



Web2CRM Technical Requirements Manual V1.3

## Web2CRM Technology Requirements

This document provides all the technical specifications required to utilize the Web2CRM application.

### CRM Server, Web Server and Client Technology Requirements

Web2CRM is a Software Plus Services application and consequently absolutely no software to support it's use is required to be installed on either the CRM Server, CRM Clients or your Company Web Server. The only software 'installation' required to access the Web2CRM application is for the client machine to have Microsoft Silverlight 3.0 installed (<http://www.Microsoft.com/Silverlight/>). That is because the Visual Form Designer is built on Silverlight. When you navigate to the Web2CRM site it will ask you to download and install Silverlight if it determines you don't have it on your client machine. Note however, the designer creates standard HTML form code so Silverlight isn't required to use the published form on your company website.

#### Web Server Requirements:

- None. The form code is server platform independent. Our carry code option gives you all the form HTML you need to paste into your web page.

#### CRM Server Requirements:

- CRM Online: No additional configuration is required.
- CRM On Premise, Partner Hosted, standard or IFD mode: The CRM server must be accessible from outside your company firewall. In other words if you type in your CRM url ie: <http://crmorgname.yourcompanyurl.com> from anywhere on the Internet it needs to come back with a request for your login credentials. Two-way access is required via this port.

#### Ports:

- Web2CRM communicates via port 443 and 1000 between the client and the application and between the application and the CRM Organization database. These ports must be open both ways (inbound/outbound) on your firewall.



**Security:**

- Should you want to control access to the CRM organization website via IIS then use this IP address 198.190.219.73 for the location of the Web2CRM hosted application in the Cloud.

**Exception Reporting:**

- If the CRM organization website is not accessible –the server is down, it is being rebooted or the application cannot otherwise be accessed the application (the authentication password has changed) will send the submitted form data to the email on record of the Web2CRM account. This will also include notification of the error incurred.

**Security Role Requirements**

While ‘any’ CRM user can utilize the Web2CRM to create and publish a web form for their website, unless they have System Customizer or System Administrator privileges, they will likely require some additional privileges so that the Designer can interact with the CRM database.

The following minimal security privileges are required to define and publish a form for their website:

1. In the Business Management tab, the user must have at least User level Create and Write privileges for User Settings.

Entity	Create	Read	Write	Delete	Append	Append To	Reparent	Enable/Disable
Organization Settings		●	○					
Business Unit	○	○	○			○	○	○
User	○	○	○		○	○	○	○
User Settings	○	○	○					
Team	○	○	○			○		
Role	○	○	○	○				
License	○	○	○	○				
Currency	○	○	○	○	○	○		



- In the Core Records tab, the user must have at least User level Create and Read privileges for the entity they intend to create a form. In the following example this is set for the Account Entity. Although it is likely that this privilege is already part of their base security role.

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>					
Contact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lead	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- On the Customization tab, Read is required on Entity, Attribute, and Relationship. Web2CRM needs these permissions in order to read your system's metadata.

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Entity	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Attribute	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Relationship	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Form		<input checked="" type="radio"/>	<input type="radio"/>					
View	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Workflow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>
System Job		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>	<input type="radio"/>

The recommended approach is to create a Metadata Reader security role that meets the requirements above and add this Role to the privileges of the Users that will be creating Web2CRM forms.