



## Account Explorer Installation Guide

Microsoft Dynamics CRM 4.0

CRM Addins  
[www.crmaddins.co.uk](http://www.crmaddins.co.uk)  
[info@crmaddins.co.uk](mailto:info@crmaddins.co.uk)



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## Introduction

### ***Document Overview.***

This document details the steps required to install Account Explorer for Microsoft Dynamics CRM 4.

### ***Version Compatibility.***

CRM Auditor is designed to be run within a Microsoft Dynamics CRM 4 environment and this document assumes that a CRM 4 environment is being used. For details on other version compatibility please email [info@crmaddins.co.uk](mailto:info@crmaddins.co.uk).

Full support of all versions of MSCRM 4 (Workgroup/Professional and Enterprise), both 32 and 64 bit deployments.

CRM Auditor can be installed in both On Premise and Hosted environments, in a hosted environment you may need assistance from your provider to carry out the installation.

## Account Explorer for Microsoft Dynamics CRM 4.0

Account Explorer is an integrated Addin module that allows you to show Account with all related elements in one view.

- You can select fields which you want to show for Account, Contact, Opportunity, Case
- You can select only Inactive Accounts, Inactive Contacts
- You can make visible only the elements that you're the owner
- You can expand/collapse elements which have sub-elements
- Easy to use
- You can print results



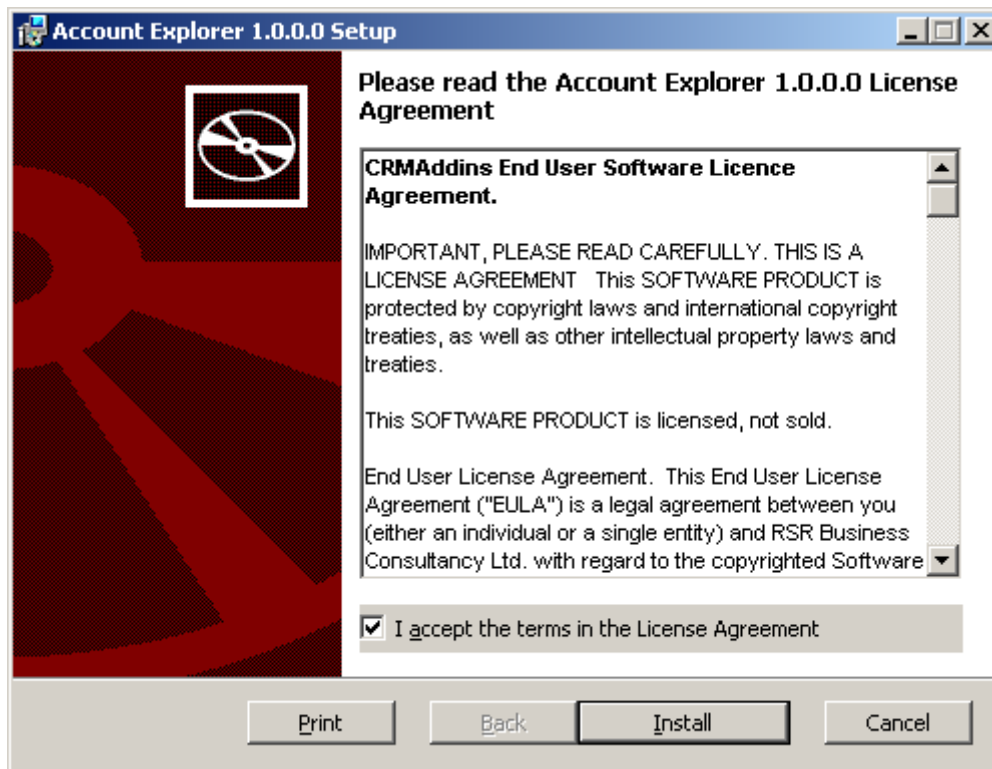
## Installing Account Explorer

### *Pre-requisites.*

- Installation is carried out on the CRM server.
- The installation is run from the server console.
- The installing user must be the CRM system administrator.
- Installation is carried out by running the Account Explorer “MSI” installation file.
- Users must not be using the CRM application during the installation, which can take up to 30 minutes depending upon the exact CRM installation environment.
- Install Silverlight downloadable from the Microsoft web site
- Install .Net Framework 4 downloadable from the Microsoft web site

### Installation steps.

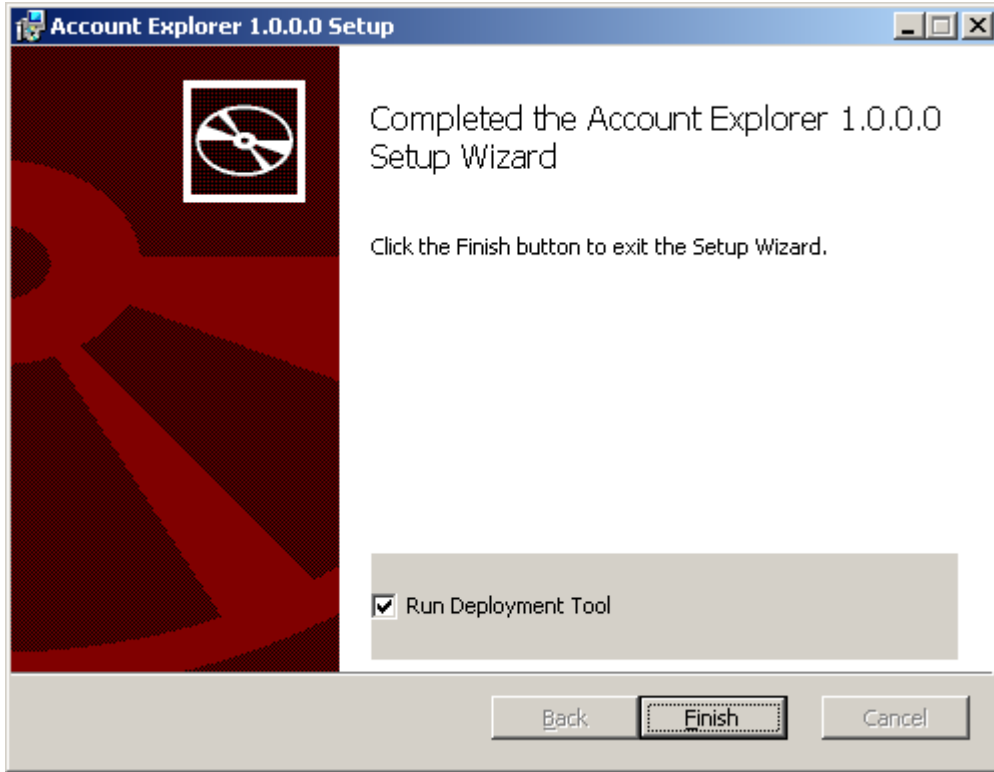
1. Save the Self extracting file to an appropriate folder on the MSCRM server, this can be on the desk top or in the My Documents area and extract the installation files. Before you do this please ensure that you have taken security backups of your CRM system and databases as a security precaution.
2. Double click on the Account Explorer MSI file or select run from the start menu and enter the path name for the MSI file. You will see the following screen, where you will then be presented with the license agreement. If you do not accept the licence agreement, select cancel to cancel the installation. If you accept the license agreement, select the tick box and click on the Install button to continue and the installation will proceed.



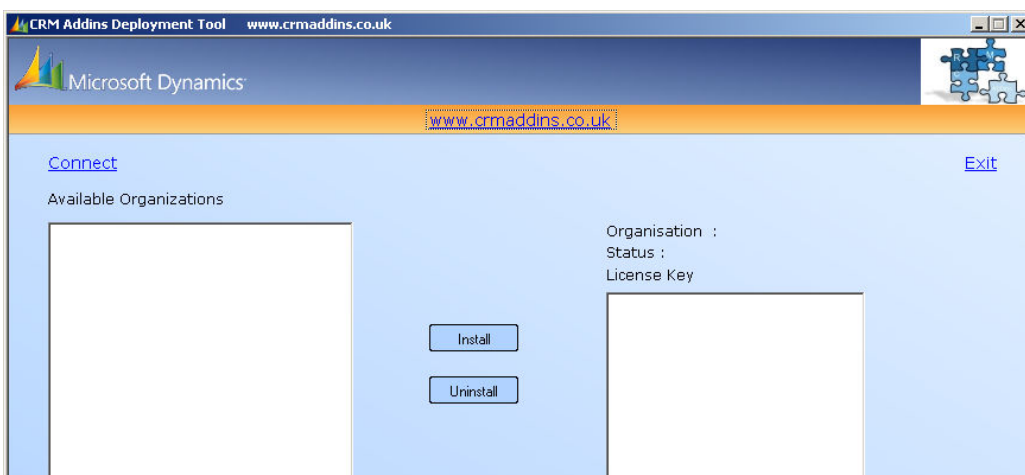


3. When the installation has completed you will be presented with a screen that will allow you to activate Account Explorer by selecting your CRM organisation and entering your license key.

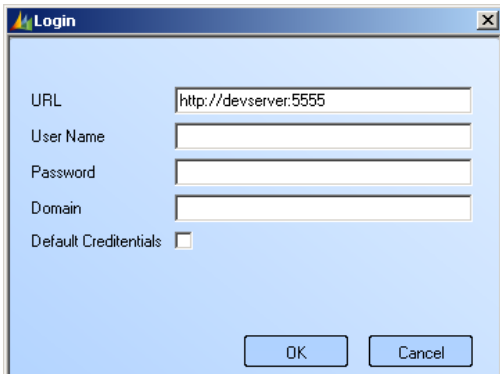
Select Finish running the deployment tool to activate Account Explorer.



4. The deployment tool screen allows you to select the CRM organisation (or should this be that you choose) and enter your license key to active Account Explorer.

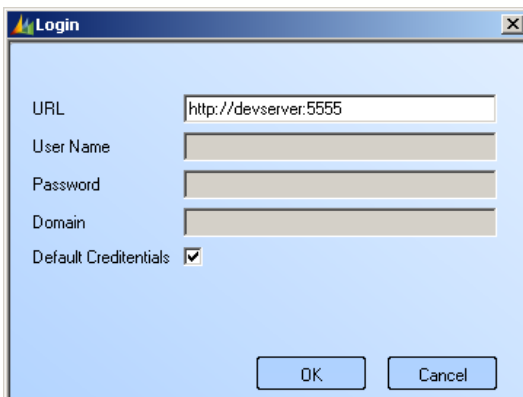


5. Select the connect option to connect to the CRM server.



The image shows a 'Login' dialog box with a blue header and a close button (X) in the top right corner. It contains four text input fields: 'URL' (with 'http://devserver:5555' entered), 'User Name', 'Password', and 'Domain'. Below these fields is a checkbox labeled 'Default Credentials' which is currently unchecked. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

6. If you are logged on as the user that installed CRM Select the tick box to use the default user id and password to access the CRM system. Otherwise enter the username, password and domain details and select OK.



