



IMPORT GUIDE

PowerWebTraffic

CRM 2013/2015



Service



Support



Education



Add-ons

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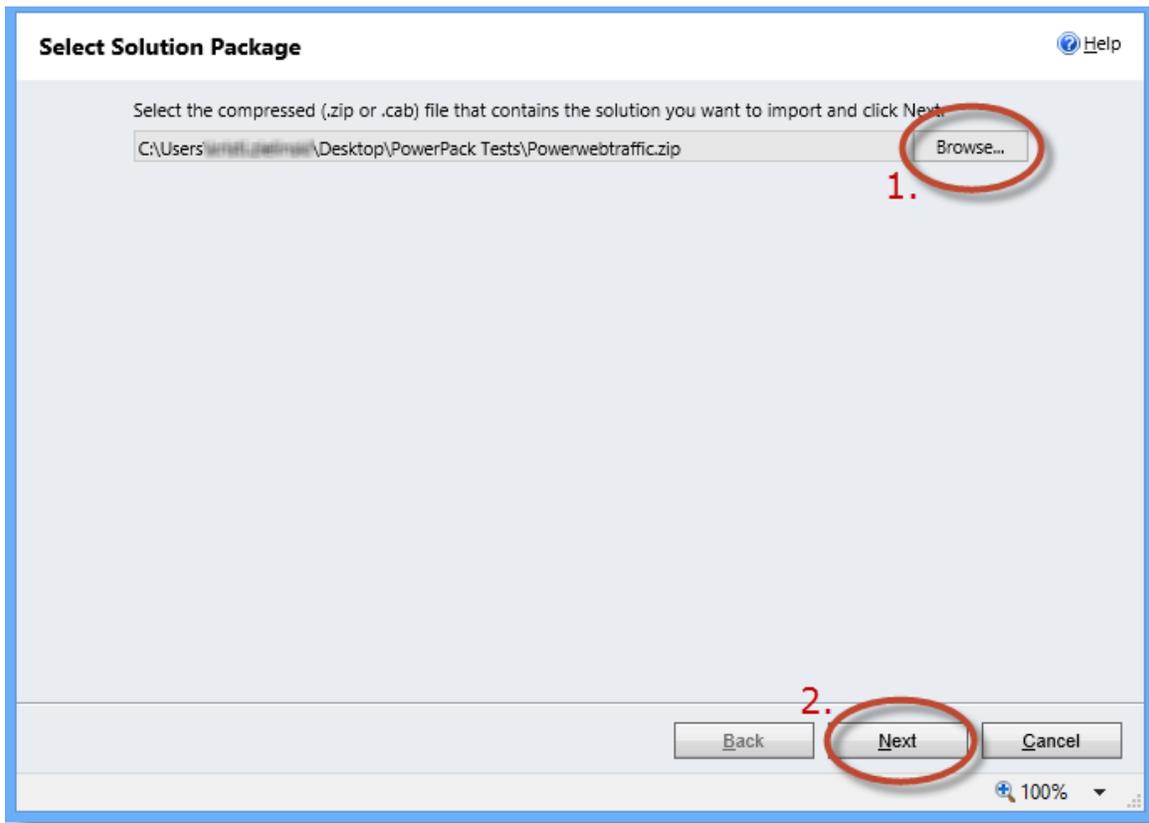
Uninstalling PowerWebTraffic



