# CRMWeb 2.5
## Setup and Configuration

Version 1.0

**CRMWeb**
BUSINESS SOLUTIONS

**Table of contents**

## CRMWeb Installation Guide

### Purpose

This document describes how to install and configure CRMWeb 2.5.

### System requirements

Server requirements:
- Microsoft Windows 2000 / Microsoft Windows XP Professional / Microsoft Windows 2003 / Microsoft Windows Vista Business (or greater)
- Microsoft Internet Information Services (IIS) server 5.0, 6.0 or 7.0
- 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) or Microsoft SQL Server 2005 Express Edition

## Installing CRMWeb

The following procedure describes how to install CRMWeb.

### Prerequisites

- Local administrator rights under Windows 2000, 2003 XP Professional or Vista.

### 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-2.5.en-US.msi.
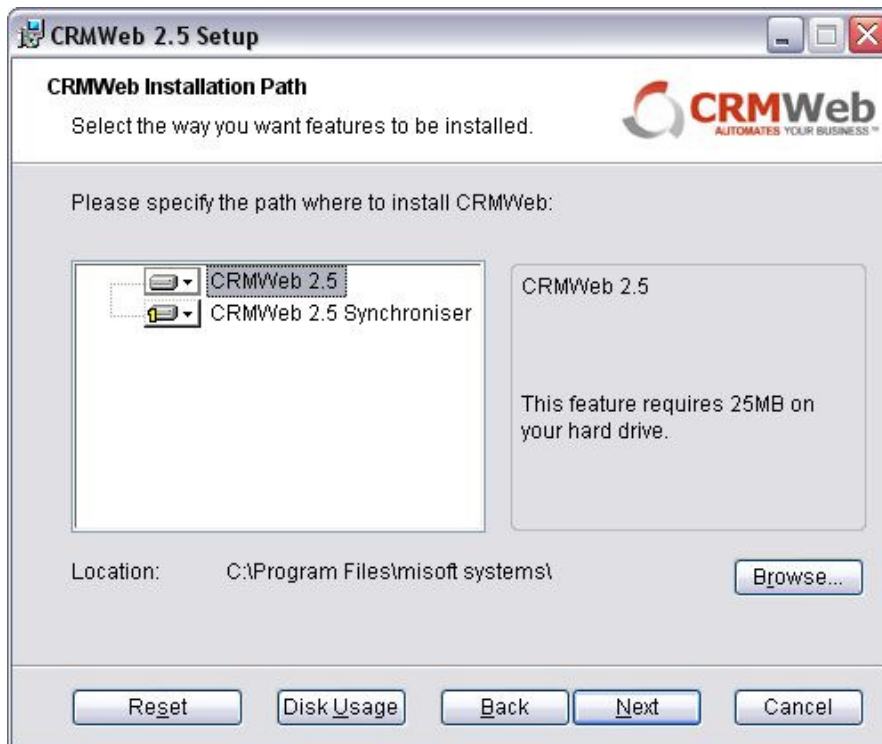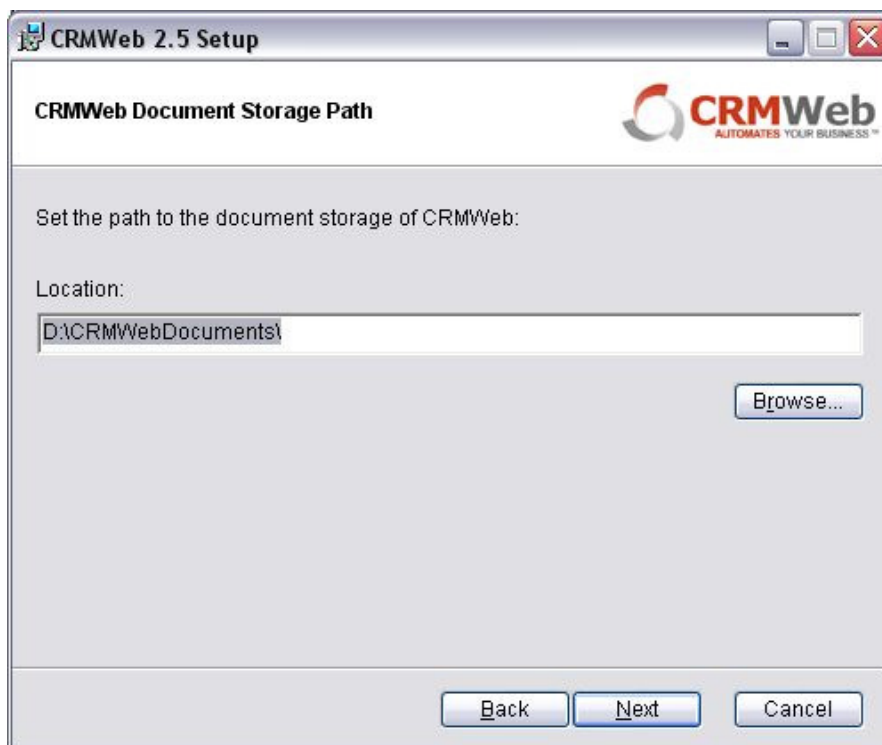3. The setup wizard starts.



