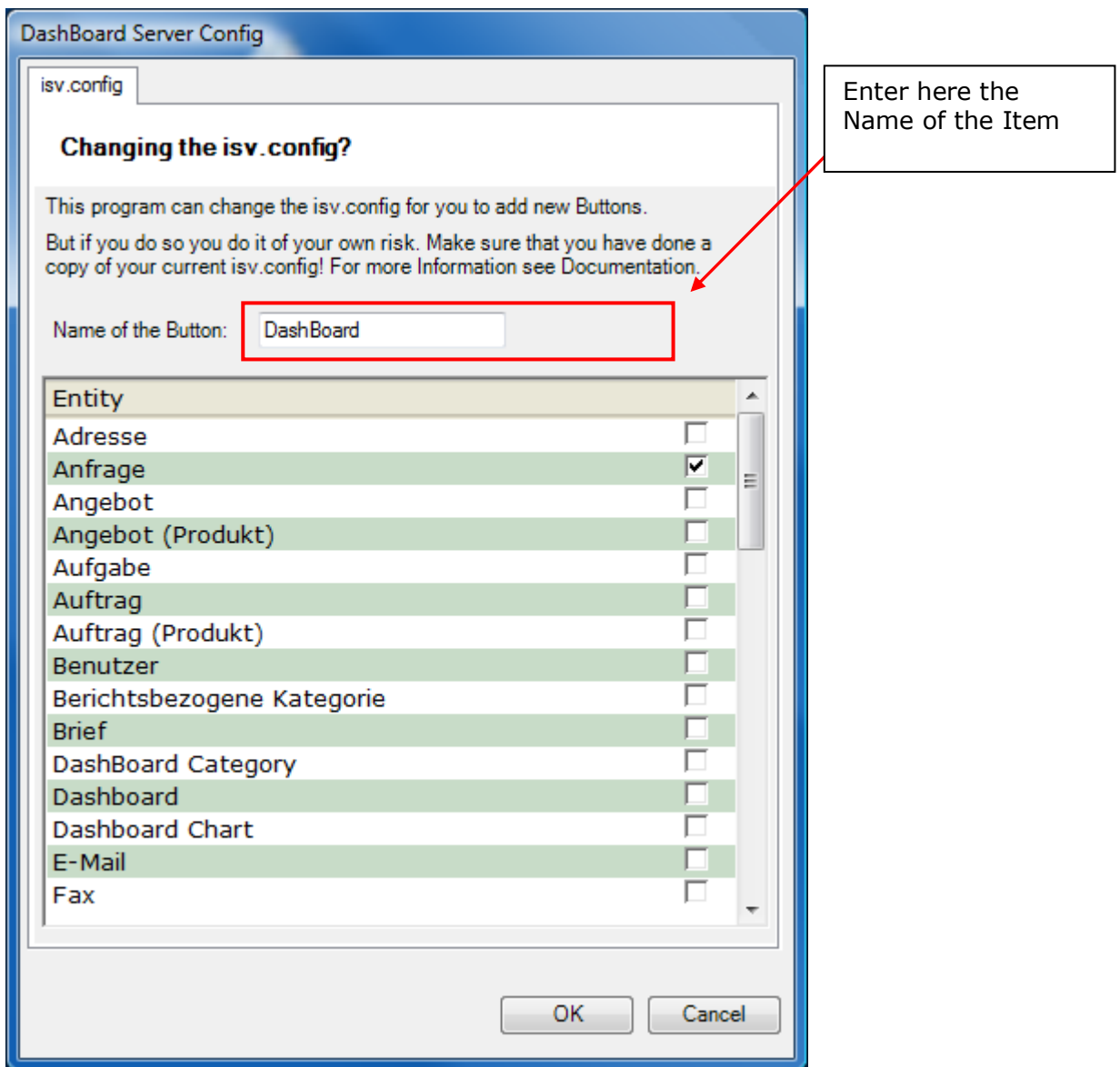


DashBoardConfig Loading ...