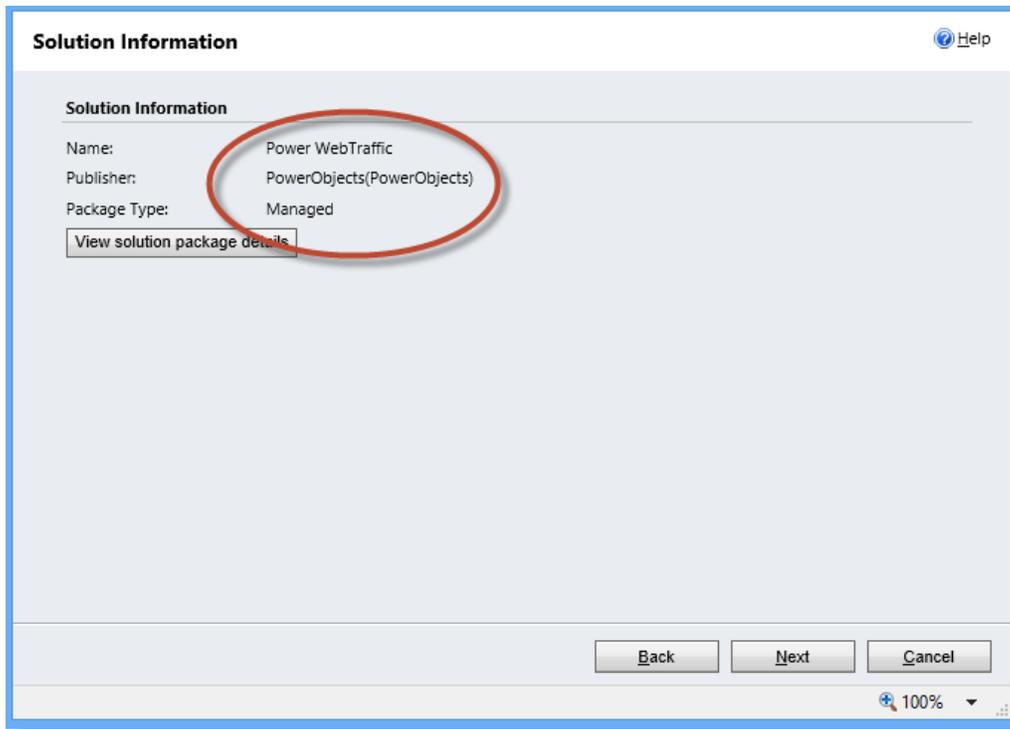
Import

The first step to installing any managed solution in Microsoft Dynamics CRM is to locate the file you want to install, download it and place it on your computer. In this instance, you would go to the PowerWebTraffic webpage, click on Download Solution and save the file in a convenient place on your computer.

After you're done with that, log into your Microsoft Dynamics CRM as a System Administrator or System Customizer – you must have administrative privileges. Navigate to Settings > Solutions and click on Import. The next window that opens will let you browse for the solution you are importing – navigate to the file, select it and click Next.

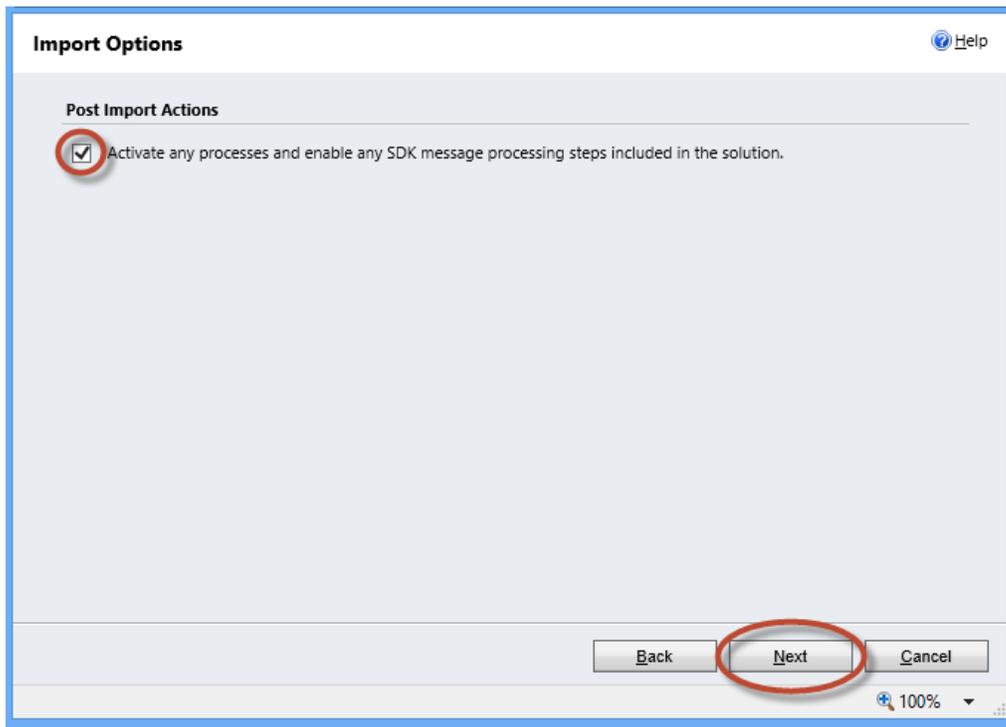


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerWebTraffic from PowerObjects.

