ImportManager 5 Installation Manual

Installation and setup

The installation guide comes in two versions, a short version that simply describes the overall steps you need to go through to install ImportManager 5 and an in depth detailed version with screen shots and step by step guidance through the entire process.

Before you commence with the actual installation, make sure you meet the requirements described in the *"Requirements"* chapter following this chapter.

Finally, if you want to be able to import more than 10 lines at a time, make sure you have a license and refer to the final chapter in this section on how to deploy this license.

Requirements

ImportManager 5 must be installed on a Windows Server 2003 or a Windows Server 2008 Operating System with the following requirements fulfilled:

- An SQL Installation. Preferably *SQL Server 2005* or later, though other SQL installations will do as well.
- Named Pipes turned on.
- The SQL server must run in mixed authentication mode.
- .Net Framework 4.0 or later.
- Internet Information Services (IIS) 7.0 or above.

It is possible to install ImportManager on a Windows Server 2000, though we do not support this! The reason why ImportManager 5 needs a SQL installation is because the installation will create a database named ImportManager, which ImportManager 5 needs to run correctly.

Short version

If you know what you're doing and just need an overall explanation of how to install ImportManager 5, the short version is for you.

1. Unzip and run setup.exe to install ImportManager 5. When prompted to provide the necessary information to open a SQL connection, make sure you do so with a user with the appropriate administrator permissions. Simply follow the wizard till ImportManager 5 has been installed.
2. Open a browser to *http://localhost:5544/* and follow the instructions (download client and start with the provided login and password information from browser).

Detailed version

If you've experienced problems or errors when following the short version or if you want more detail, this version is for you. Screenshots and detailed explanations will describe exactly how you install ImportManager 5 in depth. Note that if you only want to install the client and the server has already been installed, start from step 8, but change the address accordingly, as

http://localhost:5544/ will only work on the server. Exchanging localhost with the actual server name should do the trick.
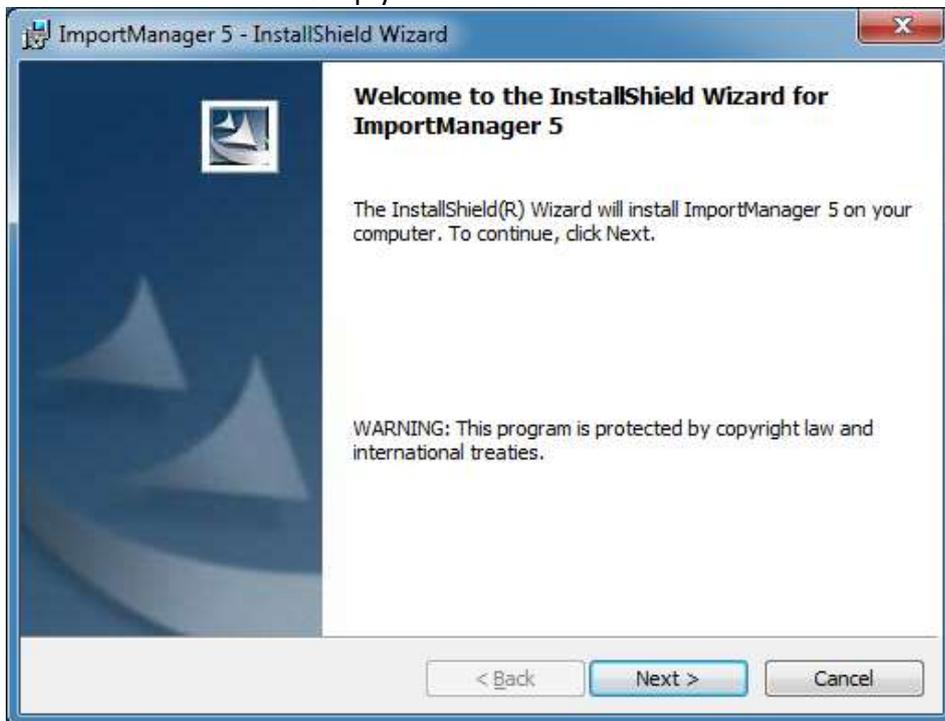
Server Installation.
Start by unzipping the program to a location of your choice.

Installer setup

Double click the *"ImportManager 5.MSI"* file to start the installation

1. Welcome

In the welcome screen simply click *"Next"*.

2. End-User license agreement

Read the EULA by scrolling down.
After reading and agreeing to the EULA, click the *"I accept the terms in the license agreement"* radio button. Click *"Next"*.

3. Destination folder

ImportManager 5 will as a default install to *"C:\Program Files (x86)\CRM Extensions\ImportManager 5\"*. *W*e recommend that you do not change this folder. Nevertheless, should you choose to do so, simply click the *"Change"* button and provide the alternative location. Click *"Next"*.
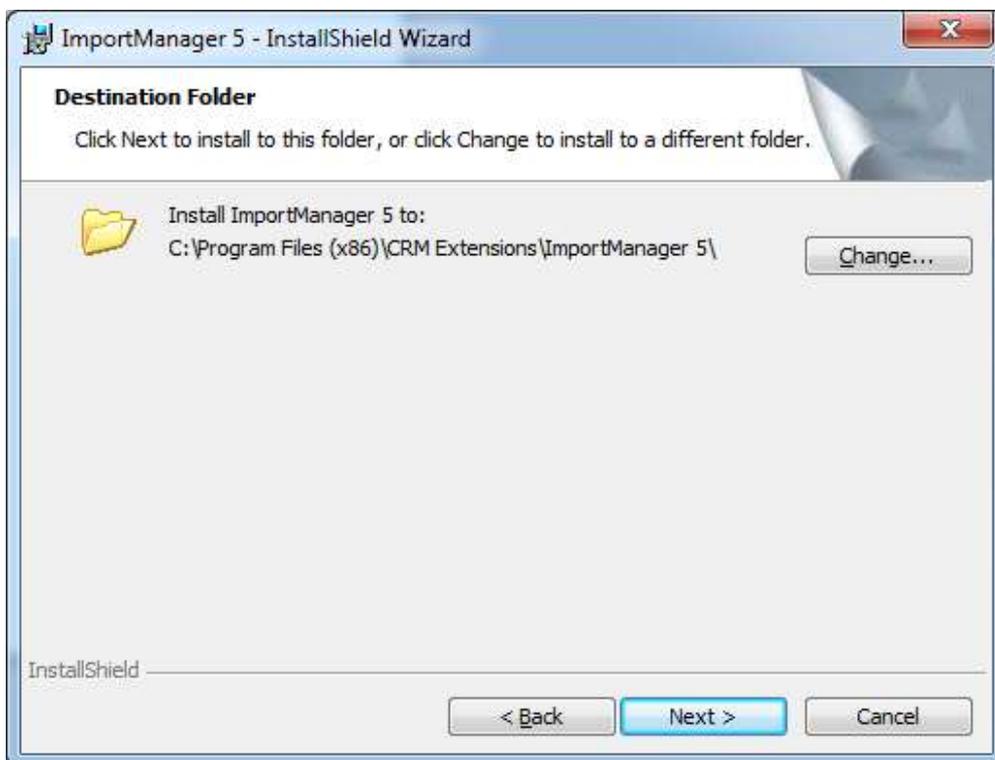
4. SQL Server

You now need to choose a database server for ImportManager 5 to use. When choosing connection method, it is imperative that you only choose *"Windows authentication credentials of current user"* if the current user has administrative rights on the chosen server! Otherwise choose *"Server authentication using the Login ID and password below"* and then provide a login ID and password for a user with the necessary administrative permissions for the chosen SQL Server.

