



ClickDimensions Deployment Guide

Microsoft Dynamics CRM 4.0 Compatible

ClickDimensions, LLC.
www.ClickDimensions.com



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Overview

This document outlines the process for deploying ClickDimensions Marketing Automation solution. ClickDimensions is a Software-as-a-Service (SaaS) solution which runs on Microsoft Azure and provides marketing automation capabilities for Microsoft Dynamics CRM. Your deployment of ClickDimensions typically takes less than 15 minutes. ClickDimensions schedules a short web meeting between your CRM administrator and your ClickDimensions success manager. During this meeting, our service connects to your CRM, creates the custom entities we use to hold your tracking data, and downloads configurations. We'll assist you in placing our tracking script on your web pages and configuring your web site forms. There is no software installed and as we add features they automatically become available to you.

Microsoft CRM Compatibility

ClickDimensions is compatible with Microsoft Dynamics CRM version 4.0 with rollup 7 and above.

Software Requirements

ClickDimensions will not function without the following components:

- Microsoft Dynamics CRM 4.0 configured for On-Premise or IFD deployment with external endpoint
- Rollup 7 for Microsoft Dynamics CRM 4.0 or above
- Flash player 10 (MS CRM users only)



Deploying ClickDimensions

Deployment Preparation

Prior to deploying ClickDimensions for MS CRM 4.0, it is necessary to go through the following steps in order to make sure your system is prepared:

- 1) Install the latest MS CRM rollup.
- 2) Expose an external endpoint of MS CRM to which the ClickDimensions service can connect. It is recommended to use IFD (Internet Facing Deployment) for the external endpoint.
- 3) Create a dedicated MS CRM user with System Administrator role assigned to it which will be used by ClickDimensions.
- 4) Register at <https://app.clickdimensions.com/mscrm/v4/pages/register.aspx> to receive the installation package for MS CRM v4.0.

Deployment Scenario

After you have registered to receive the deployment package, you will receive an email with a link to the ClickDimensions installation application for v4.0. The email will also contain a unique key which will be associated with your deployment. To install the ClickDimensions components, please download the package to your MS CRM server and extract the content.

Note: in case you have your platform and application components installed on separated servers, you will need to deploy ClickDimensions on your platform server.

To install ClickDimensions please follow the next steps:

- 1) Login to your MS CRM server as "Deployment Administrator". Deployment Administrator means your user is configured in MS CRM deployment manager as Deployment Administrator.
- 2) Download and save the ClickDimensions package zip file and extract the content to a local folder on the server.
- 3) Double click the file named "ClickDimensions.Install.exe" to initiate the install.
- 4) Click the "Connect" button to connect to your MS CRM server. The connection parameters are:
 - a. Server Url: this is your **INTERNAL** address of the crm server in the format of **http://[crm server]:[port]**
 - b. CRM User: your domain user name (NOTE: the username of the Deployment Administrator, NOT the ClickDimensions service user)
 - c. Domain: your domain
 - d. Password: user password
 - e. Report Server Version: this is your SQL Server version
- 5) Click "Connect"
- 6) At this point you will receive a list of all the organizations deployed on your server. Click on the organization you want to configure to have ClickDimensions and click the "Install" button.



- 7) One last step before installing: place the account key and token values, which were provided with the deployment email, at the top of the installation screen (make sure there are no spaces) and specify the environment language.
- 8) Click to install

Post Deployment Actions

Login into ClickDimensions Pages

ClickDimensions places external pages as iFrames inside MS CRM. If a user receives a login prompt when accessing one of these pages, it means the service user that was set up when ClickDimensions was registered is no longer valid: either the password has changed or the user has been disabled or had its security roles removed. To update the password, please contact ClickDimensions support.

Create Tracked Domains Records

The ClickDimensions tracking service is set to only track domains out of the tracked domains list. This avoids the scenario where someone could plant your tracking code in a domain you do not want tracked. For example: if your website is located at <http://www.example.com> then you should add **example.com** to the tracked domains list. In order to create a tracked domain record, navigate to the Settings area inside your MS CRM. Under the ClickDimensions Settings, you will notice a new entity called Domains. Click the New button to create a new domain, enter the domain name and click the save and close button.

Placing the tracking script in your web pages

You can now start tracking your site activity. In order to start tracking, place the ClickDimensions tracking script in your web site. The ClickDimensions tracking script is located under the ClickDimensions Settings area inside your MS CRM. Navigate to the settings area in your MS CRM and click on the ClickDimensions Settings page. Click on the Script Example button and follow the instructions on how to use the script.