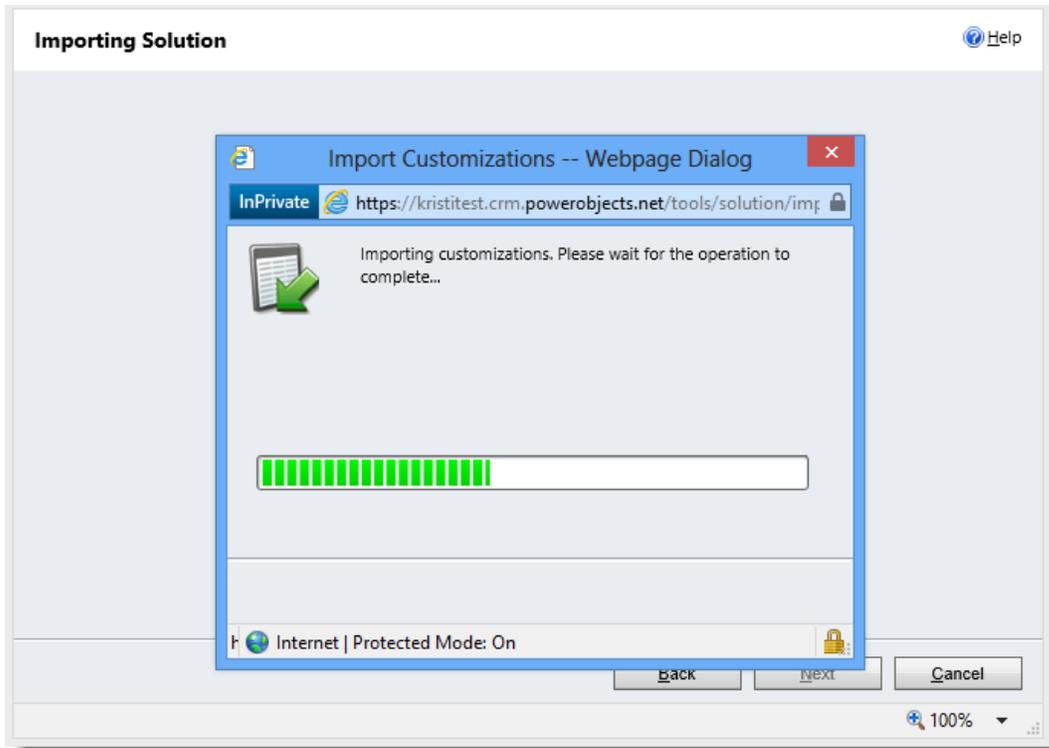


Click Next, and make sure to check the "Activate all processes..." checkbox, and click Next

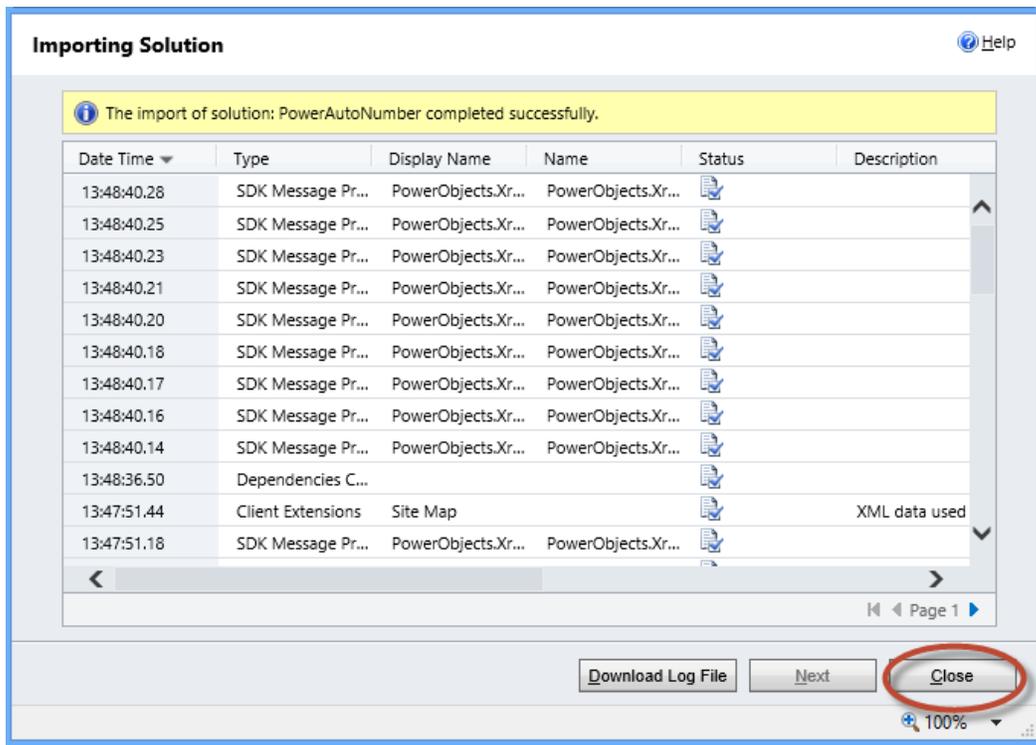
IMPORTANT: If you do not check this box, the add-on WILL NOT FUNCTION CORRECTLY!