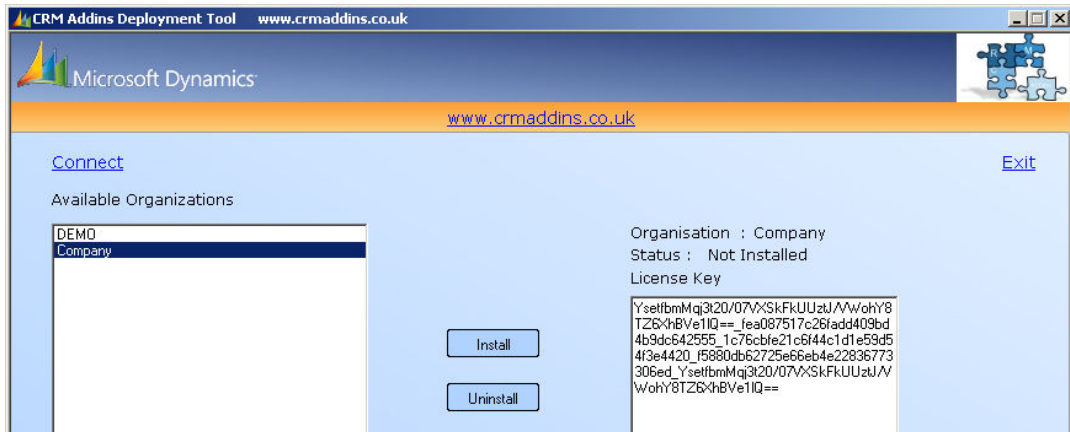
This image shows the same 'Login' dialog box as above, but the 'Default Credentials' checkbox is now checked. The 'User Name', 'Password', and 'Domain' fields are now greyed out, indicating they are disabled when the default credentials option is selected.

7. You will see the available organisation that Account Explorer installed, select your organisation and copy and paste the license key that you will have been sent by email into the license key area. The organisation and status fields will automatically be updated.



The image shows the main window of the 'CRM Addins Deployment Tool'. The title bar reads 'CRM Addins Deployment Tool www.crmaddins.co.uk'. The window has a blue header with the Microsoft Dynamics logo and the URL 'www.crmaddins.co.uk'. Below the header, there is a 'Connect' button on the left and an 'Exit' button on the right. The main area is divided into two sections. On the left, under 'Available Organizations', there is a list box containing 'DEMO Company'. Below this list are 'Install' and 'Uninstall' buttons. On the right, there are labels for 'Organisation :', 'Status :', and 'License Key', followed by a large empty text area for entering the license key.

8. Select install to validate and Activate Account Explorer, this take a moment or two to complete, once the installation have completed select OK to continue.



9. When the installation has completed you will be presented with a confirmation box, click OK to continue.
10. **The status will be updated to installed and you can exit the deployment tool by selecting Exit in the top right of the deployment tool screen.**





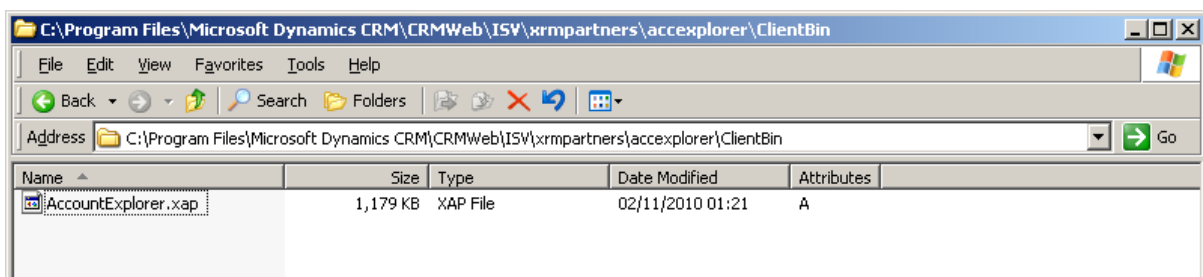
## Additional Installation Steps

Configure the Account Explorer web services.

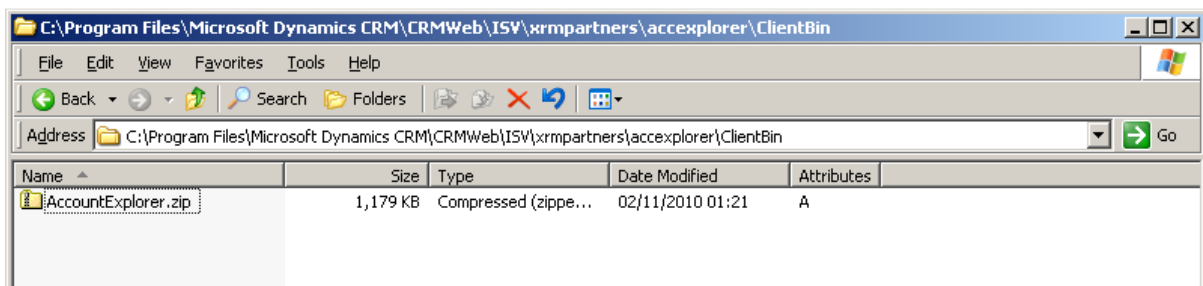
To change company name and web service path go to CRM\ISV\xrmpartners\accesplorer solution directory.

Navigate to the web folder where CRM is installed, this will depend upon your actual installation.

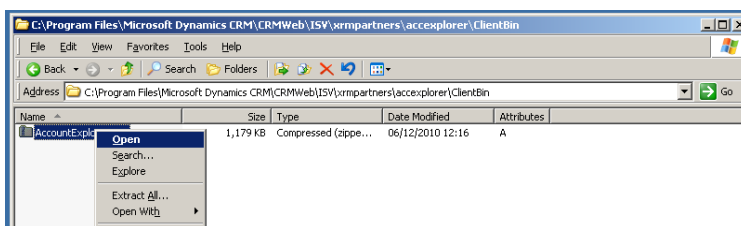
For example C:\Program Files\Microsoft Dynamics CRM\CRMWeb\ISV\xrmpartners\accesplorer\ClientBin

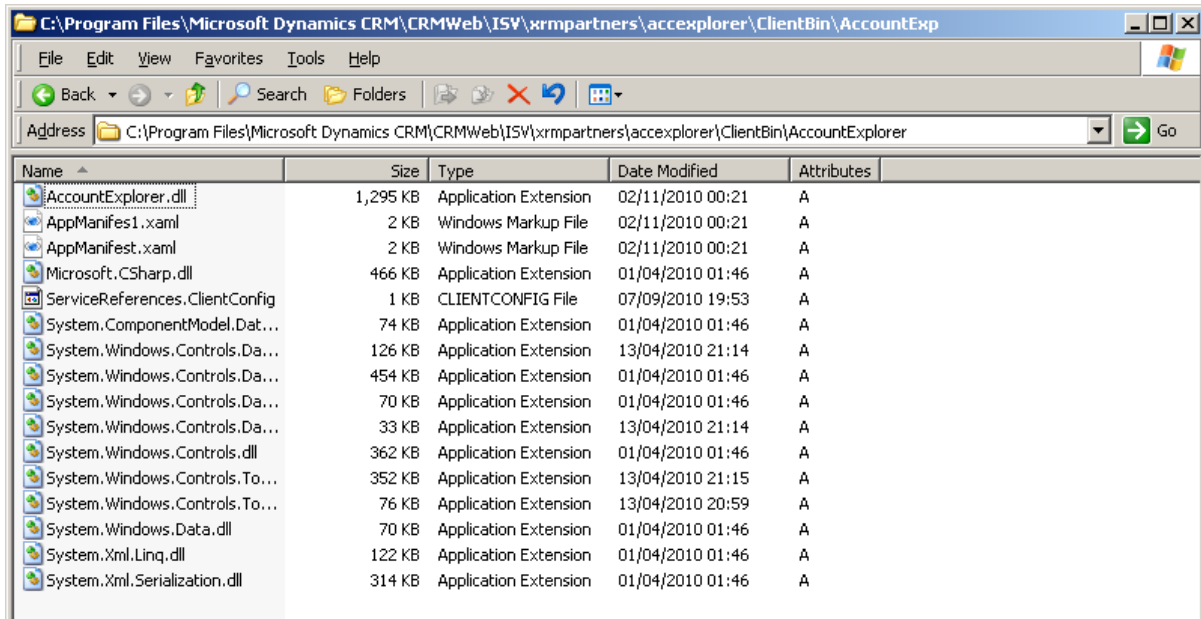


Change .xap extension to .zip in Client Bin folder.

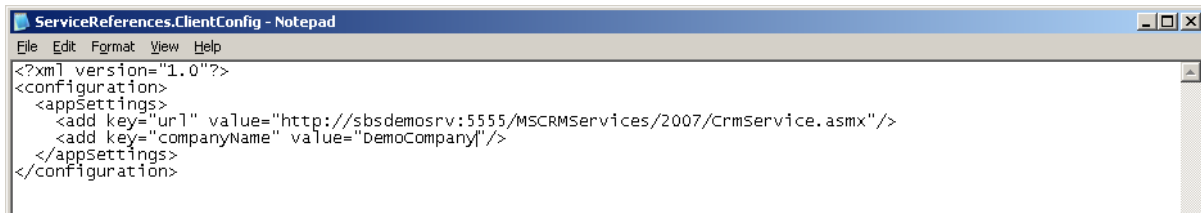


Open the AccountExplorer.zip file, do not unzip the file and then make change.