Ready to install

The installation is now ready to run, as all the necessary information has been gathered. Click *"Install"*.
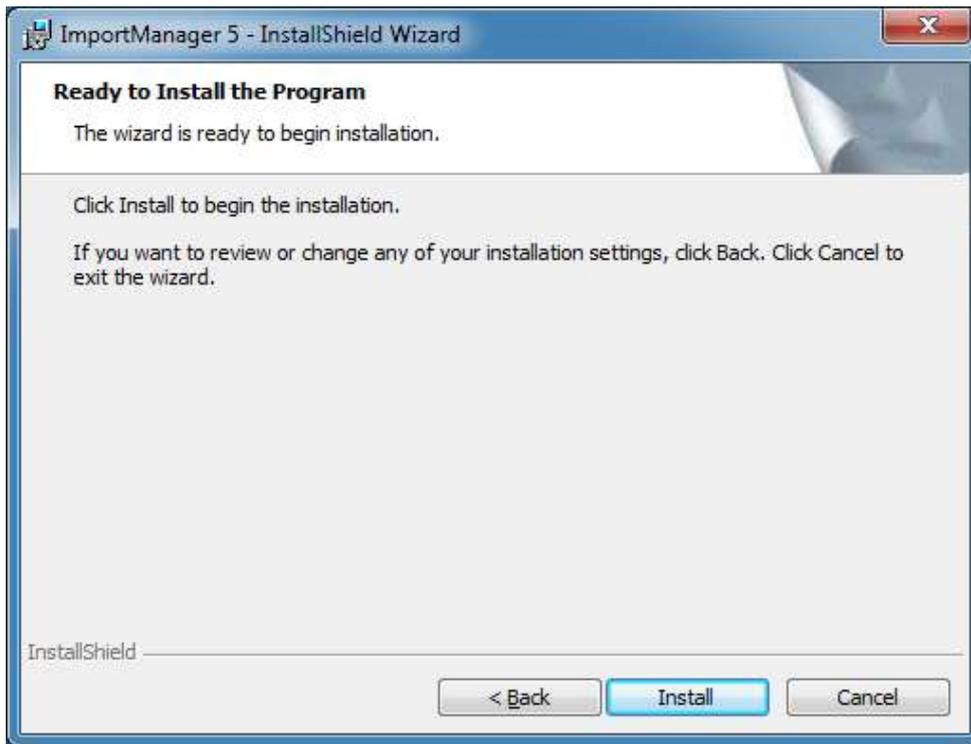
5. Installing

Simply wait while the installation progresses.
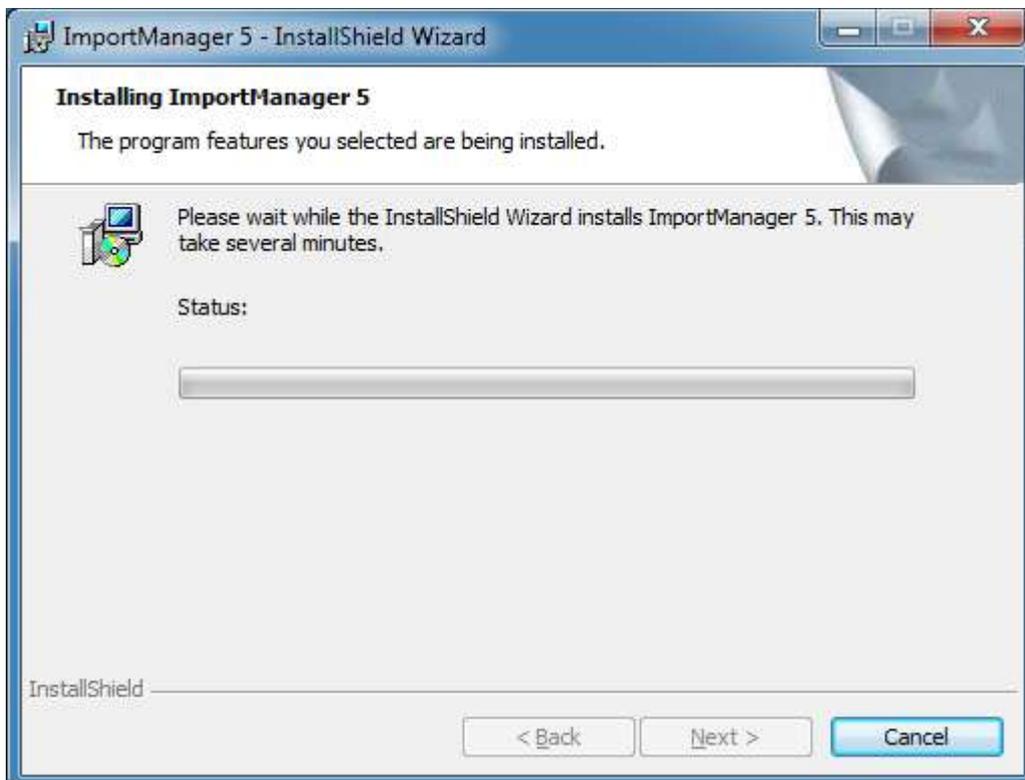
6. Completed

The installation has been completed.
Click *"Finish"*.
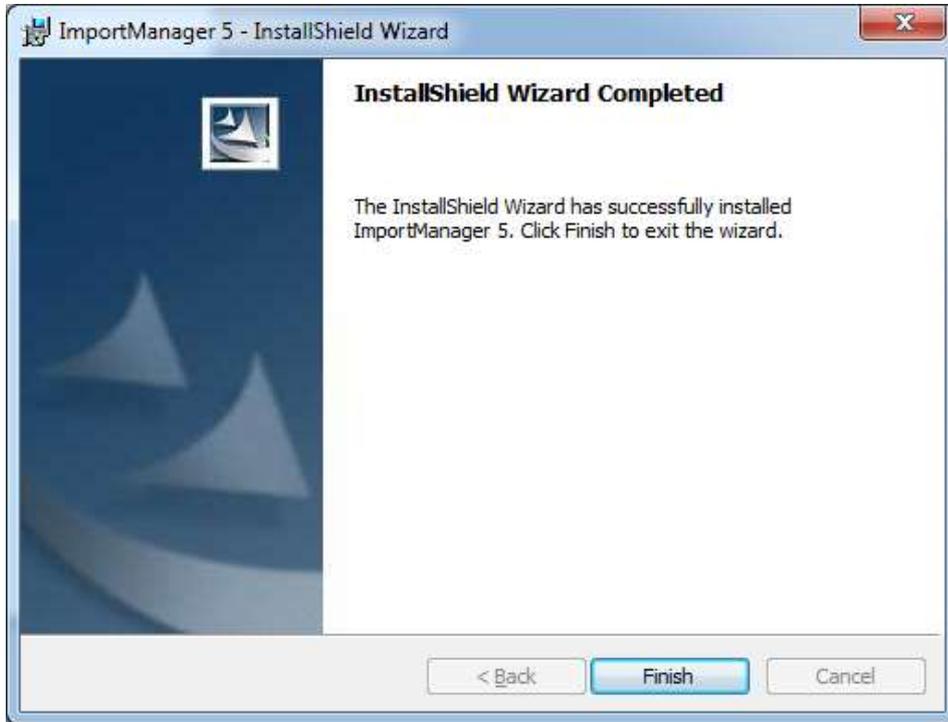
7. Set folder permissions

In order for ImportManager 5 to run properly, run "SetFolderPermissions.bat" located in the program folder. Default is c:\program files (x86)\CRM Extensions\ImportManager 5\.
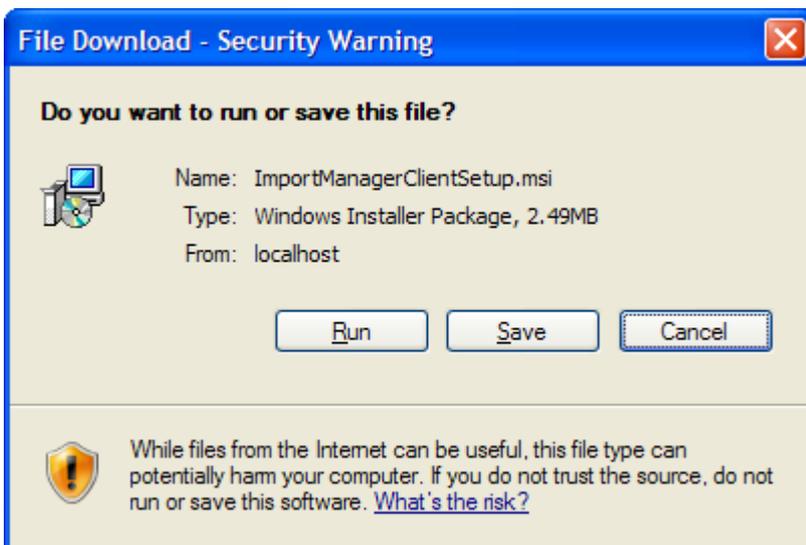
8. Client installation

Open a browser to the address http://localhost:5544/ and it should look something along the lines of the screen below. Note that this address will only work on the server, so change *"localhost"* to your servers name. In the *"Links"* section to the right, click the *"Import Manager 5 Client"* link (outlined in red in the screen shot below).

Note! If you are installing the client from another computer, the website can be found at http://serveraddress:5544/ instead.

