

Installation Guide

Dynamics CRM Campaign Integration 2.2

For administrators and developers



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1.1 Install Microsoft Dynamics CRM Campaign Integration

Microsoft Dynamics CRM Campaign Integration consists of the Dynamics CRM Security Provider module and the Dynamics CRM Campaign Integration for WFFM module. These modules are distributed as separate Sitecore packages.

The following sections describe how to install both modules and how to set up the CRM integration. For more information about configuring the CRM Security Provider module, see the [Documentation section](#).

1.1.1 Install Dynamics CRM Security Provider

Visit the [Sitecore Developer Portal](#) to download the Dynamics CRM Campaign Integration package. The package contains both the Dynamics CRM Security Provider and the Dynamics CRM Campaign Integration for WFFM modules.

Prerequisites

Prerequisites for installing the CRM Provider module:

- Sitecore XP 8.1
- Microsoft Dynamics CRM v. 3, 4, 2011, 2013, 2015
- Windows Identity Foundation and .NET Framework 4.5.2

Installation Process

The Microsoft Dynamics CRM Security Provider 2.0 module is distributed as a Sitecore package.

To install the provider:

- On the **Launchpad**, click **Control Panel, Administration, Install a Package**.
- or
- On the **Launchpad**, click **Desktop**, and then in the **Desktop**, click **Sitecore, Development Tools, Installation Wizard**.

The Installation Wizard will guide you through the installation process.

1.1.2 Install CRM Campaign Integration for WFFM

The Dynamics CRM Campaign Integration for WFFM module is distributed as a Sitecore package.

Prerequisites

Prerequisites for installing the Dynamics CRM Campaign Integration for WFFM module:

- Web Forms for Marketers v. 8.1 or later
- Microsoft Dynamics CRM Security Provider v 2.1

The installation process is the same as for the CRM Security Provider – using the Control Panel or Desktop.