

H O S T I N G CONTROLLER

HC DYNAMICS CRM MODULE SERVER CONFIGURATION User Manual

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Proprietary Notice

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Document Conventions

TERMS/ SYMBOLS	WHAT THEY MEAN?
BOLD	The 'Bold & UPPERCASE' text is used to highlight vital terms in the d <mark>ocument.</mark>
\bigcirc	This symbol is used as a sign for NOTE. It reminds about certain noteworthy steps or takes your attention towards the significant tasks to be done or gives additional information for your ease.
0	This symbol is used as a sign for WARNING. It highlights some steps that cannot be skipped or should be followed as stated to avoid errors and confusion.

Target Audience

This document is intended for **HOST ADMINISTRATORS/RESELLERS/WEB ADMINISTRATORS** who need to install, configure and manage Dynamics CRM Server with **HC**. It explains all the technicalities and functionalities of server configuration in detail. In addition to that, it also states the required steps to ensure flawless working of Dynamics CRM Server with **HC**.



It is assumed that you have successfully installed **HC** and performed all the prerequisites to configure a Dynamics CRM Server.



Introduction

About HC

It enables web hosting companies to manage all their servers both Windows & Linux through centralized interface. You can add multiple mail servers within a cluster and offer MS-Exchange & SharePoint hosting. You can expand your business with **HC**, from one server to cluster of servers. It allows you to add new clusters as per your requirements.

HC Installation

You have to first install it on database server having windows operating system. It can be a standalone server and can have other roles such as Web, Mail and DNS as per your requirements. For further as<mark>sistance, refer to <u>HC Installation Guide</u>.</mark>

HC Pre-requisites and Working

Before Installation, you should know the pre-requisites of **HC**. You have to install **Microsoft SQL Server**. Instead of this, if you want, you can also download **HC** installer, in which **MSDE** is bundled free, depending on your requirements. You have to install Mail Server such as **Mail Enable** or any other. For websites, you have to install **IIS** and **DNS**.

Following figure illustrates working of **HC** in a cluster environment:





About Dynamics CRM Server

Dynamics CRM has transformed the way many companies secure and retain their most valuable asset: loyal, satisfied customers. From global enterprise to small business, companies are quick to capitalize on the familiar and flexible functionality offered by the only CRM solution that works inside Microsoft Office Outlook.



Microsoft Dynamics CRM workflow automation and analytics let your Sales, Marketing and Service staff easily share information and route tasks to provide a seamless customer experience.

Microsoft Dynamics CRM is flexible, familiar and fits your business. Unlike other CRM solutions, it gives you a choice in two key areas:

- > Easily switch options if your needs change.
- Use it within Microsoft Office Outlook, a Web browser, a custom portal, a Microsoft Office SharePoint portal, or a mobile device.



To configure Dynamics CRM with **HC** panel, first of all install **HC** on Dynamics CRM Server as a Subsequent Server.

Post Installation Steps

- Following **HC** services runs under a Dynamics **CR**M deployment administrator account on Dynamics **CRM** Server:
 - 1. Remoting Service
 - 2. Synch Service

Once you have installed **HC** on **Dynamics CRM Server**, you need to configure the entire setup. You have to follow these steps as stated, to omit faults & errors during Dynamics CRM Server configuration.

Steps to Follow

Configuration of Dynamics CRM Server comprises of mainly two steps i.e. **Enable Dynamics CRM Server** and **Add Dynamics CRM Server**. Later sections of this document describe each of them in detail.

Enable Dynamics CRM Server

Follow these steps to enable Dynamics CRM Server for your cluster.