9. File downloaded

When asked what to do with the ImportManagerClientSetup.msi file, choose *"Run"*. Alternatively you can Download the file to a local destination and run it from there.

10. IE Security warning

Most likely you will receive a second security warning, where you should simply confirm that you want to run the MSI file. Click *"Run"*.
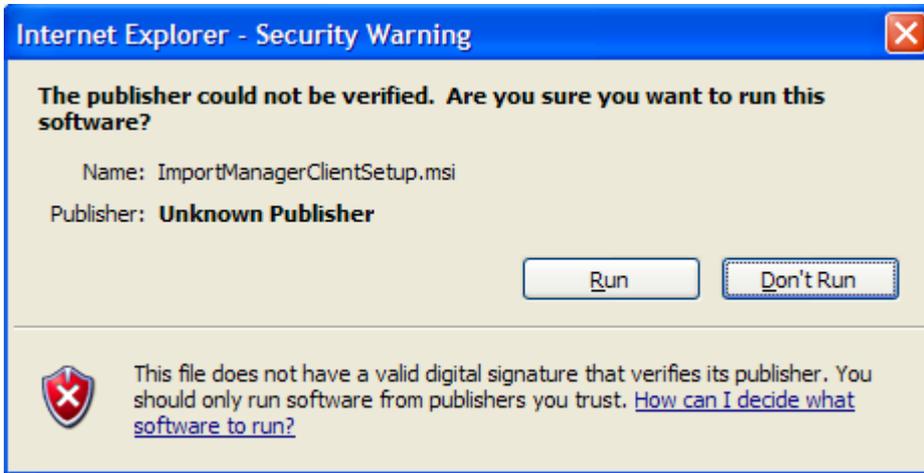

11. Select installation folder

We recommend that you keep the default destination folder, as seen in the screen below, but it is possible to change this location by clicking *"Browse"*. The ImportManager 5 Client takes up only very little space, but if the amount of space concerns you, click *"Disk Cost"*. Choose whether to install the client for everyone or just the current user profile. Click *"Next"*.
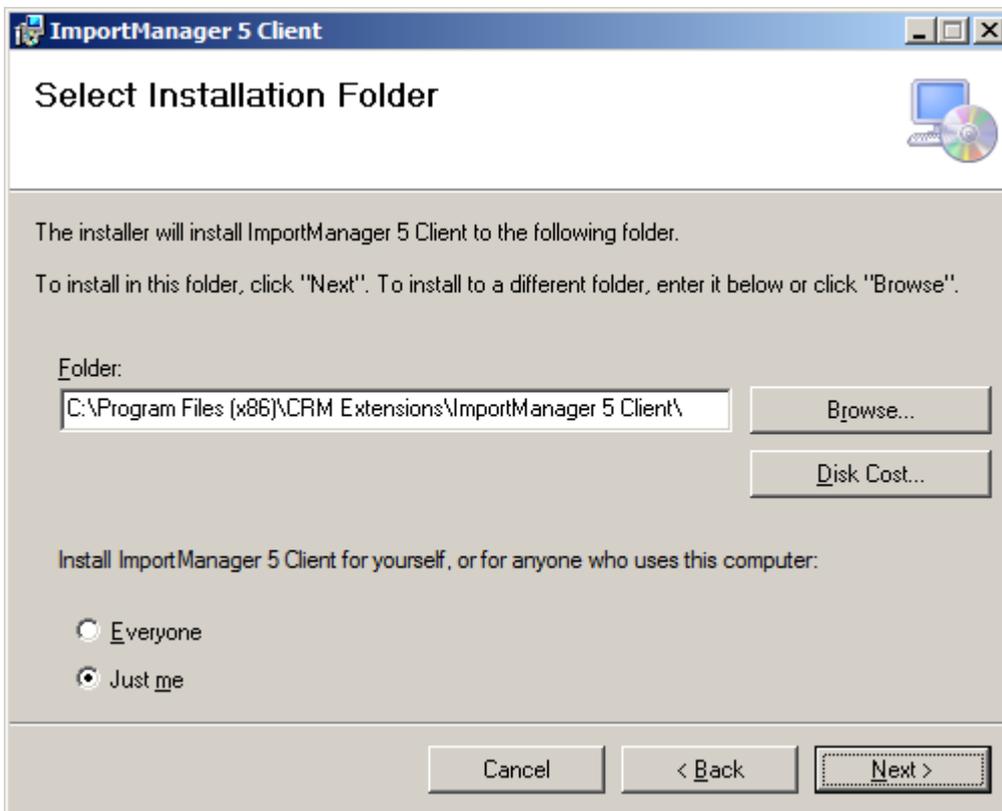
12. Confirm installation

Now the installer has gathered all the necessary information to install the ImportManager 5 Client. Simply click *"Next"*.
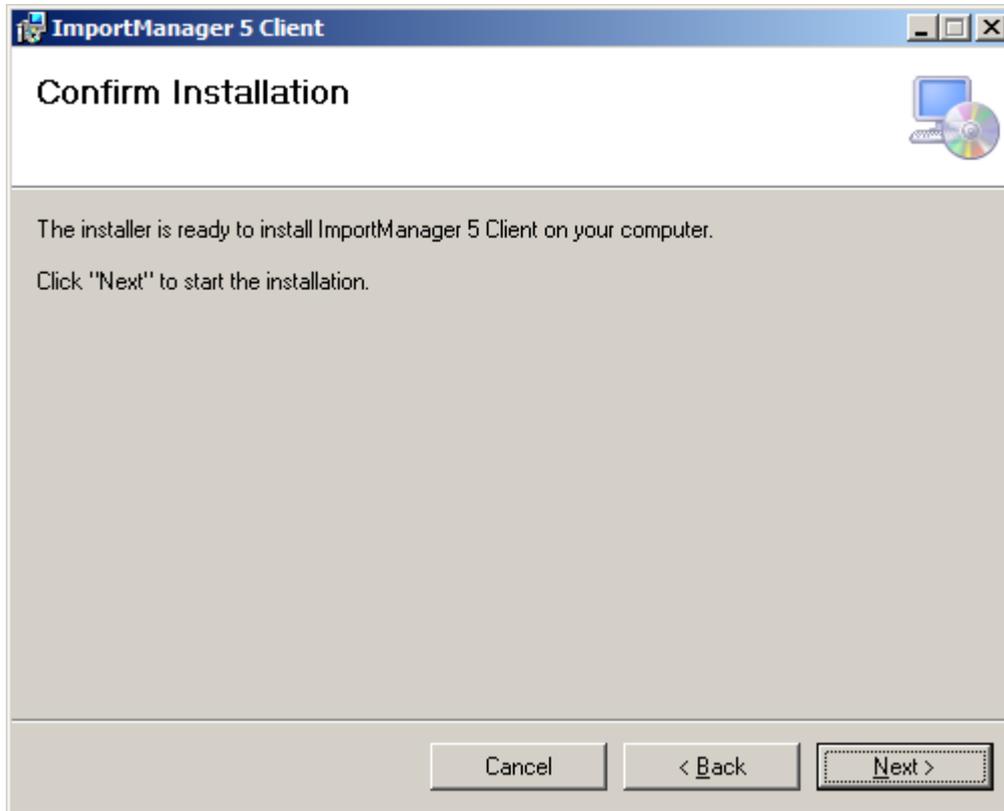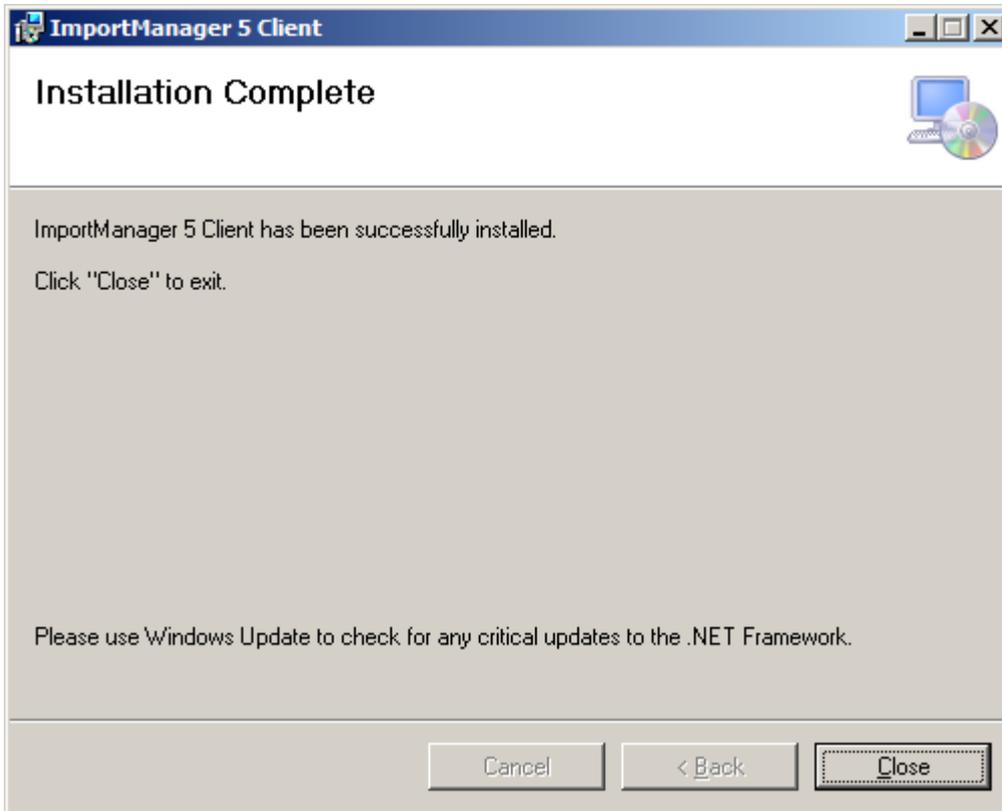
13. Installing

