
Outlook 2003/2007 CRM 4.0 Add-In Download and Installation Instructions

Microsoft Dynamics CRM

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1 Getting Started

The purpose of this guide is to provide basic instructions for the download and installation of Microsoft Dynamics CRM 4.0 Add-In for Outlook 2003/2007

1.1 Before installing the CRM 4.0 Add-In check the following prerequisites

Note: These prerequisites are important as CRM 4.0 will not properly install, please review each prerequisite before starting the installation process.

Close Outlook 2003/2007

Outlook 2003/2007 must be set to use a default profile and it does not prompt for PROFILE to be used.

Click Start > Control Panel > Mail > Show profiles... > check Always use this profile, then select your default exchange profile from the drop down box and click OK when finished.

All previous versions of the CRM Add-In need to be UNINSTALLED completely. (Please note that this will only be necessary if you have previously installed the CRM Add-In on your PC).

Remove the plug-in from Outlook. In Outlook 2007 click Tools > Trust Center > Add-ins and click GO to list COM Add-Ins... > select Microsoft Dynamics CRM > Remove > OK

Uninstall the plug-in from the computer. Click Start > Control Panel > Add or Remove Programs > select Microsoft Dynamics CRM for Microsoft Office Outlook > Change. When the Microsoft Dynamics CRM for Outlook Setup dialog opens, select UNINSTALL > Next

1.2 Your CRM URL needs to be added to Trusted Sites and Pop-up Blocker

Adding your CRM URL to Trusted Sites. Click Start > Control Panel > Internet Options > select the Security tab > select the Trusted sites zone > click the Select button. Enter your URL (supplied as your CRM web address by Prior) and click the ADD button.

Your URL will be similar to this one: <https://prior.hostedcrm4.com>

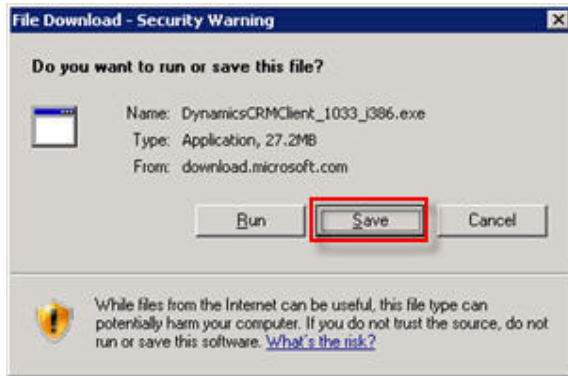
To add your CRM URL to Popup Blocker. Click Start > Control Panel > Internet Options > select the Privacy tab > check the Turn on Pop-up Blocker check box > click the Settings button. Enter your URL and click the ADD button.

2 Downloading and Saving the Link

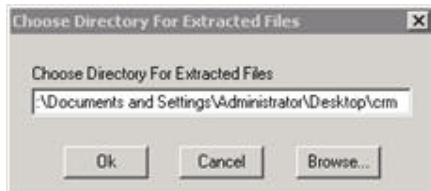
First, please download the Microsoft Dynamics CRM 4.0 for Microsoft Office Outlook link from here:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=60c4a6cc-59d7-416e-9f44-0ae8ff249768&displaylang=en>

When the File Download dialog box appears, click Save and save the file to your desktop.

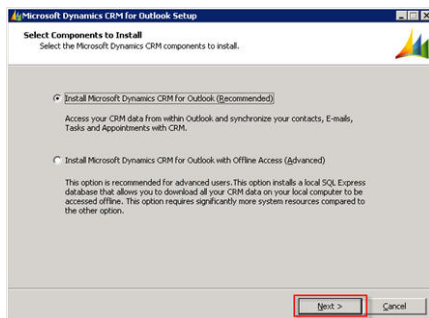


When you are ready to install the CRM plug-in, locate the icon on your desktop and double-click the executable file. Choose a directory to extract the CRM setup file. In this example we created a folder on the desktop called CRM.



