

# Outlook Client Install, Setup, & Config

STRATEGY ■ CONSULTING ■ SUPPORT



# Topics

- New Features
- CRM Outlook Clients
- Install and Configuration
- What is installed
- Client Configuration
- Terminal Server & Citrix
- Upgrade Flow
- CRM Outlook Client GUI
- CRM & Outlook Synchronization
- Go Offline Process
- CRM E-mail Tagging
- CRM Address Book Provider
- CRM Updates
- Troubleshooting

# What's New?

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# New Features

- Outlook Fluent UI
- Views and Form enhancements
  - Customizing
  - Conditional Formatting
  - Categories
  - Follow-ups
- Recurring Appointments
- MAPI Integration
- Data Filter enhancements
- Convert to Opportunity, Lead or Case
- Add Connections
- Sync Performance enhancements
- Address Book Improvements
- 64 bit Outlook support

# CRM Outlook Clients

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# CRM Outlook Clients

- There is now only 1 CRM Outlook client install
  - Client with online capability installs by default
    - Multiple Client Installs per machine (TS\Citrix)
  - Offline Access is available through custom install
    - Else SQL Express will install when user clicks “Go Offline”
    - Only 1 Client Install per machine
    - Hosted Process (while offline only)

# Install and Configuration

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# Setup

- MSI-based deployment
  - Can be run by any administrator
- Published
  - Can be published via Group Policy to allow elevated mode (Non admin install)
- SCCM installs are supported
  - CRM IG – Installing Outlook section has the SCCM installation instructions



# Prerequisites

- Install:
  - Local Admin – Manual install
  - Outlook client cannot be on the exchange server
  - Connection to CRM server not required
  
- Configuration:
  - Outlook Initialized
  - Local Admin – Manual install
    - Not required if client installed in admin mode via SCCM\GPO
  - Must have a connection to the CRM server

# Prerequisites

- Microsoft Dynamics CRM 2011 for Microsoft Office Outlook software requirements
  - Microsoft Windows – XP, Vista & 7
  - Microsoft Office – 2003 SP3, 2007 SP1 & 2010
  - Additional Components
- Microsoft Dynamics CRM 2011 for Microsoft Office Outlook hardware requirements
  - Minimum requirements
    - 750 MHz CPU with 2 GB RAM
  - Recommended requirements
    - 1.8GHz CPU with 4 GB RAM or more

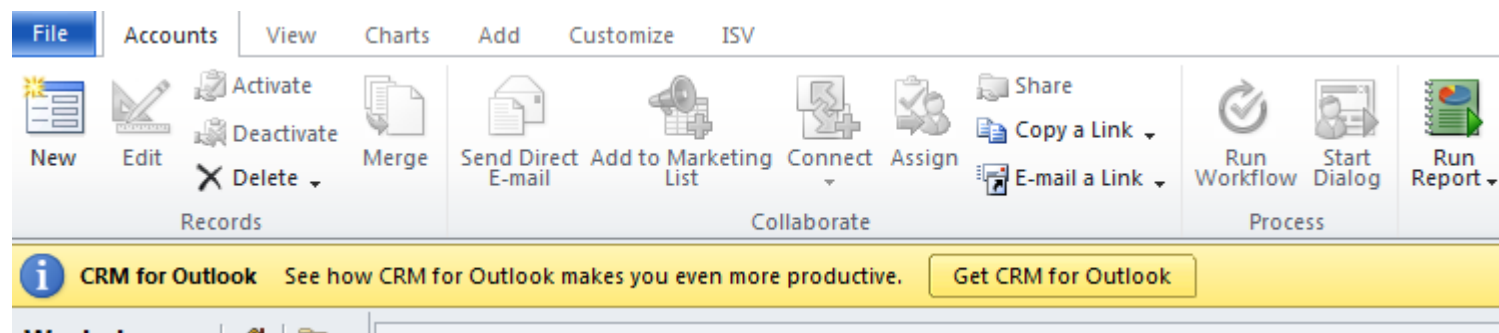
# New Setup Option – Install from Website