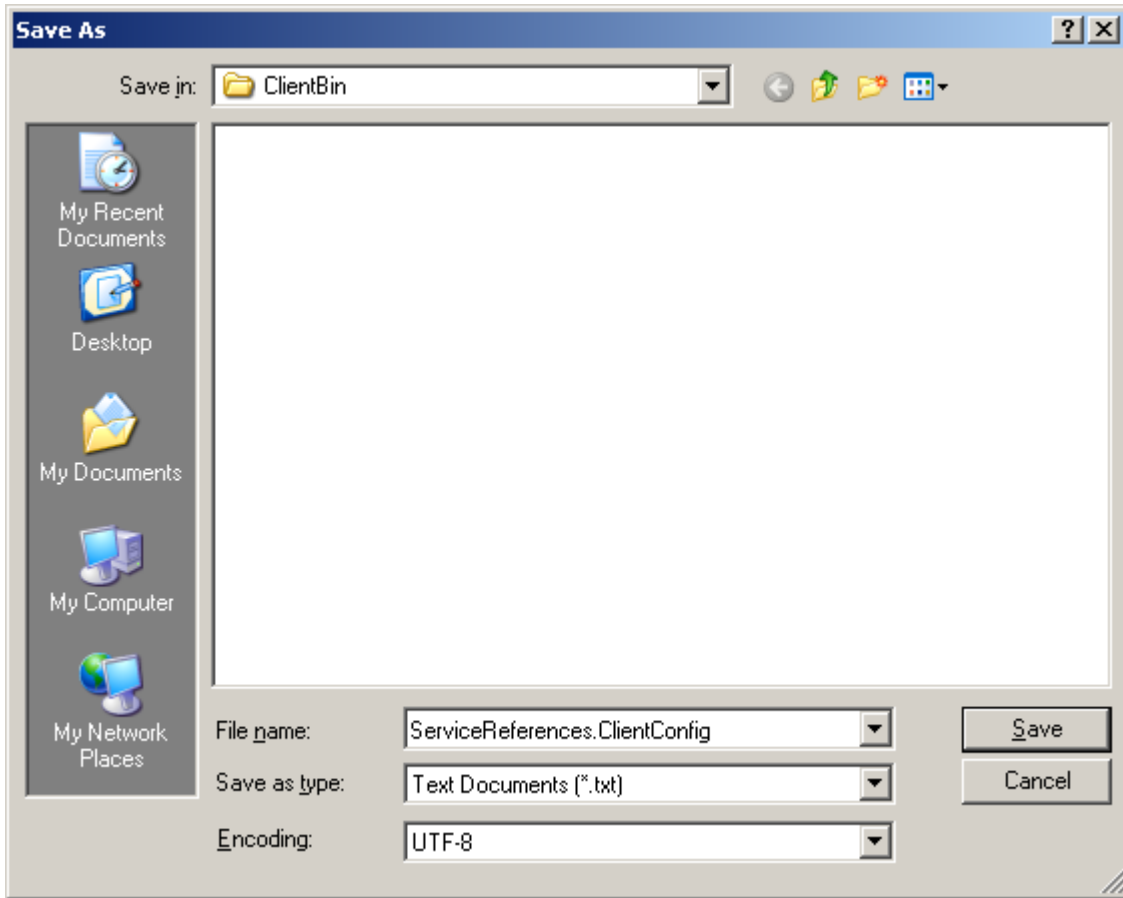
Edit ServiceReference.Config with notepad.



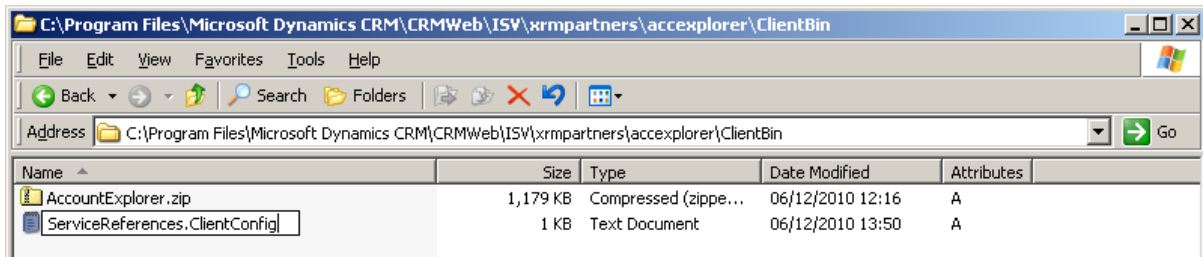
Update the web service URL values to match the URL used in your deployment, for example <http://crmservername/MSCRMServices/2007/CrmService.asmx>

Update CompanyName value to be the name used in your CRM deployment

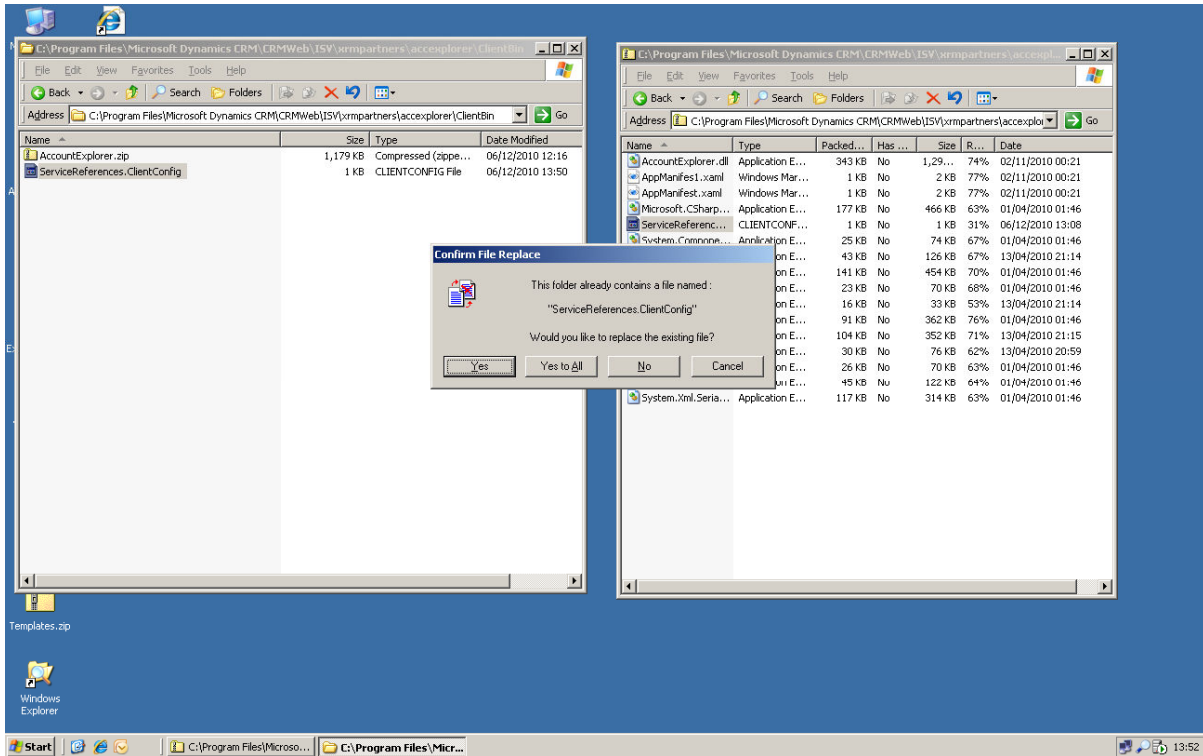
Save the updated file in the ClientBin directory, making sure that the file does not have a .txt file extension



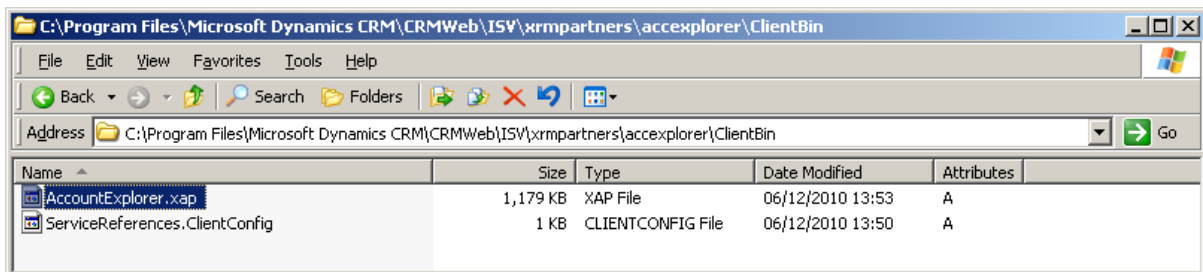
Navigate back up to the ClientBin folder, remove the .txt file extension and drag the updated file into the open zip file.



Select yes to replace when prompted to do so.



Close the zip file and rename it back to .xap.





## ***Download and Install Silverlight.***

Download Silverlight from the Microsoft web site.

<http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx>

Once downloaded run the installation process.

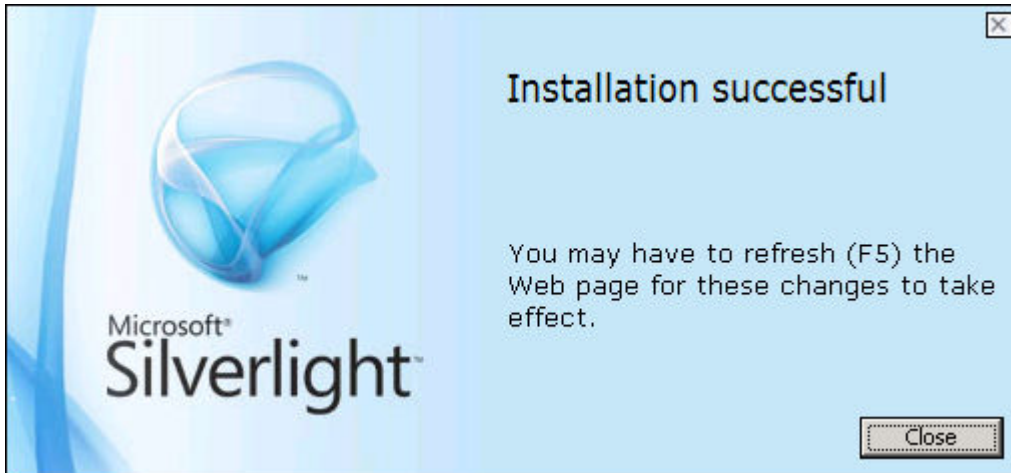


Select install now to start the installation.

The silverlight will give a series of progress updates.



When Silverlight has completed installing you will see the following screen.