Select the folder the CRM was extracted to and double click **setupclient.exe** to start the installation process.

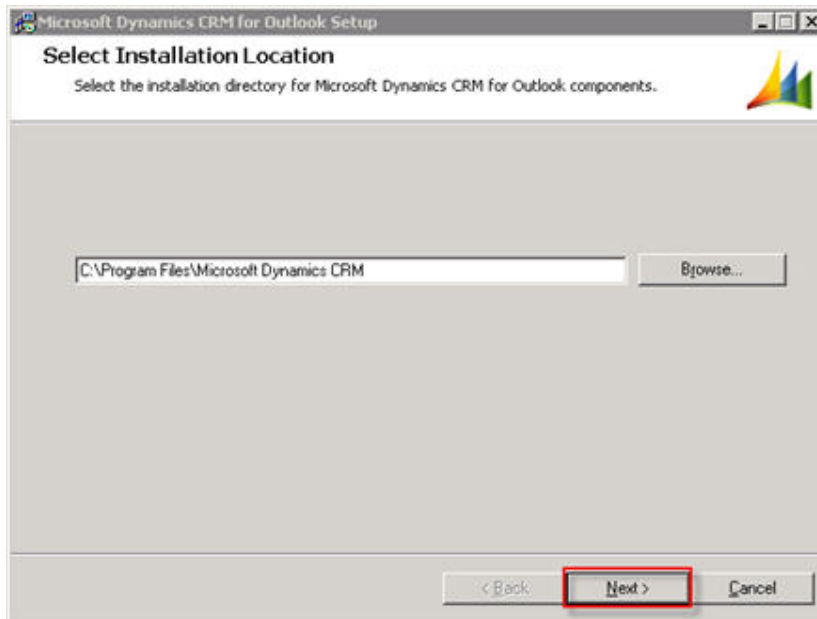
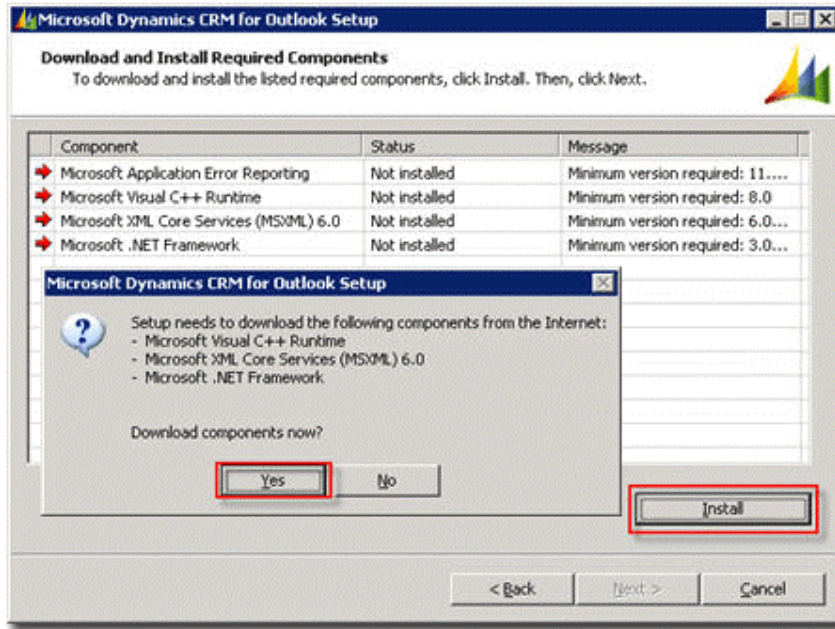
Select "Install Microsoft Dynamics CRM for Outlook (Recommended)"