## Basics of the “Get CRM for Outlook” button

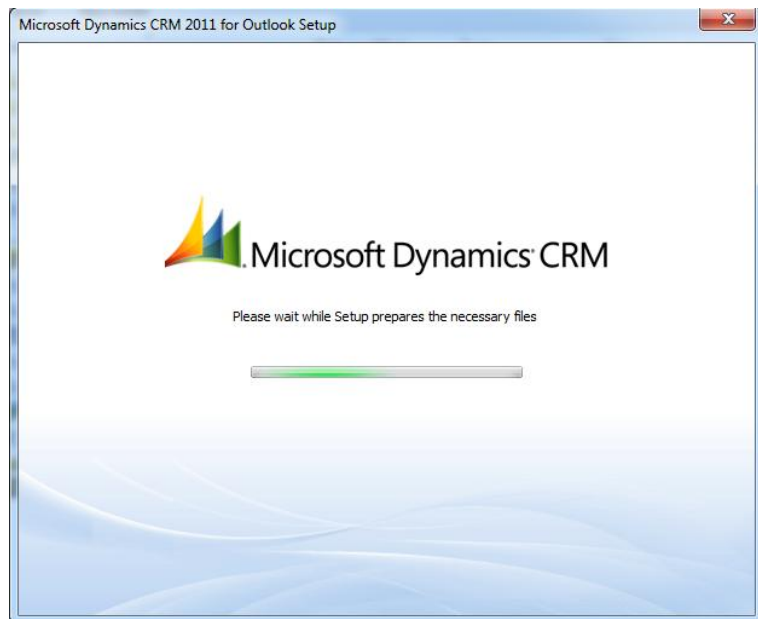
Visibility

Disabling the button

What does the button do?