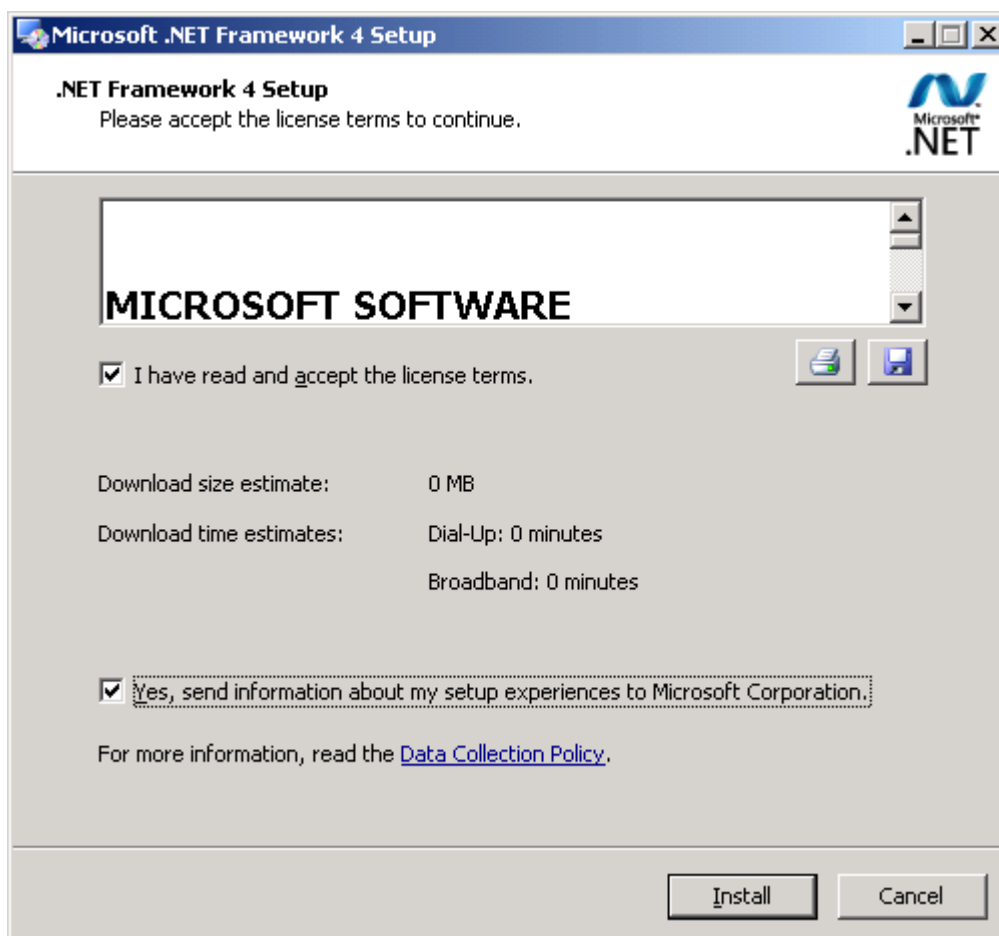


## **Download and Install .Net 4 Framework.**

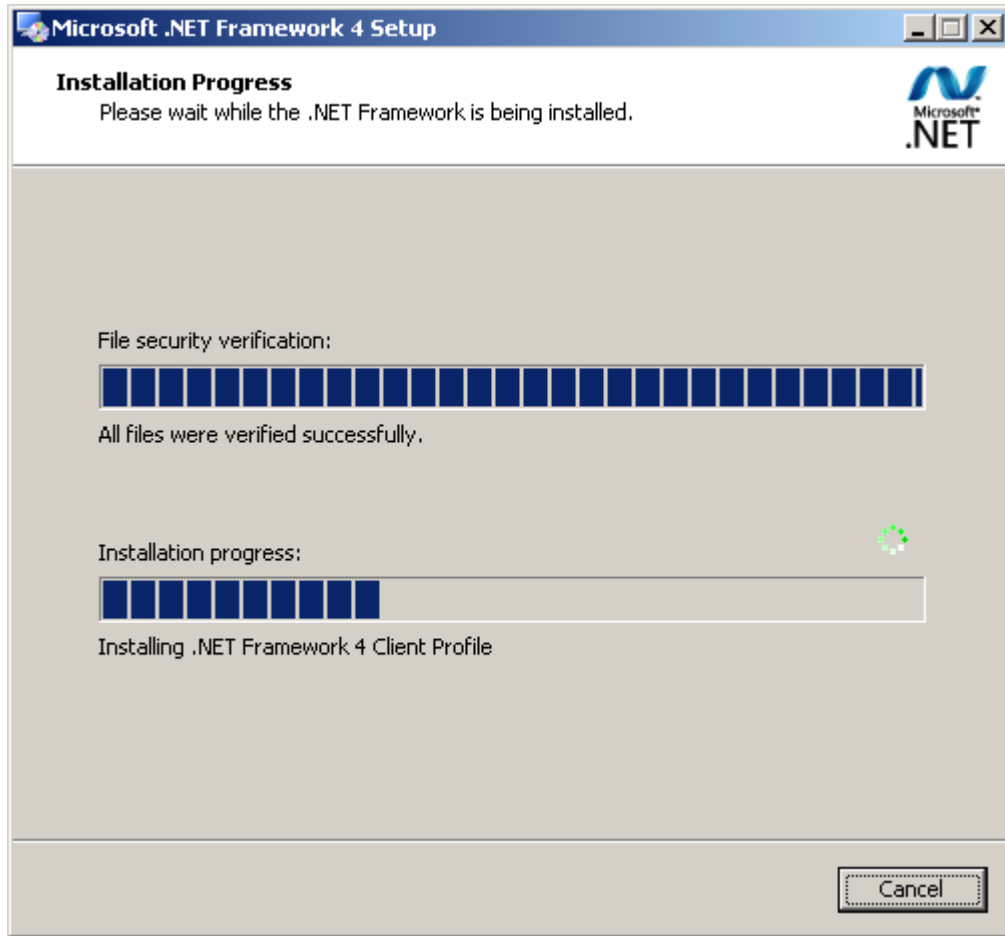
Download .Net 4 Framework from the Microsoft web site.

<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=9cfb2d51-5ff4-4491-b0e5-b386f32c0992&displaylang=en>

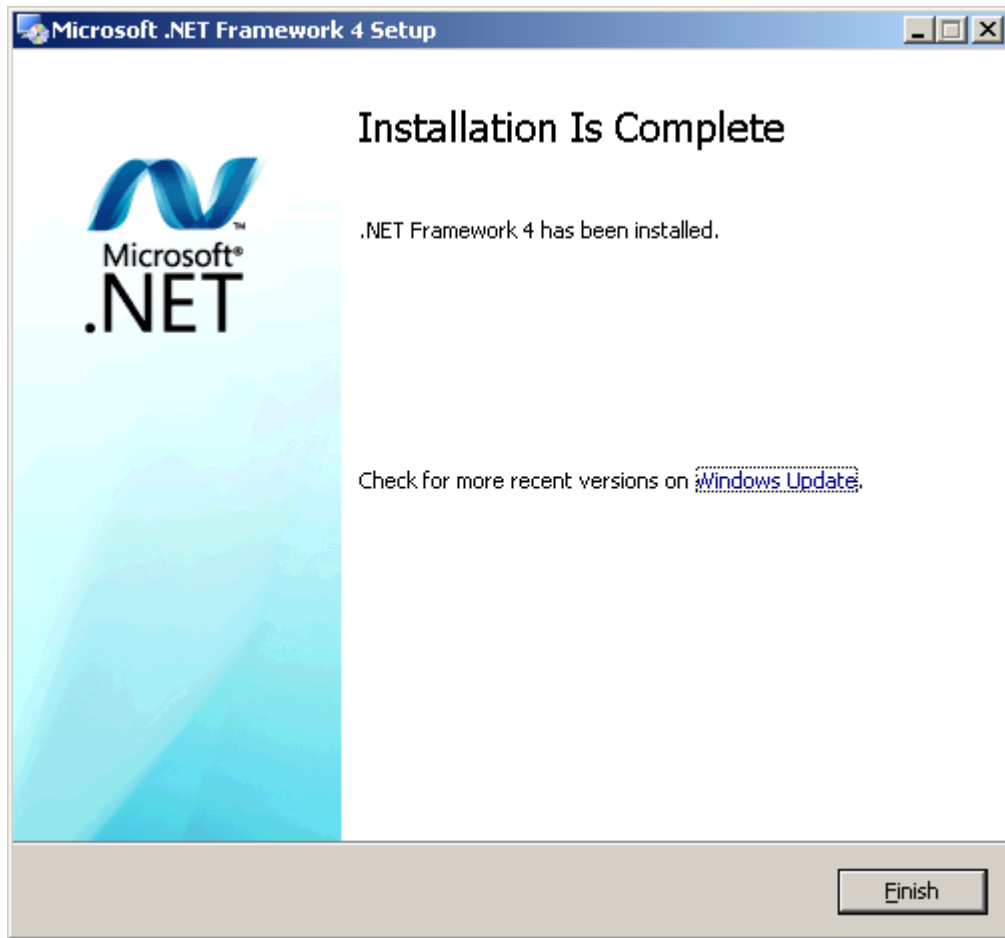
Once downloaded run the installation process.



Select the options to allow the installation to proceed. The installation progress will be displayed.



When the installation completes select Finish





## **Configure .Net 4 Framework.**

Start the command prompt, MS Dos window.

Navigate to C:\Windows\Microsoft.NET\Framework\v4.0.30319

Run the following command to register .Net 4.

```
aspnet_regiis.exe -i
```

```
ca Command Prompt - aspnet_regiis.exe -i
Microsoft Windows [Version 5.2.3790]
(C) Copyright 1985-2003 Microsoft Corp.

C:\Documents and Settings\Administrator>cd c:\windows\microsoft.net\framework\v4
.0.30319

C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319>aspnet_regiis.exe -i
Start installing ASP.NET (4.0.30319).
.....
```

When the registration has completed exit the command prompt window.



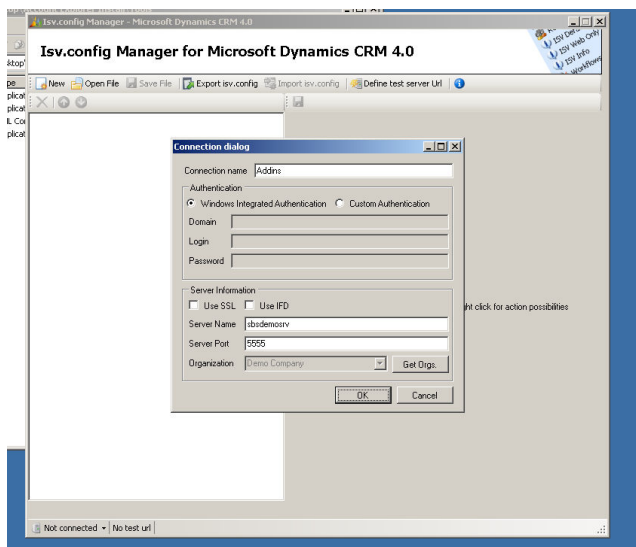
## Configure CRM to display the Account Explorer Addin.

