Copyright: Manual copyright © 2003 eOne Integrated Business Solutions All rights reserved.

Your right to copy this documentation is limited by copyright law and the terms of the software license agreement. As the software licensee, you may make a reasonable number of copies or printouts for your own use. Making unauthorized copies, adaptations, compilations, or derivative works for commercial distribution is prohibited and constitutes a punishable violation of the law. Unless otherwise noted, all names of companies, products, street addresses, and persons contained herein are fictitious and are used solely to document the use of this product.

Trademarks: All company or product names mentioned are trademarks or registered trademarks of eOne Integrated Business Solutions or of their respective holders.

Warranty: eOne Integrated Business Solutions disclaims any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose.

Limitation of liability: The content of this manual is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by eOne Integrated Business Solutions. eOne Integrated Business Solutions assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual. Neither eOne Integrated Business Solutions nor anyone else who has been involved in the creation, production or delivery of this documentation shall be liable for any indirect, incidental, special, exemplary or consequential damages, including but not limited to any loss of anticipated profit or benefits, resulting from the use of this documentation or sample code.

License agreement: Use of this product is covered by a license agreement provided by eOne Integrated Business Solutions, with the software product. If you have any questions, please call eOne Integrated Business Solutions on +1 888 319 3663.

Publication date: September 2008
Introduction

SmartConnect is a Microsoft Dynamics GP add-on that allows you to easily create new or update existing Dynamics GP or Dynamics CRM records from records contained within a SmartList or external data connection. SmartConnect uses eConnect for Dynamics GP and Dynamics CRM web services to create or update records, so all of the Dynamics business logic is adhered to. Before you put SmartConnect to work for you, take a few moments to review the information presented here. Understanding the organization can provide you with the proper approach to the SmartConnect documentation. This introduction is divided into the following sections:

This introduction is divided into the following sections:

- What's in this manual
- Symbols and Conventions

What's in this manual

The SmartConnect Manual is designed to give you an in-depth understanding of how to use SmartConnect. The manual contains the following parts:

- Part 1, Installation, provides details of how to install SmartConnect and updating SmartConnect from previous versions.

- Part 2, Using SmartConnect, shows you how to start using SmartConnect.
Symbols and Conventions

This manual uses the following symbols to make specific types of information stand out.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Light Bulb" /></td>
<td>The light bulb indicates helpful tips, shortcuts and suggestions</td>
</tr>
<tr>
<td><img src="image" alt="Warning Symbol" /></td>
<td>The warning symbol indicates situations you should be aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Great Plains may be affected.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 4, Data Entry</td>
<td>Bold type indicates a part name</td>
</tr>
<tr>
<td>Chapter 8, “Windows”</td>
<td>Quotation marks indicate a chapter name</td>
</tr>
<tr>
<td>SMARTCONNECT.EXE</td>
<td>Words in uppercase indicate a file name</td>
</tr>
<tr>
<td>TAB or CTRL+M</td>
<td>Small capital letters indicate a key or key sequence.</td>
</tr>
</tbody>
</table>
Part 1: Installation

This portion of the manual describes the installation and registration of SmartConnect.

The information is divided into the following chapters:

- **Chapter 1, “Installing SmartConnect”,** describes how to install, set up and register SmartConnect

- **Chapter 2, “Setup”,** describes the process of setting up SmartConnect for use.
Chapter 1: Installing SmartConnect

This chapter describes how to install SmartConnect. The installation process is the same regardless of whether you are integrating to Dynamics CRM or not. This information is divided into the following sections:

- Prerequisites
- Installation

Prerequisites

The following applications are required to be installed on the client computer before SmartConnect can be installed:

Dynamics GP version 9:-

- Dynamics GP 9 Service Pack 2 or higher
- Microsoft .Net framework 3

Please note that the Dynamics GP service pack installation wizard must be run. An installation folder already containing Dynamics GP 9 service pack 1 or higher cannot be just be copied into the installation directory.

Dynamics GP version 10:-

- Microsoft .Net framework 3

Installation

To install SmartConnect:

1. Run the setup executable, SMARTCONNECT INSTALLER.EXE, which will start the SmartConnect installation.
The prerequisites wizard will not run if all the required software has already been installed. VS tools runtime will not be present in the list with SmartConnect version 10.

2. Click on the Next button to continue.

3. Select the next button to start installing the prerequisites listed in the prerequisites window.
4. Click on the Next button to begin the installation of the visual studio tools runtime.

5. Accept the license agreement and click next to continue.
6. Make sure that the location displayed is the path to your Dynamics GP installation. The default is “C:\Program Files\Microsoft Dynamics\GP”. Select next to continue.

7. Select install to install the Visual Studio Tools for Dynamics GP Runtime
8. Select finish continuing with the SmartConnect Installation. If eConnect has not been installed the eConnect installer will now run.

9. Select next to install eConnect.
10. Accept the license agreement and click next.

11. Select next to continue with the installation.
12. Enter your user name and Organization and click next (The user name and organization are not required to install eConnect.).

13. Select the custom option and click next.
14. Click next to install eConnect.

The business objects need only be installed once per SQL server. If the business objects have already been installed on the SQL server deselect the business objects option as per the screen shot above.

15. Use the ellipses button to select your SQL server where Microsoft Dynamics GP has been installed. Click next.
16. Click Install to continue with the installation.

17. Enter the domain and user name of user account under which eConnect will run.

The account must have access to the SQL Server where the business objects have been installed and be part of the SQL security group DYNGRP.
18. Select the finish button to continue.

19. Select the next button to continue.
20. Select the features you require. Please refer to the table below for more information regarding the different options.

<table>
<thead>
<tr>
<th>Where</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client (Dynamics GP).</td>
<td>SmartConnect</td>
</tr>
<tr>
<td>* You do not need the SmartConnect Web services to run the SmartConnect UI inside of GP or to integrate to CRM or GP.</td>
<td></td>
</tr>
<tr>
<td>IIS Server hosting Dynamics CRM Server and SmartConnect Web service or IIS server hosting just the SmartConnect Web services.</td>
<td>SmartConnect Web Service</td>
</tr>
<tr>
<td>* You will only require the SmartConnect web services if you intend to use real time integration between CRM and GP or the Excel Add in.</td>
<td></td>
</tr>
<tr>
<td>IIS Server hosting just the Dynamics CRM Server</td>
<td>SmartConnect for CRM Support Files</td>
</tr>
</tbody>
</table>
21. If you are installing the web services, enter the connection details of your SQL server.