4. Choose *"Next"*.

5. Choose *"Next"*.



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

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



8. 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".)

9. Select the name of the virtual directory where CRMWeb should be installed, the authentication type, and the language of the application 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)



10. 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.

**Note:** in Windows Vista, if you want to create a new database using Windows authentication and User Account Control is enabled in your system, you should launch the setup.exe program with option "run as administrator".



11. Set the CRMWeb database connection information for runtime.

**Note:** if you want to use Windows authentication to access the database you have to make sure that CRMWeb will have the necessary rights. (See the chapter "Configure SQL Server security" in "Configuration".)
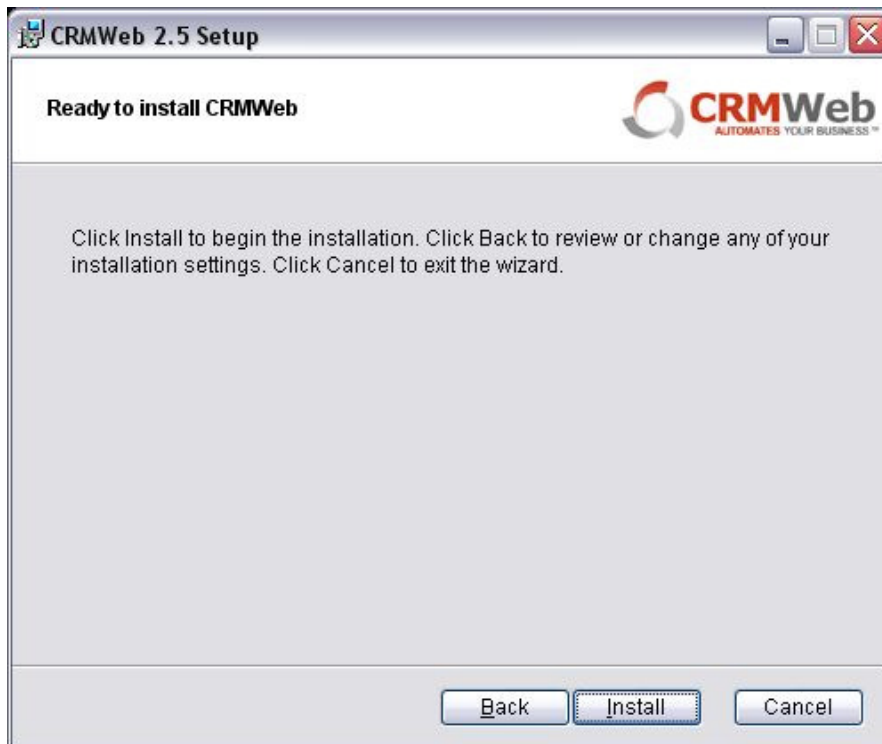
12. Choose *"Install"*.
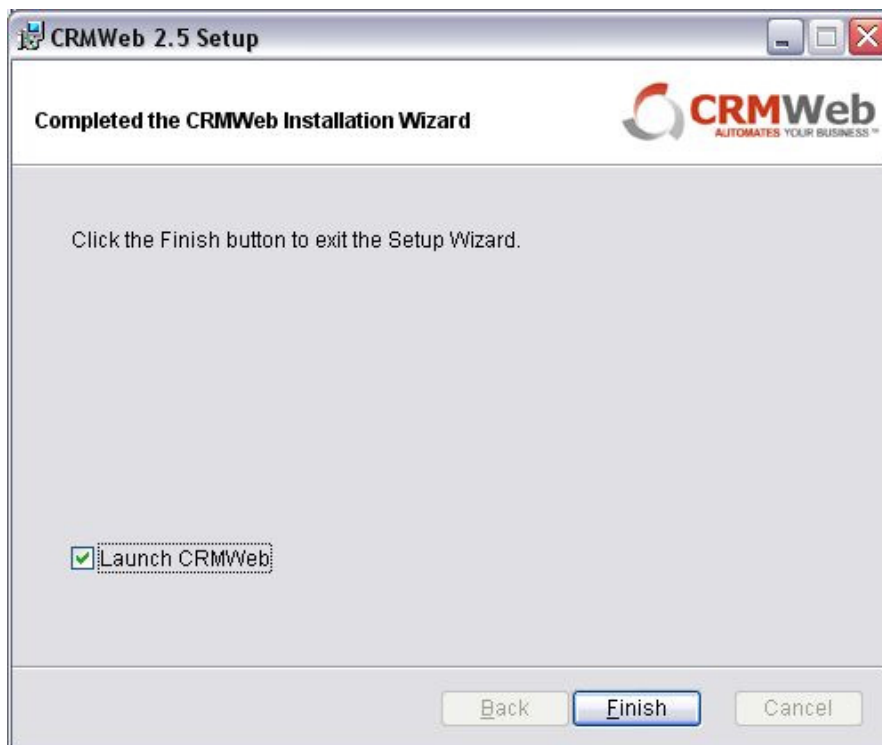