1. Login as Host Administrator to Control Panel



Control Panel	Login
6	Username : hostadmin Password : •••••• Language : English M Sign In Reset
	If you have forgotten your password, click on the "Forgot Password" link to have a reminder sent to you at the e-mail address you specified during registration.
	[Forgot Password]
p	owered by Hosting Controller

2. After successful login, following screen is displayed:

Admin Treadmin Langua	ge :	English			[Home] [Sign
sting_Controller			100	- 1 1a	. <u></u>
General Server Manager User Manager Domains		Welcome ! Hosting Controller is complete hosting autor an ideal application to diversify web hosting environment for both Windows & Linux serv	nation solution and servers in cluster ers. This is all what	Profile Disp Setti	lay ngs Change Password Tutorials Quick Links
Hosting Manager Hosting Plans Billing System		you need to put your hosting business on au Message Center Control Panel Summary Windows: Eamily	Jo pilot.]	
Reports		Available Servers	Total Instance	5	Resource lisage
		Web Server	1		0 Websites
		DNS Server	1		0 DNS Zones
Tools	14	Mail Server	1		0 Mail Domains
Auto Signup	ľ	Database Server	1		0 Databases
	ч.	SharePoint Server	0		0 SharePoint Sites
System		Linux Family			
System.		No Linux server found			
My Server Migration	ł	Servers Status Plans Tickets			
	4	Server Name	S	Status	
Heln		All servers up and running.			
		· · · · · · · · · · · · · · · · · · ·			
// Irouble Licket					
Message Center					

3. Go to "General >> Server Manager" as highlighted in the previous screenshot. It opens following screen:

Server Name	Primary IP Address	OS Family	Licensing Status	Build Number	Status
Anage Your Servers	(Advance Search)		My Ser	vers Add Server	Global Settings



- 0 Server Manager :: Global Settings 8 Ð 50 Add Serve My Servers Global Settings Windows Family Linux Family Web Server DNS Server Mail Server Database Server SharePoint Server Dynamics CRM Serv $\overline{\vee}$ Web Server : Services Options User Accounts MS FTP -ODBC DSN 🗹 Enable COM Registration 🗹 Enable Index Server Catalogs Enable ASPFusion Components 🗹 Enable Sub-Domains 🗹 Enable Domain Registration 🗹 Enable IP Based Domains 🗹 Enable FrontPage Extension 🗌 Enable Shared SSL Enable ACL Adjustments 🖳 Enable $\overline{\mathbf{x}}$
- 4. Go to "Global Settings". It opens following screen:

5. Select "Windows Family >> Dynamics CRM Server". It opens following screen:

Windows Fam	ily Linux Fa	mily						
Web Server	DNS Server	Mail Server	Database Server	ShareP	oint Server	Dynamics CRM Server		
Dynamics CR	M Server :				\checkmark			
Services			Options					
Dynamics CRM Enabled		🗹 Enable						
					Dynamics	CRM 4.0 💌		
							Sav	e Settings

Enable Dynamics CRM Server by checking the checkbox and then enable its service by selecting the second checkbox. Select your required options from the list and select "Save Settings". It updates the changes and enables Dynamics CRM Server for your cluster as shown below:

Success : Glo	obal Settings of the Cluster	updated successful	Iy.				
Windows Fam	nily Linux Family						
Web Server	DNS Server Mail Server	Database Server	ShareP	oint Server	Dynamics CRM Server		
Dynamics CRI	Dynamics CRM Server :			V			
	Services			Options			
	Dynamics CRM Enabled			🗹 Enable			
				Dynamics	CRM 4.0 💌		
						Sav	e Settings



Add Dynamics CRM Server

To make your server a Dynamics CRM Server, you have to add a server and assign it a role such as Dynamics CRM Server. Follow these steps to make your server a Dynamics CRM Server.