22. Browse to your Microsoft Dynamics GP installation or select the default. Click Next.

   If you are just installing either the Dynamics CRM Support files or the web service you may ignore this portion.
23. Accept the license agreement and click next.

The installer will create a new website and virtual directory if you selected to install the web services.

24. Click Install
25. Select finish then open Microsoft Dynamics GP.

26. Select yes to include the SmartConnect chunk file. Login into GP as sa.

27. Click OK to install the SQL objects needed to run SmartConnect.
28. Click OK to complete the installation.

If SmartConnect has previously been installed the preceding dialogue boxes will not be shown.
To register SmartConnect:

1. Click tools >> SmartConnect >> Map. If the product hasn't been installed you will be prompted for registration keys.

2. Enter your supplied Registration Key.
3. Click on the Save button.

If the registration window is not displayed you can add this window to your explorer bar and register the product from there.
Chapter 2: Installing SmartConnect Excel Add in

This chapter describes how to install SmartConnect Excel Add in. This information is divided into the following sections:

- Prerequisites
- Installation

Prerequisites

The following applications are required to be installed on the client computer before SmartConnect Excel Add in can be installed:

Microsoft Office Excel 2003 or 2007

The following is a list of prerequisites that are installed by the SETUP.EXE and may require an active internet connection.

- KB908002
- Office 200x primary interop assemblies.

The Add in uses the SmartConnect web services.

Installation

To install SmartConnect Excel Add in:

2. Double click the SETUP.EXE file.
3. **Click Install, accept the license agreements.**

4. **Click Next.**

5. **Click Next**
6. Select the install path and click next.
7. Click close to complete the installation. Browse to the install folder.


9. Change the highlighted web address to your address for the SmartConnect Web service. Save the file and close notepad.
Chapter 3: Setup SmartConnect

To make SmartConnect easier to use, SmartConnect provides a mapping between the nodes and parameters in eConnect to the real names that are used in Dynamics GP.

These SmartConnect nodes and parameters are automatically defaulted when SmartConnect is installed. If you have added nodes or parameters to any of the eConnect schema, you may need to change this setup to enable your nodes to be used.

The list of Dynamics CRM entities are pulled from the Dynamics CRM Meta data service and are not stored locally by SmartConnect. SmartConnect uses the setting from the Dynamics CRM setup screen to connect to the Dynamics CRM server.

This information is divided into the following sections:

- General Setup
- Dynamics CRM Setup
- Dynamics GP Setup
General Setup

SmartConnect Setup screen

Select Tools>>SmartConnect>>Setup

This screen allows you to enter setup options for SmartConnect. The following table describes the purpose of each section.

Message Queue Defaults

eConnect Error Log Server

Enter the name of the server where the eConnect event viewer is located. SmartConnect reads the eConnect event messages from this server’s instance of the eConnect Event log when a maps destination is either file or Message Queue.
Queue Name

This will be the default Microsoft message queue name used for maps directed to the message queue. This queue name will default in the map window but will allow the user to change it.

Schedule Settings

Schedule Server

This is the name of the server where the windows scheduled tasks will be created when scheduling SmartConnect Maps. If this option is left empty all tasks will be scheduled on the local machine.

Schedule working folder

This is the working folder to the eOne.SmartConnect.Scheduler.exe file on the schedule server. This exe is located in the GP installation folder on the schedule server. This path must be the local path on the server e.g. “C:\Program Files\Microsoft Dynamics\GP\”. Where “C:\” is the c: drive on the schedule server not the local client’s c drive.

Schedule EXE Path

This is the full path to the eOne.SmartConnect.Scheduler.exe file itself on the schedule server.

Connection string

This connection string is used by the server to connect to SQL and read information regarding the map it will run. The database name MUST always be DYNAMICS. This setting is encrypted in the config file on the local machine.

SmartConnect Web service URL

Web service URL

This is the path to the SmartConnect web service for this installation of SmartConnect. This option is used by the SmartConnect Plug-in that handles real time integrations between Dynamics CRM and Dynamics GP.
**E-Mail Settings**

**SMTP Server**

This is the name of the SMTP server that will be used to send email from map email tasks.

**Management Console**

**Error Files Path**

This is the folder where the information about the map logging will be stored. When you select any of the logging options in the map setup window the files are stored in this directory and are read by the Management Console.

**Real time**

**Show progress bar checkbox**

When this option is selected the SmartConnect progress bar will be shown when integrating real time between Dynamics GP and Dynamics CRM.

**Dynamics CRM Setup**

Dynamics CRM Setup screen

![Dynamics CRM Setup screen](image)

Select Tools>>>SmartConnect>>>Setup>>>Dynamics CRM button.
CRM Server and Port

This is the URL to your Dynamics CRM Server. This URL will be used for all interactions by SmartConnect with Dynamics CRM.

Security

Credentials Check box

When this option is selected all interaction with Dynamics CRM will be done using the settings specified in this section. If you would like SmartConnect to connect to your Dynamics CRM server using the currently logged in active directory user do not use this option.

User name

The active directory user name to use to connect to your Dynamics CRM server.

Password

The active directory password to use to connect to your Dynamics CRM server.

Domain

The active directory domain to use to connect to your Dynamics CRM server.

Please note that the credentials specified above are not stored in the database but are stored locally in an encrypted config file in the Dynamics GP folder and are for this installation only.
Authentication Type

Active Directory

When this option is selected the connection to Dynamics CRM will be made using active directory and the username, password and domain fields above will be used.

Passport

When this option is selected the connection to Dynamics CRM will be made using a Microsoft Windows Live Passport. This option should be used when connecting to Microsoft Dynamics CRM Online. Only the User name and password fields are used when this option is selected. The user name will be in the format of myemail@mydomain.com.au, as you would enter it when logging into Dynamics CRM Online.

Internet facing deployment

When this option is selected the connection to Dynamics CRM will be made using active directory and the username, password and domain fields above will be used. Only the connection method is different from using standard active directory.
Dynamics GP Setup

Groups

Groups are used to arrange node types into functional groups. All of the standard groups have been defined within eConnect. You would only use this window if you are wanting to redefine the groups or add a custom group. For example, if you are an ISV that has built a number of Custom eConnect nodes you could create a specific group for your nodes.