13. After the installation is completed, choose *"Finish"*. You can choose to open CRMWeb for the first time.

**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.
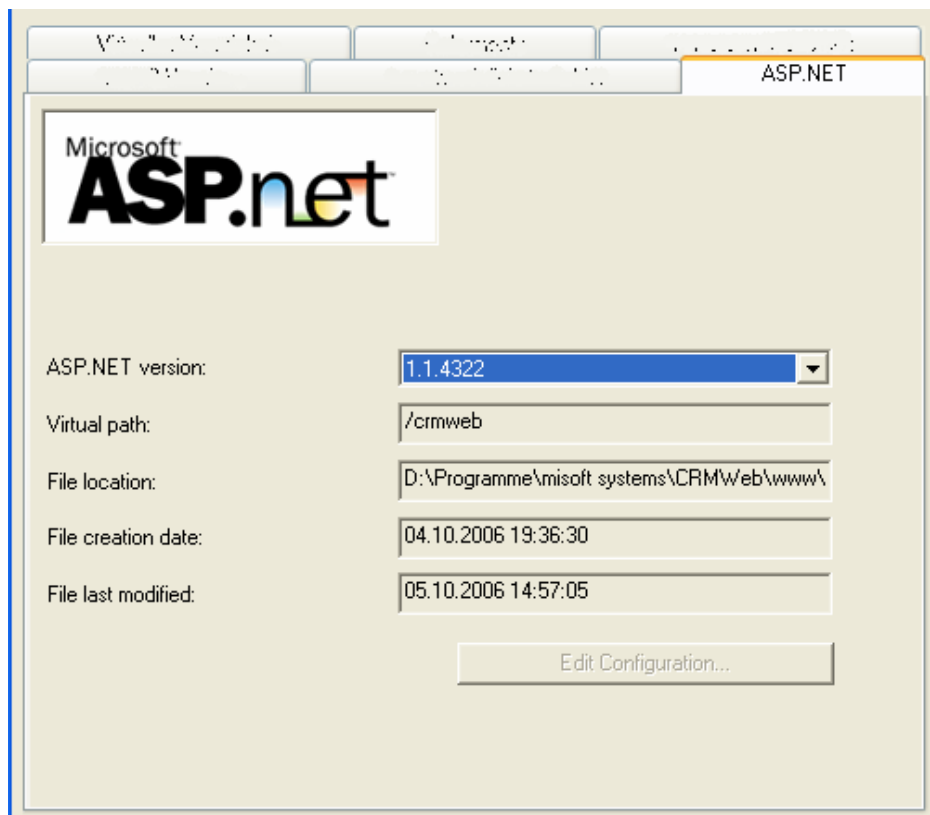
## Uninstalling CRMWeb

The following procedure describes how to uninstall CRMWeb.

### Prerequisites

- Local administrator rights under Windows 2000, 2003 XP Professional or Vista.

### Procedure

1. Close all running applications.
2. Select **Start** menu → **misoft systems** → **CRMWeb 2.5** → **Configure CRMWeb 2.5** shortcut or **Add or Remove Programs** → **CRMWeb 2.5** → **Change**.

   Note: For Windows Vista, the shortcut should be run "as administrator".
3. The uninstall wizard starts.