3.2 **Manage Entities**

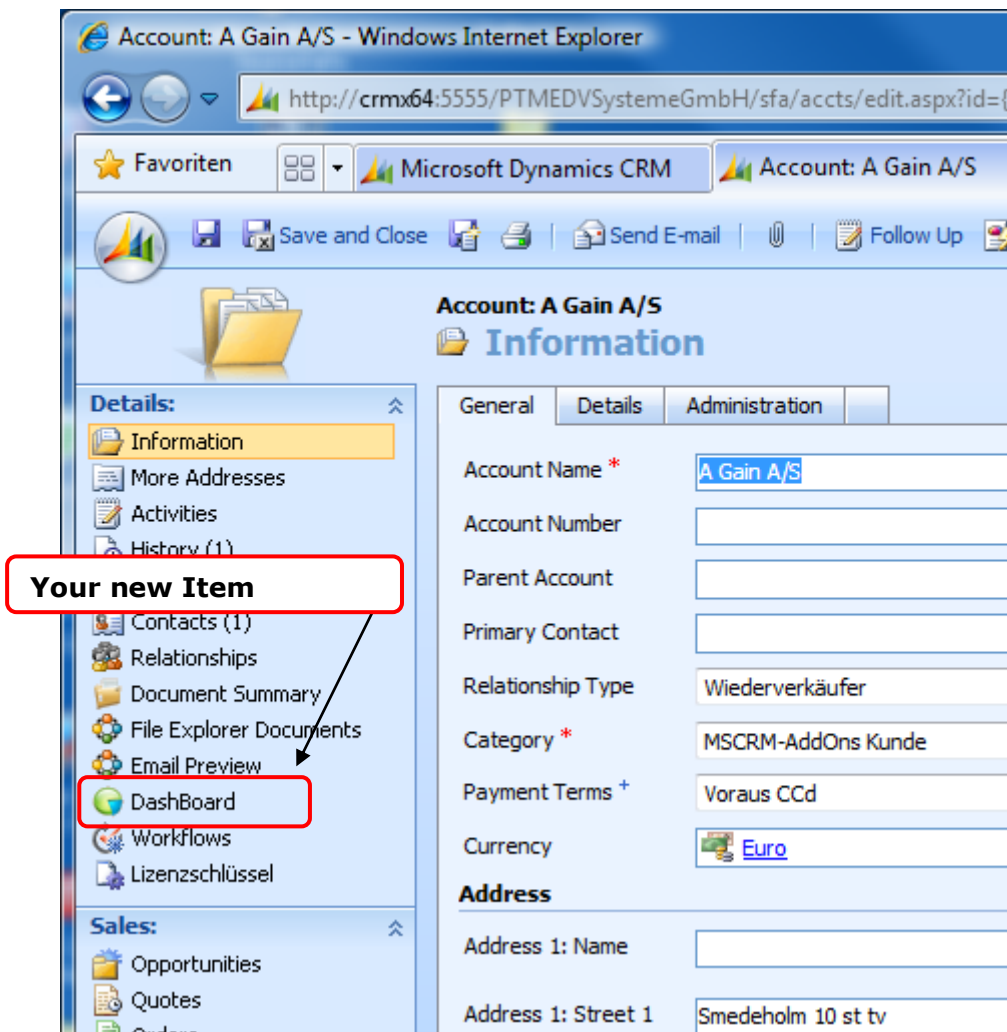
Select the desired Entities where you want to activate DashBoard-functionality.



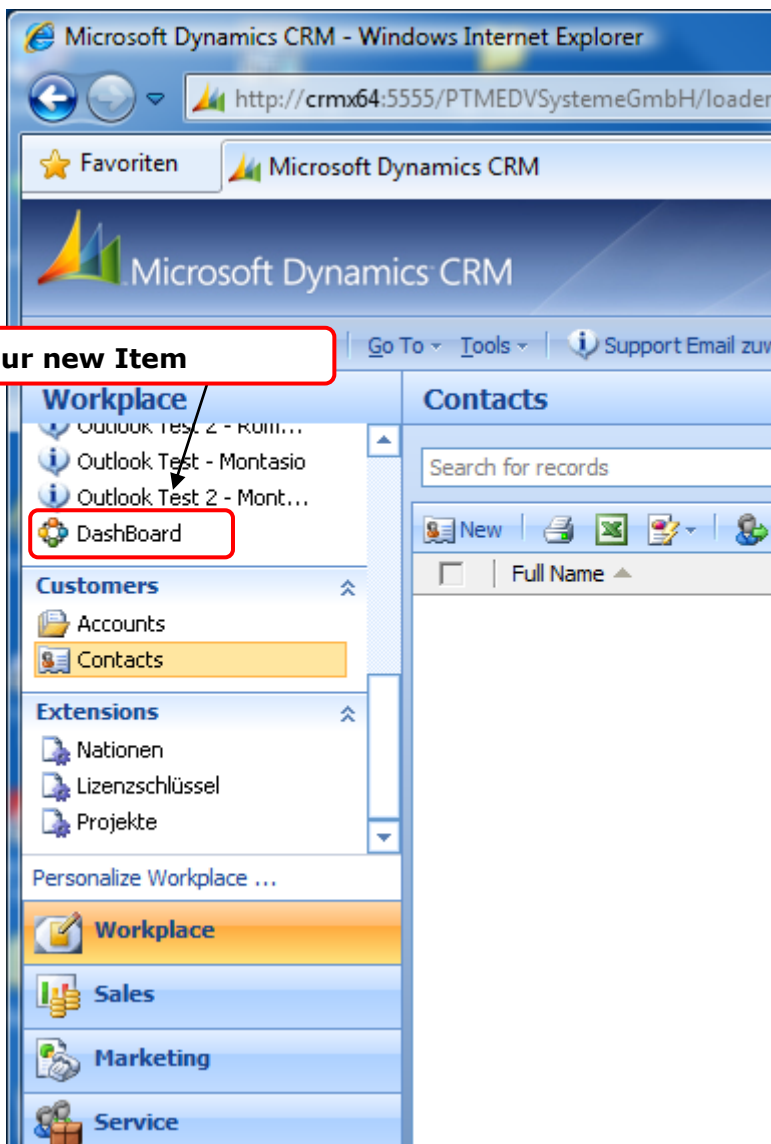
Click „OK“ to complete the configuration of their selection. If the configuration is created, this dialog will be automatically closed.

4 Results

Result in the entity:



Result in the Workplace:



5 Upgrade

Do the same as the install instructions.

Important: In the DashBoardConfig (will be started from the installer), click on OK and not on Chancel. DashBoardConfig must be run after an upgrade! (The preselected Entities are not configured)

6 Contact

If you have problems with the installation, send an Email to support@mscrm-addons.com or call +43 316 680 880 0