1. Go to "General >> Server Manager"

sting_Controller			1	Latit L	14.11
General	Welcome !				
Server Manager	Welcome .			· · · · · · · · · · · · · · · · · · ·	10 🛛 🏹
User Manager	Hosting Controller is complete hosting auto	mation solution and	Profile Displa	y Change	Online Quick
Domains	an ideal application to diversify web hostin	g servers in cluster	Setting	s Password T	utorials Links
	you need to put your hosting business on a	vers, mis is all what auto pilot.	L		
Hosting Manager					
Hosting Plans	Manager Caster Cantral David Summer				
Billing System	Message Center Control Panel Summar	y System Information			
Reports	Windows Family				
	Available Servers	Total Instances		Resource Usage	
Toolbox	Web Server	1		0 Websites	
	DNS Server	1		0 DNS Zones	
Tools	Mail Server	1		0 Mail Domains	
Auto Signup	Database Server	1		0 Databases	
	SharePoint Server	0		0 SharePoint Sites	
System	Linux Family				
System	No Linux server found				
My Server					
Migration	Servers Status Plans Tickets				
	Server Name	Sta	tus		
Heln	All servers up and running.				
Trouble Ticket					
Message Center					
Message Center ASK HC					
Message Center ASK HC					
Message Center ASK HC					
Message Center ASK HC			_		
Message Center ASK HC					
Message Center ASK HC	ring screen:				
Message Center ASK HC	ring screen:				
Message Center ASK HC	ring screen:				
Message Center ASK HC	ring screen:		7		
Message Center ASK HC	ring screen:				
Message Center ASK HC	ring screen:				
Message Center ASK HC	ring screen:				0 0
Message Center ASK HC	ring screen:				0 0
Message Center ASK HC	ring screen:				00
Message Center ASK HC	vers				0
Message Center ASK HC	ring screen: rers (Advance Search]		My Serv	ers Add Server	C 0
Message Center ASK HC	vers		My Serv	ers Add Server	© Ø
Message Center ASK HC	vers Q [Advance Search]		My Serv	ers Add Server	© Ø
Message Center ASK HC	ring screen: rers (Advance Search]		My Serv	ers Add Server Tota	© Ø Global Settings
Message Center ASK HC	ring screen: rers (Advance Search] s Primary IP Address	OS Family Lic	My Serv	ers Add Server Tota	© Ø Global Settings

2. Go to "Add Server", it opens following screen:



endly Name :	Enterprisecrm 💌	
mary IP Address :	192.168.0.236	
erating System :	Windows Family	
hat is the Role of this Server in the Clus	iter?	
Server Role	Role Capacity	Purposing
🗌 Web Server	700 Websites	Everyone(Reseller, End User) 💌
DNS Server	500 DNS Zones	Everyone(Reseller, End User) 💌
Mail Server	500 Mail Domains	Everyone(Reseller, End User) 💌
BlackBerry Server	30 Activations	Everyone(Reseller, End User) 💌
Database Server	300 Databases	Everyone(Reseller, End User) 💌
SharePoint Server	700 SharePoint Sites	Everyone(Reseller, End User) 💌
Dynamics CRM Server	700 CRM Sites	Everyone(Reseller, End User) 💌

Friendly Name:

It is the list of available servers; you can select one as per your requirements.

- Primary IP Address: It is the unique IP Address of the selected Server.
- *Operating System:* It shows the supported operating system.
- *Server Role:* It allows you to select role for the server, you are going to add.
- Role Capacity:

It shows the maximum limit of supported domains/DNS/mail domains/databases/CRM Sites on Web/DNS/Mail/Database/Dynamics CRM Server respectively.

• Purposing:

It allows you to specify end user for the selected server. You can dedicate your server to only resellers as well as to everyone according to your requirements.

3. Select "Next" to proceed, it opens following screen:



Dynamics CRM Server			
General Settings			
Dynamics CRM Version :	Dynamics CRM 4.0		
CRM Server Name :	Enterprisecrm		
Server Port :	5555		
Credential User Name :	Administrator		
Credential Password :			
Confirm Password :			
Active Directory Domain :	enterprise.local 💌		
Default CRM Domain :	crmsite.com		
	Add Server		

- *Dynamics CRM Version:* It is CRM version.
- CRM Server Name:

It is the name of the server where Dynamics CRM and **HC** are installed.

• Server Port:

It is the port that is defined while installing Dynamics CRM Server. Usually it is 5555 as suggested by the CRM Installer.