Please wait while the installer progresses through the installation.
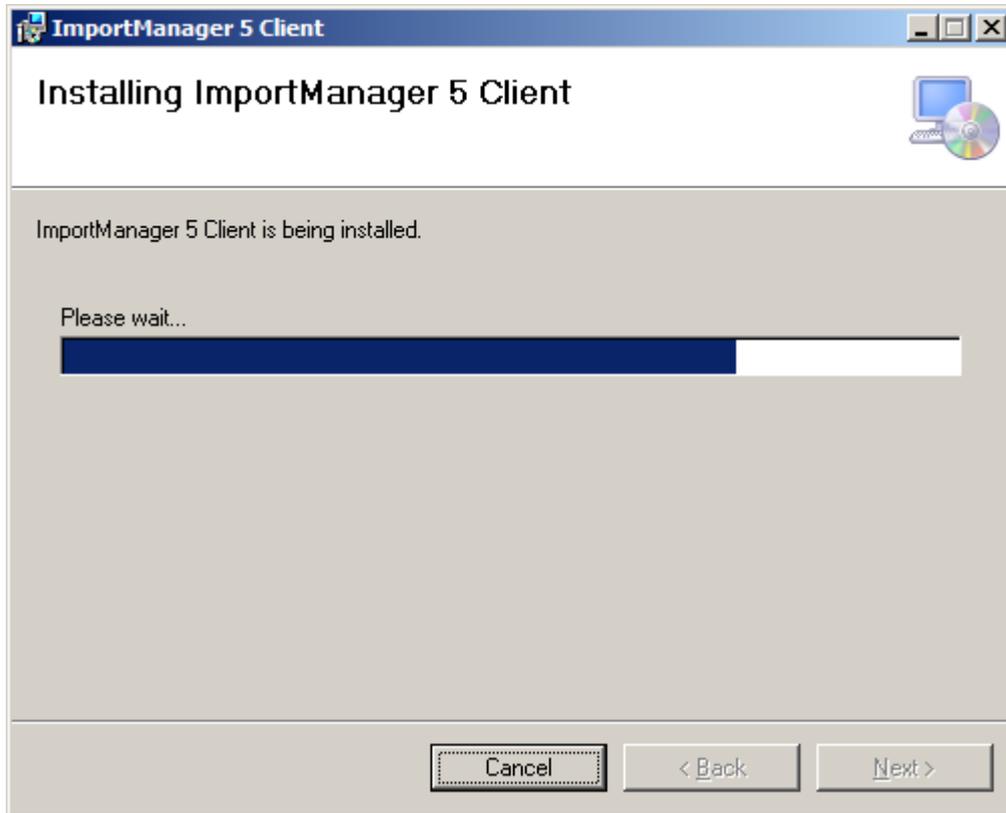
14. Completed

The installation has been completed.
Click *"Close"*.

15. Start Import Manager

To start ImportManager 5 click the *"Start"* button, select *"All Programs"* and then *"CRM Extensions"* followed by the *"ImportManager 5"* folder and finally *"ImportManager 5"*.
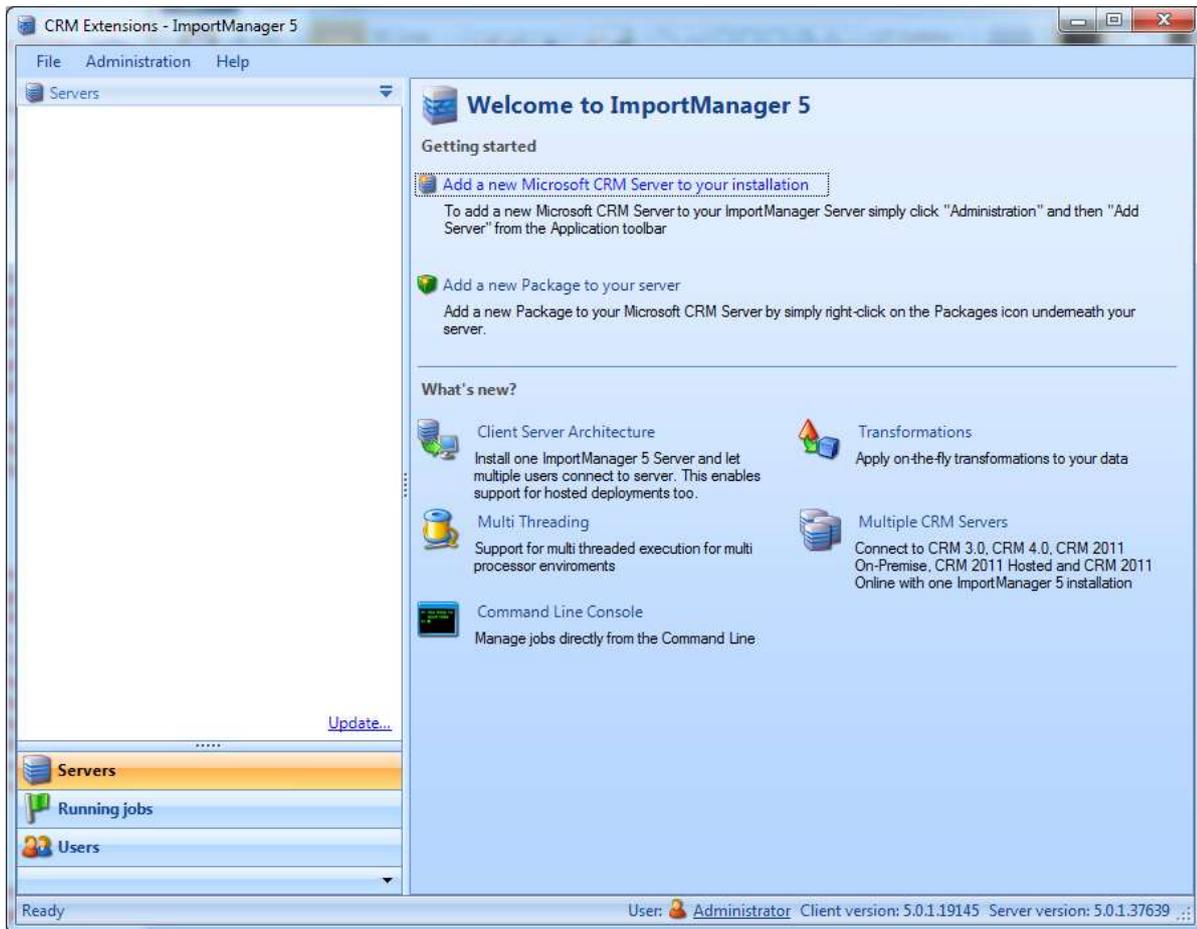
16. Login

The login window as seen in the screen below will pop up after a short time. Use the information provided by the browser as depicted in step 8 to log into ImportManager 5. Click "*Connect*".
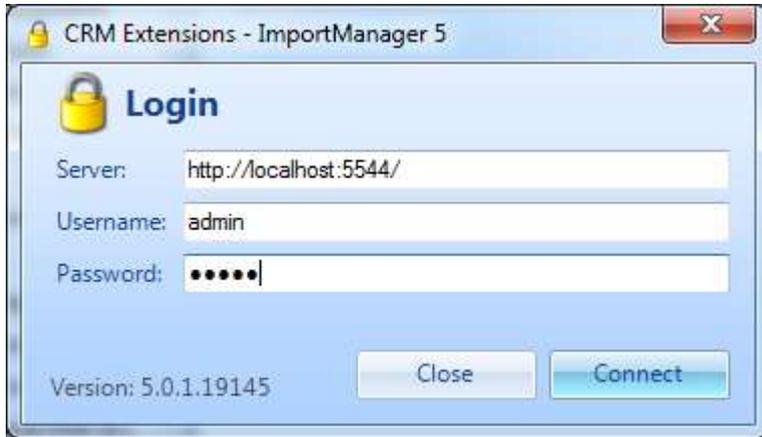
Finished

ImportManager 5 has now been started and should look like the screen below, ready to start importing.