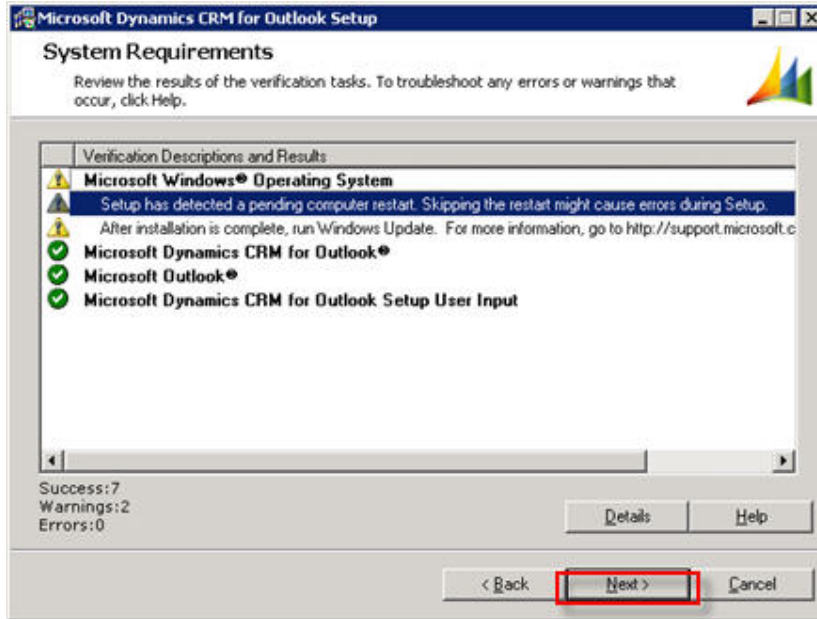


After you've clicked Next> Select "I accept the license agreement" and click I Accept

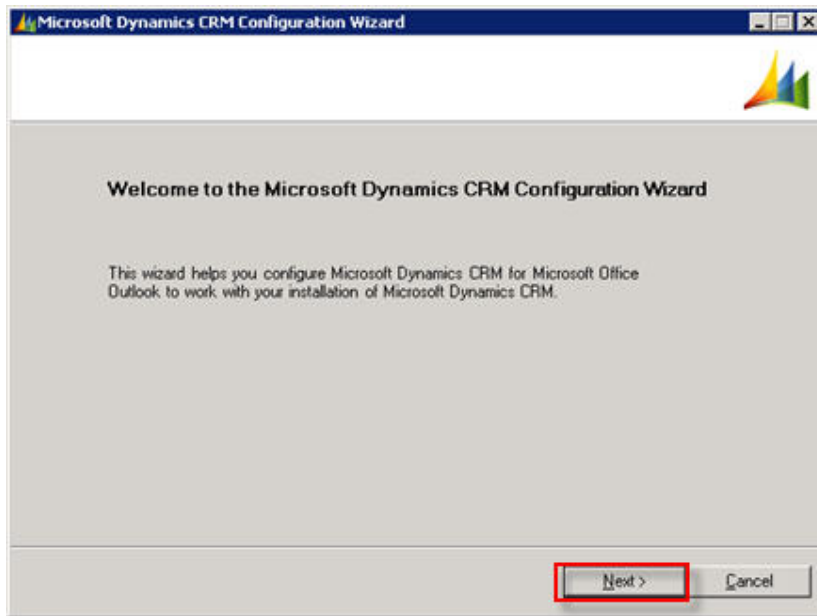


The CRM plug-in requires a number of additional Windows components to be installed. Select YES to have the CRM setup wizard automatically download the necessary updates. Select INSTALL once these components have all populated. Please note that depending upon the number of components that are required, this make take around 30 minutes to download.