4. Choose *"Next"*.
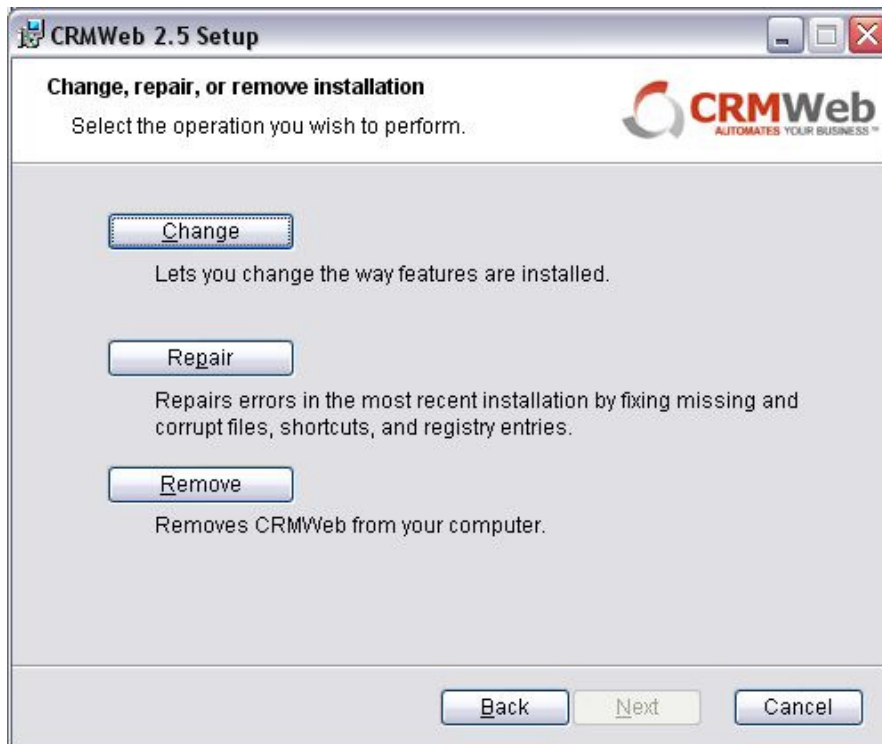
5. Choose *"Remove"*.



6. You can choose to remove the existing CRMWeb database or not.

7. Choose *"Remove".*



8. Choose *"Finish".*

## Configuration

**Configure SQL Server security**

Create a new login:

1. General:

## 2. Server Roles:

**Login - New**

Select a page
- General
- Server Roles
- User Mapping
- Securables
- Status

Script ▾  Help

Server role is used to grant server-wide security privileges to a user.

Server roles:
- ☐ bulkadmin
- ☐ dbcreator
- ☐ diskadmin
- ☐ processadmin
- ☐ securityadmin
- ☐ serveradmin
- ☐ setupadmin
- ☑ sysadmin