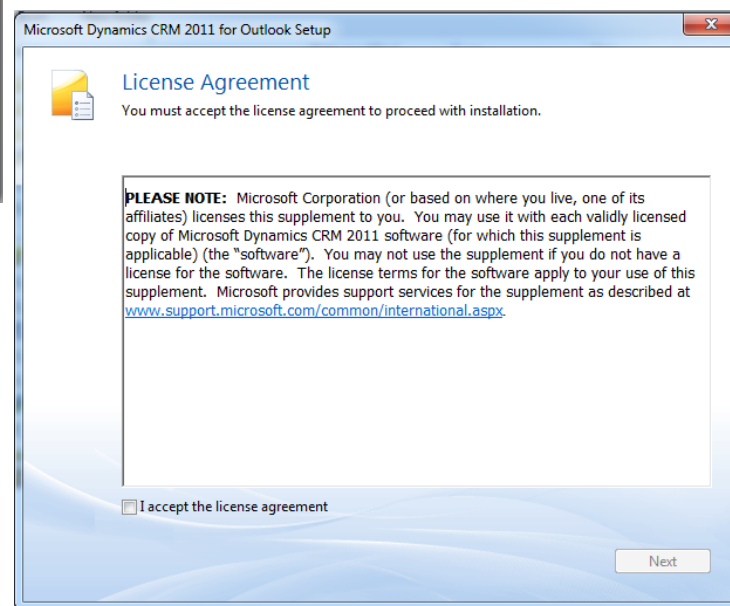


# CRM Outlook Client – Install

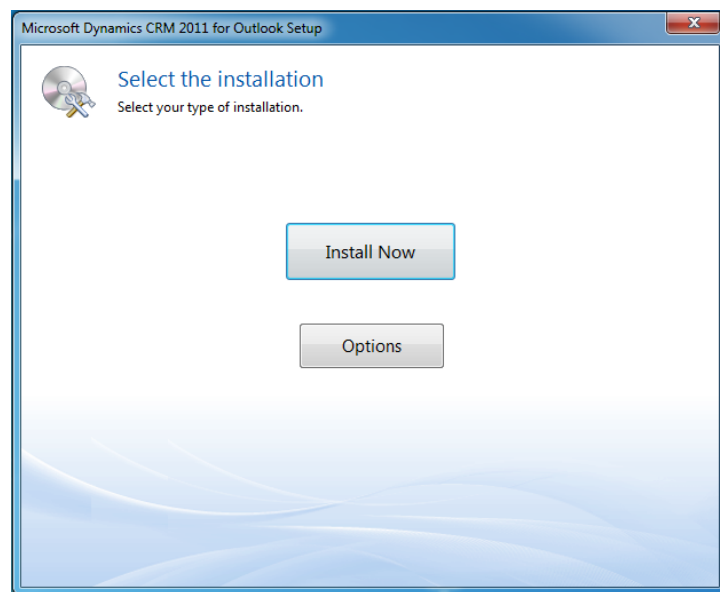


- Run SetupClient.exe

- License Agreement

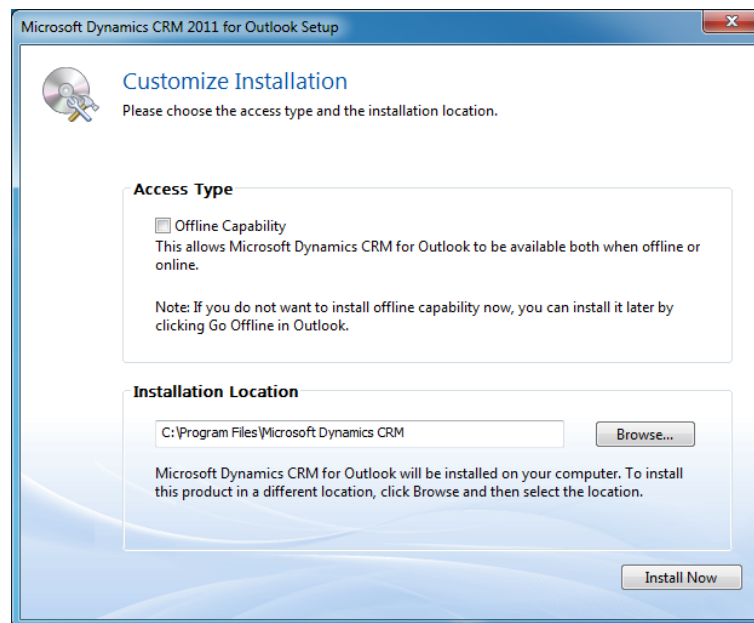


# CRM Outlook Client – Install

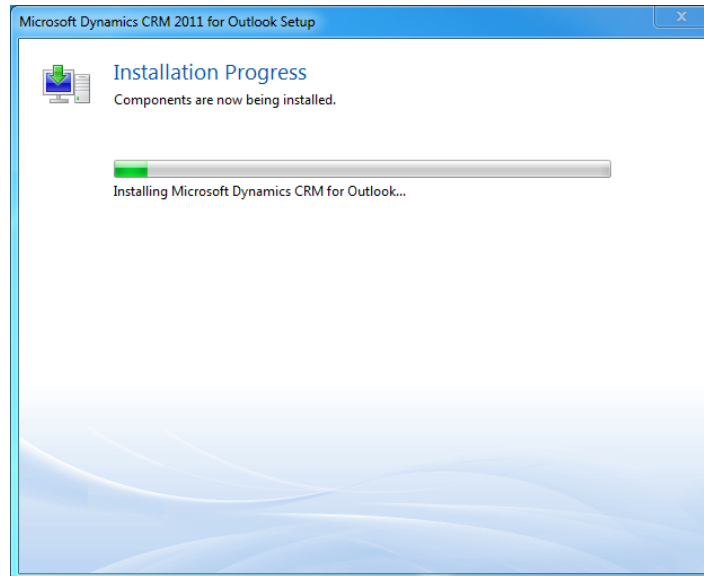


- Select the Installation type

- Options
  - Offline Client
  - Install Location

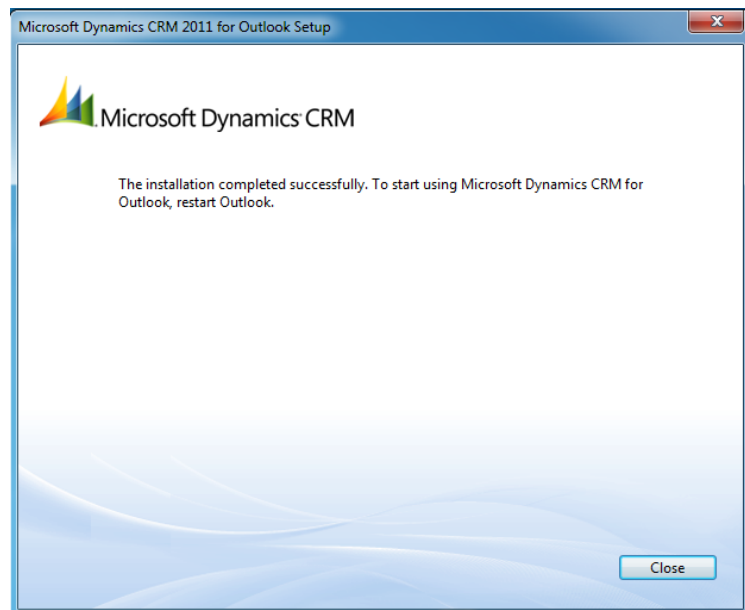


# CRM Outlook Client – Install



- Required components and CRM Outlook client are installed

- Installation Complete



# What is installed?

- Install Registry Keys are located:
  - HKLM\Software\Microsoft\MSCRMClient
- User Configuration Registry Keys are located:
  - HKCU\Software\Microsoft\MSCRMClient
    - OrganizationID subfolders
- Default Install Directory C:\Program Files\Microsoft CRM
- SQL Express (Only for Offline Client install)
- Default location of the database files
  - C:\Users\<user>\AppData\Local\Microsoft\MSCRM\Data
  - MSCRM\_MSDE.mdf
- CRM Outlook Addin (CRMAddin.dll)
  - Tools-Trust Center-Com Add-Ins
  - C:\Program Files\Microsoft CRM\Client\bin
- Outlook Address Book Provider
  - Gives easy access to email CRM accounts, contacts, users, etc.

