

CRMWeb 2.0

Setup and Configuration

Version 1.0



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CRMWeb Installation Guide

Purpose

This document describes how to install and configure CRMWeb 1.3.

System requirements

Server requirements:

- Microsoft Windows 2000 / Microsoft Windows XP Professional / Microsoft Windows 2003
- Microsoft Internet Information Services (IIS) server 5.0 or 6.0
- Microsoft .NET Framework 1.1
- Intel® Pentium® III 800-MHz or higher CPU
- 256 MB RAM (512 MB or more recommended)
- 512 MG to 1 GB of available hard disk space

Client requirements:

- Web browser (Internet Explorer 5 or greater, Mozilla 1.1, Netscape 6 or greater, Firefox)
- Super VGA (800 x 600) or higher-resolution video adapter and monitor

Database requirements:

- Microsoft SQL Server 2000 / MSDE 2000 (Microsoft SQL Server 2000 Desktop Engine)

Installing CRMWeb

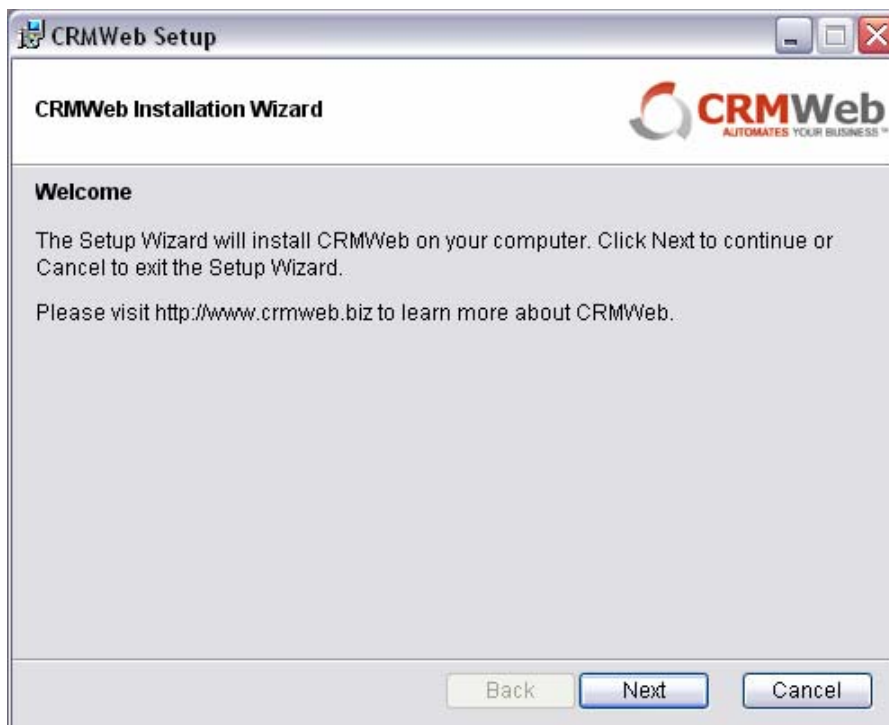
The following procedure describes how to install CRMWeb.

Prerequisites

- Local administrator rights under Windows 200, 2003 or Windows XP Professional.