To add a group:

1. Open the Node Maintenance window.
2. Click on the prompt for the Group list to drill down to the Group Maintenance window.
3. Enter a new group name into the group list.
4. Click on the OK button.

To remove a group:

1. Open the Node Maintenance window.
2. Click on the prompt for the Group list to drill down to the Group Maintenance window. Select the Group that you want to delete from the group list.
3. Select Edit >> Delete Row.
4. Click on the OK button.

**Node Types**

Node types are a collection of nodes. SmartConnect will default the node types for all the core eConnect nodes. You would only use this window to group together custom nodes or add a custom node into an existing node group/type.

**To add a node type:**

1. Open the Node Maintenance window (Tools >> SmartConnect >> Node Maintenance).
2. Enter the name of the Node Type. This is the name that is used by eConnect to identify the node type.
3. Enter the Display Name of the node type.
4. Select the Group for the node type.
5. Add nodes to the node type.
6. Click on the Save button.

**To edit an existing node type:**

1. Open the Node Maintenance window (Tools >> SmartConnect >> Node Maintenance).
2. Enter or select the node type that you want to edit.
3. Enter new details for the node type.
4. Click on the Save button.

**To remove a node type:**

1. Open the Node Maintenance window (Tools >> SmartConnect >> Node Maintenance).
2. Enter or select the node type that you want to delete.
3. Click on the Delete button.

**Nodes**

Nodes are objects in eConnect that are used to create, update or delete Dynamics GP transactions.

**To add a node:**

1. Open the Node Maintenance window (Tools >> SmartConnect >> Node Maintenance).
2. Enter or select the Node Type that you want to add a node to.
3. Click on the Add Node button.
4. Enter the name of the Node. This is the name used by eConnect to identify the node.
5. Enter the Display Name of the node.
6. Enter the details of the parameters of the node.
7. Click on the Save button.

**To edit a node:**

1. Open the Node Maintenance window (Tools >> SmartConnect >> Node Maintenance).
2. Enter or select the Node Type that contains the node that you want to edit.
3. Select the Node that you want to edit from the Nodes list.
4. Click on the Edit Node button.
5. Enter the new details for the node.
6. Click on the Save button.
To remove a node:

1. Open the Node Maintenance window (Tools >> SmartConnect >> Node Maintenance).
2. Enter or select the Node Type that contains the node that you want to remove.
3. Select the Node that you want to remove from the Nodes list.
4. Click on the Remove Node button.
Part 2: Using SmartConnect

This portion of the manual will describe how to create and update Dynamics GP and Dynamics CRM records using SmartConnect.

The information is divided into the following chapters:

- **Chapter 4**, “Creating maps”, describes how to create a SmartConnect mapping.
- **Chapter 5**, “Data sources”, describes how to setup the various map data sources.
- **Chapter 6**, “Scheduling”, describes how to set up a schedule to automatically run a SmartConnect integration
- **Chapter 7**, “Security”, describes how to grant or deny security to SmartConnect nodes
- **Chapter 8**, “Import and Export”, describes how export and import SmartConnect settings via XML
Chapter 4: Creating Maps

This chapter describes how to create, update and remove SmartConnect maps.

This information is divided into the following sections:

- Creating maps for Dynamics GP
- Creating maps for Dynamics CRM
- Generic mapping functions
- Creating maps for the SmartConnect Excel Add in.
Creating maps for Dynamics GP

A SmartConnect map matches the source data to the Dynamics GP destination for a set of related nodes.

To create a map:

1. Open the SmartConnect window from Tools >> SmartConnect >> Map.

2. Enter the Map ID and Description.
3. Select the Destination. If the Destination is a Dynamics GP File, then click on the Path button to select the location that the XML files will be saved to. If the Destination is Dynamics GP Message Queue, enter the path of the eConnect incoming message queue. Select Dynamics GP to pass the messages directly to eConnect.
4. Select the Group and Node Type.
5. Select the data source button. Create a data source using the lookup provided. More information on data sources.
6. Select the Source Key Fields. These fields are used to join grouped nodes to ungrouped nodes. It should be a unique identifier for each header record that will be created.
7. Map the nodes that you want to create records for in Dynamics GP.
8. Click on the Save button.
The destination type Dynamics GP File will save the resulting XML file to a predefined location. This is normally only used when troubleshooting a map, to allow you to look directly at the XML file produced and see the data values being passed in.

Selecting Dynamics GP as the destination, is the recommend destination for the majority of maps. This runs the map directly into GP without the need for any queuing.

Mapping nodes

The parameters of the node are mapped by dragging and dropping from the source data.

To map a node:

1. Select a node from the Available Nodes list and click on the Map Node button.

2. Drag and drop the source columns to the parameters list.

3. You may also set a parameter using one of the options listed in the “Map To” column. Please find a description of each Map to Type below:

   - **Source Field**: This is an alternative to the drag and drop. Choose Source field and then in the name column you receive a drop down list of all source fields you can select.

   - **Global Constant**: A global constant is a constant that can be used on other maps you create. e.g. Use a constant to populate the batch ID “Batch1” and you can then
use this constant on additional maps. Use the Goto icon above source columns to define the value of a global constant.

**Local Constant:** Local constants can be entered in line while building a map. These constants can only be used on this map and cannot be reused.

**Rolling Column:** Rolling columns are used to define a sequential series of numbers. You can define a custom series or pull the numbers from the GP setup for individual modules.

**Calculated field:** Calculated fields allow you to define values that do not exist in the source. Calculated fields are commonly used to transform data from one system to the other. E.g. Date formats, numerical calculations, converting numeric values to characters etc.

**List:** This type provides a predefined list of values that can be selected. These have been defined to make selection easier when building a map e.g. SOP type provides the values (Return, Order, Invoice, backorder).

4. If you want to update existing records, mark the Update existing records checkbox.
5. Click on the Save button.

**To remove a mapped node:**

1. Select a mapped node from the Available Nodes list.
2. Click on the Delete Mapping button.
Rolling columns

Rolling columns allow you to generate an auto-incrementing sequence that can be used as unique identifiers for Dynamics GP transactions. You can use one of the standard Dynamics GP sequences from Receivables Management, Payables Management, Sales Order Processing, Purchase Order Processing, or Inventory Management or create a custom sequence.

