



# Alerts for Microsoft CRM 4.0 Server

Version 4.0

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

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# 1 Install Alerts for MS CRM 4

Before installing **Alerts 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 Alerts for MS CRM 4
2. Configuring Alerts for MS CRM 4

## 2 Installing

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

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

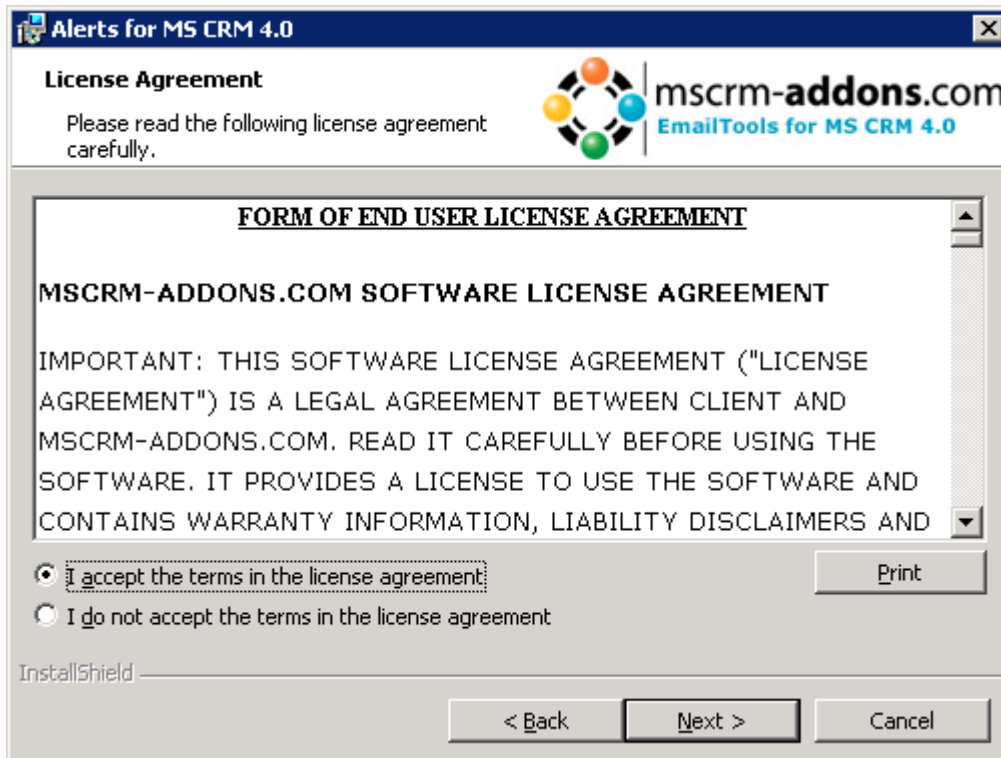
### 2.1 Open the Installer

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



Click on „Next>“

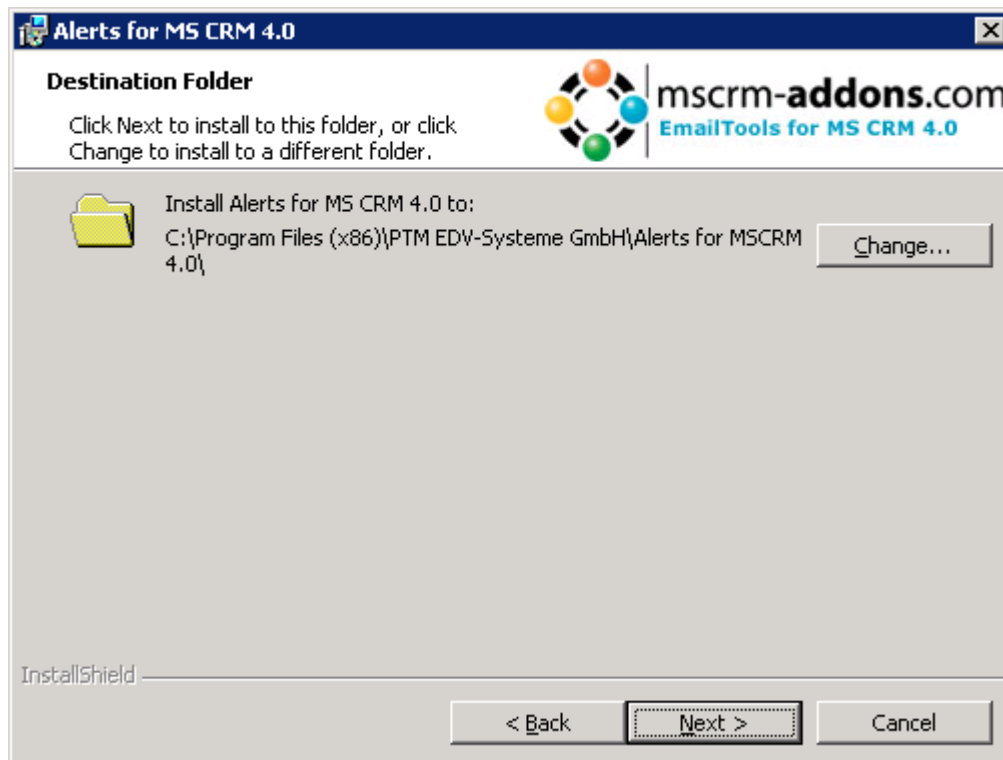
## 2.2 License Agreement



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