A green progress indicator will display while the solution imports.

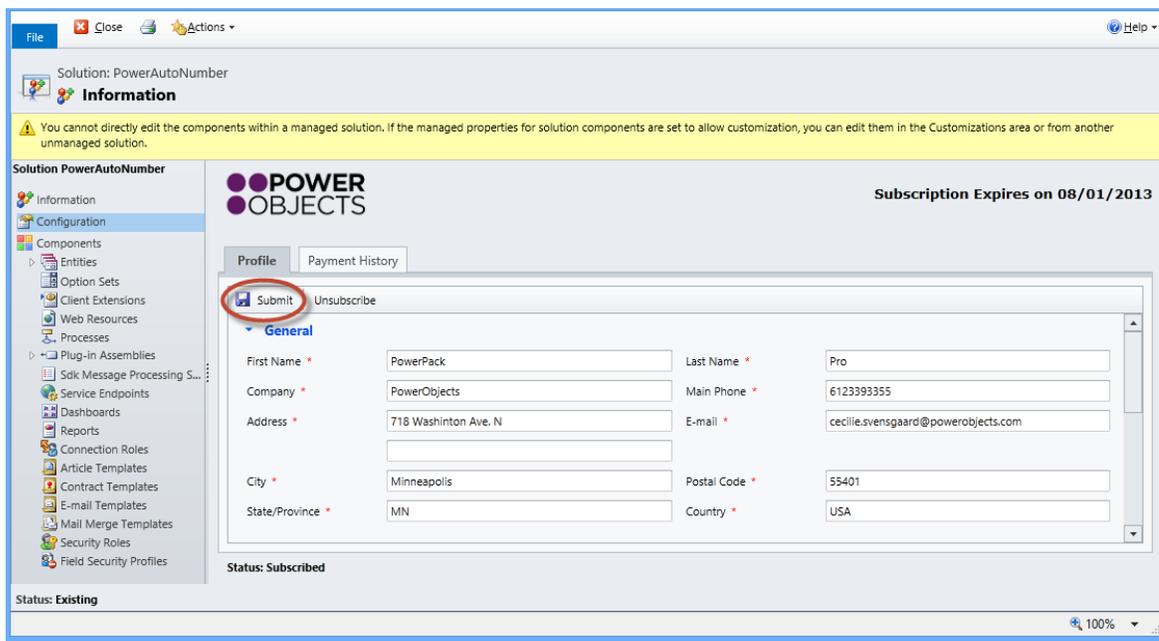


Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



Registration

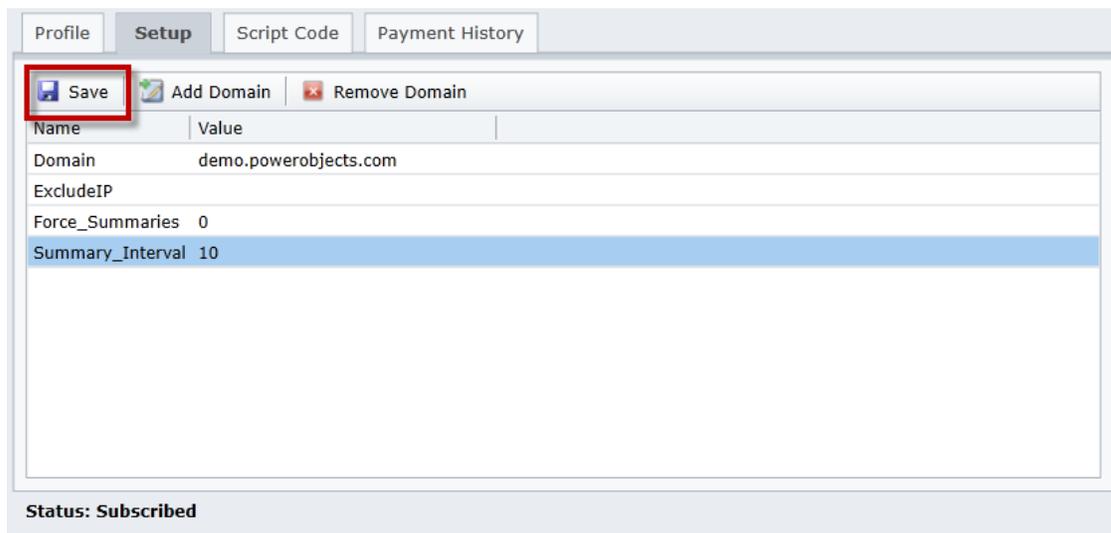
In the Solutions List, double click on PowerWebTraffic. Fill in your information to register for your free 30 day trial, and click Submit. Be patient while the information is submitted.



Set-up

Domain

In the Value column next to Domain, enter the name of the Domain you would like to track. Do not include http:// or https:// in front of your domain value. If you'd like to track more than one domain, click on Add Domain and enter the other domain(s) you wish to track. When complete click Save.



Note: Do not include any extra /'s before or after your domain name. It is unnecessary to add each sub-domain. You only need to add the main domain name.

Exclude IP