Procedure

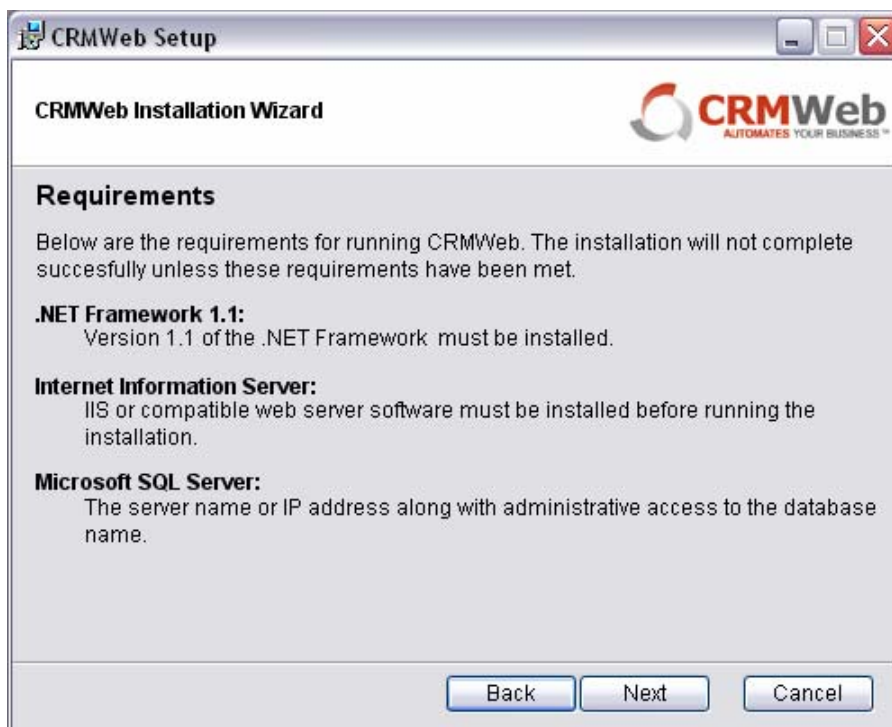
1. Close all running applications.
2. From the root directory of the installation CD (or from whichever folder you copied the installation files to), double-click CRMWebSetup-2.0.msi.
3. The setup wizard starts.



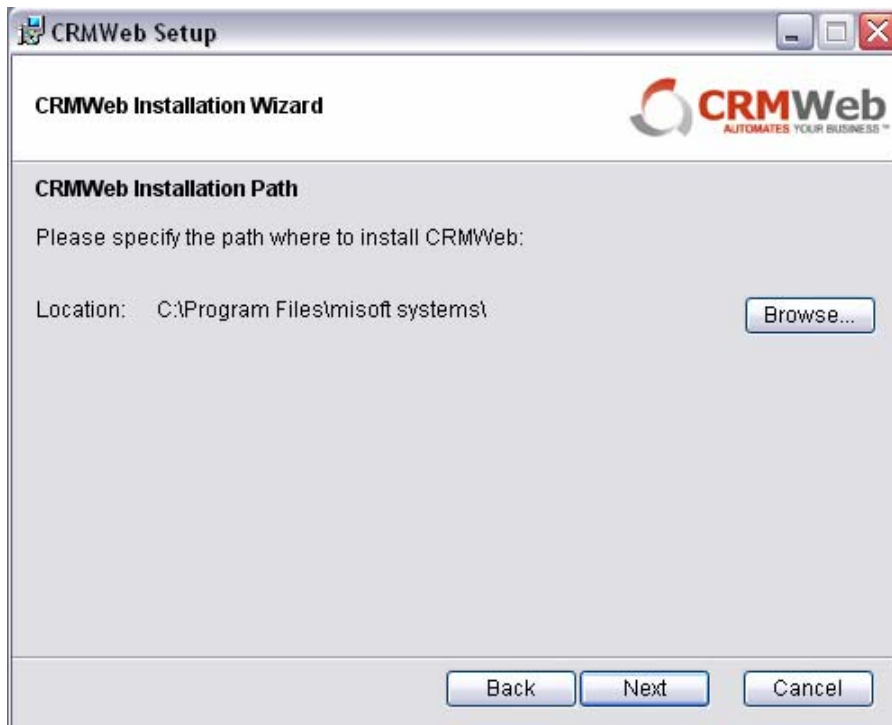
4. Choose "Next".



5. Select "I accept the terms in the License Agreement" and choose "Next".



6. Choose "Next".



7. Specify the path where CRMWeb should be installed and click on "Next".



8. Enter the name of the virtual directory where CRMWeb should be installed and choose "Next".

The name of the virtual directory you enter here will be used in the URL for accessing CRMWeb. (i.e. <http://localhost/crmweb/default.aspx>)



The screenshot shows the 'CRMWeb Setup' window with the 'CRMWeb Installation Wizard' title. The CRMWeb logo is in the top right. A checkbox labeled 'Create a new CRMWeb Database' is checked. Below it, a note states: 'These credentials are used only to configure your database and will not be used by CRMWeb to connect to your database when running.' A red note follows: 'Note: In case you make an update of your CRMWeb installation please uncheck this option, otherwise your database will be removed and created again.' There are two input fields: 'Server name or IP address' (empty) and 'Database name' (containing 'msCRMDB'). Two radio buttons are present: 'Use Windows Authentication' (unselected) and 'Use SQL Authentication' (selected). Below the radio buttons are 'Username' (containing 'sa') and 'Password' (empty) fields. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

CRMWeb Setup

CRMWeb Installation Wizard

☒ Create a new CRMWeb Database

These credentials are used only to configure your database and will not be used by CRMWeb to connect to your database when running.