Connection

Server:
.\SQLEXPRESS

Connection:
sa
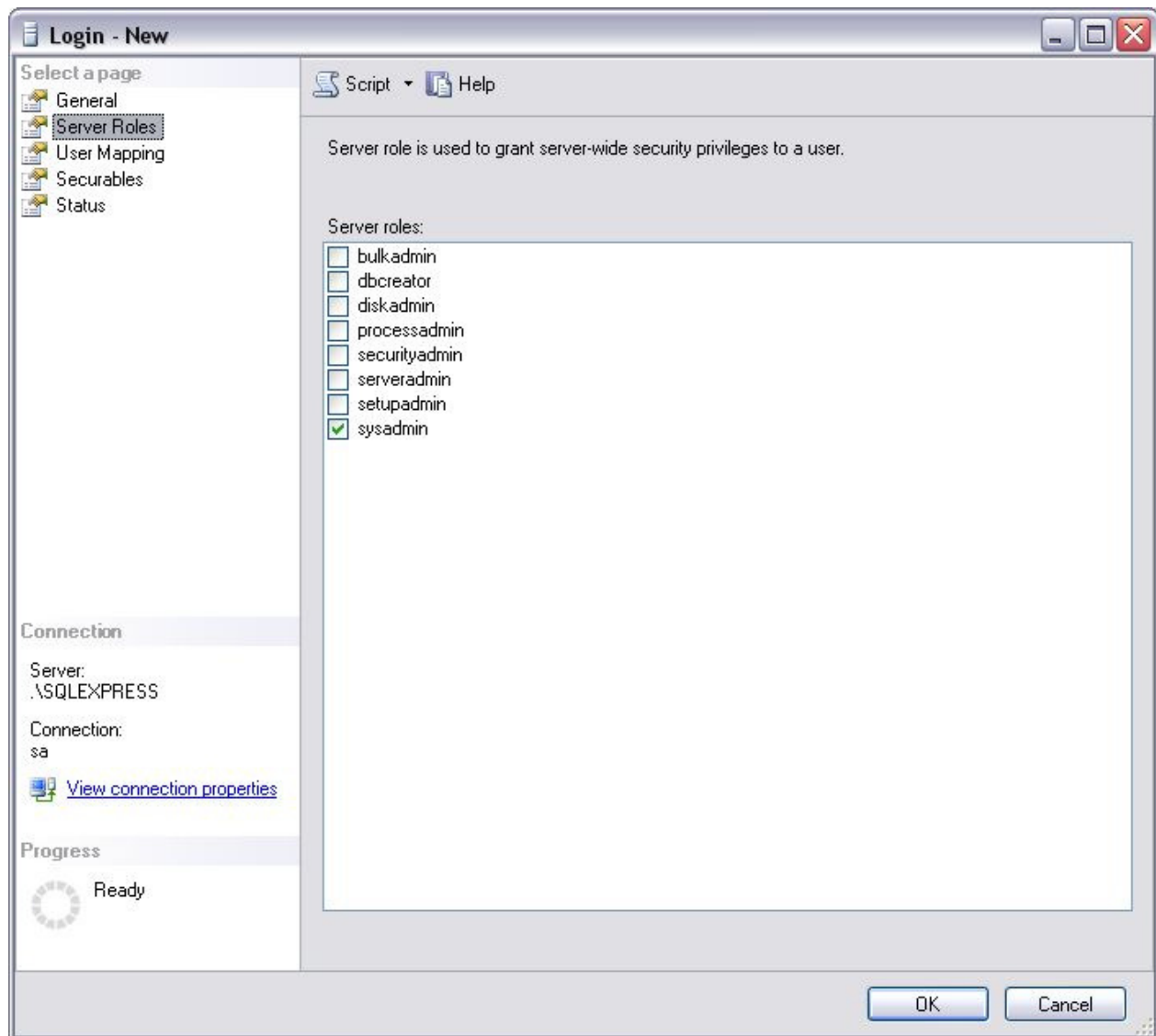