To add a Dynamics GP rolling column:

1. Click on the Add Rolling Column button.
2. Mark the Use Rolling Column checkbox.
3. Enter the Name of the rolling column.
4. Select Microsoft Dynamics GP as the Number Type.
5. Select the Module.
6. Select the Document Type.
7. If the Module is Sales Order Processing, select the Document ID.
8. Click on the Save button.

To add a custom rolling column:

1. Click on the Add Rolling Column button.
2. Mark the Use Rolling Column checkbox.
3. Enter the Name of the rolling column.
4. Select Custom as the Number Type.
5. Enter the Next Number value.
6. Click on the Save button.

To remove a rolling column:

1. Click on the Add Rolling Column button.
2. Unmark the Use Rolling Column checkbox.
3. Click on the Save button.
Intercompany maps

By default, SmartConnect maps are run in the same company that the user is currently logged into. SmartConnect maps can be run in another Dynamics GP company and more than one Dynamics GP company. Maps can also run in companies installed in another Dynamics GP installation. You may also define the destination company from your data source.

To change the companies that the map will be run in:

1. Click on the Companies button.
2. Mark the companies that you want the map to run in.
3. Click on the OK button.

To add a company from another Dynamics GP installation:

1. Click on the Companies button.
2. Click on the Add button.
3. Enter the name of the SQL Server.
4. Click on the Validate button to fill the companies list.
5. Select the Company.
6. Click on the Add button. The new company will be automatically selected.

To define the destination company from the source data:

1. Click on the Companies button.
2. Click on the Define button.
3. Create a script that defines the Database Name that the integration should run into.

For example, if you had a column in your data source that was called “company” and it contained the value “TWO” your script would look like the following.

```
Return _company
```

Your integration would then run into the sample company because the script will return the value “TWO”, the database name of the company.
Creating maps for Dynamics CRM

A SmartConnect map matches the source data to the Dynamics CRM destination for a set of entities.

To create a map:

1. Open the SmartConnect window from Tools >> SmartConnect >> Map.

2. Enter the Map ID and Description.
3. Select the Destination. If the Destination is a Dynamics CRM File, then click on the Path button to select the location that the XML files will be saved to. Select Dynamics CRM to pass the messages directly to the Dynamics CRM web services.
4. Select the destination organization.
5. Select the data source button. Create a data source using the lookup provided. More information on data sources.
6. Select the Source Key Fields. These fields are used to join grouped entities to ungrouped entities. It should be a unique identifier for each header record that will be created.
7. Map the entities that you want to create records for in Dynamics CRM.
8. Click on the Save button.
**Mapping entities**

The attributes of the entity are mapped by dragging and dropping from the source data.

**To map an entity:**

1. Select an entity from the Available Entities list and click on the Map Node button.

2. Drag and drop the source columns to the attributes list.
3. You may also set an attribute using one of the options listed in the “Map To” column.
4. If you want to update existing records, mark the Update existing records checkbox.
5. If you want the map to delete the entity select the for delete checkbox.
6. Click on the Save button.

**To remove a mapped entity:**

1. Select a mapped entity from the Available entity list.
2. Click on the Delete Mapping button.
**Entity Lookup fields**

From time to time it may be necessary to lookup values for certain Dynamics CRM attributes. This is generally done if the destination attribute is of type “Lookup”. An entity lookup field finds a unique identifier or GUID for a particular entity and inserts it into the map.

You can view the data type of the entities attribute by going over the attribute name with the mouse pointer.

Entity lookups are used for attributes such as currency, salesperson, sales territory etc. These records are stored as GUID’s rather than values. When integrating into CRM this allows you to have the actual value in the file, and SmartConnect looks up and returns the GUID.

**To create an entity lookup:**

1. In the entity mapping window select the goto button in the top corner of the source fields.

2. Select entity lookup.

3. Select the add button (plus sign).
4. Enter a name.
5. Lookup an entity to find
6. Match the entity to finds attributes to your source column name.

**Defining the keys of a map**

SmartConnect allows you to define what fields will be used as the keys or the unique identifier when updating or deleting specific records in Dynamics CRM. When a map is run entities will be updated or deleted based on the fields you select. You will also be prompted to create a duplicate detection rule when saving an entity mapping.

**To specify a key for an entity map:**

1. In the node mapping window, check either the key or group by check box next to source field which are the keys from your source.
2. Drag the checked source field over to the destination entity attribute that will be the entities key. The Account Number is now part of the key below.

<table>
<thead>
<tr>
<th>Source Columns</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type</td>
</tr>
<tr>
<td>CUSTOMERID</td>
<td>Standard</td>
</tr>
<tr>
<td>CUSTOMERNAME</td>
<td>Standard</td>
</tr>
<tr>
<td></td>
<td>Function</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

When integrating into CRM be careful in defining your key field. By nature CRM allows you to have duplicate records such as accounts, so if you built a map that said update the customer name, where the key field is ‘state’ or perhaps ‘address ID’, you would update the name of every account there the state or address ID matched. E.G. All CRM accounts in CA may suddenly be called AARONFIT0001!!!
**Generic Mapping functions**

The functionality outlined in the section below is relevant when mapping to either Dynamics CRM or Dynamics GP.

**Calculated fields**

You may enter as many calculated fields as you wish. Calculated fields can be written in Microsoft Visual Basic .Net or Microsoft C# .Net. The default is Microsoft Visual Basic .Net. Please see Appendix A for further information on calculated fields.

**To add a calculated field:**

1. Select the calculated field’s button.
2. Click on the “Plus sign” icon in the top right of the Calculated fields window.
3. The Create New Calculated field’s window opens. Add code to the code free text window. You may drag the columns from the Fields window into the Code free text field. The columns of your source data may be used in your code.
4. Select Validate.
5. Select Save

To remove a calculated field:

1. Select the calculated field’s button.
2. Select a Calculated field.
3. Click on the “Minus sign” icon in the top right of the Calculated fields window.

Restrictions

Restrictions allow you to restrict nodes or entities from being created. For the node/entity to be included in the import the restrictions code must return true.