• Credential User Name:

Specify user name in this field. This user can access the CRM server. It should be an Active Directory User and Dynamics CRM Deployment Administrator.

- *Credential Password:* Specify password in this field.
- *Confirm Password:* Re-type the password for confirmation.
- *Active Directory Domain:* Select active directory domain for credential user from the list as required.
- *Default CRM Domain:* Select default CRM domain from the list as required.

It is the IFD (Internet Facing Deployment) domain. It is used in IFD URL for each Dynamics CRM Site.

Select "Add Server" to apply the changes. It adds a Dynamics CRM Server with the specified information.

Managing Dynamics CRM Server

In order to manage Dynamics CRM Sites (Organizations), users and Business Units, logon as a Reseller/Web Admin and follow these steps as stated:

1. Go to "Toolbox >> Tools" section as shown below:



2. Select "Dynamics CRM", it opens following screen:



1

ools :: Dynamics CRM :: Dynamics	CRM Sites		v 🖸 🖉
			Dynamics CRM Sites
Dynamics CRM Sites		Тс	otal Dynamics CRM Sites : 2
CRM Users Business Units Dis	able Delete		
Dynamics CRM Site Name	Dynamics CRM Access URL	Owner Name	Status
	http://crm3600.crmsite.com	crmadmin	Enabled
C spsite1.com	http://crm.crmsite.com	Auto1	Enabled

You cannot manage any Dynamics CRM site until its status is 'Enabled'. When a site is created through **HC**, it is actually queued in **HC** database for creation. Then **HC** Sync service on Dynamics CRM Server retrieves this request and tries to create the site. Meanwhile, 'Pending' status is shown until the site is created successfully or some how the process fails.

3. These are the existing CRM sites. You can create one as required. To add a Dynamics CRM Site, select "Add Dynamics CRM Site" button shown in the top right corner of the previous screen shot. It opens following screen:

Add CRM Site		
Site Information		
Select Website :	Auto1.com	
CRM Site Name :	CRMSite	

• Select Website:

Select your required website from the list under which you are going to create the CRM site.

• CRM Site Name:

Specify name of the CRM site, you are going to add.

Select "Add CRM Site". It adds the site with the specified information.



The site is not created immediately after selecting the "Add CRM Site" button. It may cause delay of few minutes and till then the status of the website is shown as 'Pending'.



You can add other CRM sites as well in the same way as stated.

CRM Users

Dynamics CRM Sites have their own **CRM USERS**. In order to create a new user/to view the existing users, select your required CRM Site and then select "CRM Users" button as shown below:

Tools :: Dynamics CRM :: Dynamics	CRM Sites		0
Dynamics CRM Sites		Τα	Dynamics CRM Sites
CRM Osers Business Units Disable Delete			
Dynamics CRM Site Name	Dynamics CRM Access URL	Owner Name	Status
● 4crm.com	http://crm3600.crmsite.com	crmadmin	Enabled
O spsite1.com	http://crm.crmsite.com	Auto1	Enabled

Selecting "CRM Users" opens following screen:

Dynamics CRM Users of "4d	crm.com"		
1 2 3 4 Add User Roles Disable Properties Display Name Status			
 John Smith 	ENTER PRISE \John1	Enabled	

These are the existing CRM Users for the selected CRM Site.

1. *Add User:* It allows you to add a new user for the selected CRM Site as shown below:



General User Addresses		
User Information		
User Name :	William	@4crm.com*
Password :	•••••	*
Confirm Password :	•••••	*
First Name :	William	*
Last Name :	Henry	*
Title :		
Primary E-mail :		
E-mail 2 :		
Mobile Alert E-mail :		
Main Phone :		
Other Phone :		
Home Phone :		
Mobile Phone :		
Prefered Phone :	Main Phone 💌	
Pager :		
Fax :		
Organization Information		
Business Unit :	crm3600 💌 *	
E-mail Access Information		
E-mail Access Type - Icoming :	Microsoft Dynamic	s CRM for Outlook 💌 *
E-mail Access Type - Outgoing :	Microsoft Dynamics	s CRM for Outlook 💌 *
Client Access License (CAL) Information		
Access Mode :	Full	*
		Next >>