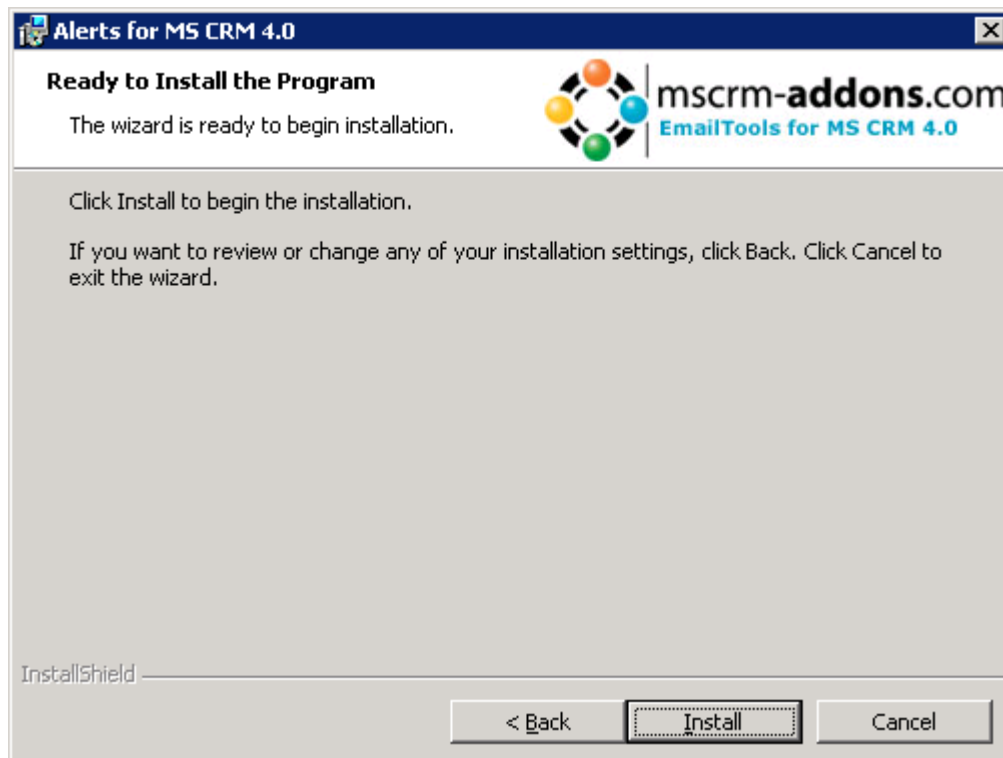
### 2.3 Destination Folder

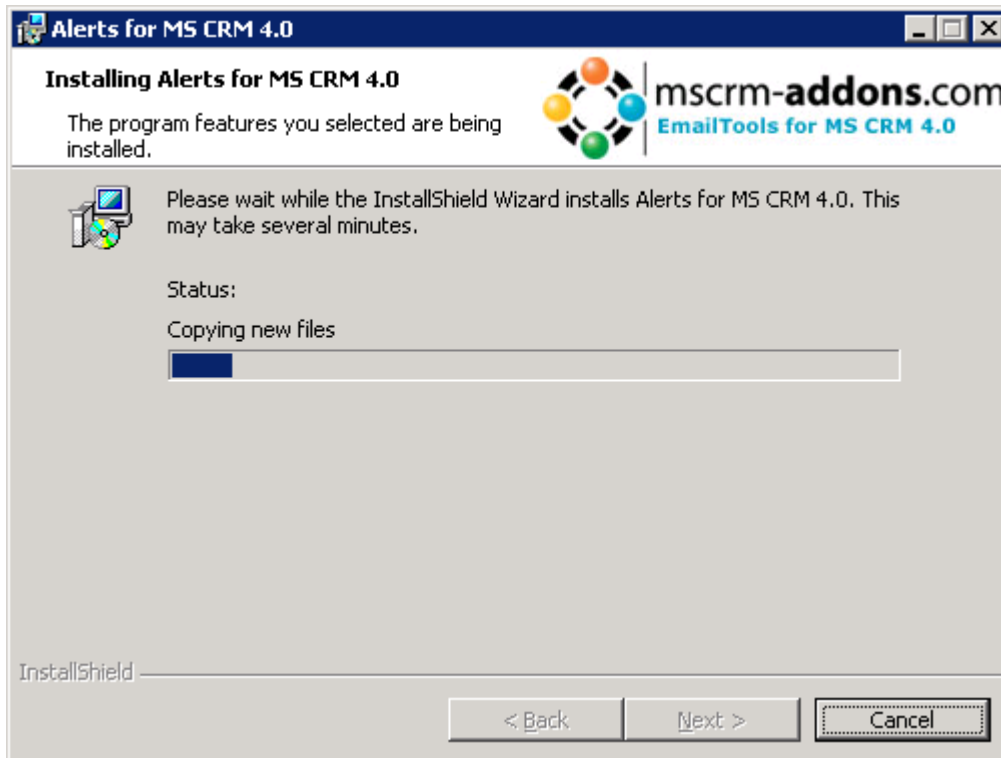
Click Next to install to this folder, or click Change to install to a different folder.



## 2.4 *Begin the installation*

Click on „Install“ to begin the installation.





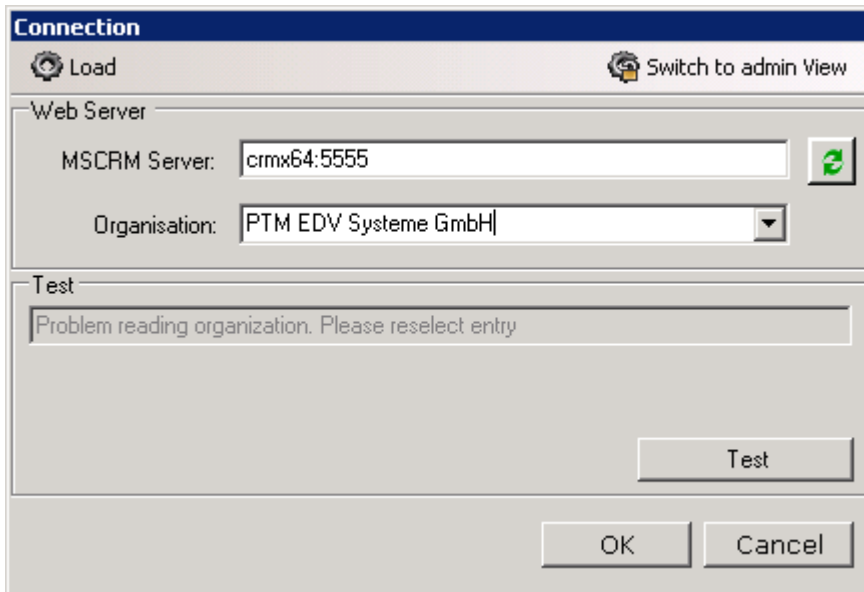
Alerts being installed...