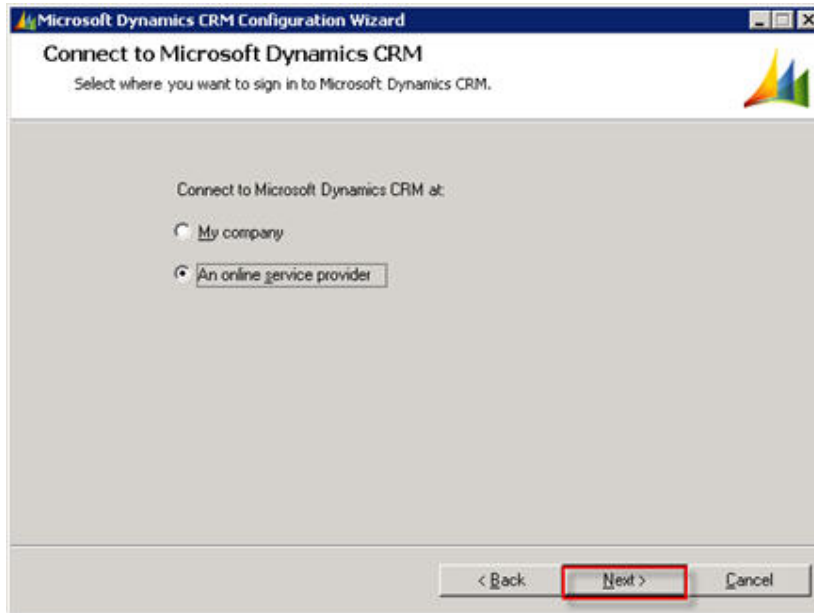
When everything is successfully downloaded and installed you will see the following screen:





3 Configuring the Link between Outlook and CRM

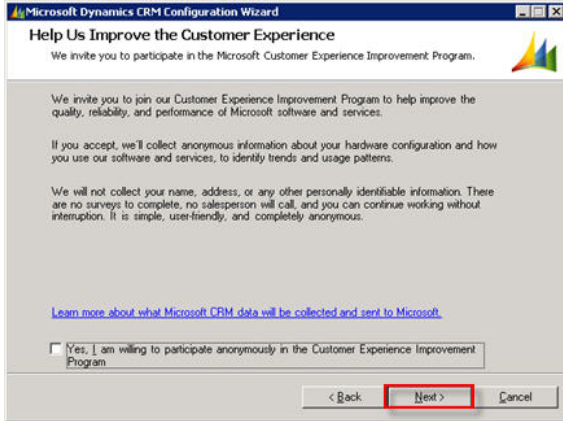
You should choose An online service provider when this screen is displayed as shown:



The next screen will prompt for your online CRM service provider URL. Enter the details supplied by Prior Analytics - e.g. <https://prior.hostedcrm4.com>

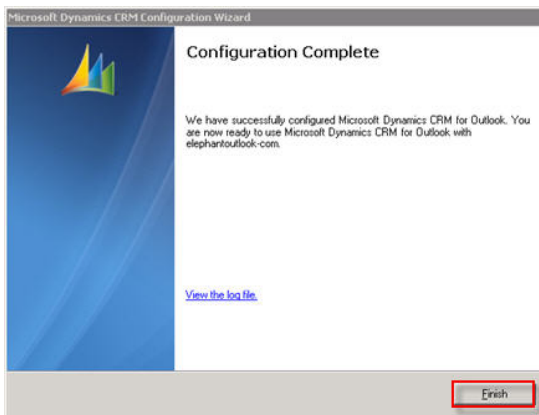
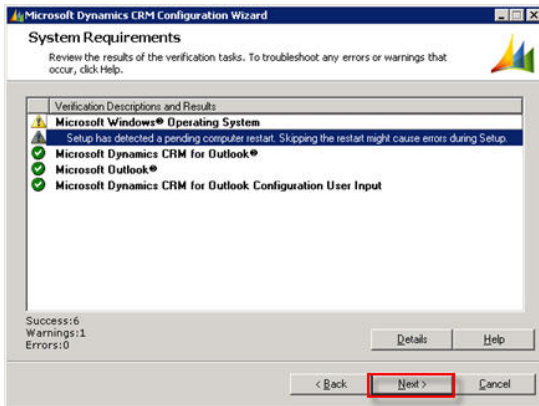
Next, enter the email address and password for CRM supplied by Prior:





Click Next to skip this screen

The next screen should be as follows:



Click Finish to complete the setup. Now, when you open Outlook you will be able to access CRM.