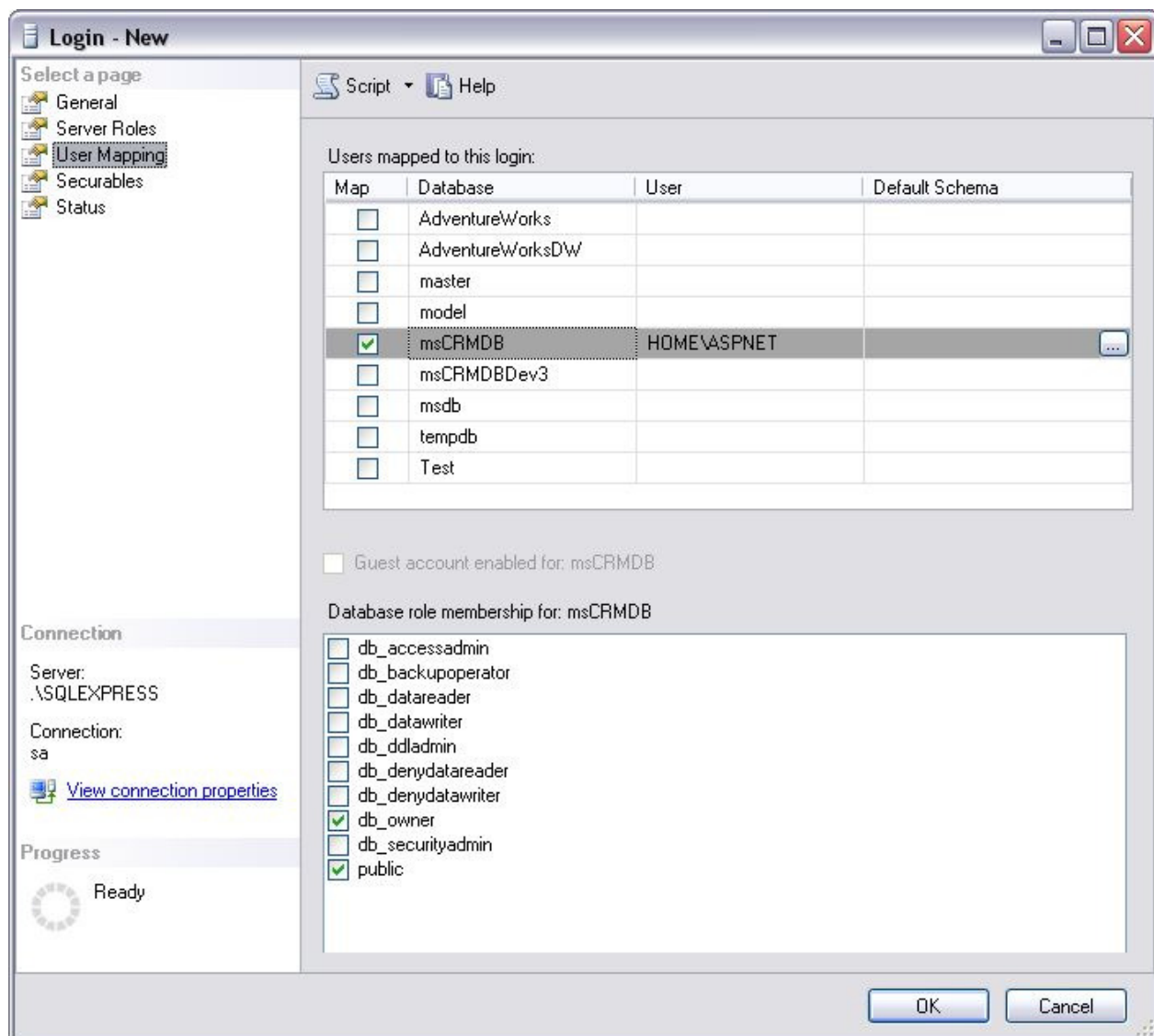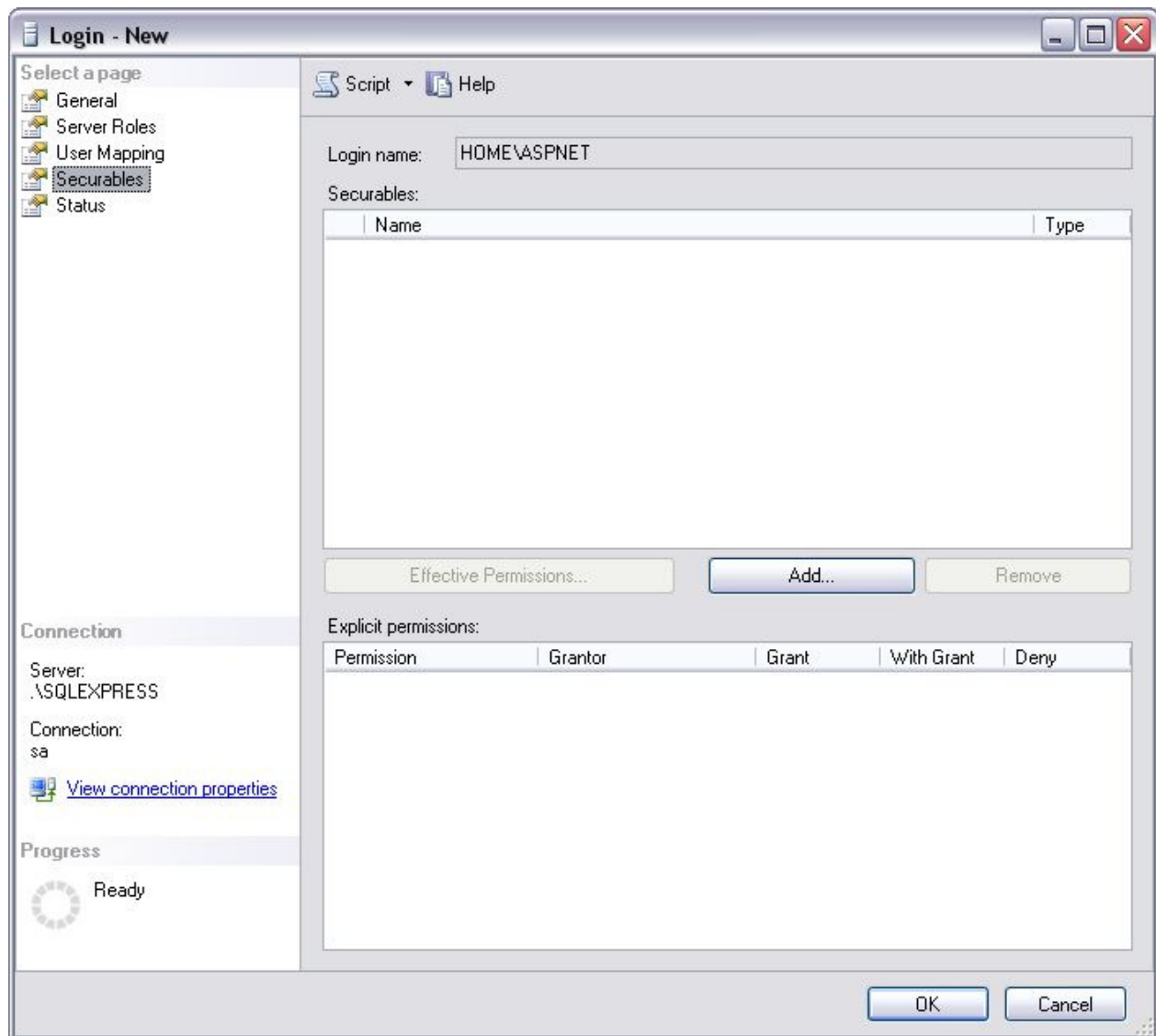