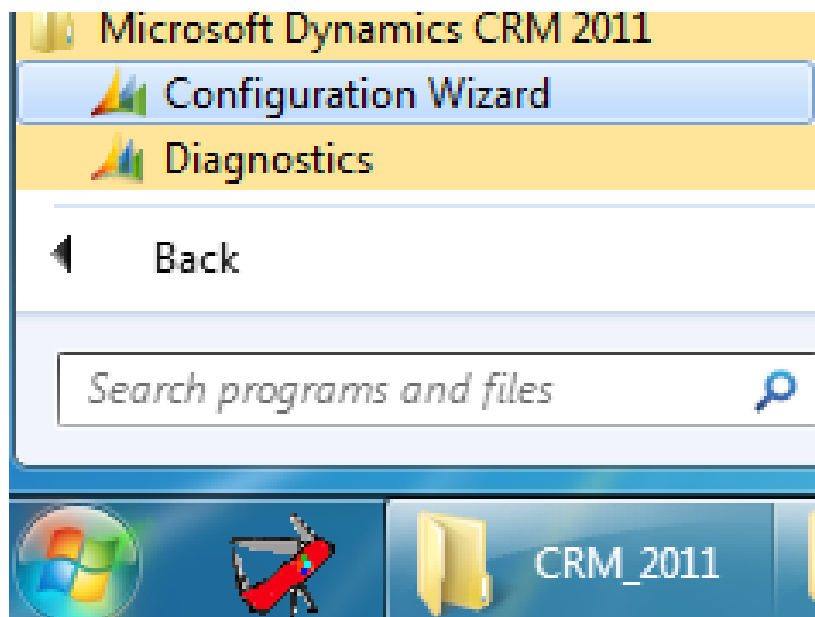


# Client Configuration

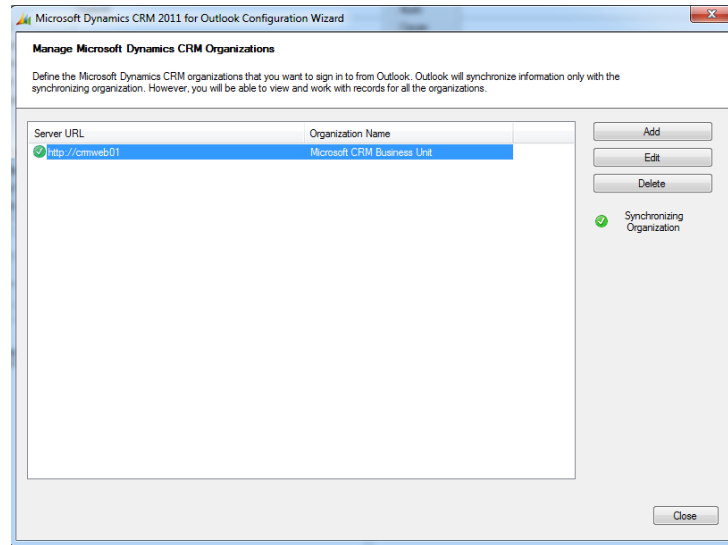


# CRM Outlook Client Configuration

- CRM Configuration Wizard will automatically launch after opening Outlook for the first time.
- Can be launched manually through Start | All Programs | ...