Adding a License

Licensing your product is easy. Simply copy or move your license file to a permanent location on your hard drive, where ImportManager 5 can locate it and then follow the steps below, to add the license to a server.
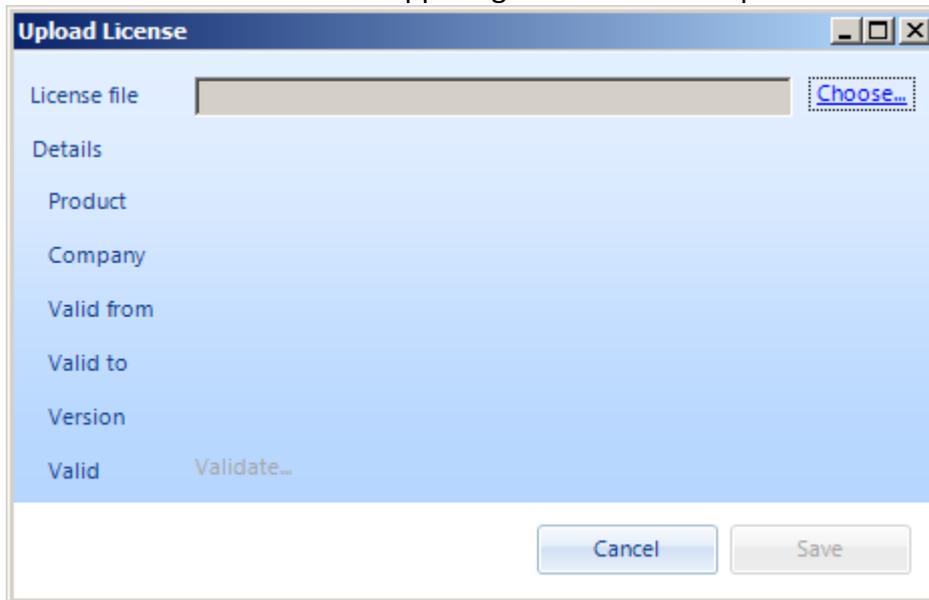
1. License Method.

When creating a new server (or editing an existing server), you will be prompted to choose a license method, as depicted in the screen below. Choose Full version mode and click the button *"Choose license file"*.
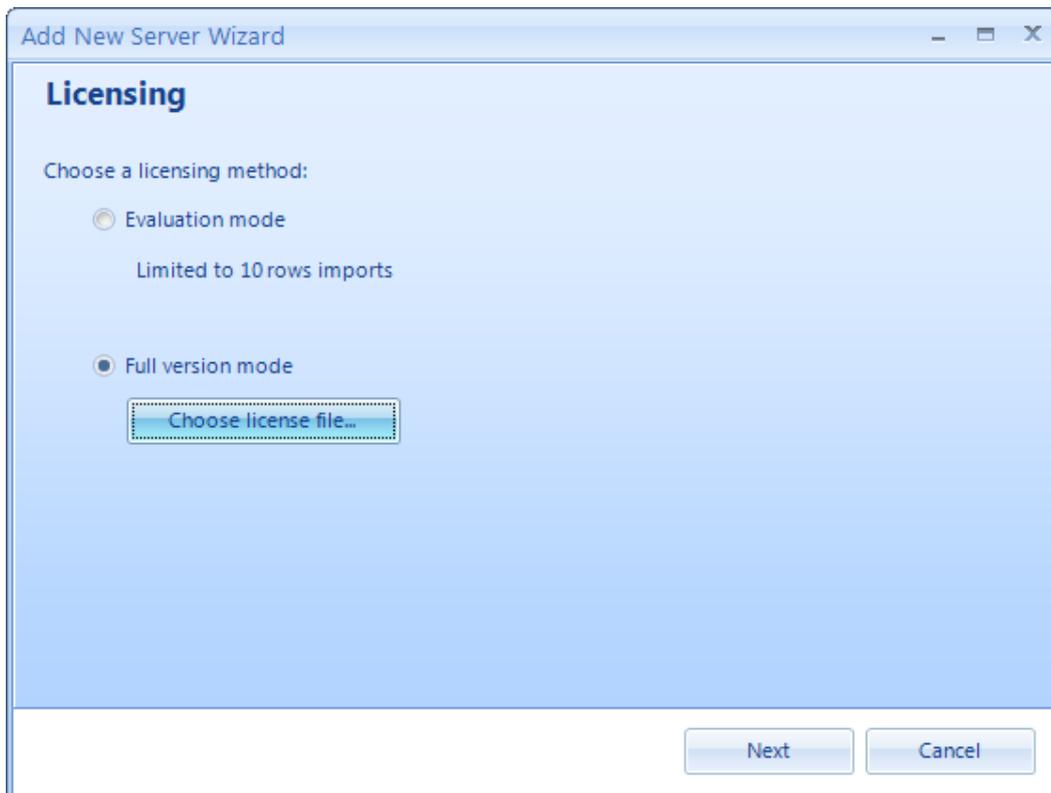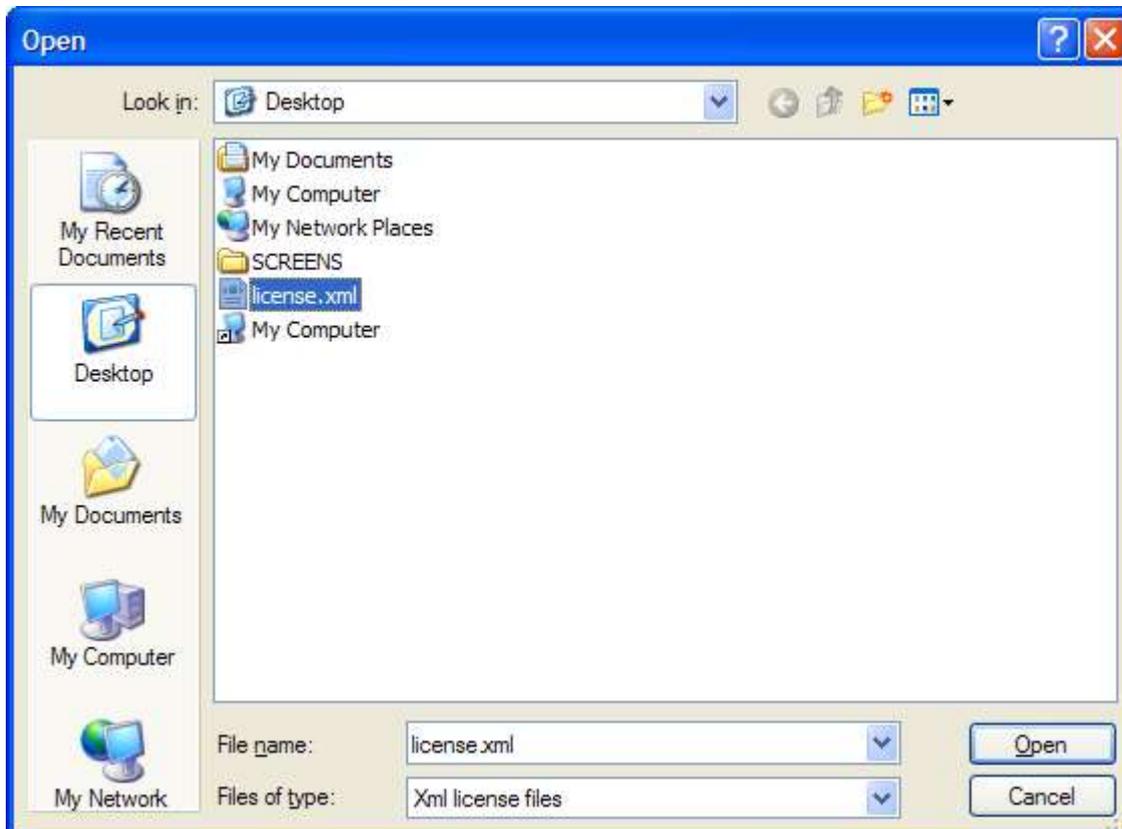
2. Choose License File.