## 2.5 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:



**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 crm64 and CRM-port is 5555

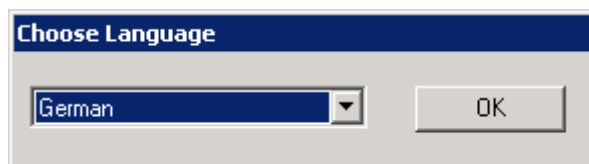
**Organisation:** Select an organisation name.

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

Click on „OK“ to proceed the installation.

## 2.6 *AlertsConfig language select*

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



Now, the installer starts the administration-tool AlertsConfig.

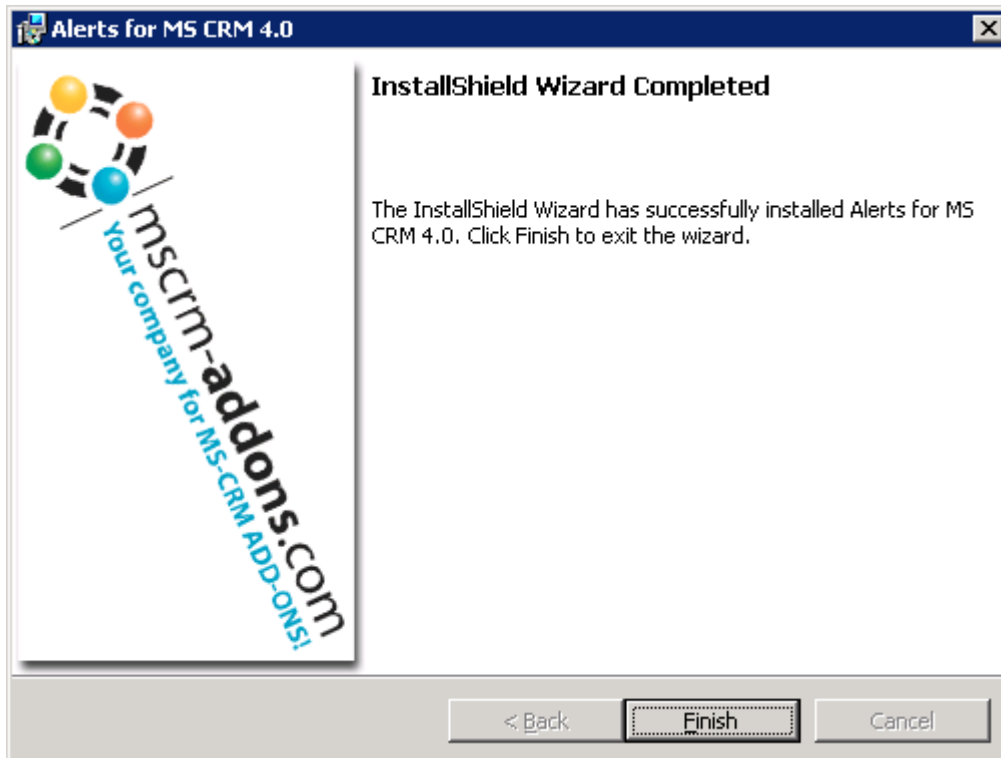
**For more information, see Chapter 2 (Configuration of Alerts)**

## 2.7 *IIS Reset*

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

## 2.8 *Installation completed*

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



## 3 Configuration of Alerts

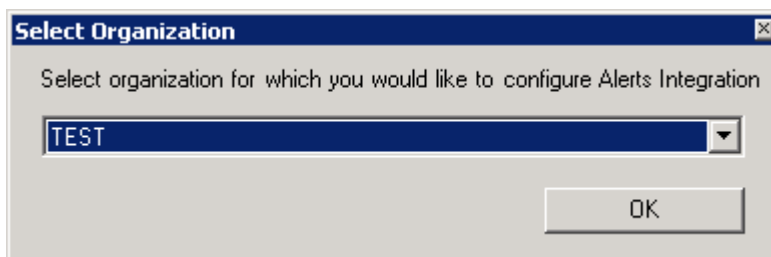
### 3.1 Starting AlertsConfig

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

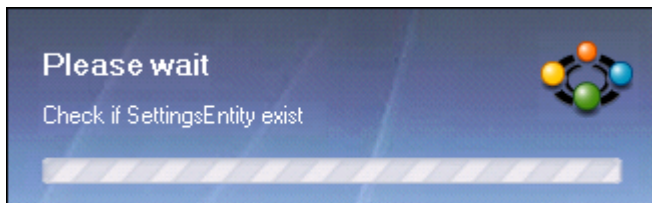
(C:\Program Files (x86)\PTM EDV-Systeme GmbH\Alerts for MSCRM 4.0\AlertsConfig\AlertsConfig.exe)

Select the desired organization for configuration.

