



Sage CRM

7.0 SP1 Terminal Services and Citrix Support Guide

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Introduction

This Support Guide is for Sage OpCos, Sage CRM partners, and Sage CRM customers installing Sage CRM in a Terminal Services (TS) or Citrix environment.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, regional products may use different brand names.

Which Versions are Supported in 7.0 SP1?

The following table is an extract from the Product Support Matrix. The full version is available here:

https://community.sagecrm.com/user_community/m/sage_crm_v70_documentation/3651.aspx

Terminal Services / Citrix	v7.0 SP1	
	32-bit	64-bit
Windows Terminal Server 2008 & 2008 R2 (Standard & Enterprise Editions) over HTTP & HTTPS	○	○
- Deployed by publishing the desktop	●	● **
- Deployed by publishing the application only	○	○
Windows Terminal Server 2003 & 2003 R2 (Standard & Enterprise Editions) over HTTP & HTTPS	○	○
- Deployed by publishing the desktop	●	● **
- Deployed by publishing the application only	○	○
Citrix Presentation Server v4.5	○	○
- Deployed by publishing the desktop	○	○
- Deployed by publishing content	○	○
Citrix XenApp Server v5.0 (Enterprise Edition) over HTTP	○	○
- Deployed by publishing the desktop	●	○
- Deployed by publishing content	●	○

Support may not be available for all Integrated Suites. Please consult your local support team

- Supported
- Not Supported
- ** IE 32bit/Office 32bit for plugins required

The following are not supported on TS/Citrix:

- Solo
- CTI
- Roaming profiles
- Multi-server TS/Citrix¹.

¹ This should not be confused with Multi-server Sage CRM, which is supported in a TS/Citrix environment.

What Requires Special Consideration?

The following areas relating to plugins require special consideration in a Sage CRM implementation on TS/Citrix:

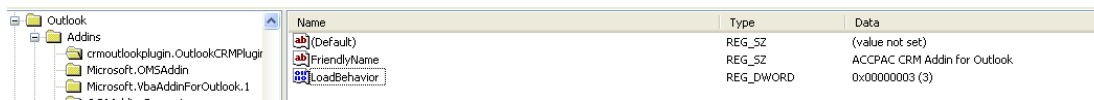
- The Administrator is responsible for installing and uninstalling Sage CRM plugins. Particular care must be taken when uninstalling plugins. For example, if a user uninstalled the Outlook plugin from his/her profile, the plugin OCX/DLL may get unregistered on the server.

Please follow these general recommendations when installing the current Outlook Integration feature:

- The Administrator of the site should log on for each user under their own profile and carry out the Outlook Integration installation on a user-by-user basis.
- Make sure that all the users are connecting to one TS/Citrix server as Load Balancing with multi-server TS/Citrix is currently not supported.


Note: Multi-server TS/Citrix is not supported for Outlook integration as the last sync historical data, mapping files, last sync date details and modification etc. are on the first server where it has been installed and synched from.

- Make sure that the IE and OUTLOOK.EXE processes are not running while installing the plugin for each user on the TS/Citrix session.
- Make sure that all users have disconnected from the TS/Citrix session and no other users are connected to TS/Citrix as this may lock registry settings or the DLL. This includes the Admin user who should not be connected to the TS/Citrix session.
- Provide a different plugin installation software folder for each of the users during the installation process.
- Make sure that none of the users uninstall the plugin. If they do, it may uninstall for all users, which may create an issue of missing buttons and general instability with the plugin. If this occurs, re-install the plugin for each user as described above.
- Make sure that office 2003/2007 is up to the latest service pack available from Microsoft.
- Under the registry key
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\Outlook\Addins\crmoutlookplugin.OutlookCRMPlugin, verify the value of Load Behavior key – it should be 3.



Name	Type	Data
(Default)	REG_SZ	(value not set)
FriendlyName	REG_SZ	ACCPAC CRM Addin for Outlook
LoadBehavior	REG_DWORD	0x00000003 (3)

- The value in step 8 should also be checked in:
HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\OutlookAddIn2003



Name	Type	Data
CommandLineSafe	REG_DWORD	0x00000001 (1)
Description	REG_SZ	OutlookAddIn2003 -- an addin created with VSTO tech
FriendlyName	REG_SZ	OutlookAddIn2003
LoadBehavior	REG_DWORD	0x00000003 (3)
Manifest	REG_SZ	C:\Program Files\Sage\CRM Client\Outlook Plugin\Sage
ManifestLocation	REG_SZ	C:\Program Files\Sage\CRM Client\Outlook Plugin\
ManifestName	REG_SZ	SageCrmOutlookAddIn2003.dll.manifest