Click the *"Choose"* link in the upper right corner of the Upload License window.

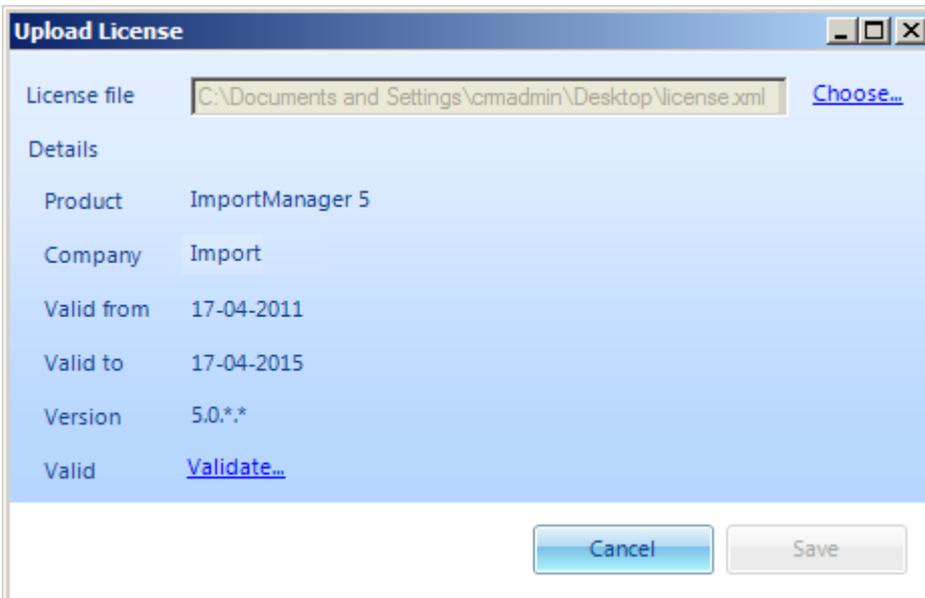**3. Browse.**

Browse to the location of your license file, select it and click *"Open"*.

4. Validate.

Various information about the selected license will be shown in the Upload License window, as shown in the screen below.

Click the *"Validate"* link in the bottom of the window to validate your license.

5. Success.

If you have a valid license and everything works out as it should, the valid license icon will show in the bottom of the Upload License screen as seen in the screen below. Click save.
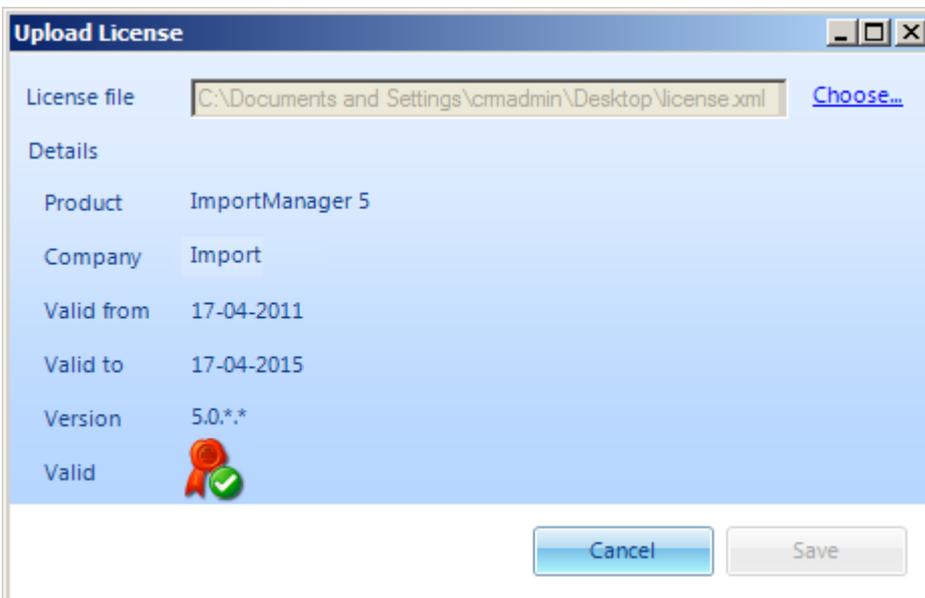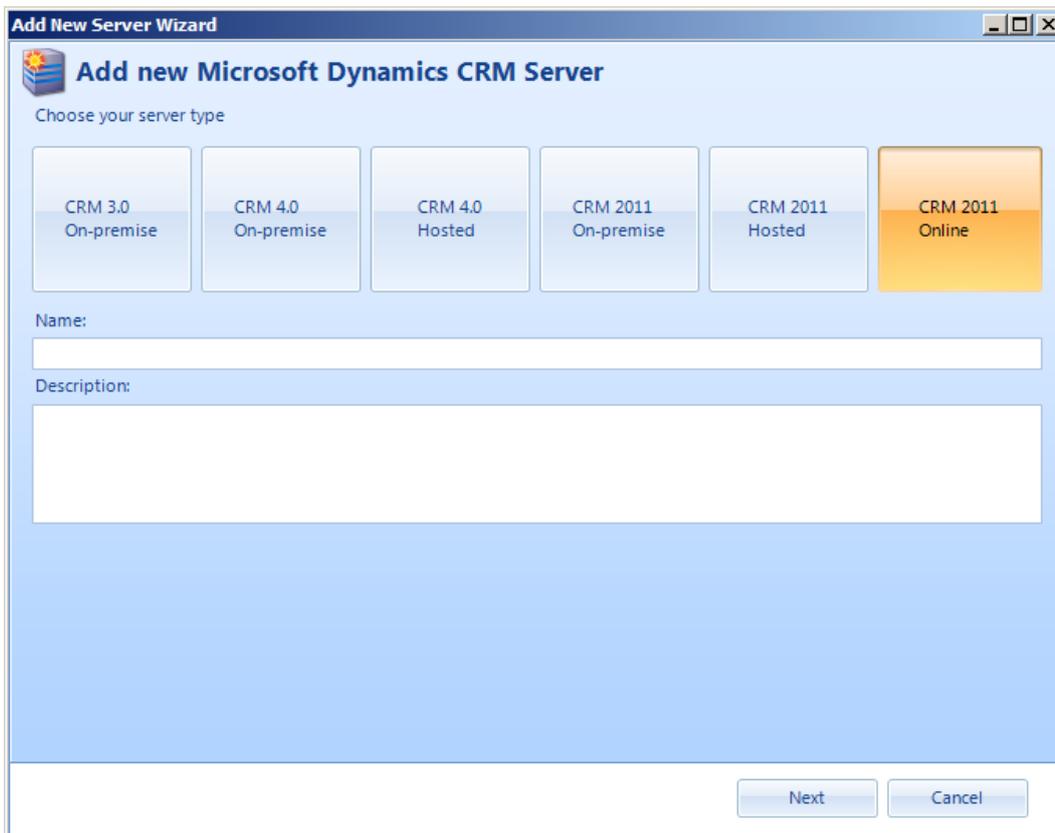
Creating a server

ImportManager 5 uses a client-server architecture. To create a server, follow the steps below describing how to add a CRM 2011 Online server.

1. Create Server.
Click *"Administration"* in the top bar menu and select *"Add Server"*.

2. Choose Server Type.
Select a server type, give the server a name and optionally, give the server a short description.

3. Connection Information.

Enter the Live ID credentials and select the datacenter used.

4. Select organization.

A list of associated organizations will appear. Pick the one you wish to work with.