Specify the required information and then select "Next". It opens following screen:

Mailing Address	
Street 1 :	8721 Santa Monica
Street 2 :	8733 Santa Monica I
Street 3 :	
State/Province :	California
Zip/Postal Code :	90077
Country/Region :	USA
City :	Los Angeles
Other Address	
Street 1 :	
Street 2 :	
Street 3 :	
State/Province :	
Zip/Postal Code :	
Country/Region :	
City :	
Preferred Address :	Mailing Address 💌



Specify information in the fields as required and select "Add User". It adds a new user for the selected CRM Site.

2. *Role:* It allows you to assign role(s) to the selected CRM User as:

Dynamics CRM User Roles of "William Henry"	
Customer Service Representative	
Vice President of Marketing	
System Administrator	
🗌 Sales Manager	
Marketing Professional	
🗌 Schedule Manager	
CEO-Business Manager	
Marketing Manager	
Salesperson	
System Customizer	
Scheduler	
CSR Manager	
Vice President of Sales	
	Update Role

Select the checkboxes against each role to assign role(s) to the selected user as required and then select "Update Role". It updates role(s) of the selected user as specified.

3. *Disable/Enable:* It allows you to enable or disable any user or multiple users as per your requirements. Selecting "Disable" button disables the selected user as shown below:

Dynamics CRM Users of "4cri Add User Roles Enable Pro	n.com"	
Display Name	Domain Name	Status
C John Smith	ENTERPRISE\John1	Enabled
• William Henry	ENTERPRISE\William	Disabled +
C First name Last name	ENTERPRISE\Administrator	Enabled
C hcadmin hcadmin	ENTER PRISE \hcadmin	Enabled

Select "Enable" button to enable any disabled user as required.

4. *Properties:* It shows the information of the user that you have specified while adding the selected user. You can edit the information as required. Once you update the information, select "Update User" to apply he changes.



Business Units

HC allows you to manage **BUSINESS UNITS** for each Dynamics CRM Site as per your requirements. In order to create a new BU/to view the existing BUs, select your required CRM Site and then select "Business Units" button as shown below:

Dynamics CRM Sites Total D		Total Dynamics CRM Sites : 2	
Dynamics CRM Site Name	Dynamics CRM Access URL	Owner Name	Status
• 4crm.com	http://crm3600.crmsite.com	crmadmin	Enabled
C spsite1.com	http://crm.crmsite.com	Auto1	Enabled

Selecting "Business Units" opens following screen:

Business Unit of "4crm.com"		
(1) (2) Add Business Unit		
Name	Status	
€ crm3600	Enabled	

These are the existing Business Units for the selected CRM Site.

1. *Add Business Unit:* It allows you to add a new Business Unit for the selected CRM site as required.

General User Addresses	
Name :	BusinessUnit
Parent Business :	crm3600 💌 *
	Next >>

Specify information as required and select "Next". It opens following screen:



General User Addresses	
Mailing Address	
Street 1 :	8721 Santa Monica I
Street 2 :	8734 Santa Monica I
Street 3 :	
State/Province :	California
Zip/Postal Code :	90077
Country/Region :	USA
City :	Los Angeles
Other Address	
Street 1 :	
Street 2 :	
Street 3 :	
State/Province :	
Zip/Postal Code :	
Country/Region :	
City :	
Preferred Address :	Mailing Address 💌
	Add Business Unit

Specify information as per your requirements and select "Add Business Unit". It adds a new business unit with the specified information.

2. *Disable:* It allows you to enable or disable any BU as per your requirements.

Contact Us

In case of any ambiguity/query regarding **HC** and Dynamics CRM configurations, please feel free to contact us at <u>support@hostingcontroller.com</u>