



Paribus Interactive[™]

for Microsoft Dynamics CRM

Version 2.0

Paribus Interactive for Microsoft Dynamics 365/CRM Setup Guide

Document Version 2.0

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Notices

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Disclaimer

Although every effort has been made to ensure the processing performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of any database(s) to which Paribus Interactive connects to obtain match data.

Note: Paribus Interactive does not alter any data in databases as part of the matching and review process. Changes are only made by subsequent updates via Paribus Interactive Plug-in Tools.

If possible, perform any match processes or updates using live databases outside of normal operational hours.

We highly recommend that where applicable, all remote Microsoft CRM databases should be fully synchronised with the main host database before any updates are performed.

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Overview

This document provides a setup guide to the installation and configuration of Paribus Interactive™ for Microsoft Dynamics 365/CRM.

Outlining the steps required to install and configure Paribus Interactive into an instance of Microsoft Dynamics 365/CRM.

System Requirements

For up to date information on system requirements for Paribus Interactive and integration with Microsoft Dynamics CRM, see the online information available at the Paribus Cloud Help Center:

<http://www.paribuscloud.com/help/paribus-interactive/sysreqs/>

Other Related Information

For information on using Paribus Interactive see the Paribus Interactive User Guide or visit the Paribus Help Center.

For additional reference information on Paribus Interactive, see the Paribus Help Center at <https://www.paribuscloud.com/help/paribus-interactive/>

For up to date information on Paribus Interactive and the Paribus Cloud, please visit the Paribus Cloud website at www.ParibusCloud.com.

Paribus Interactive Solution Manager

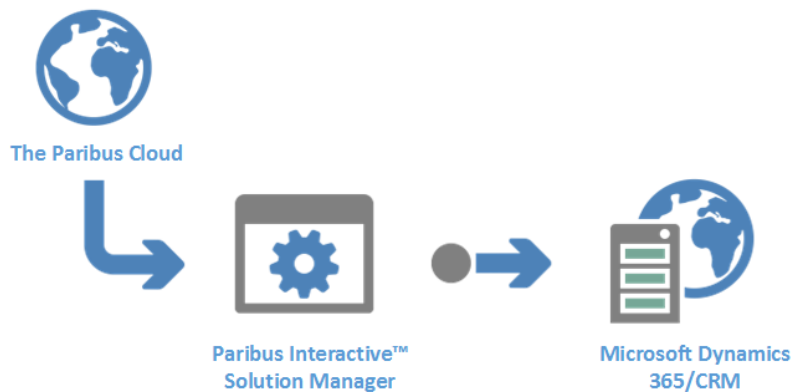
Introduction

The installation of Paribus Interactive for Microsoft Dynamics 365/CRM is achieved through a managed process utility known as the **Paribus Interactive Solution Manager**.

This utility is responsible for the installation of the Paribus Interactive CRM components into Dynamics 365/CRM and configuration of the Paribus solution.

Dynamics CRM Connectivity

The Paribus Interactive Solution Manager will connect to the target Dynamics 365/CRM system via the Dynamics CRM API, and upon which will provide a connected experience to installing and configuring your implementation of Paribus Interactive.



Upon successful connection to the target Dynamics 365/CRM system, the Solution Manager will analyse the CRM system to ascertain which version of CRM is connected and determine which Paribus components to be installed.

The Solution Manager also establishes a connection to the Paribus Cloud for the purpose of acquiring and downloading the necessary content and Paribus components to be installed into the target CRM.

Data Privacy

The connection made by the Solution Manager to the target CRM system is able to access CRM data within that system, however this data access is for the express purpose of installation and configuration of Paribus Interactive.

All CRM data accessed by the Solution Manager is securely contained within the executing process of the Solution Manager application and is not shared with any external process, external cloud service or remote systems.

Download

To download the Paribus Interactive Solution Manager, visit the Paribus Cloud Help Center:

<http://www.paribuscloud.com/help/paribus-interactive-solution-manager>

Paribus Interactive Product Installation

Due to recent changes in the implementation of Paribus Interactive for Microsoft Dynamics 365/CRM the content of this document has been temporarily removed and is under review.

For direct assistance in installing Paribus Interactive into your instance of Microsoft Dynamics 365/CRM please contact the Paribus Cloud support team:

<https://www.paribuscloud.com/contact.html>

Paribus – Technical Support and Troubleshooting

In the interest of providing customers with the latest product support information and troubleshooting assistance, QGate provides the following online resources within our Paribus Help Center.

General Support

For general technical support information, please visit the main product support page:

<https://www.paribuscloud.com/help/paribus-interactive/>

Troubleshooting

For troubleshooting common problems and scenarios relating to Paribus Interactive and Paribus Interactive for Microsoft Dynamics CRM, please visit the following troubleshooting pages:

<https://www.paribuscloud.com/help/paribus-interactive/troubleshooting/>

System Requirements

For information regarding the minimum system requirements for installing and running Paribus Interactive, please visit the product system requirements page:

<https://www.paribuscloud.com/help/paribus-interactive/sysreqs/>

Product Information

For more information about Paribus Interactive

Paribus Cloud <https://www.paribuscloud.com/>

Or, for other products from QGate Software, see one of the QGate websites:

EMEA: www.QGate.co.uk

Americas: www.QGateSoftware.com

Fault Reporting

If you wish to report a fault or an issue with Paribus Interactive, please contact your Paribus Interactive software supplier.

Upgrades and Service Releases

Revision upgrades and service releases of Paribus Interactive are available on request from your Paribus Interactive software supplier.

Warning: We strongly recommend you review the release information provided with each release, to ensure each upgrade is suitable to apply. If you are in any doubt, we recommend you contact your Paribus Interactive software supplier.

All major version release upgrades will require the purchase of a new licence.



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