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

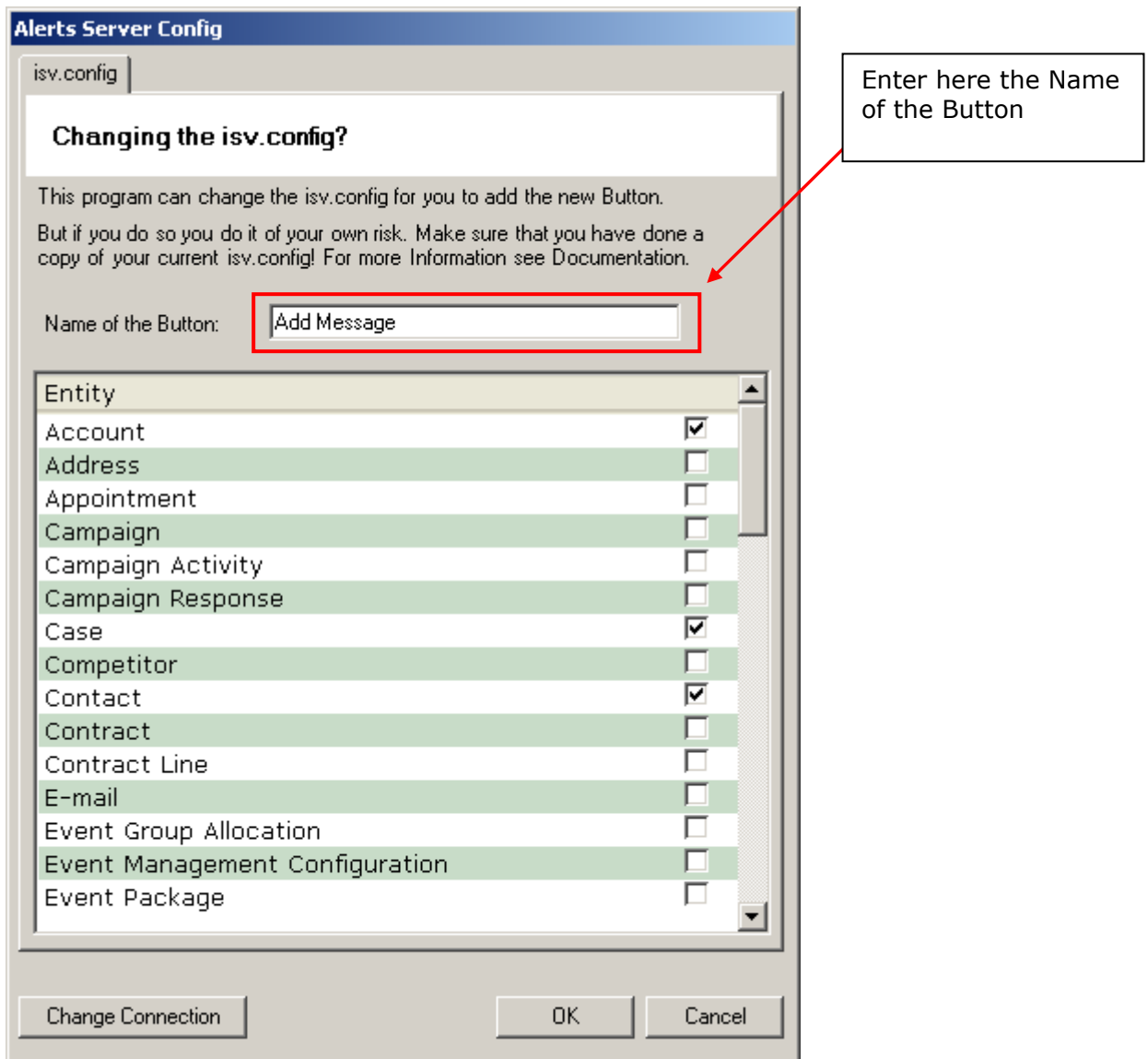


AlertsConfig Loading ...