5. Choose licensing method.

If you have a license, choose the *"Full version mode"* (see the license chapter for more information on this) and if not, choose the *"Evaluation mode"*. Click *"Next"*.
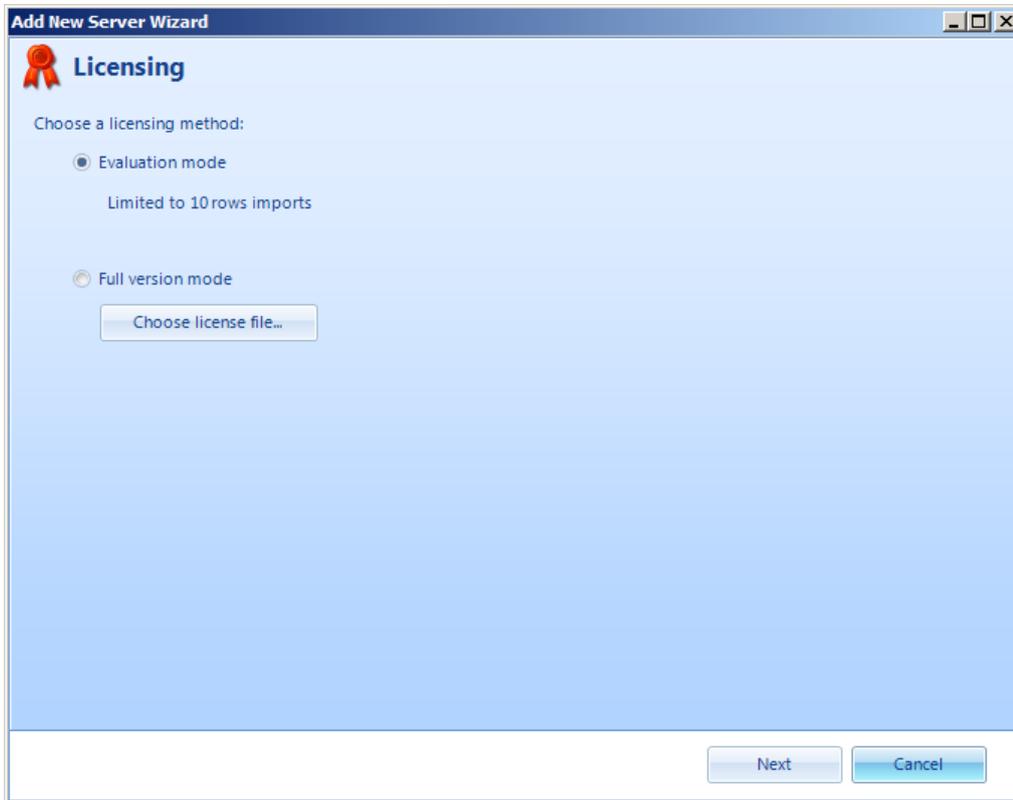

5. Finished.

ImportManager 5 recaps the choices you've made for the new server and if you're satisfied, click *"Create"* and the server will be created. Alternatively you can click *"Cancel"* and start over.

Creating a user

As an administrator, it is possible to add users and setup which servers they can connect to. Follow the procedure below to add a user and set him up to use a server.
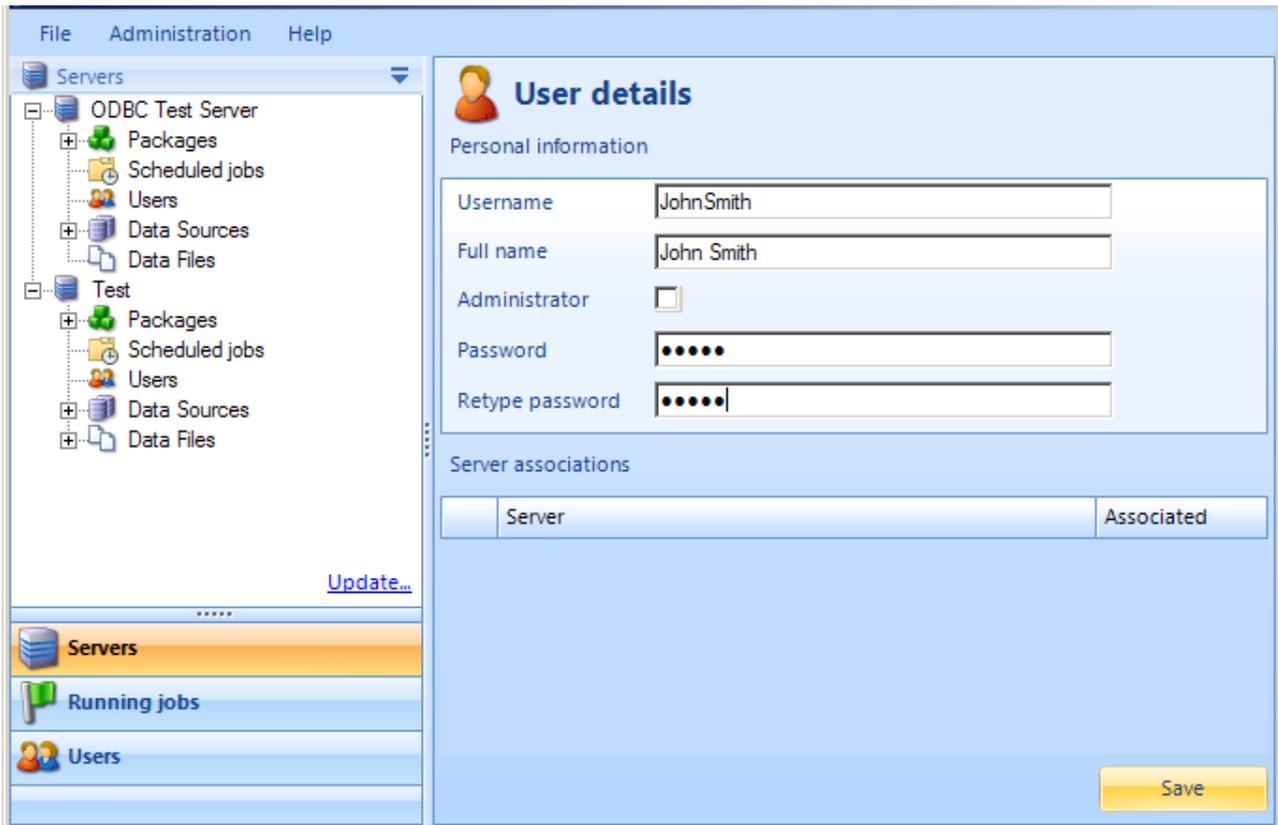
1. Add User.
Select *"Administration"* from the top bar and select *"Add User"*.
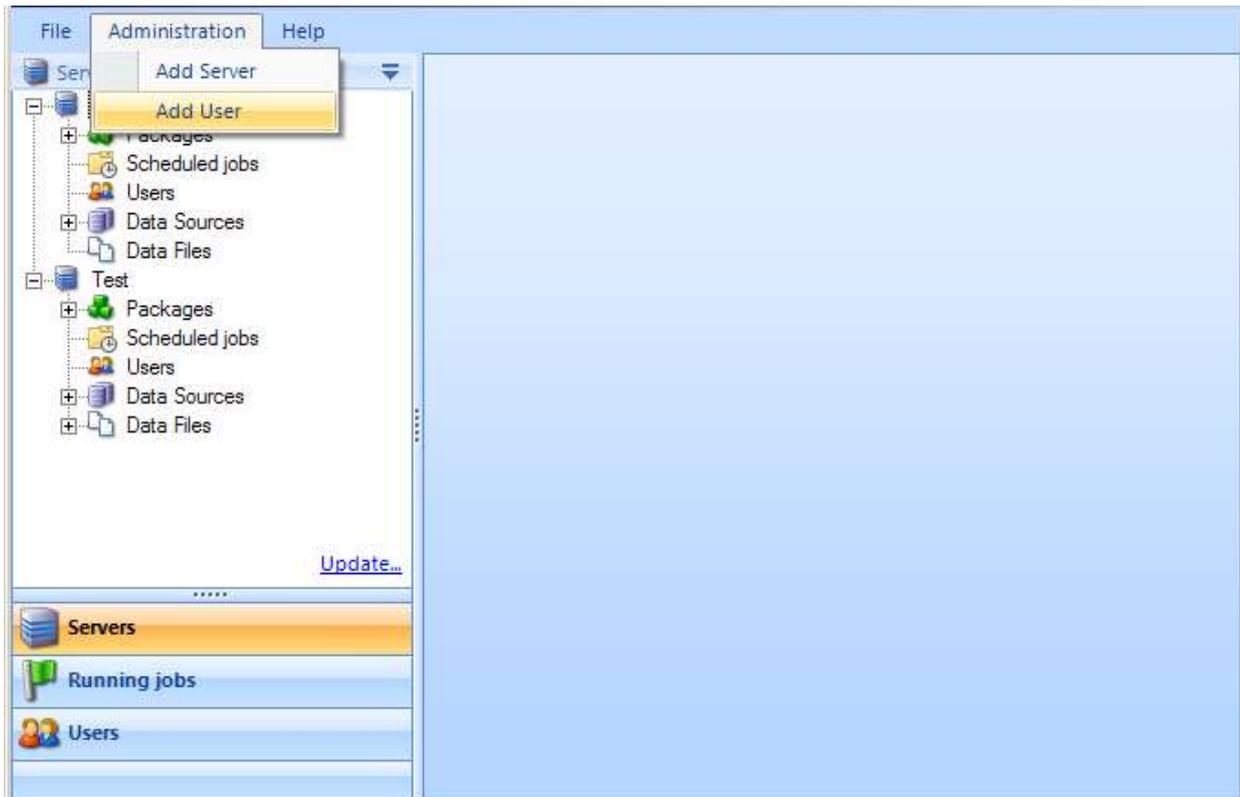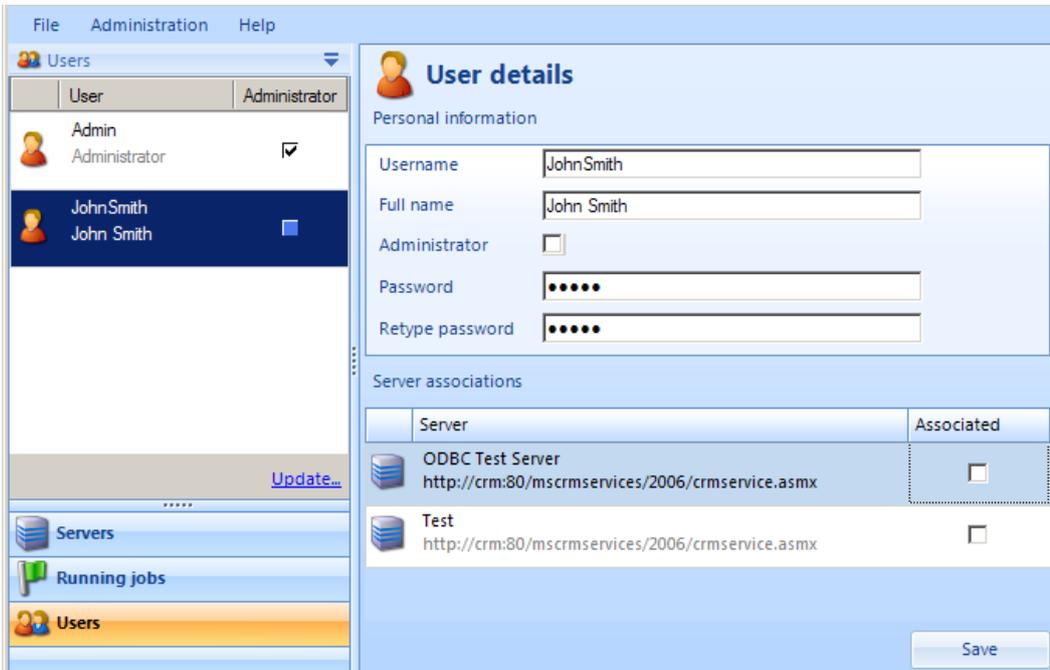