To add a restriction:

1. Select the restrictions button.
2. Enter the code in the code free text field.
3. Click Validate.
4. Click on the save button.

To remove a node restriction:

1. Select the restrictions button.
2. Replace the code in the code free text field with “return true”.
3. Click Validate.
4. Click on the save button.
This is different from a data source level restriction. At the map level every record in the data source will be read, but nodes only created for those that are not restricted here. E.g. If the speed of the integration is important, then place all restrictions at the data source level.

Example:
If _custclass='Australia' then
Return true else
Return false
End if
Global Constants

You can use the Node\Entity Mapping window to create constants that can be used as Source Columns to be mapped to the destinations.

To create a new global constant:

1. Select the “add constant” option from the “go to” above the source fields.

2. Enter the name of the constant.

3. Enter the value of the constant.

4. Select where the constant can be used.

5. Click on the Save button.

To add a global constant to a map:

1. Click on the Add Constant button.

2. Mark the Constants that you want to add to the map.

To delete a global constant:

1. Click on the Add Constant button.

2. Mark the Constants that you want to remove.

3. Click the Delete button.
**Grouped maps**

A grouped map summarizes the source data. Each field that is used for mapping must be either: selected as a grouping field or a summary method must be selected for the field.

**To create a grouped map:**
1. Open the Node\Entity Mapping window.
2. Mark the Group data checkbox.
3. Mark the Group by fields.
4. Select the Function for each of the source columns that have been mapped to parameters.
5. Click on the Save button.

**Map Options**

The map options allows you log information when an integration document fails or succeeds, as well as specify what language will be used when creating calculated fields, restrictions and script tasks. It is not advisable that you change the language option after a map has been saved.

**To change map options:**

1. Open the SmartConnect window.
2. Click on the goto's button.
3. Select options
4. Change the options as required. Below is a summary of the options

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Log</td>
<td>Enable logging</td>
</tr>
<tr>
<td>Log Errors</td>
<td>The Errors will be logged</td>
</tr>
<tr>
<td>Log Success</td>
<td>The successful integrations will be</td>
</tr>
<tr>
<td></td>
<td>logged.</td>
</tr>
<tr>
<td>Log Source Data</td>
<td>Saves the data in xml format which was</td>
</tr>
<tr>
<td></td>
<td>used to generate the xml that was sent</td>
</tr>
<tr>
<td></td>
<td>to either eConnect or Web services.</td>
</tr>
<tr>
<td>Log Xml</td>
<td>Saves the xml that was passed to the</td>
</tr>
<tr>
<td></td>
<td>destination.</td>
</tr>
</tbody>
</table>

The xml documents described above are saved in the folder defined in the management console section of the setup.

**Deleting maps**

You can use the Map Setup window to delete a SmartConnect map.

**To delete a map:**

1. Open the SmartConnect window.
2. Enter or select the Map ID of the map that you want to delete.
3. Click on the Delete button.
Creating maps for the Excel Add in

The SmartConnect Excel Add in allows users to **push** information via the SmartConnect Web services into Dynamics GP or Dynamics CRM from within the Microsoft Excel user interface instead of **pulling** the information into either CRM or GP from SmartConnect User interface. This is accomplished in three easy steps.

**Step 1: Create a mapping to handle the integration.**

1. Open the Map Setup window Tools>>SmartConnect >> Map Setup
2. Enter a name and description for your map.
3. Select the Data source button
4. Select the ODBC option.
5. Click the lookup button and select Excel or Excel 2007.
6. Configure your excel ODBC source.
7. Create a map as per usual for importing from a spread sheet. The destination can be either Dynamics CRM or Dynamics GP.
8. Test the Mapping by hitting the run button. Modify the map until you are happy that the information is being integrated successfully.

**Step 2: Configure the spread sheet to push information.**

In this step you will tell excel which map to use to integrate the information with.

1. Open Microsoft Excel and Open your spreadsheet you used for step 1.
2. Create a new Sheet in your spread sheet, call it “SmartConnectConfig”
3. In cell A1 type the words MAP
4. In cell A2 type the words COMPANY
5. In cell B1 type in the name of the mapping you created in step 1.
6. In cell B2 type the company in which the map resides e.g. TWO
Step 3: Run the map from inside excel.

1. With the sheet open that you used to test with in step one, select the add ins tab
2. Click the SmartConnect Map button.
3. Your information should be pushed into Dynamics CRM or Dynamics GP via the SmartConnect web services.
Before trying to run an Excel map make sure you have installed the Excel Plug-in. See Chapter 2 p26 for details.

Push integration diagram:

Push integrations
Duplicating Maps

The duplicate map screen allows you to duplicate maps into another company. You may also duplicate a map into the same company, allowing you to use a working map as a template.

1. Navigate to Tools>>SmartConnect>>Duplicate Map

2. Select the map to duplicate
3. Enter a new name and description
4. Select the company in which to create the new map
5. Click duplicate
6. Open the new map and select a destination company
Chapter 5: Data sources

SmartConnect allows for integration from any ODBC source as well as other locations including real time events in Dynamics GP and Dynamics CRM.

**ODBC Connections**

You may create maps to any source accessible through Microsoft ODBC.

1. Once you have selected your destination in the Map setup screen click the data source button.
2. Select the ODBC option from the drop down list.
3. Click on the data source lookup button.
4. Select the ODBC type you would like to connect to.
5. Configure your ODBC.

If you would like to use a data source on an ODBC connection from a DSN that already exists on your computer select the ‘Select a DSN’ option from the list.

**XML Files**

SmartConnect supports using simple XML files as a data source. You may use any xml file in any format as data source but SmartConnect will only read the fields from the first or main node.

A developer's/technical consultants note :-

The xml file is read into a .net dataset and only the first data table is used. The method used is `dataset.ReadXml()`.

1. Once you have selected your destination in the Map setup screen click the data source button.
2. Select the XML File option from the drop down list
3. Use the lookup button to your data source.

**Microsoft Dynamics CRM Plug-in**

This is a real time data source. SmartConnect allows the retrieval of information from events triggered inside the Dynamics CRM web services. This is achieved by first specifying which fields and related fields will be made available during an event and then registering a map on this event which uses the data to integrate information into Dynamics GP.