If you would like to exclude a number of IP addresses, or a range of IP addresses, you can put them in the value column, next to ExcludeIP. Separate your IP's by semi-colons (no spaces), and if you are putting in a range of IP's make sure to input the range with a dash in between (again, no spaces). The web traffic from these IP addresses will not be included in your PowerWebTraffic.

Force Summaries

This feature is used for emergency summary recovery. If a whole number is entered into the Value column, a summary will be calculated for the appropriate number of days into the past. Once the calculation is complete, the configuration record will reset to the default "0" to prevent from overloading the system. The maximum number of recovery days is 180.

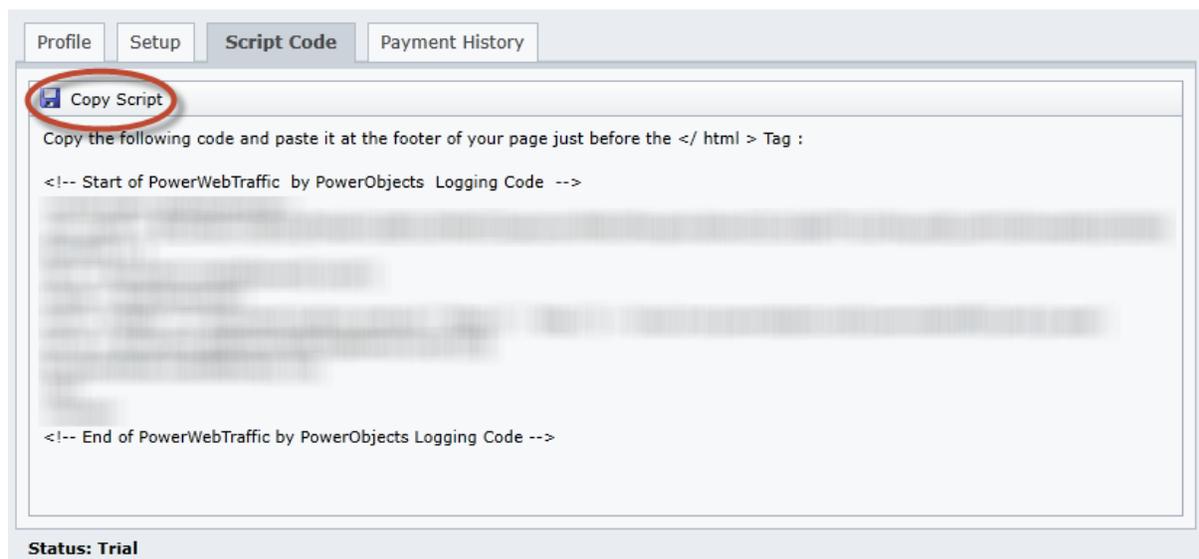
Summary Interval

The summary interval defaults to a value of 10. This means that the time frame between summary calculations is 10 minutes. If you would like this to be more or less frequent, please change the number in the Value column, and click Save.