### 3.2 *Manage Entities*

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

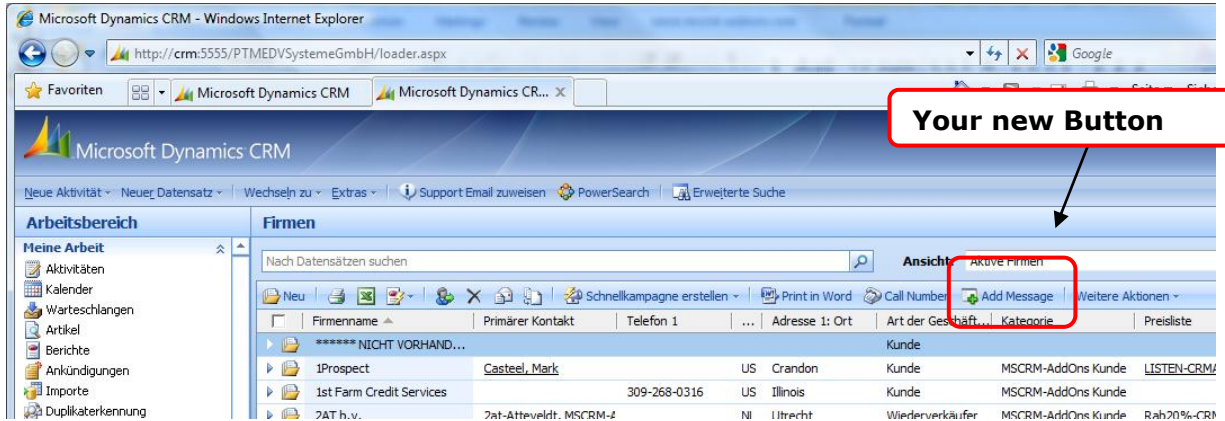


Click „OK“ to complete the configuration of their selection. If the configuration is created, this dialog will be automatically closed.

Note: This process may take several minutes!

## 4 Results

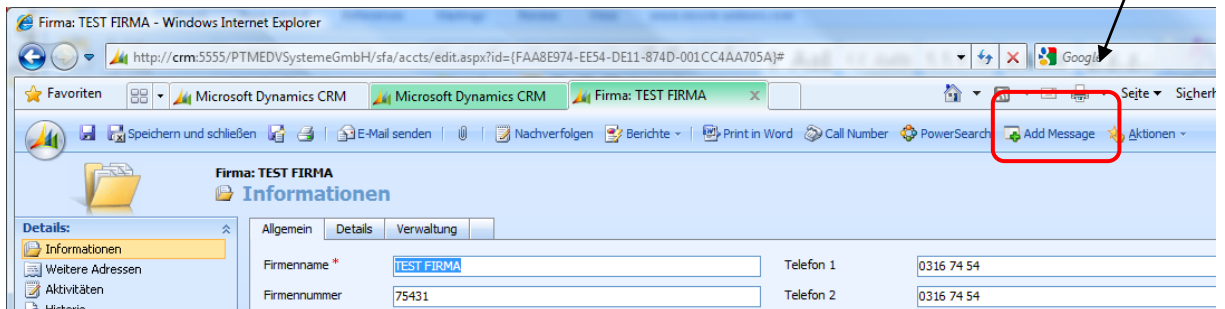
Result in the entity overview table:



The screenshot shows the Microsoft Dynamics CRM interface in Internet Explorer. The main content area displays a table of company records under the 'Firmen' entity. A red box highlights a new button labeled 'Add Message' in the top right corner of the table's action bar. Another red box labeled 'Your new Button' points to the 'Aktive Firmen' view selector.