To create a map from the data retrieved from Dynamics CRM during a web services event you must first define which entities can be used as a data source.

**To define a Dynamics CRM Plug-in Data source**

1. Tools>>SmartConnect>>Dynamics CRM>>CRM Plug-in Data source
2. Lookup the organization the entity exists in
3. Lookup the entity you would like to create a real time map on.
4. Select the fields and related fields that will be available during the mapping process.
To map to a Dynamics CRM Plug-in Data sources

1. From the SmartConnect Map Setup screen click the data source button
2. Select the Microsoft Dynamics CRM Plug-in option

3. Select the Microsoft organization and entity you are going to create a map from

Only entities that have been defined in the Configure CRM Plug-in data source window will be available here.
To register a map against a Dynamics CRM Plug-in

1. From the SmartConnect Map Setup screen click the register button. The run button is renamed to ‘register’ for maps with a real time data source.

2. Select the event you would like the map to run on.
3. Select the ‘Add’ button, the plus sign. You may add a map to more than one event.
4. Click the process button.

Once you have registered a map, it will run every time that entity is saved. If you need to stop the map from running you will need to un-register the map.

To unregister a map against a Dynamics CRM Plug-in

1. Click the register button on the map window.
2. Remove the linked maps for create, update and delete
3. Hit the process button, to remove the registered plug-in
1. InfoPath XSD

This option is used when creating maps that will be called via a web service call from a Microsoft InfoPath data entry form. You do this by first creating a form inside Microsoft InfoPath to push data into Microsoft Dynamics GP, then creating a map off the InfoPath forms Schema. Microsoft InfoPath is then setup to submit its data via the SmartConnect web services to Dynamics GP.

To map to an InfoPath XSD (Schema)

1. Inside Microsoft InfoPath Design mode, Select file>>Save source files as.
2. Select the InfoPath XSD option.
3. Browse to the .xsd file that was created by InfoPath in step 1.
4. From the SmartConnect Map Setup screen click the data source button.

To setup InfoPath to submit data to the SmartConnect web services

1. Inside Microsoft InfoPath Design mode add two new text box controls
2. Right click the first new text box, rename it to MAPID and set its value to the name of the map you will submit to.
3. Right click the second new text box, call it COMPANYID and set its name to the database name which holds your map e.g. TWO.
4. Add a button control to your form.
5. Right click the new button, select properties.
6. Change the action to submit.

7. Select ‘Submit options’.
8. Select ‘Allow users to submit form’.
9. Select ‘Send form to single destination’.
10. Select ‘Web service’ from the drop down list.
11. Select ‘Add’
12. Enter the path to the SmartConnect Web services e.g. http://myserver/smartconnect/smartconnect.asmx
13. Select ‘RunMapInfoPath’.
14. Select the mapID parameter.
15. Select the ‘Modify’ button next to the field or group option.
16. Select your MAPID text box from step 2.
17. Select the ‘interID’ parameter.
18. Select the ‘Modify’ button next to the field or group option.
19. Select your COMPANYID text box from step 3.
20. Select the ‘xml’ parameter.
21. Select the ‘entire form’ option.
22. Select your COMPANYID text box from step 3.
23. Select the ‘Entire String’ checkbox.
24. Click next.
25. Click finish.
**Microsoft Dynamics GP Trigger**

This is a real time data source. SmartConnect allows the retrieval of information from events triggered inside the Dynamics GP application. This is achieved by first specifying which fields and related fields will be made available during an event and then registering a map on this event which uses the data to integrate information into Dynamics CRM or Dynamics GP. For example you can use a GP trigger data source to move data to another Dynamics GP in real time.

To create a map from the data retrieved from Dynamics GP during a trigger event you must first define which Dexterity Table can be used as a data source.

**To define a Dynamics GP Trigger Data source**

1. Tools>>SmartConnect>>GP Trigger Data source
2. Select a product
3. Select a series
4. Select a table. All the fields from the main table will be available during the mapping process.
5. Select the ‘Allow GP Table to be used as a data source’
6. Add a linked table to the main table by selecting the ‘Add’ button.
7. Select the fields that will be retrieved from the linked table.

To map to a Dynamics GP Trigger Data sources

1. From the SmartConnect Map Setup screen click the data source button
2. Select the Microsoft Dynamics GP Trigger option
3. Select the product, series and table to use a source.
To register a map against a Dynamics GP trigger

1. From the SmartConnect Map Setup screen click the register button. The run button is renamed to ‘register’ for maps with a real time data source.

![SmartConnect Map Setup Screen](image)

2. Select the event you would like the map to run on.
3. Select the ‘Add’ button, the plus sign. You may add a map to more than one event.
4. Click the process button. You must log out before the trigger will be registered.

To unregister a map against a Dynamics GP trigger

1. Click the register button on the map window.
2. Remove the linked maps for create, update and delete
3. Hit the process button, to remove the registered triggers. You must log out before the trigger will be registered.
**Microsoft Excel**

You can create a map directly off a Microsoft Excel 2003 or 2007 spreadsheet.

1. Once you have selected your destination in the Map setup screen click the data source button.
2. Select the Excel 2007 or Excel 2003 option from the drop down list.
3. Select the workbook.
4. Select the Sheet.
5. Click “validate” or “preview”.
**Text file**

You can create a map directly off a comma separated text file

1. Once you have selected your destination in the Map setup screen click the data source button.
2. Select the “Text File” option from the drop down list.
3. Select a text file.
4. Click “validate” or “preview”.

![Datasource window](image)
Real time integration diagram:
Chapter 6: Scheduling

SmartConnect maps can be scheduled to run daily, weekly, monthly, at start-up, at login and once. Schedules can only be created for maps that were created from ODBC, Excel or Text file connections.

- Daily Schedules
- Weekly Schedules
- Monthly Schedules
- Scheduling maps to run at start-up
- Scheduling maps to run at login
- Scheduling maps to run once

Daily Schedules

A daily schedule runs every few days at the specified time.

To add a daily schedule:

1. Open SmartConnect and enter or select the Map ID of the map that you want to schedule.

2. Click on the Schedule button.
3. Select Daily as the Schedule Task option.
4. Enter the time that the map should start.
5. Enter the number of days between each run of the map.
6. Click on the OK button.
**Weekly Schedules**

A weekly schedule runs every few weeks on the selected days at the specified time.

