

WELCOME to ClickDimensions

INTRODUCTION

Below you will find a guide to assist with the installation and implementation of ClickDimensions. We are excited to work with you and your team!

SET UP

Prior to testing your CRM's external access or attempting to register for the ClickDimensions solution, refer to the following articles:

- *Configuring external access for your CRM:* <http://help.clickdimensions.com/connectivity-for-the-clickdimensions-solution/>
 - Configure the Internet Facing Deployment (IFD) for CRM

(or)

- Expose the CRM website to the internet through standard web publishing techniques.
- Firewall considerations: <http://help.clickdimensions.com/what-firewall-changes-are-needed-to-allow-clickdimensions-proper-access-to-your-crm-deployment/>
- Check your SSL certificate to make sure it is valid: <http://www.sslshopper.com/ssl-checker.html>

DEPLOYMENT TIMELINE

- Registering for the ClickDimensions License – Expected Duration – 10 Minutes to register, Receive the Solution file within 24 hours
- Installation – 15 – 30 Minutes
- Configuration – Approximately 4 Hours

REGISTRATION

- ClickDimensions for all CRM versions: <https://app.clickdimensions.com/mscrm/pages/register.aspx>

INSTALLATION & CONFIGURATION

- [Installation of ClickDimensions Solution License](#) (Licensed is Packaged as a Managed Solution File for CRM 2011 and CRM 2013/2015)
- Go to **Settings > Customization > Solutions in your CRM**

POST-INSTALLATION SET UP

- [Setup CNAMEs for email links and web content](#)
- [SPF records for ClickDimensions](#)
- [Import unsubscribes and suppression lists](#)
- [Publish metadata](#)
- [Automatic updates for ClickDimensions](#)

- [Set up ClickDimensions Web Tracking](#)
- Associate ClickDimensions Security Roles to the CRM Users that you'd like to have access.
- Have any HTML templates and images that you'd like to use within ClickDimensions saved in a location where they are accessible to import into ClickDimensions.

ClickDimensions

HELPFUL RESOURCES

- Opt into ClickDimensions Emails:
 - Monthly Newsletter: <http://clickdimensions.com/resources/newsletter>
 - Product Updates and New Releases: <http://help.clickdimensions.com/sign-up-for-clickdimensions-product-updates-and-new-releases/>
 - Service Announcements Forum: <http://support.clickdimensions.com/forums/356777-Announcements>
- ClickDimensions Blog: <http://clickdimensions.typepad.com/clickdimensions/>
- 7- Minute Overview Video: <http://www.clickdimensions.com/video/demo/>
- Recorded Webinars and More: <http://clickdimensions.com/resources/webinars>
- New Marketing eBooks released quarterly: <http://clickdimensions.com/resources/ebooks>
- View the uptime of ClickDimensions: <http://trust.clickdimensions.com>

TRAINING

- ClickDimensions Academy: Held live every day, multiple times per day <http://help.clickdimensions.com/clickdimensions-academy/>
- Help Site: “How to” guides, trainings videos and more <http://help.clickdimensions.com/>

SUPPORT

- 24 hour free and unlimited Support <http://support.clickdimensions.com/home>
 - 1 (678) 466-6944 ****PLEASE LOG A SUPPORT TICKET FIRST IF POSSIBLE****
- Q&A Forums: <http://support.clickdimensions.com/forums>
- Add feature requests: <http://support.clickdimensions.com/forums/356780-Feature-Requests>

USAGE CHECK

- You can view the usage report in CRM, by going into Settings > ClickDimensions Settings > Usage, and then filter by day, month, year. Instructions can be found at <http://help.clickdimensions.com/account-questions-1/>

ADDITIONAL HELPFUL LINKS

- <http://help.clickdimensions.com/category/best-practices/>
- <http://help.clickdimensions.com/category/faq/>
- <http://help.clickdimensions.com/category/tips-and-tricks/>