Note: In case you make an update of your CRMWeb installation please uncheck this option, otherwise your database will be removed and created again.

Server name or IP address: .

Database name: msCRMDB

☐ Use Windows Authentication

☒ Use SQL Authentication

Username: sa

Password:

Back Next Cancel

9. If you want to create a new database for the application you should fill out the connection information and the name of the database you want to create.

Note: if you already have a database, then unselect the checkbox and go further. In the next step you can configure the database connection information for CRMWeb.



The screenshot shows the 'CRMWeb Setup' window with the 'CRMWeb Database Login' title. The CRMWeb logo is in the top right. The text says: 'Specify how CRMWeb will access the database at runtime.' There are two input fields: 'Server name or IP address' (empty) and 'Database name' (containing 'msCRMDB'). Two radio buttons are present: 'Use Windows Authentication' (unselected) and 'Use SQL Authentication' (selected). Below the radio buttons are 'Username' (containing 'sa') and 'Password' (empty) fields, followed by a 'Confirm' label and another empty field. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

CRMWeb Setup

CRMWeb Database Login

Specify how CRMWeb will access the database at runtime.

Server name or IP address: .

Database name: msCRMDB

☐ Use Windows Authentication

☒ Use SQL Authentication

Username: sa

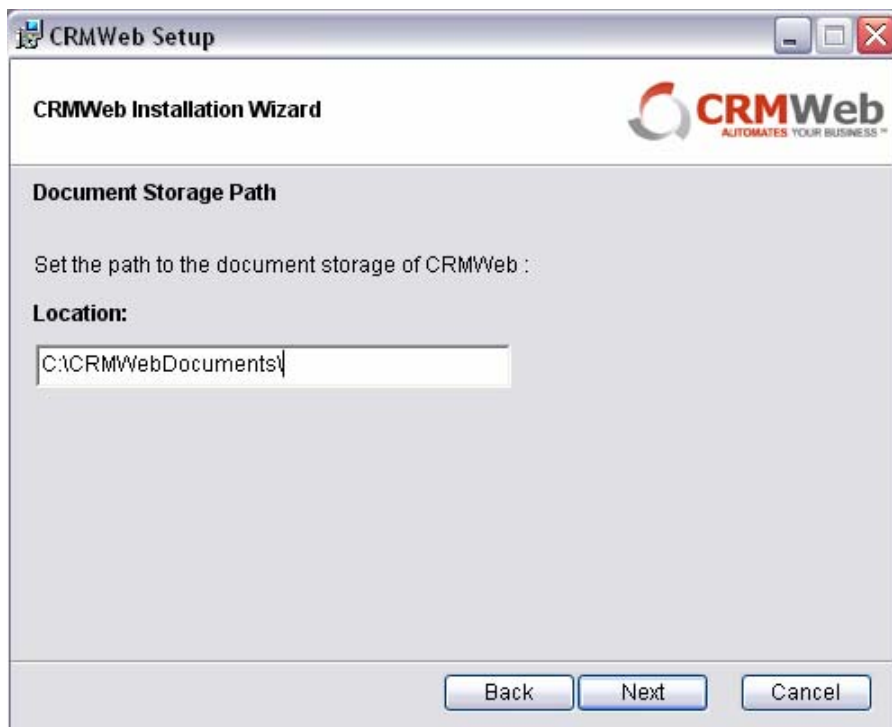
Password: Confirm:

Back Next Cancel

10. Set the CRMWeb database connection information for runtime.



11. Set the language for CRMWeb.



12. Set the folder where CRMWeb should save the uploaded documents.

Note: you have to make sure that CRMWeb will have the necessary rights to write into this folder. (See the chapter "Documents store" in "Configuration".)