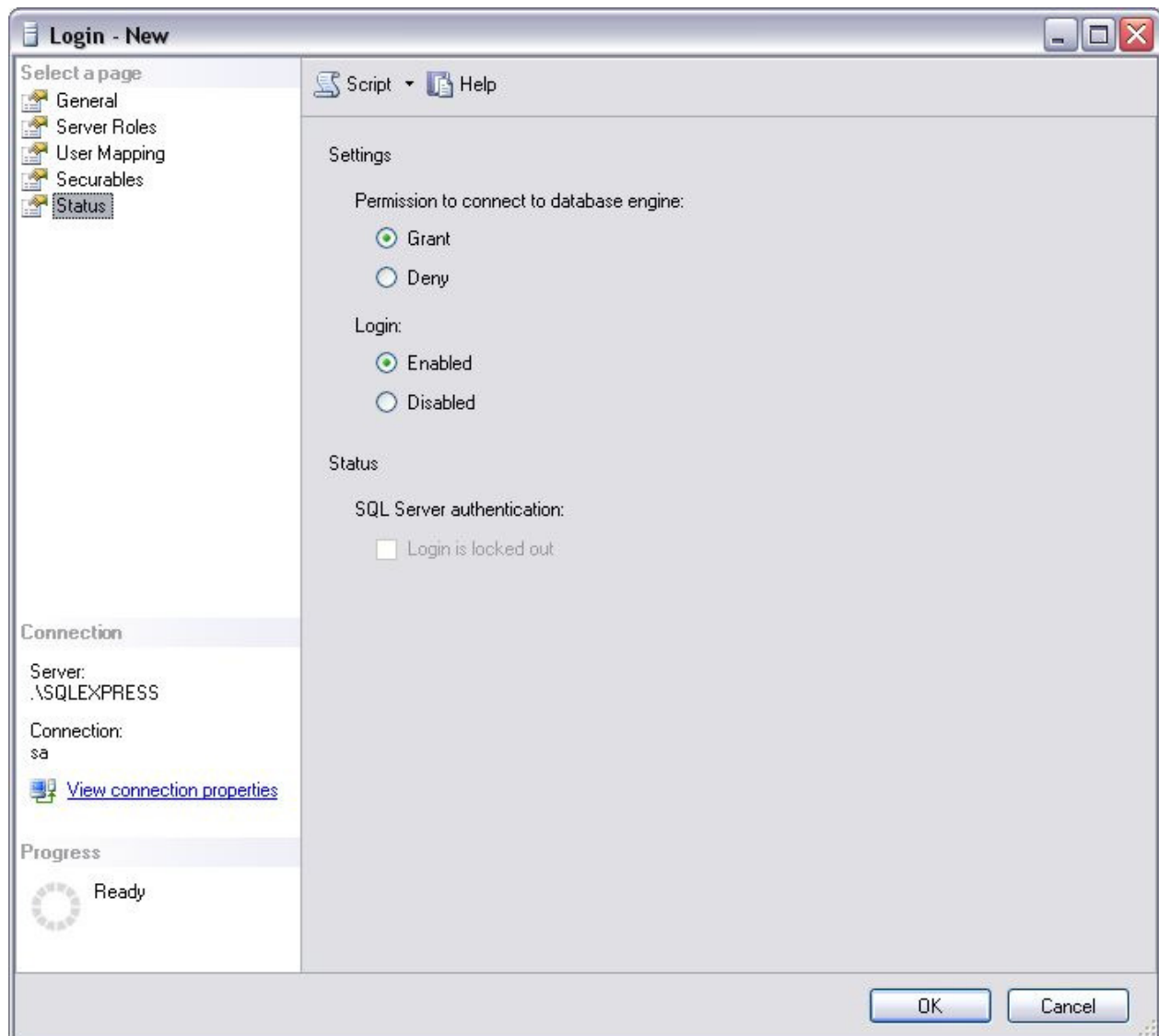View connection properties