**To add a weekly schedule:**

1. Open SmartConnect and enter or select the Map ID of the map that you want to schedule.
2. Click on the Schedule button.
3. Select Weekly as the Schedule Task option.
4. Enter the time that the map should start.
5. Enter the number of weeks between each run of the map.
6. Mark the days of the week that the map will run on.
7. Click on the OK button.

![Weekly Schedule](image)

**Monthly Schedules**

A monthly schedule runs on a certain day of the month for the selected months at the specified time.

**To add a monthly schedule:**

1. Open SmartConnect and enter or select the Map ID of the map that you want to schedule.
2. Click on the Schedule button.
3. Select Monthly as the Schedule Task option.
4. Enter the time that the map should start.
5. Select the day of the month that you want to run the map on.
6. Mark the months that you want the map to run.
7. Click on the OK button.

**Scheduling maps to run at start-up**

This type of schedule runs whenever the user starts up the computer that is hosting eConnect.

**To add a schedule that runs at start-up:**

1. Open SmartConnect and enter or select the Map ID of the map that you want to schedule.
2. Click on the Schedule button.
3. Select At System Start-up as the Schedule Task option.
4. Enter the time that the map should start.
5. Click on the OK button.

**Scheduling maps to run at login**

This type of schedule runs whenever the user logs into Dynamics GP.

**To add a schedule that runs at login:**

1. Open SmartConnect and enter or select the Map ID of the map that you want to schedule.
2. Click on the Schedule button.
3. Select At Logon as the Schedule Task option.
4. Enter the time that the map should start.
5. Click on the OK button.

**Scheduling maps to run once**

This type of map runs once on the specified date and time.

**To add a schedule that runs once:**

1. Open SmartConnect and enter or select the Map ID of the map that you want to schedule.

2. Click on the Schedule button.
3. Select Once as the Schedule Task option.
4. Enter the time that the map should start.
5. Enter the date that the map should run.
6. Click on the OK button.
Chapter 7: Security

Security can be added to grant or deny access to run SmartConnect in Dynamics GP companies, individual eConnect nodes and features of SmartConnect. This chapter is divided into the following sections:

- Company Security
- Node Security
- Permissions
- Copying Security
- SmartConnect and the Active Directory

**Company Security**

By default, security to all companies is set to off for all users except for the system administrator.

**To set security for a company:**

Open the SmartConnect Security window (Tools >> SmartConnect >> Security). Select the users that you want to set security for. Mark the companies that you want to grant security to. Unmark the companies that you want to deny security to.

**Node Security**

By default, security to all nodes is set to off for all users except for the system administrator.

**To set security for a node:**

1. Open the SmartConnect Security window (Tools >> SmartConnect >> Security).
2. Select the users that want to set security for.
3. Select the companies that you want to set security for.
4. Mark the nodes that you want to grant security to. Unmark the nodes that you want to deny security to.

Permissions

Permissions are tasks that the user can perform in SmartConnect. The permissions that are available are:

Create/Change Maps – A user must have this option selected to create or update maps.

Run Maps – This permission must be enabled for a user to be allowed to run maps.

Send documents to Dynamics CRM – If this permission is allowed, the user can create and update SmartConnect mappings for Dynamics CRM

Send documents to Dynamics GP – If this permission is allowed, the user can create and update SmartConnect mappings for Dynamics GP

Create intercompany transactions – If this permission is allowed, the user can run maps in companies other than the company that they are currently logged in to. If this permission is not allowed, the user can only run maps in the company that they are currently logged in to.

To set security permissions:

1. Open the SmartConnect Security window (Tools >> SmartConnect >> Security).
2. Select the users that want to set security for.
3. Select the companies that you want to set security for.
4. Mark the permissions that you want to grant access to. Unmark the permissions that you want to deny security to.
Copying Security

You can use the SmartConnect Security window to copy security settings from one user to another. Existing security settings will be overwritten.

To copy security settings:

1. Open the SmartConnect Security window (Tools >> SmartConnect >> Security).
2. Click on the Copy button.
3. Select the User and Company that you want to copy security from.
4. Mark the Copy Nodes checkbox if you want to copy nodes from the selected user and company. Unmark the Copy Nodes checkbox if you do not want to copy node security.
5. Mark the Copy Permissions checkbox if you want to copy permissions from the selected user and company. Unmark the Copy Permissions checkbox if you do not want to copy security permissions.
6. Mark the users that you want to copy security to.
7. Mark the companies that you want to copy security to.
8. Click on the Copy button.
SmartConnect and the Active Directory

SmartConnect has two features that will need the windows user or the Active directory user that is using them to be linked to a Dynamics GP user. The windows user account then inherits its permissions from the GP account it’s linked to, including the maps it has access to and the individual SmartConnect permissions.

These two features are:-

The SmartConnect Web services:-

The windows user that is processing the web request whether it’s via the Excel Add, InfoPath or real time integration from a Dynamics CRM plug-in must be linked to Dynamics GP user account to inherit its permissions. The SmartConnect web service uses the account specified during the install to impersonate calls to the Dynamics GP Database.

The SmartConnect Scheduler:-

The windows user you choose the SmartConnect Scheduler to run under when scheduling a map will also need to be linked to windows user account.
To link a windows account to Dynamics GP User:

1. Open the SmartConnect Security window (Tools >> SmartConnect >> Security).
2. Select a Dynamics GP account from the list.
3. Select “Active Directory” from the list header.
4. Select “Link AD Account”.
5. Lookup a windows account.
6. Click OK.
Chapter 8: Import and Export

This chapter describes how to export SmartConnect settings to XML and import SmartConnect settings from an XML file. This information is divided into the following sections:

- Exporting settings
- Importing settings

Exporting settings

You can use the Export SmartConnect Settings window to export SmartConnect settings to a XML file.

To export SmartConnect settings:

1. Open the Export SmartConnect Settings window (Tools >> SmartConnect >> Export).

2. Enter the filename that you want to export the SmartConnect settings to.
3. Mark the SmartConnect settings that you want to export.
4. Click on the Export button

Importing settings

You can use the Import SmartConnect Settings window to import SmartConnect settings from an XML file.

To import SmartConnect settings:
1. Open the Import SmartConnect Settings window (Tools >> SmartConnect >> Import).