13. Choose *"Install"*.

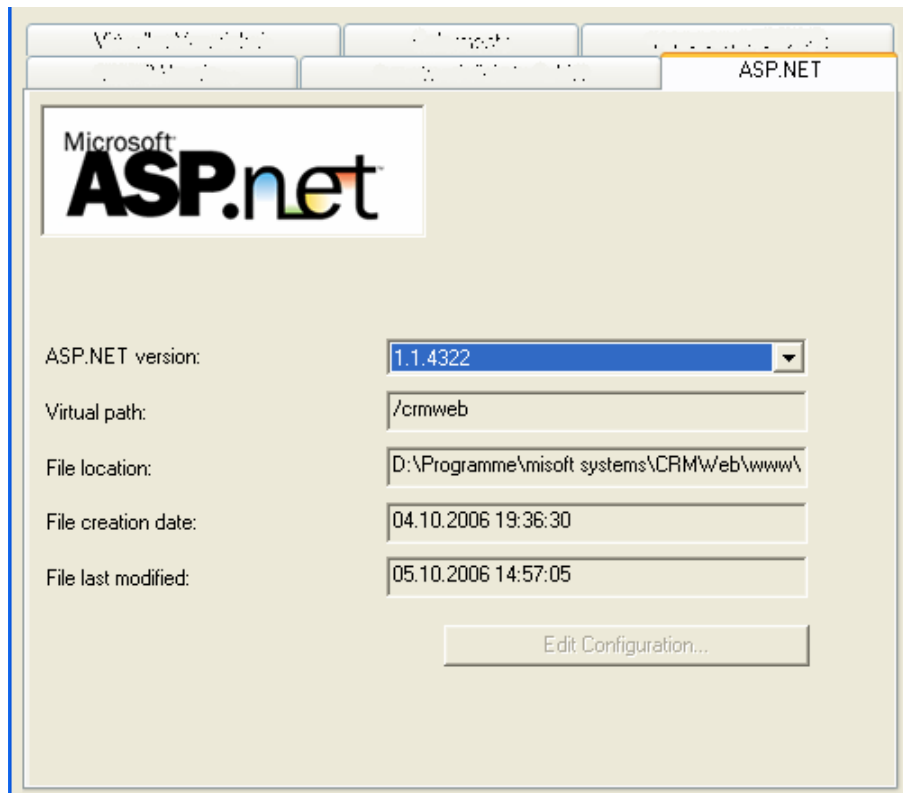


14. After the installation is completed, choose *"Finish"*. Now you can start a browser and open CRMWeb going to <http://localhost/crmweb>.

Trouble shooting CRMWeb with ASP.NET 2.0

In case you have .NET Framework 2.0 installed on your computer the newly created web virtual directory in IIS will have as default setting the ASP.NET 2.0 version. In this situation the CRMWeb will not work because it requires .NET 1.1.

To fix this problem go to Control Panel and open the Administrative Tools. From there go to Internet Information Services, open the Default Web Site and with right mouse click on the crmweb virtual directory open the Properties page. Open the ASP.NET tab and set the version 1.1.4322 for ASP.NET. To persist the settings please click on Ok button. Now CRMWeb should work without any problems.



Configuration

CRMWeb Application Configuration

After you have completed the installation and finished the configuration of web.config you can access CRMWeb using one of the internet browsers you have installed on your computer going to the <http://localhost/crmweb> (depending on how you named the application during the installation).

Log in as CRMWeb Administrator

To logon for the first time you should use the user name **admin** with the password **admin**.