The ISVConfigManager can be downloaded from the internet

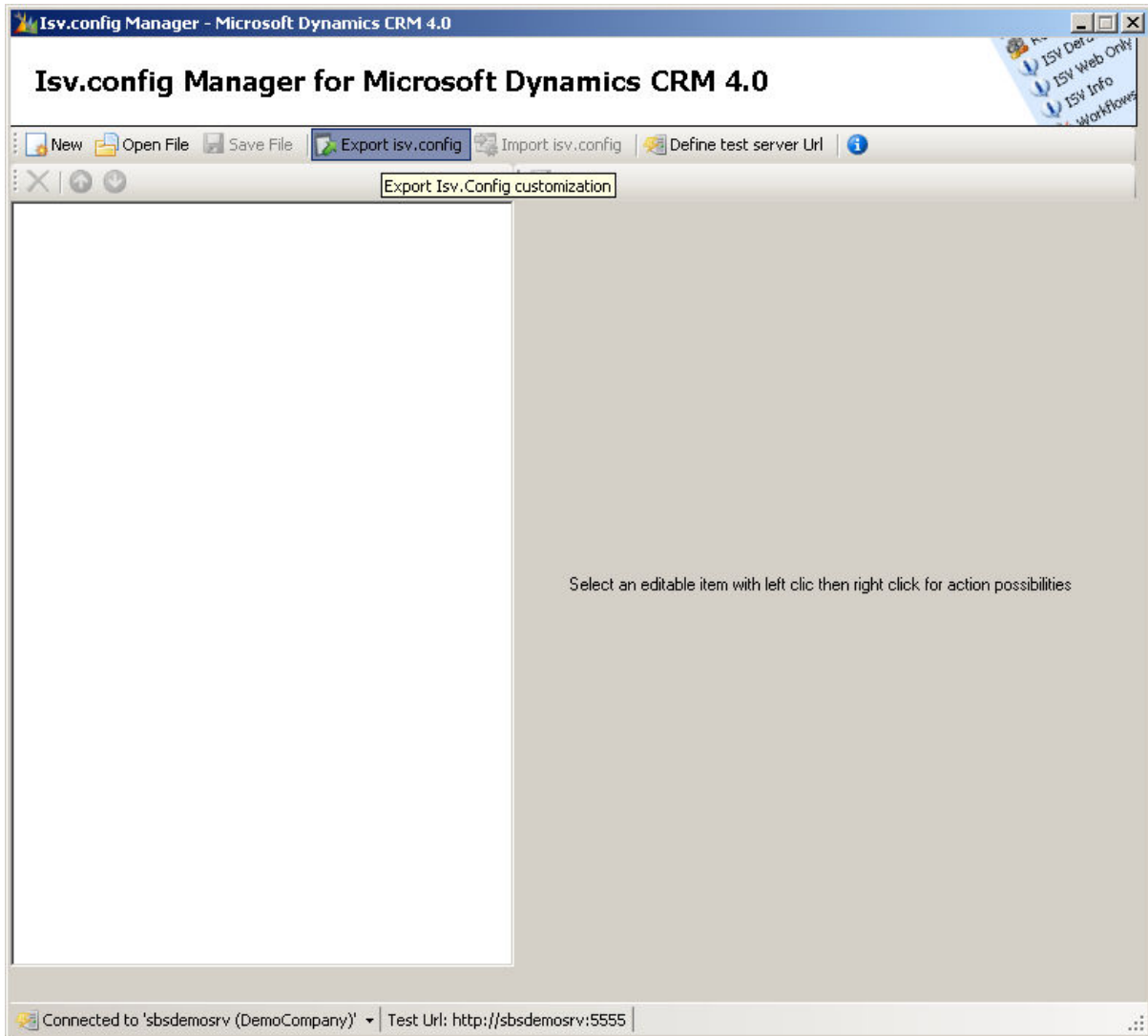
Open a new connection for your MSCRM implementation.

Select Get Orgs and select your organisation.

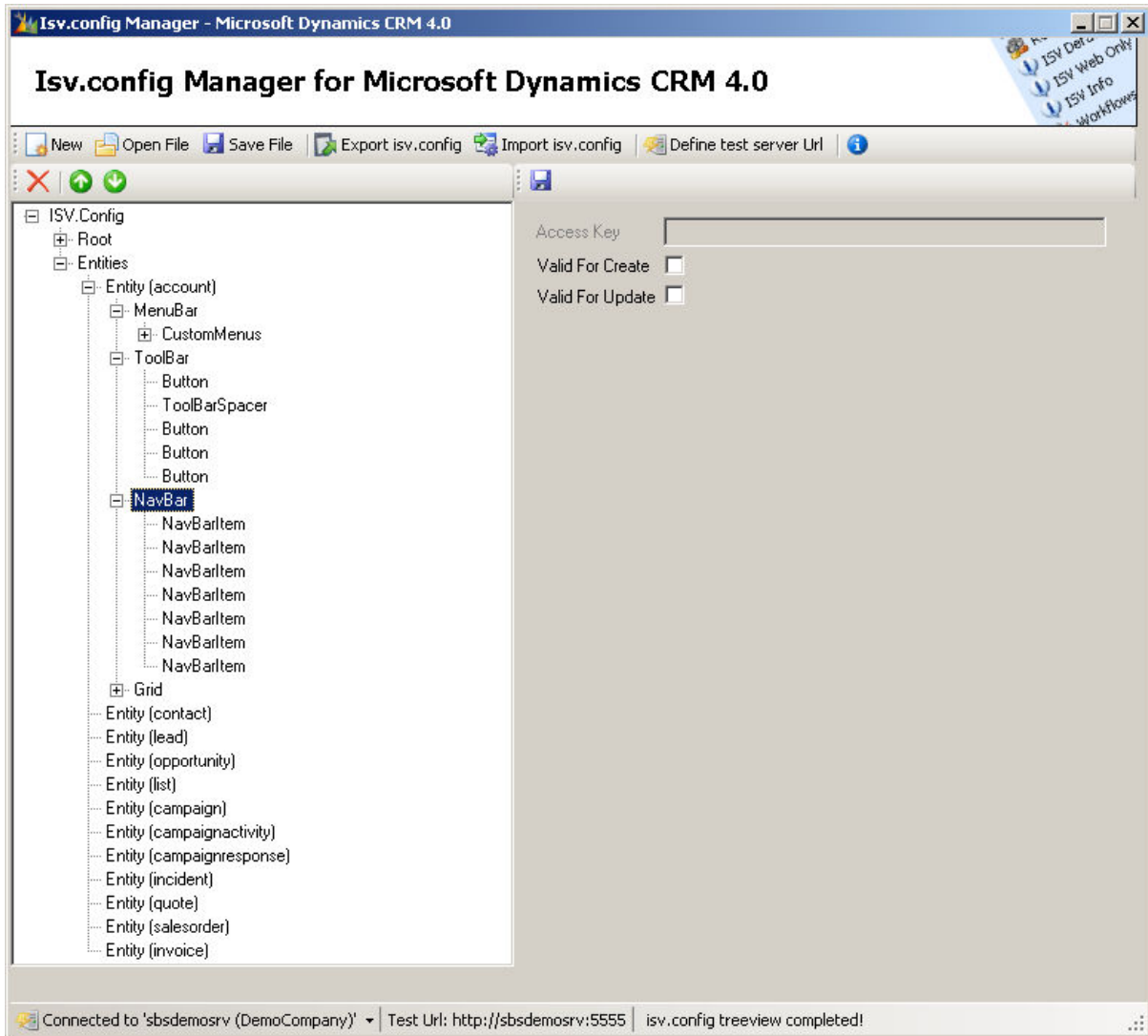
Select OK to connect.



Once connected select Export isv.config

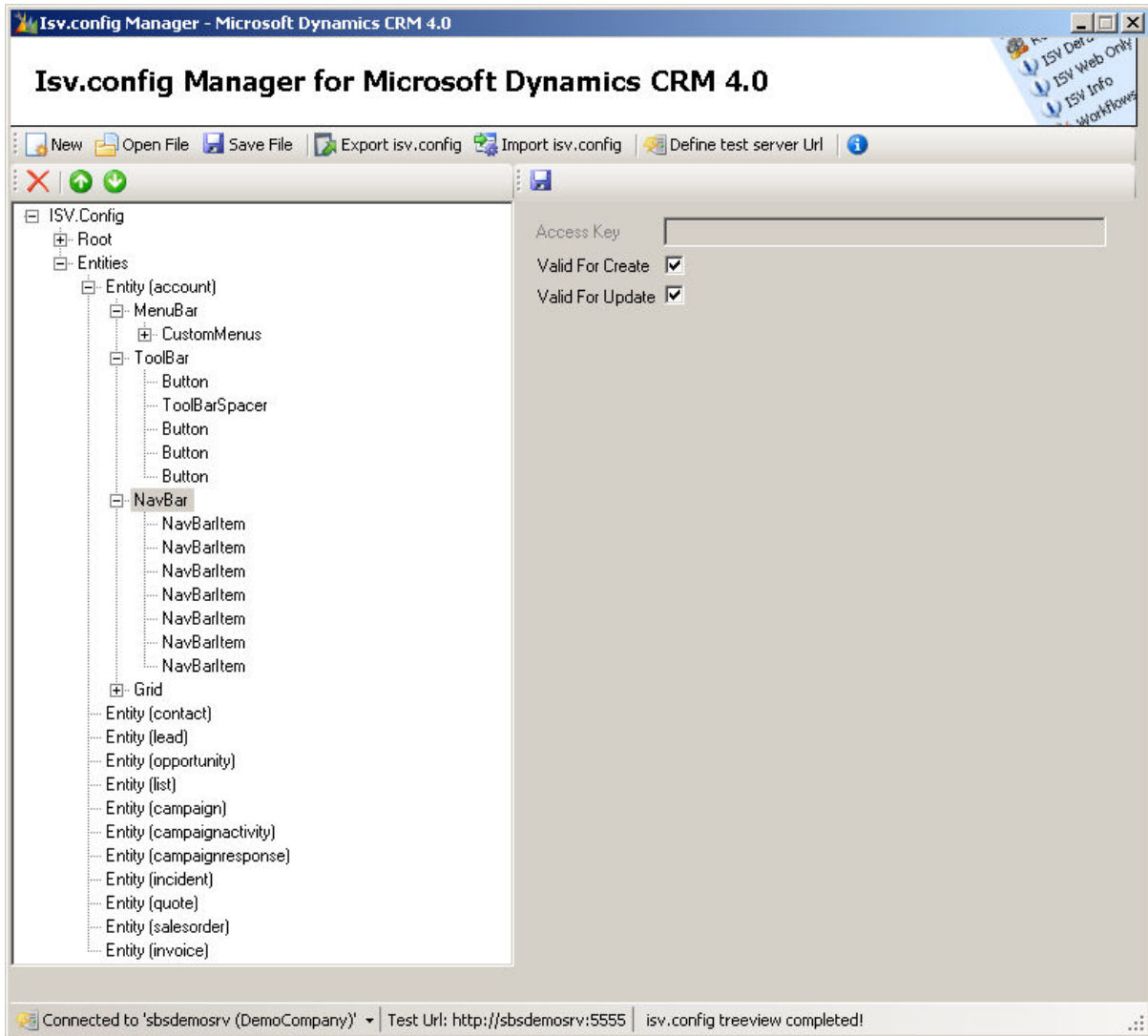


Once connected expand the menu as shown below



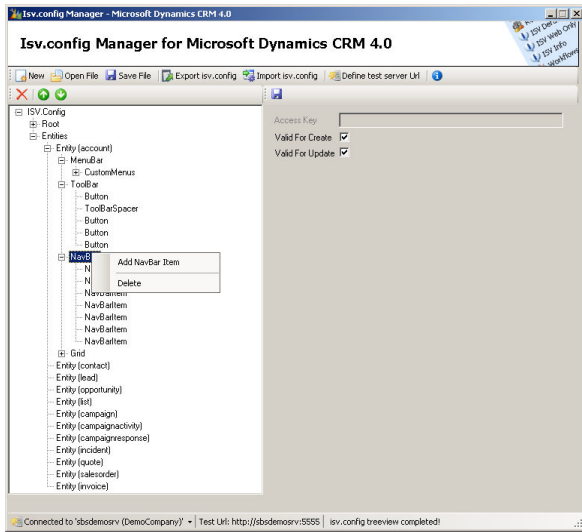
Entities  
Entity (account)  
NavBar

Once the NavBar option is selected check the options for Valid For Create and Valid For Update as shown below.