2. Enter or select the file that you want to import.
3. Click on the Import button.
Chapter 9: Tasks

This chapter describes how to create tasks that will execute on the completion of various events when a map is run. For example, you may want to send an email or move a file once a map has completed successfully.

- Task Events
- Creating Tasks

Task Events

Map – Before

Tasks running after this event execute in sequence before a map is run i.e. as soon as the run button is clicked or a map is run from a scheduled task.

Map – After – Fail

Tasks running after this event execute in sequence after a map is run and the map fails to complete without errors i.e. after the map is run and one of the integrations fail. For example, if you were to integrate ten customers and one fails, these tasks will be run.

Map – After – Success

Tasks running after this event execute in sequence after a map is run and the map completes without errors i.e. after the map is run and none of the integrations fail. For example, if you were to integrate ten customers and none fail, these tasks will be run.

To add tasks to an event:
1. Open the map window.
2. Select a map to edit.
3. Select the goto button in the top right-hand corner.
4. Select Tasks.
5. Select the event.
Creating Tasks

Copy File

1. Select the “Add Sign” from the tasks event window.
2. Enter a Name for the task.
3. Select what the map should do when the task completes successfully.
4. Select what the map should do when the task fails to complete successfully.
5. Select the folder icon next to the Copy File Field to select a file.
6. Select the folder icon next to the To Field to select a file.
7. Click Save

Delete File

1. Select the “Add Sign” from the tasks event window.
2. Enter a Name for the task.
3. Select what the map should do when the task completes successfully.
4. Select what the map should do when the task fails to complete successfully.
5. Select the folder icon next to the Delete File Field to select a file.
6. Click Save
Move File

1. Select the “Add Sign” from the tasks event window.
2. Enter a Name for the task
3. Select what the map should do when the task completes successfully.
4. Select what the map should do when the task fails to complete successfully.
5. Select the folder icon next to the Move File Field to select a file.
6. Select the folder icon next to the To File Field to select a file.
7. Click Save

Send Email

1. Select the “Add Sign” from the tasks event window.
2. Enter a Name for the task
3. Select what the map should do when the task completes successfully.
4. Select what the map should do when the task fails to complete successfully.
5. Enter a To Address.
6. Enter a CC Address
7. Enter a BCC Address
8. Enter a From Address
9. Enter a Subject.
10. Enter a Message body.
11. Click Save
Run File

1. Select the “Add Sign” from the tasks event window.
2. Enter a Name for the task.
3. Select what the map should do when the task completes successfully.
4. Select what the map should do when the task fails to complete successfully.
5. Select the folder icon next to the File Field to select a file.
6. Enter an Exit Code.
7. Click Save.

Script

1. Select the “Add Sign” from the tasks event window.
2. Enter a Name for the task.
3. Select what the map should do when the task completes successfully.
4. Select what the map should do when the task fails to complete successfully.
5. Enter the .Net Code.
6. Select validate button.
7. Click Save
Appendix A

Scripting

About
Scripting in the SmartConnect environment can be done in either the Microsoft Visual Basic .Net or Microsoft Visual C# languages. Each Script in SmartConnect must be treated like a function and must return a value.

Node restrictions and task scripts must both return a Boolean. If a node restriction script returns false the node will not be included on the XML document and if it returns true the node will be included. If a script tasks returns false it indicates the script has not completed successfully and if it is true the task is reported to have run successfully.

The following is a code snippet (VB.Net) for a task script that returns false if an error is thrown in the script at runtime. You should try and follow the same structure when creating scripts.

```vbnet
Try
    'Some Code Here
Catch e As Exception
    Return False 'The task is unsuccessful
End Try

Return True 'The task is successful
```

Calculate fields are functions that return a type of “object” which is the .Net object representing a generic object of any type.

```vbnet
Public Function MyCalculatedFieldFunction(ByVal ParamArray Parameters() As Object) As Object
End Function
```

This means that your calculated fields can return an object of any type but the result is casted to string for insertion into the XML document.

For example you could have a script like

```vbnet
Dim var1 As Integer
Dim var2 As Integer
Return var1 + var2 'This result will be casted into a string by SmartConnect at runtime
```
Global Variables

Using Global Variables in scripts

There are Global variables that can be used across all scripts in SmartConnect.

They are as follows

```vbnet
Public GlobalFileName As String = String.Empty
Public GlobalFilePath As String = String.Empty
Public GlobalToAddress As String = String.Empty
Public GlobalFromAddress As String = String.Empty
Public GlobalCCAddress As String = String.Empty
Public GlobalBCCAddress As String = String.Empty
Public GlobalMessage As String = String.Empty
```

These global variables can be set in one script and their values used or changed in another script.

Consider the following example.

We have a Task Script that runs in the “Map – Before – Event” which looks as follows.

```vbnet
GlobalMessage = "MyCustomerClass"
Return True
```

We could then use the “GlobalMessage” global variable in any other preceding script, for example we could use the value in a calculated field as follows.

```vbnet
Return GlobalMessage
```
Using Global Variables in the user interface

Once global variables are set by a script you can use them in various fields on the user interface where they will be replaced with their values at runtime.

For instance you may set the “GlobalToAddress” in a calculated field then use it on the User Interface to set the To Address on Email Task Dynamically.

Likewise you could set the File name field on copy file task to the GlobalFileName global variable and it will be replaced at runtime.

Global variables will be replaced by their values in the following locations in the user interface

Map Window >> (Then all of the following locations)
Tasks>>Send Email
Tasks>> Copy File
Tasks>>Move File
Tasks>>Delete File
Data source >> (The query field i.e. Select * from GlobalFileName)
Data source>> Xml File Path.
Appendix B

**eConnect COM+ Application Settings**

The Microsoft eConnect application relies on the Data Transaction Coordinator service. If more than one client will be running SmartConnect on your network you may need to have the eConnect COM+ application on both the database server and the computer running SmartConnect.

The MSDTC Service must be configured to allow remote transactions on both eConnect installations.

**To configure the MSDTC service**

1. Start >> Control Panel >> Administrative tools >> Component Services
2. Expand Component Services >> Expand Computers
3. Right Click My Computer>>Select Properties >> Select MSTDC
4. Select Security

5. Configure the service as shown in the above screen shot.