2. User Details.
Fill in the necessary information for the new user as illustrated in the screen below.
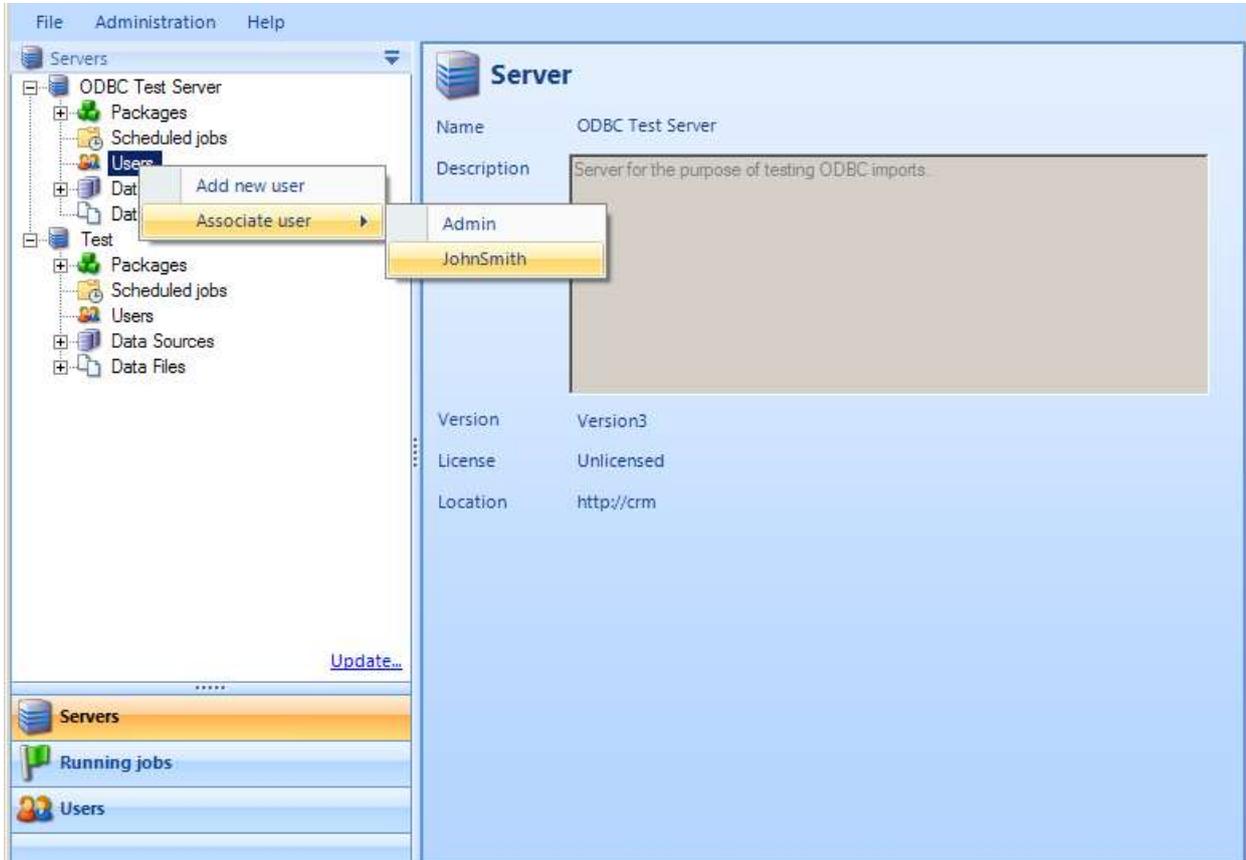
Click the *"Save"* button.

3. Save User.

The user is created, but as seen in the screen below, the user still isn't associated with a server.

4. Associating Server.

Click the *"Servers"* button in the bottom left corner to view the servers. In the *"Servers"* tree structure right click *"Users"* and select *"Associate user"* and then the new user.

5. User Associated.

When clicking *"Users"* in the bottom left corner and then selecting the new user, it is now possible to see that the user has been associated with a server. Next time you log into ImportManager 5 you can use the credentials of the new user.

Troubleshooter

- During installation, an error occurs when trying to create SQL Database on "master".

Reason: The user provided for SQL authentication does not have sufficient privileges to create databases.

Solution: Give user suffient privileges or provide another user during installation

- When logging on through ImportManager Client, an error occurs stating that the SQL server could not be found.

Reason: A bug in the installation can cause that the provided SQL servername/IP is not saved correctly.

Solution: Please find "c:\program files (x86)\crm extensions\ImportManager 5\web.config". Open in notepad or similartext/xml reader.

About 19 lines down you'll see a line similar to this:
   <add name="CrmExtensions.ImportManager.Server.Properties.Settings.ImportManagerConnectionString" connectionString="Data Source=YOUR_SERVERNAME_OR_IP;Initial Catalog=ImportManager;Uid=ImportUser;Pwd=Password#1" providerName="System.Data.SqlClient"/>

Please verify that YOUR_SERVERNAME_OR_IP is set to your SQL server. A user has reported that only a ".". was present, and he had to fill in the SQL server IP.

- You receive an error "Unable to create temporary class" while connecting to the server using the ImportManager Client

Reason: The user does not have suffient read permission to the windows temporary folder.

Solution: Please locate "c:\program files (x86)\crm extensions\ImportManager 5\SetFolderPermissions.bat". Run by double clicking the .bat file. You must be a system administrator to do this.