Remember to hit Save after you have made any changes to this screen.

Script Code

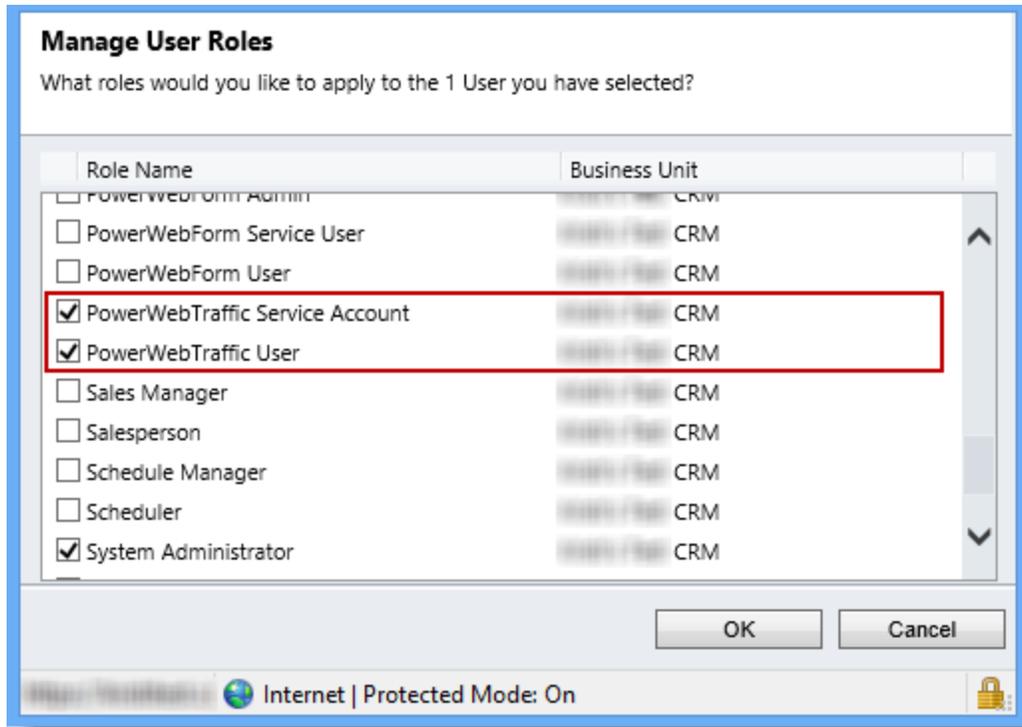
This is the code that you will need to add to your website for the solution to work properly. Click on the Script Code tab and select Copy Script. Then navigate to the footer of the main page for each of the domains you entered in the setup tab and paste the script right before the `</body></html>` tags.



Security Roles

Every user who would like to have access to PowerWebTraffic will need the PowerWebTraffic User security role assigned to them. System Administrators will automatically see PowerWebTraffic in their left navigation, even without having the security role assigned.

The PowerWebTraffic Service Account security role is meant to be assigned to the user whose username and password is entered in the PowerWebTraffic solution, if that user is not a system administrator. The PowerWebTraffic User security role gives users the privileges to access the PowerWebTraffic entities in the CRM system.



Uninstalling PowerWebTraffic

To uninstall, first delete any PowerWebTraffic web traffic records that have been created – you may need to set up a bulk delete job to do this. Then uninstall as usual, by deleting the solution from the solutions list in CRM. Deleting this solution will remove all activities and data collected from PowerWebTraffic from your system, if you wish to keep this information simply “Unsubscribe” and leave the solution in your CRM.

Thanks for your interest in PowerWebTraffic. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change “try” to “subscribe” and enter your credit card information – you will be charged \$1/CRM user/month.

Interested in more CRM tips and tricks? Check out our [blog](#) or subscribe to our [newsletter](#).