Next right click the NavBar and if prompted to save changes select yes.

Next select the option to create a NavBar item.



At the create NavBar screen enter the following details, replacing “crm” with the URL for you own CRM deployment.

- Id = 10
- Icon = <http://crm/isv/xrmpartners/accexplorer/AccountExplorer.gif>
- Url = <http://crm/isv/xrmpartners/accexplorer/AccountExplorer.html>
- Pass parameters = true
- Area = Info
- Available offline = false
- Client = web
- Titles: LCID = 10 and Text = Account Explorer



**Isv.config Manager for Microsoft Dynamics CRM 4.0**

Id: 10

Icon:  Test

Url:  Test

Pass Parameters:

Area:

Available Offline:

Client:

	LCID	Text
	10	Account Explor
***		

Connected to 'sbsdemosrv (DemoCompany)' | Test Url: http://sbsdemosrv:5555 | isv.config treeview completed!

Next select the option to import the cusomisations.



ISV.Config

- Root
  - Entities
    - Entity (account)
      - MenuBar
        - CustomMenus
      - ToolBar
        - Button
        - ToolBarSpacer
        - Button
        - Button
        - Button
      - NavBar
        - NavBarItem
        - NavBarItem
        - NavBarItem
        - NavBarItem
        - NavBarItem
        - NavBarItem
        - NavBarItem
        - NavBarItem
    - Grid
      - Entity (contact)
      - Entity (lead)
      - Entity (opportunity)
      - Entity (list)
      - Entity (campaign)
      - Entity (campaignactivity)
      - Entity (campaignresponse)
      - Entity (incident)
      - Entity (quote)
      - Entity (salesorder)

Import and publish Isv.config customization

Id: 10

Icon: http://sbsdemosrv:5555/ISV/xrmpartners/accepl [Test]

Url: http://sbsdemosrv:5555/ISV/xrmpartners/accepl [Test]

Pass Parameters:

Area: Info

Available Offline:

Client: Web

	LCID	Text
	10	Account Explor
**		

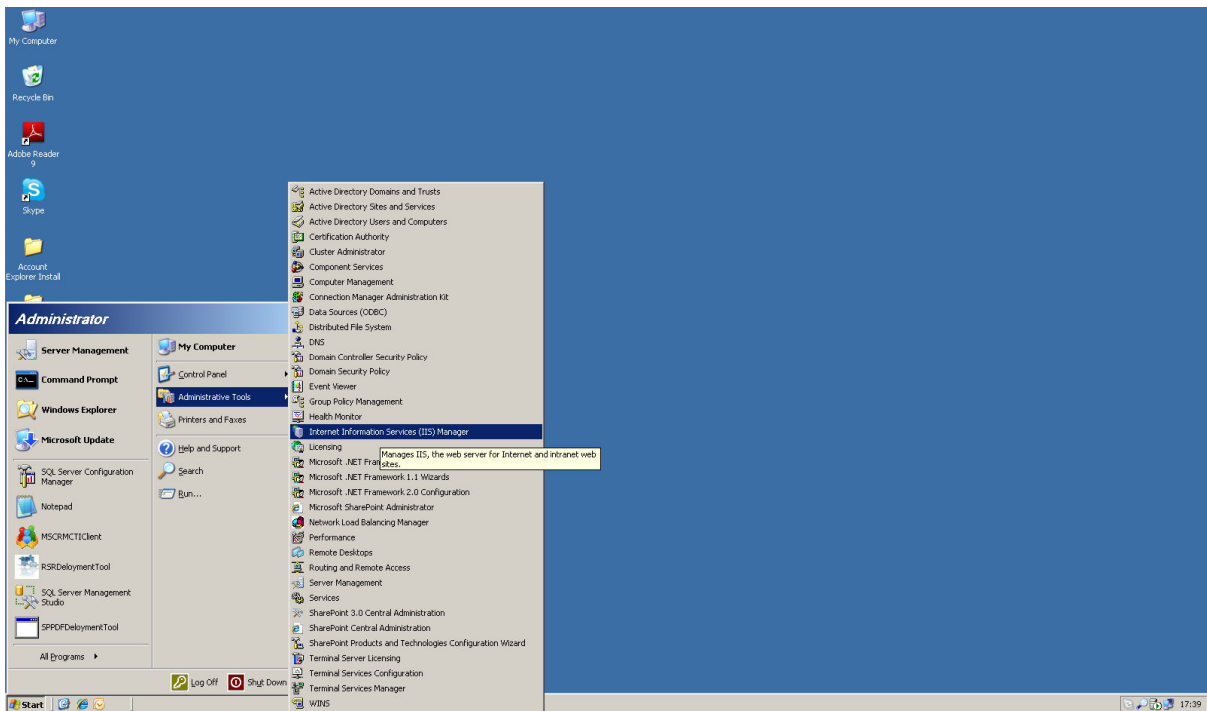
Connected to 'sbsdemosrv (DemoCompany)' | Test Url: http://sbsdemosrv:5555 | isv.config treeview completed!

When prompted to publish the customisation, select Yes.

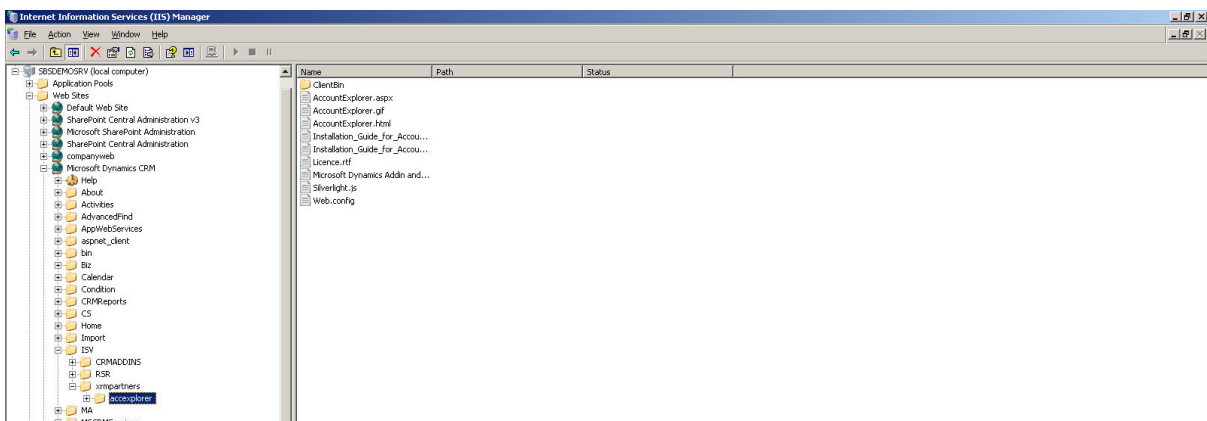


## Configure IIS.

Run Internet Information Services (IIS) Manager



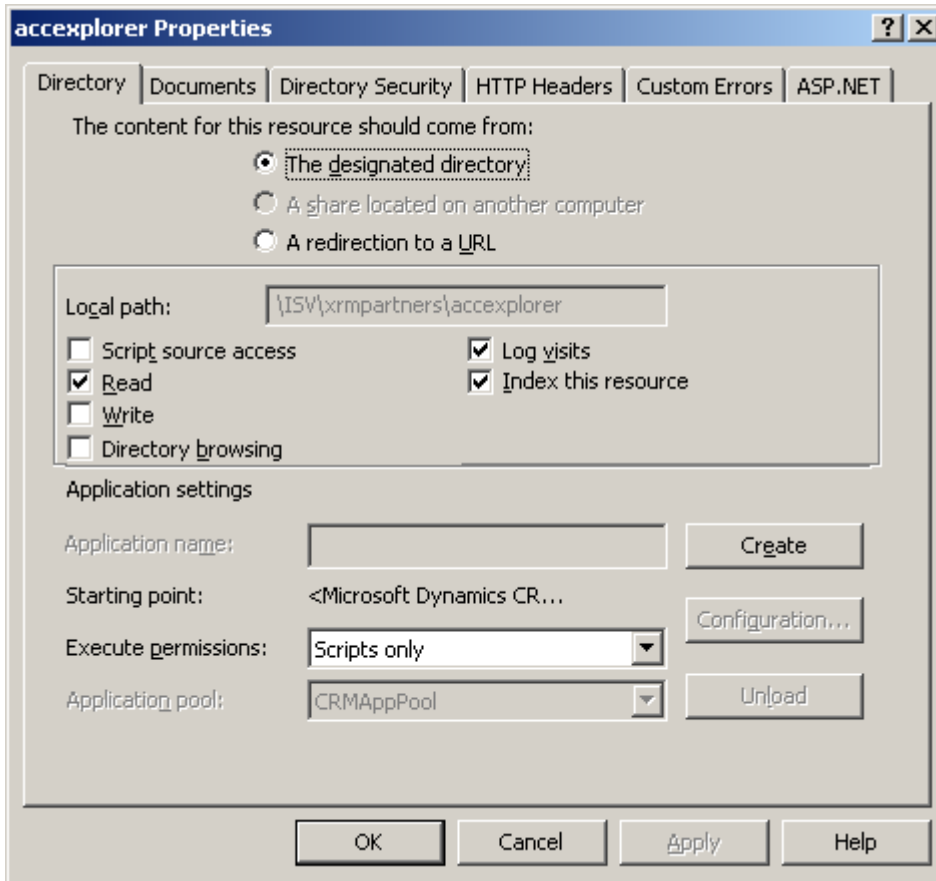
Navigate to the CRM website and then to the ISV folder and then the accexplorer folder



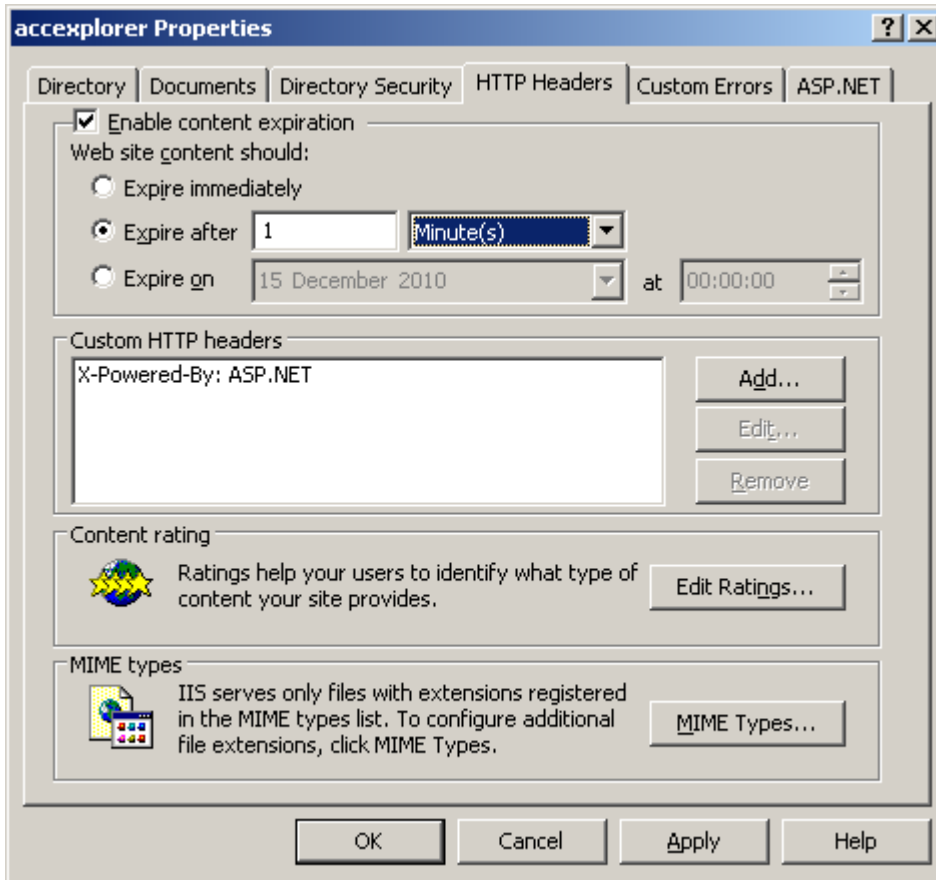
Right click on the accexplorer folder and select properties.



