



SmartConnect 2014 Release Information and Upgrade Instructions

Release Information

New Features and Bug fixes (2014)

<http://doc.eonesolutions.com/SmartConnect/index.html?new in smartconnect.htm>

Upgrade Instructions

1. Uninstall the current version of SmartConnect
2. Run the SmartConnect installer.
3. Agree to the license terms and conditions then select Next.
4. Select the installation type required.
 - Client - selecting this option auto selects the SmartConnect user interface for install. The install process also assumes that the MSSQL SmartConnect database has already been set up and so will not ask for credentials to create and set up the SmartConnect database.
 - Server - selecting this option auto selects the SmartConnect user interface, as well as the windows and web services. This process will also ask for MSSQL credentials to create and set up the SmartConnect database.
5. Select the SmartConnect components for this install.
 - **SmartConnect**
 - i. **User Interface** - required to access SmartConnect to create / manage or run maps.
 - ii. **Windows Service** - required if this install is to be used for SmartConnect scheduled processes. Note: only one windows service install is required in order to schedule SmartConnect maps and processes.
 - **Web Service** - required if this install is to be used to process Dynamics CRM real-time data sources, Dynamics GP real-time data sources, Dynamics GP SmartList data sources, data pushes from the SmartConnect Excel Add-In, or run other processes via the

SmartConnect web service. Note: only one web service install is required to support these processes.

- **SalesForce Web Service** - required if this install is to be used to process Salesforce real-time data sources. Note: only one web service install is required to support this functionality.
 - **Great Plains 10** - required on at least one Dynamics GP machine to create the GP Resource Cache within Microsoft Dynamics 10. Also required if real time data or SmartList data sources are to be triggered from within Dynamics GP.
 - **Great Plains 2010** - required on at least one Dynamics GP machine to create the GP Resource Cache within Microsoft Dynamics 2010. Also required if real time or SmartList data sources are to be triggered from within Dynamics GP.
 - **Great Plains 2013** - required on at least one Dynamics GP machine to create the GP Resource Cache within Microsoft Dynamics 2013. Also required if real time or SmartList data sources are to be triggered from within Dynamics GP.
 - **eConnect for Microsoft Dynamics GP 10** - required if updates to GP 10 are required, and eConnect for GP 10 has not already been installed.
 - **eConnect for Microsoft Dynamics GP 2010 64 bit** - required if updates to GP 2010 are required, and eConnect for GP 2010 has not already been installed. Only appears for 64 bit machines.
 - **eConnect for Microsoft Dynamics GP 2010 32 bit** - required if updates to GP 2010 are required, and eConnect for GP 2010 has not already been installed. Only appears for 32 bit machines.
 - **eConnect for Microsoft Dynamics GP 2013 64 bit** - required if updates to GP 2013 are required, and eConnect for GP 2013 has not already been installed. Only appears for 64 bit machines.
 - **eConnect for Microsoft Dynamics GP 2013 32 bit** - required if updates to GP 2013 are required, and eConnect for GP 2013 has not already been installed. Only appears for 32 bit machines.
 - **Note: Since SmartConnect 2011 SP1 CRM support file installation is no longer required**
6. Enter the required information about the SmartConnect installation. Select Next to continue.
- Select the folder where SmartConnect should be installed.
 - Enter a password for the SmartConnect user. Remember this password as it will be required in the event of installations on other machines.
 - If this is an upgrade from a version that did not require the entry of the SmartConnect password, use *SmartConnect* here.
 - If the installation has been run on other machines, enter the same password as was entered on the initial machine.
 - Enter the name of the MSSQL server where the SmartConnect database should be created.
 - Enter a MSSQL login and password to be used to connect to the MSSQL server. The user selected must have security to create the SmartConnect user and database.

7. If installation of the windows service has been selected, enter the required information for the service setup.
 - Enter the domain of the service account
 - Enter the username of the user that will run the service (must have log on as a service rights)
 - Enter the user password
 - Enter the MSSQL server name (defaults if entered previously)
8. If installation of the SmartConnect web service has been selected, enter the information required then select Next.
 - Enter the domain of the web service account.
 - Enter the user to be used for impersonation on the web server.
 - Enter the password.
 - Enter the MSSQL server name (may default if entered previously)
9. If installation of the SalesForce web service has been selected, enter the required information then select Next.
 - Enter the domain of the web service account.
 - Enter the user to be used for impersonation on the web server.
 - Enter the password.
 - Enter the MSSQL server name (may default if entered previously)
10. If a Dynamics GP version has been selected, enter the path to the GP installation, then select Install.
11. Select finish to close the installation window.

Extender Upgrade Instructions

1. Make sure extender is upgraded to 2013 on the GP machine.
2. Confirm all views in extender are still working and all the fields are included.
3. Log into SmartConnect
4. Go to Setup → Setup → SmartConnet Dynamics GP Connector
 - Change the GP Version to 2013
5. Go to Setup → System Maintenance
 - Run system maintenance
6. Go to Maintenance → Upgrade Extender
 - Wait for the form to load all maps
 - Click upgrade
 - The process will run through all maps that has extender data sources and destinations and upgrade them to 2013.