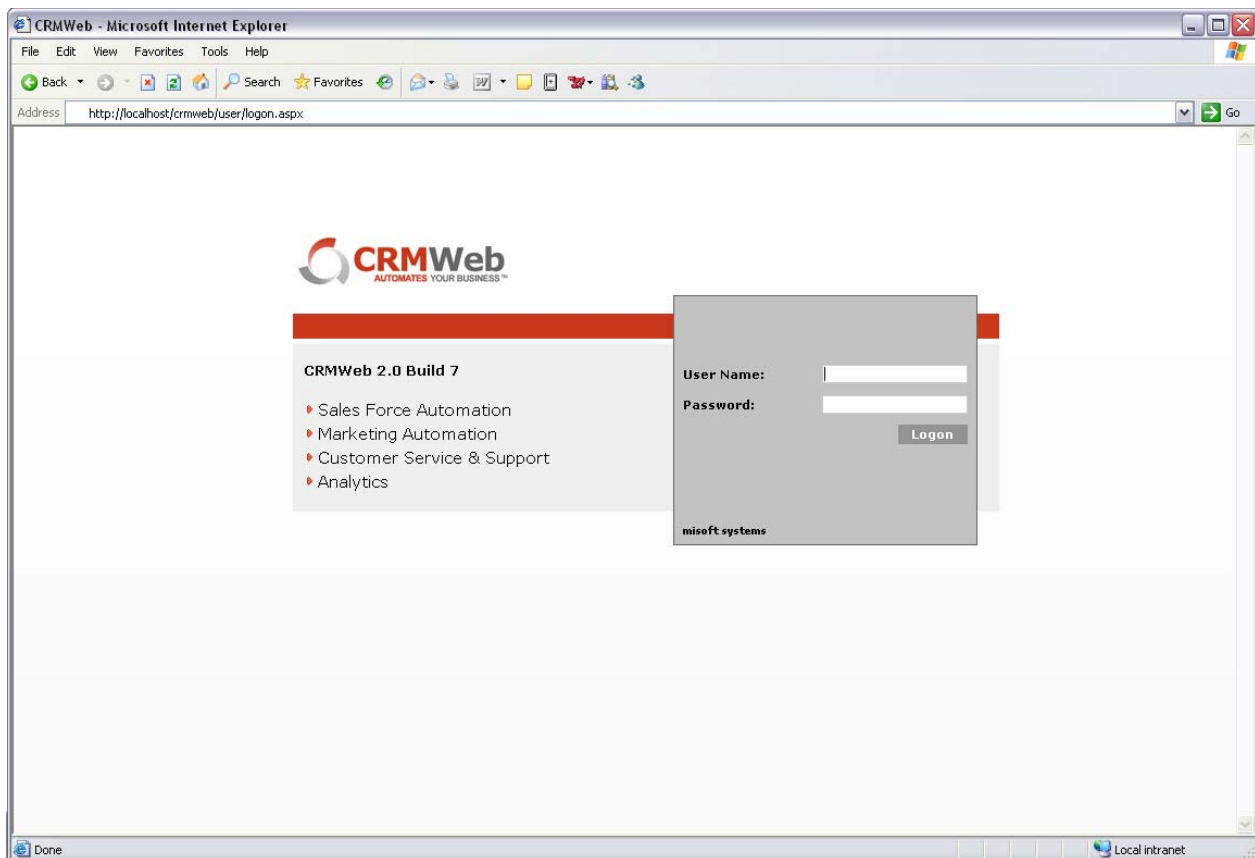


Figure 1 – Logon page

Note: we strongly recommend after the first logon that you change the password of the admin user!

Note: additionally you should set the SMTP configurations. When you create a new user, he will receive the logon information by email. Therefore the SMTP settings for the admin user should be correctly configured. (go to **Setup** -> **Users** -> edit admin user and set the SMTP connection information)

Now you can create new users for each employee who will use the application. For that click on the **Setup** link and then on the **Users** link in the left menu.

Above the users list there is the **New User** button. Click on it in order to create a new user.

Figure 2 – Create user form

Note: we strongly recommend that you do not use the role *Administrator* for all users. You can choose between one of the predefined roles or create new ones with according permissions.

By default the “*Generate new password and notify user.*” option is checked. That means, the new created user will receive a notification email with the password to access the application.

Configure web.config (Expert mode)

The web.config file is located in the www folder within your CRMWeb installation folder. (by default this is C:\Program Files\misoft systems\CRMWeb\www\web.config)

Database Type

Set the database type:

```
<!-- Database
This represents the database type information. The value can be "MSSQL".
Microsoft SQL Database: "MSSQL"
-->
```

```
<add key="Database" value="MSSQL"/>
```

Database Connection

Set the database connection string. You can use for MS SQL database a connection string like:

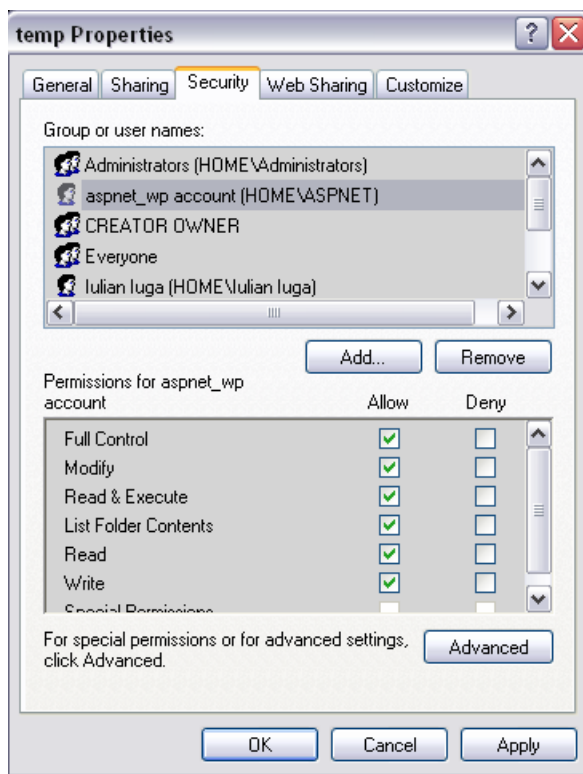
```
<add key="ConnectionString" value='packet size=4096;user  
id=sa;password=sa;data source=".";persist security info=True;initial  
catalog=msCRMDB' />
```

Documents store

Set the folder where the documents should be saved:

```
<add key="DocumentsStore" value="C:\CRMWebDocuments\" />
```

You have to set full control on this folder for the user in whose context the web application is running (default is ASPNET user).



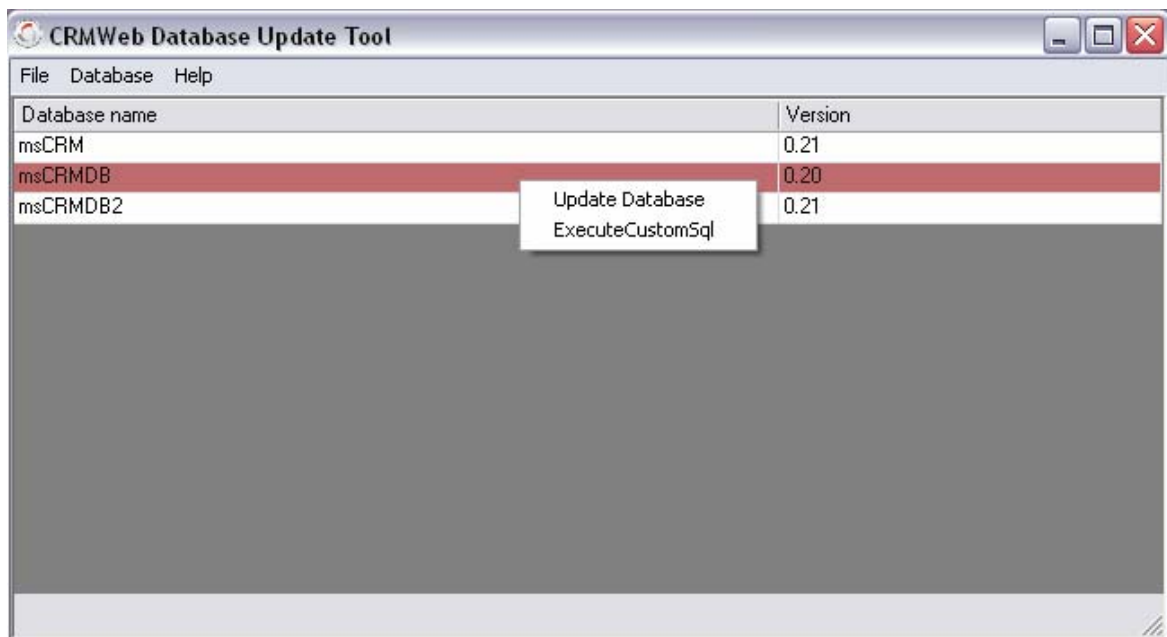
Database Update

Update existing CRMWeb databases

1. Start the “CRMWeb Database Update” application from the Program Files menu.



2. Log on to your database server.



3. Select the database you want to update from the list and right-click on it. Choose “Update Database” from the context menu.

Execute custom SQL commands on a CRMWeb database

Follow the same steps as described below and choose “Execute Custom Sql” from the context menu.