Firmenname	Primärer Kontakt	Telefon 1	Adresse 1: Ort	Art der Geschäft...	Kategorie	Preisliste
***** NICHT VORHAND...				Kunde		
1Prospect	Casteel, Mark		US Crandon	Kunde	MSCRM-AddOns Kunde	LISTEN-CRM
1st Farm Credit Services		309-268-0316	US Illinois	Kunde	MSCRM-AddOns Kunde	
2AT h.v.	2at-Atteveldt. MSCRM-4		NI Utrecht	Wiederverkäufer	MSCRM-AddOns Kunde	Rah20%-CR

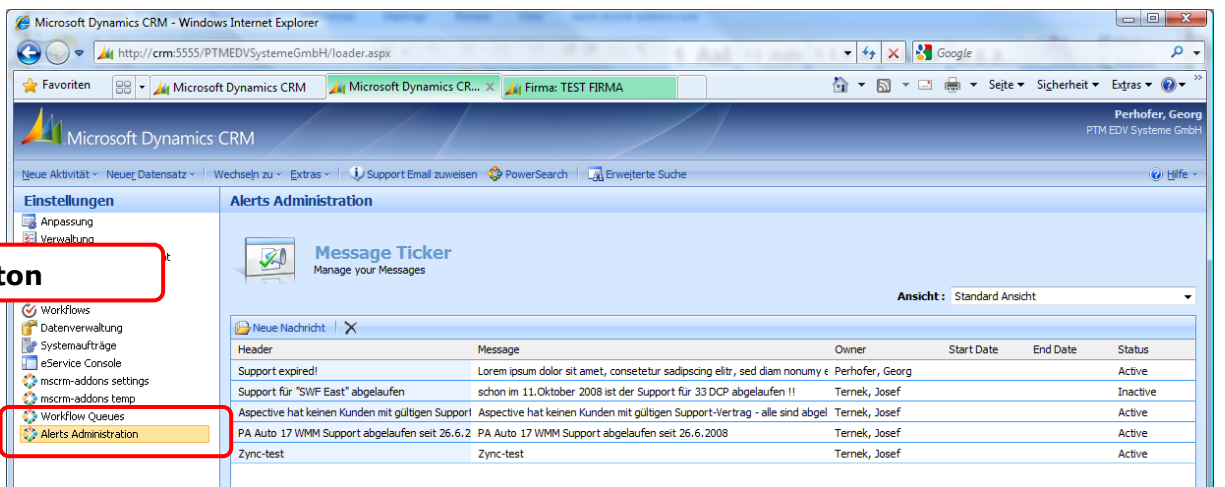
Result in the entity:



The screenshot shows the 'Firma: TEST FIRMA' entity details page. A red box highlights the 'Add Message' button in the top right corner of the page. Another red box labeled 'Your new Button' points to the 'Aktive Firmen' view selector from the previous screenshot.

Informationen	Telefon 1	Telefon 2
Firmenname * TEST FIRMA	0316 74 54	
Firmennummer 75431		0316 74 54

Result in the settings:



The screenshot shows the 'Alerts Administration' settings page in Microsoft Dynamics CRM. A red box highlights the 'Alerts Administration' option in the left-hand navigation pane, with a callout box labeled 'Your new Button' pointing to it. The main content area shows a table of message ticks.

Header	Message	Owner	Start Date	End Date	Status
Support expired!	Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy €	Perhofer, Georg			Active
Support für "SWF East" abgelaufen	schon im 11.Oktober 2008 ist der Support für 33 DCP abgelaufen !!	Ternek, Josef			Inactive
Aspective hat keinen Kunden mit gültigen Support!	Aspective hat keinen Kunden mit gültigen Support-Vertrag - alle sind abge	Ternek, Josef			Active
PA Auto 17 WMM Support abgelaufen seit 26.6.2	PA Auto 17 WMM Support abgelaufen seit 26.6.2008	Ternek, Josef			Active
Zync-test	Zync-test	Ternek, Josef			Active

## 5 Set CRM Rights

### 5.1 Set Rights

Users can create new alerts? Users should obtain sufficient rights to create Alerts.

Do extended rights (add a role) for the following entity:

Entity name: **mscrm-MessageTicker**

Alternatively you can add the new created role "**dcp/gc/ti security role**" to the users.

### 5.2 Detract Rights

Exclude Users from allow to add, modify, or delete Alerts.  
Set the appropriate Settings in the MS-CRM Right-Management.