Progress

Ready

OK    Cancel

3. User Mapping:

4. Securables:

5. Status:

## 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**.
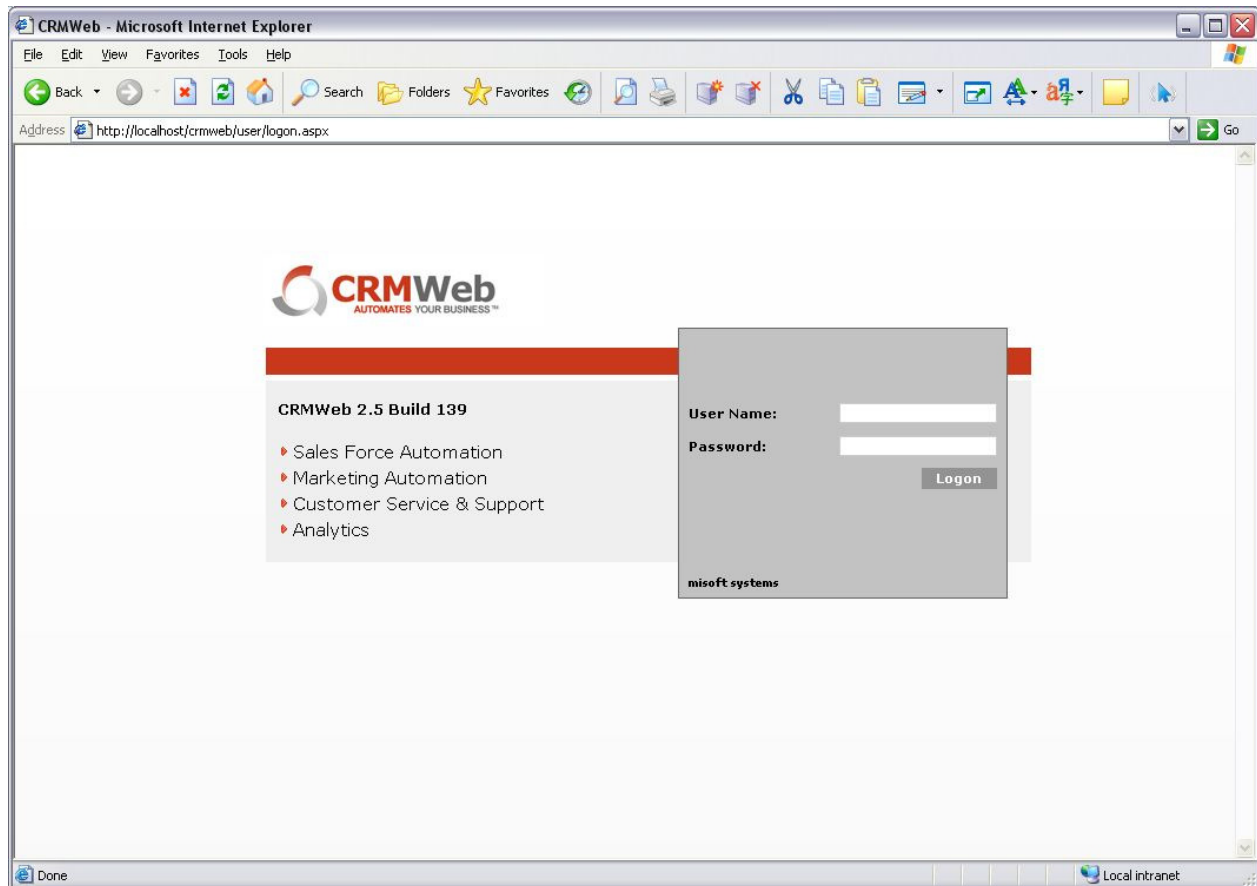


Figure 1 – Logon page

**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 2.5\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).
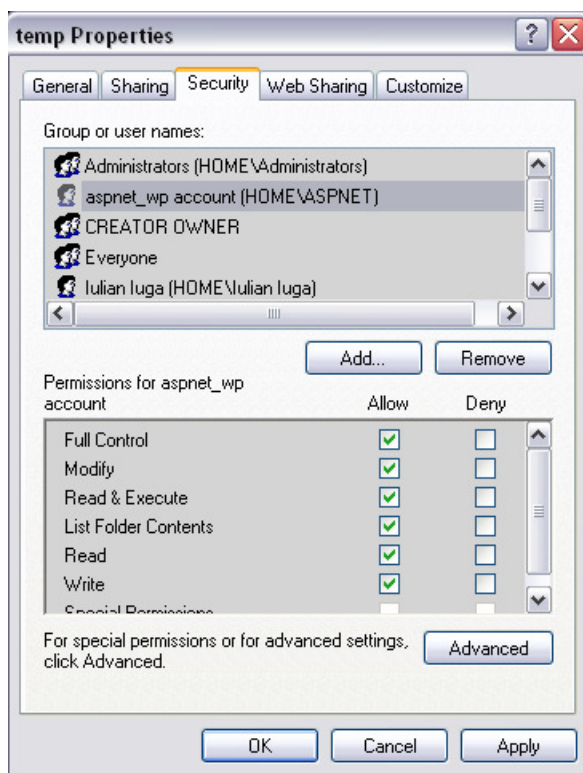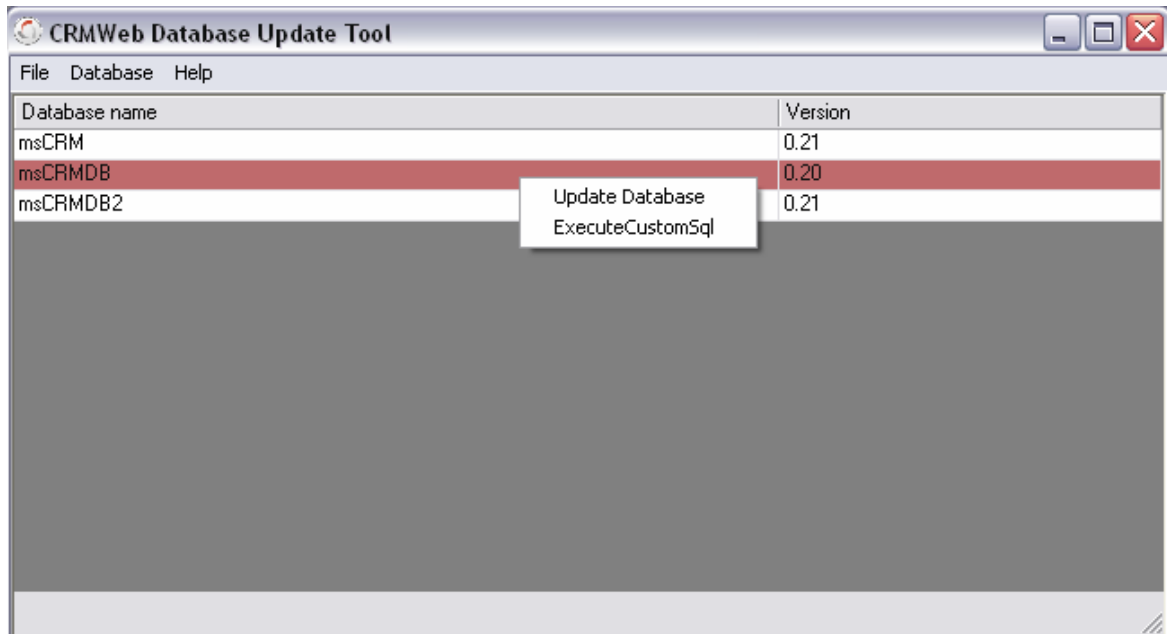
## Database Update

### Update existing CRMWeb databases

1. Start the *"CRMWeb Database Update"* application from the Program Files menu.



2. Logon 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.