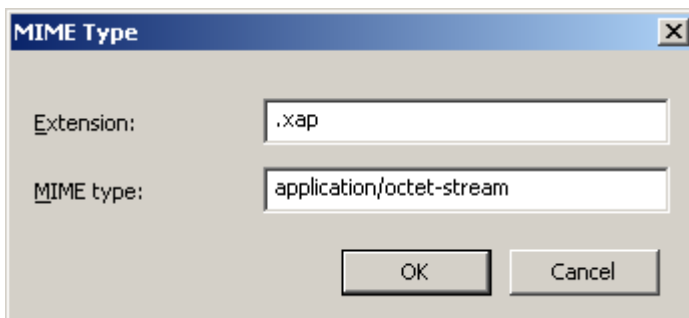
Modify the Directory tab as shown below.



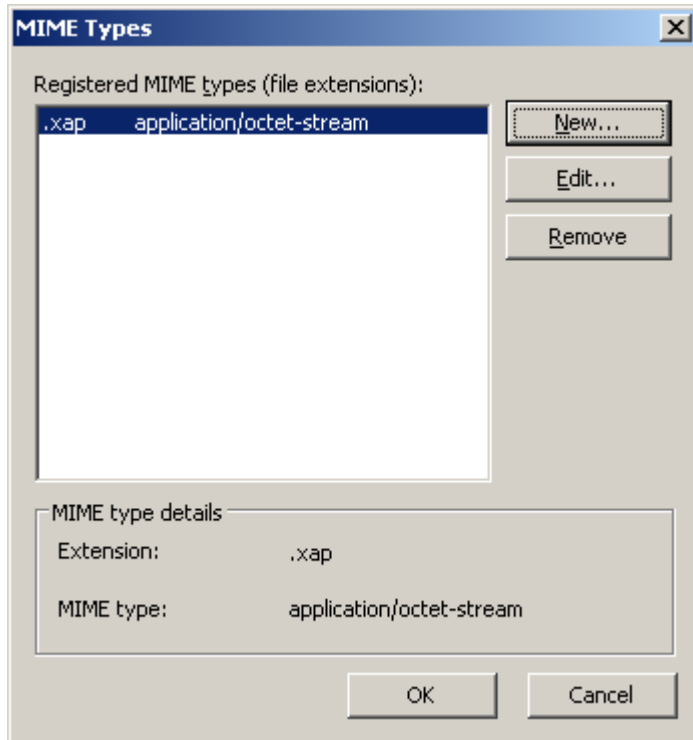
Modify the HTTP Headers tab as shown below.



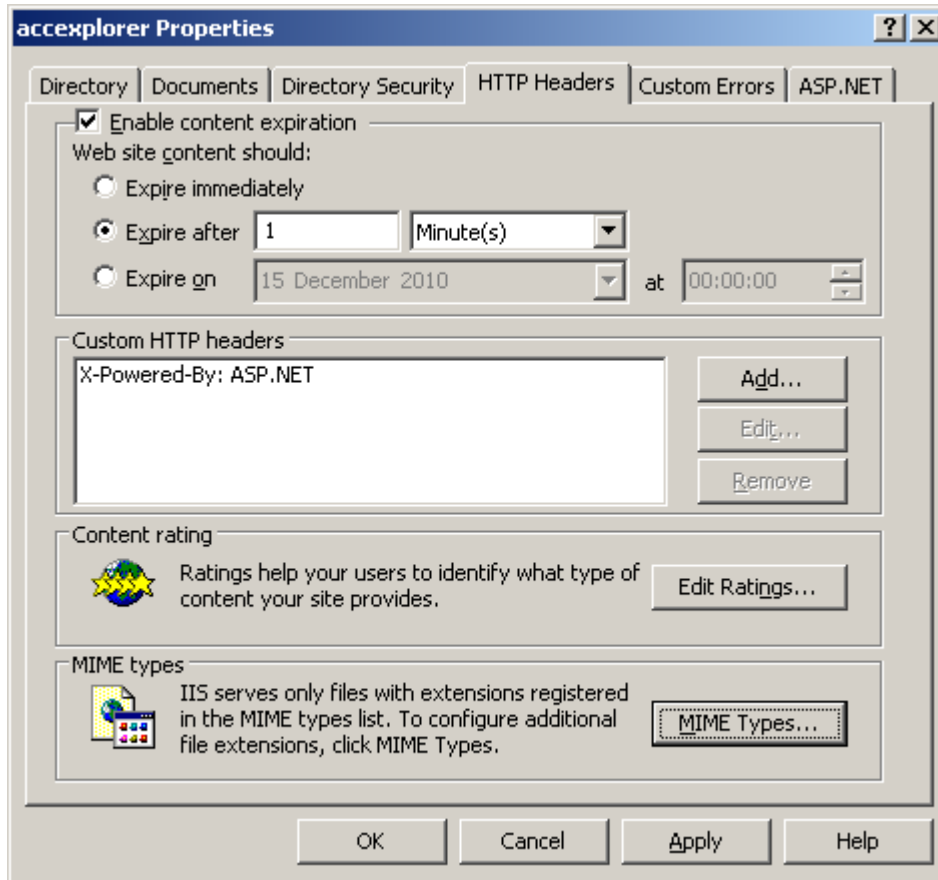
Select MIME types and complete the screen as shown below.



Select OK to save the changes.



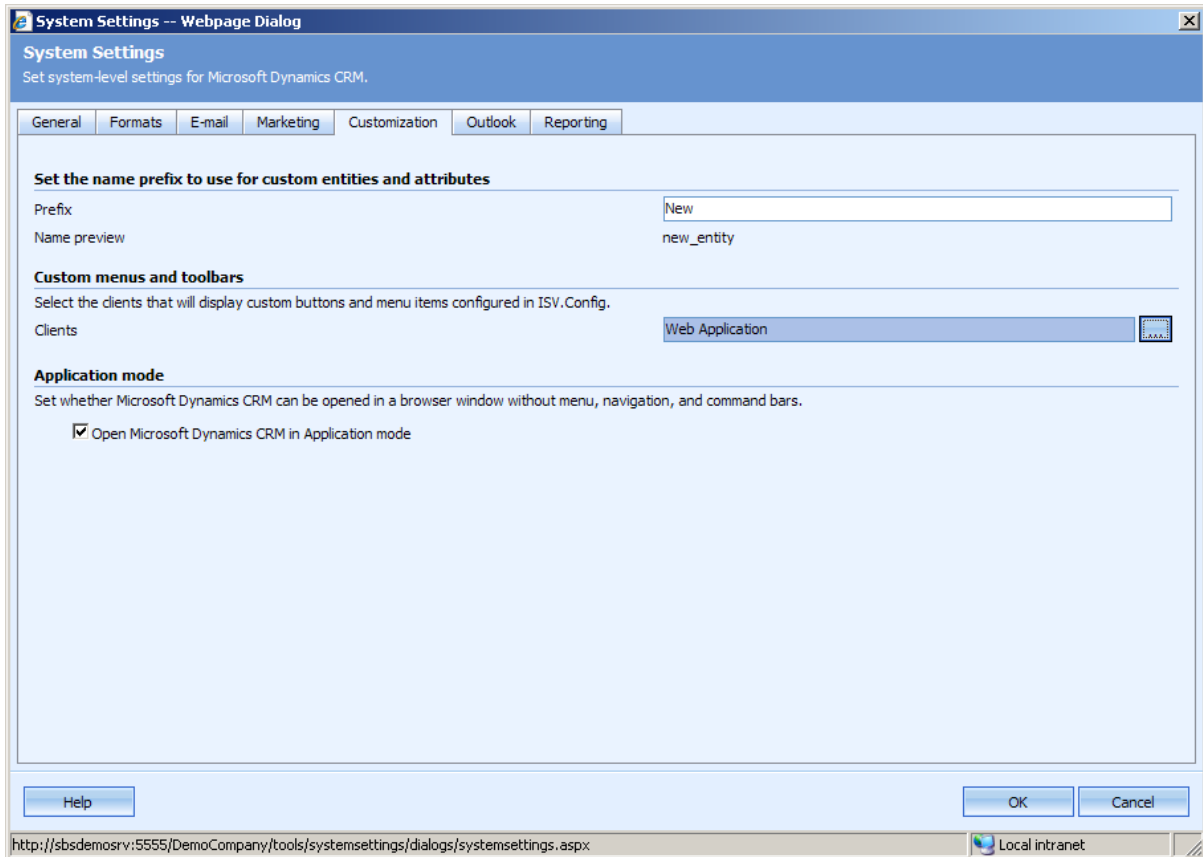
Select OK the save changes



Select Apply to apply changes and then OK to close the window.

### ***CRM Administration set up.***

Go into settings and Administration and update the system settings as shown below.



Perform an IISReset.

Account Explorer is now full installed.



## Client Installation.

Each client that will be using the Account Explorer module for Microsoft CRM will require SilverLight and .Net 4 Framework to be installed.

### ***Download and Install Silverlight.***

Download Silverlight from the Microsoft web site.

<http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx>

Once downloaded run the installation process.