## 6 Upgrade

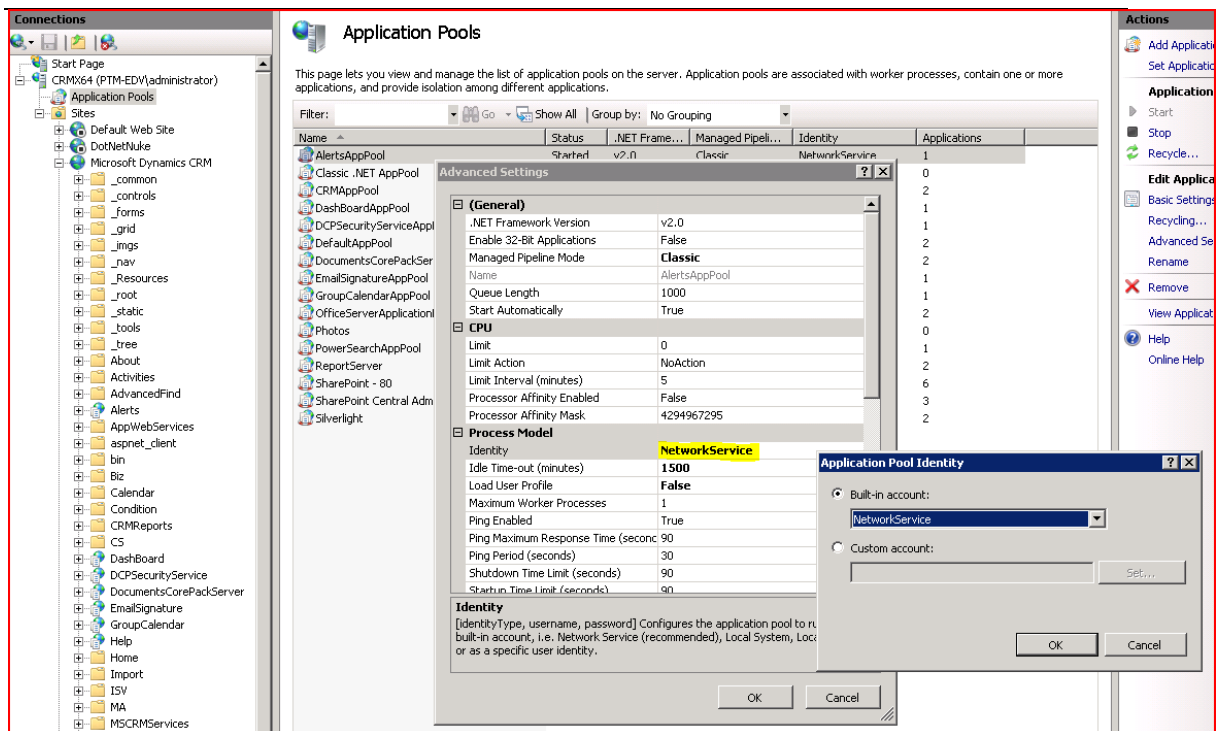
Do the same as the install instructions.

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

## 7 Error Handling / Known Issues

### 7.1 ApplicationPool Error

If you get an ApplicationPool error, please set the **Identity** on the IIS to **NetworkService**.



The screenshot displays the IIS Manager interface. The left pane shows the 'Connections' tree with 'AlertsAppPool' selected under 'Application Pools'. The main pane shows the 'Application Pools' configuration for 'AlertsAppPool'. The 'Advanced Settings' dialog box is open, showing the following configuration:

Category	Property	Value
<b>(General)</b>	.NET Framework Version	v2.0
	Enable 32-Bit Applications	False
	Managed Pipeline Mode	Classic
	Name	AlertsAppPool
<b>CPU</b>	Limit	0
	Limit Action	NoAction
	Limit Interval (minutes)	5
	Processor Affinity Enabled	False
<b>Process Model</b>	Identity	NetworkService
	Idle Time-out (minutes)	1500
<b>Identity</b>	Load User Profile	False
	Maximum Worker Processes	1
	Ping Enabled	True
	Ping Maximum Response Time (seconds)	90
	Ping Period (seconds)	30
	Shutdown Time Limit (seconds)	90
	Startup Time Limit (seconds)	90

The 'Application Pool Identity' dialog box is also open, showing the 'Built-in account' section with 'NetworkService' selected in the dropdown menu.

## 8 Contact

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