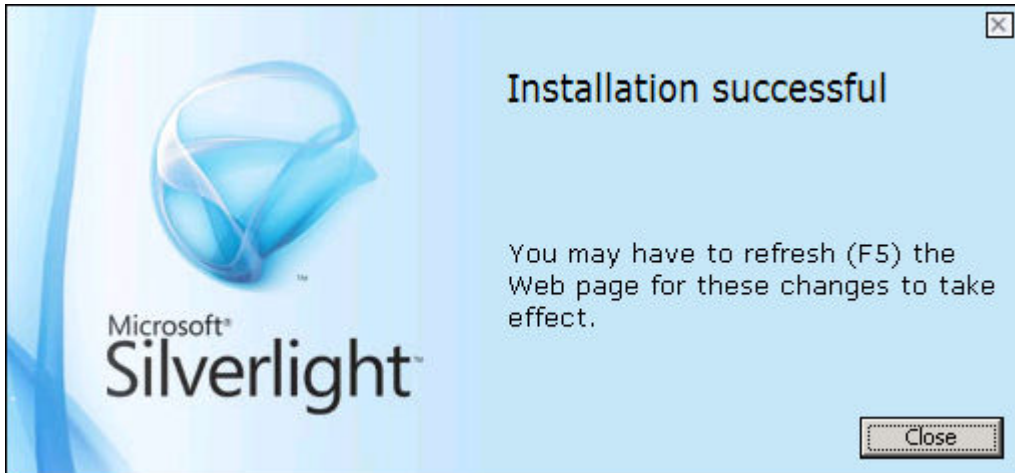


Select install now to start the installation.

The silverlight will give a series of progress updates.



When Silverlight has completed installing you will see the following screen.



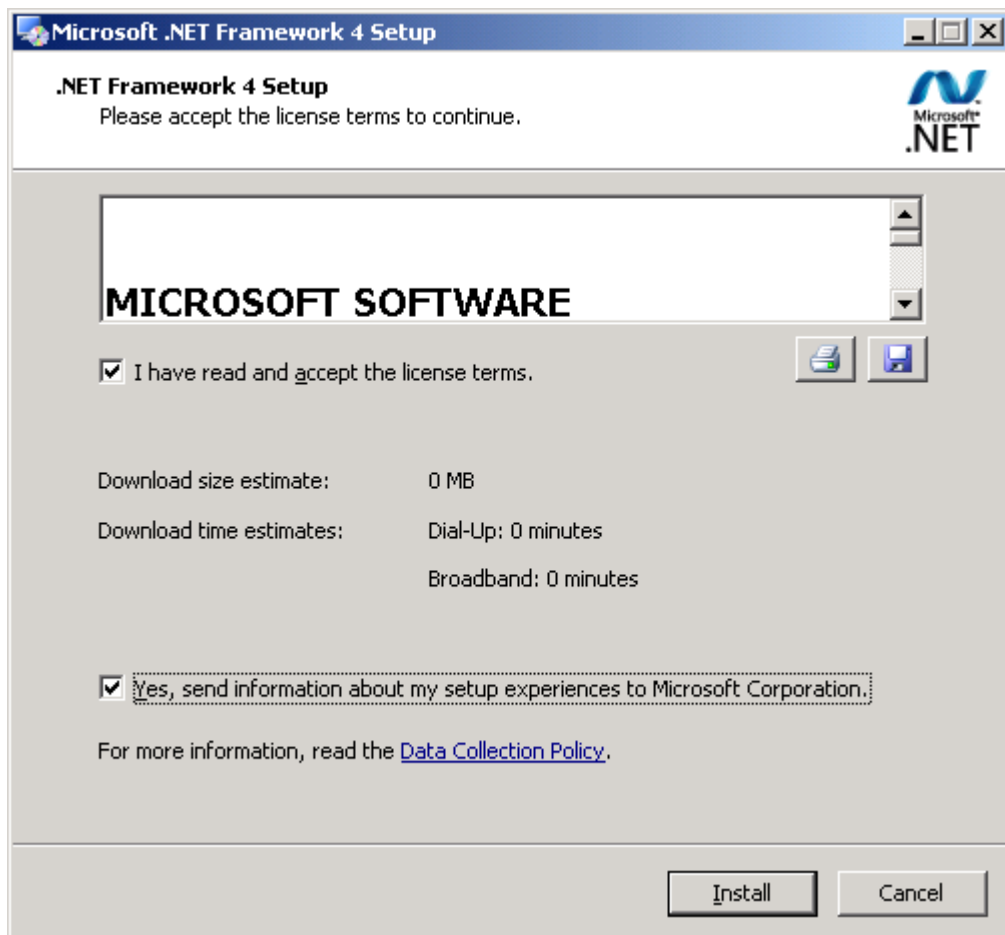


## **Download and Install .Net 4 Framework.**

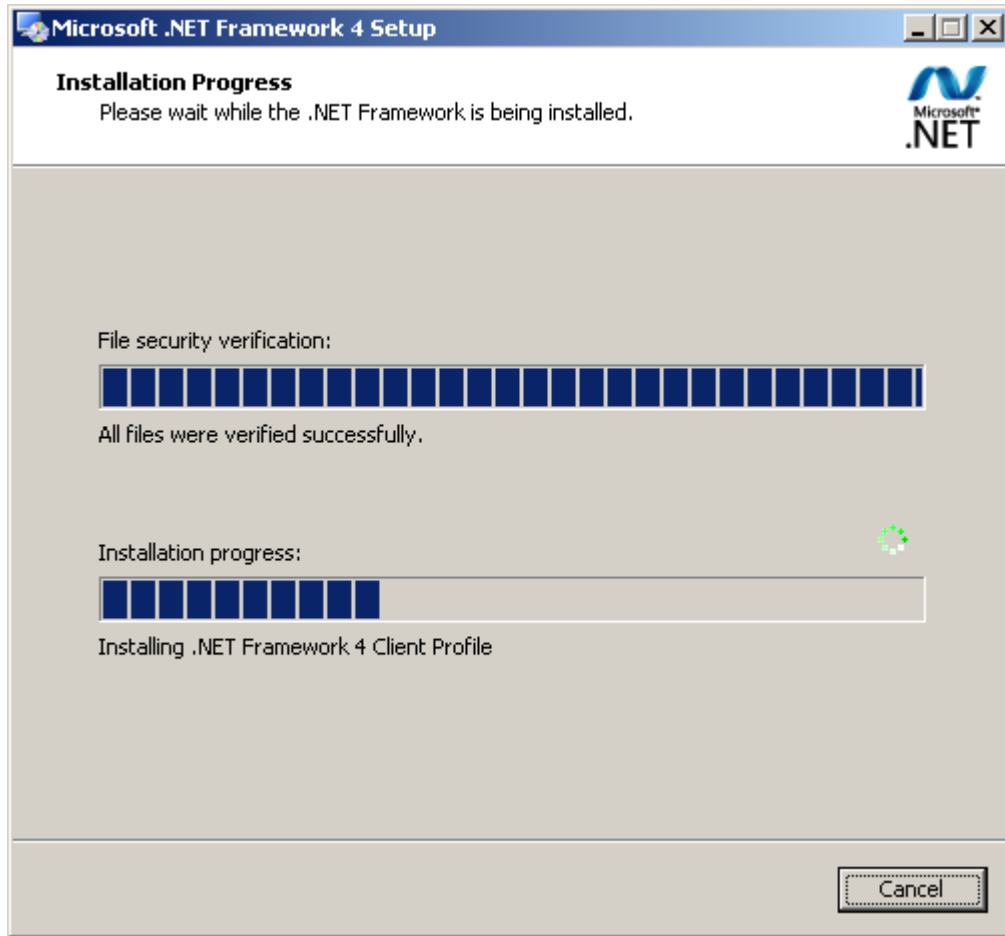
Download .Net 4 Framework from the Microsoft web site.

<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=9cfb2d51-5ff4-4491-b0e5-b386f32c0992&displaylang=en>

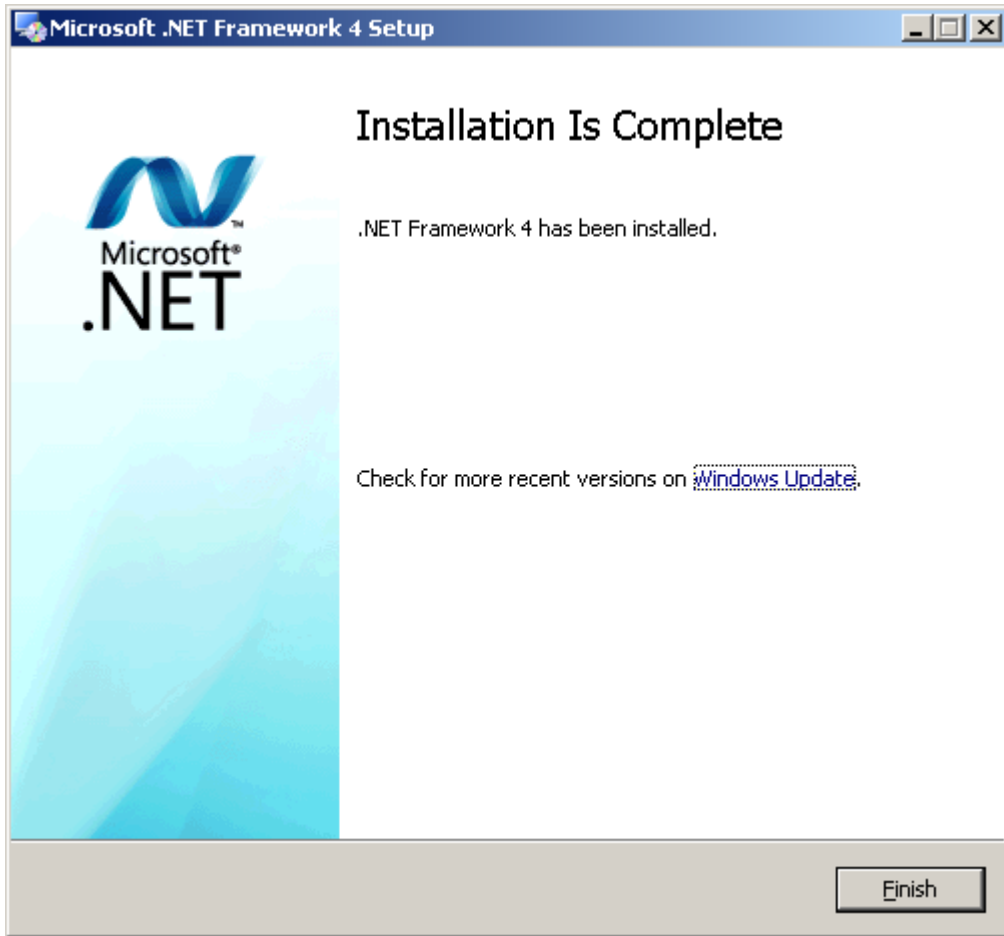
Once downloaded run the installation process.



Select the options to allow the installation to proceed. The installation progress will be displayed.



When the installation completes select Finish





### ***Configure .Net 4 Framework.***

Start the command prompt, MS Dos window.

Navigate to C:\Windows\Microsoft.NET\Framework\v4.0.30319

Run the following command to register .Net 4.

```
aspnet_regiis.exe -i
```

When the registration has completed exit the command prompt window.