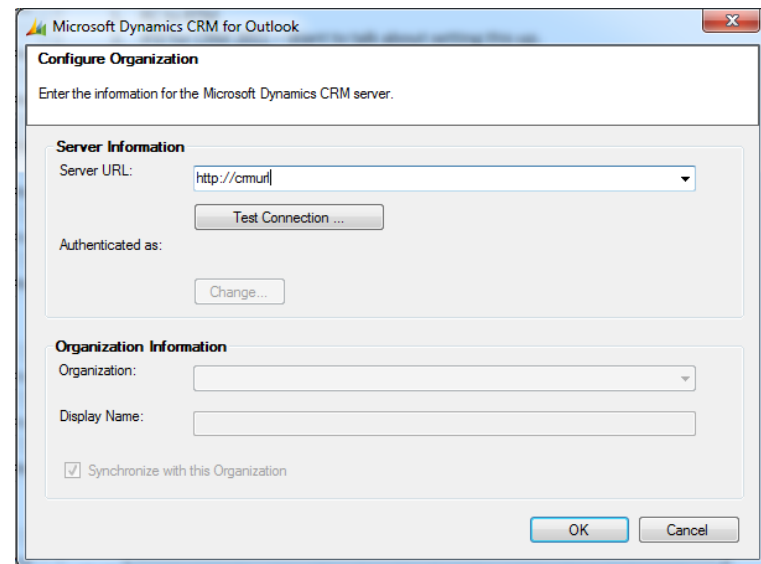


# CRM Outlook Client – Configuration

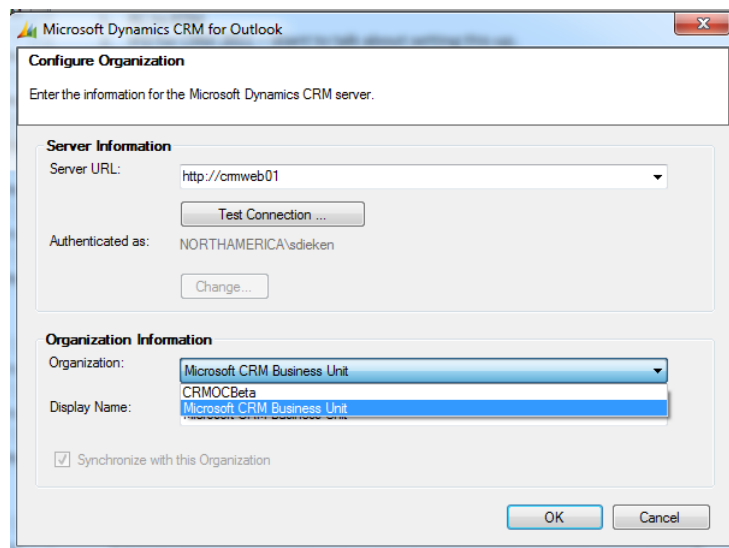


- Manage CRM Organizations

- Enter CRM URL and click Test Connection

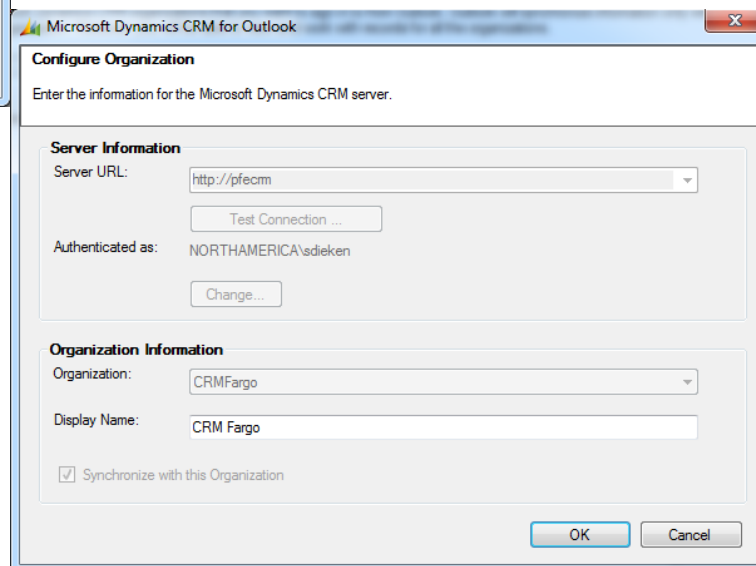


# CRM Outlook Client – Configuration



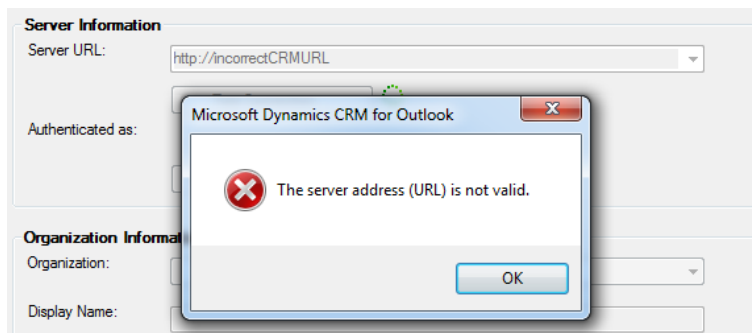
- Select your organization and specify a Display Name

- Edit to change Display Name Or Synchronizing Org

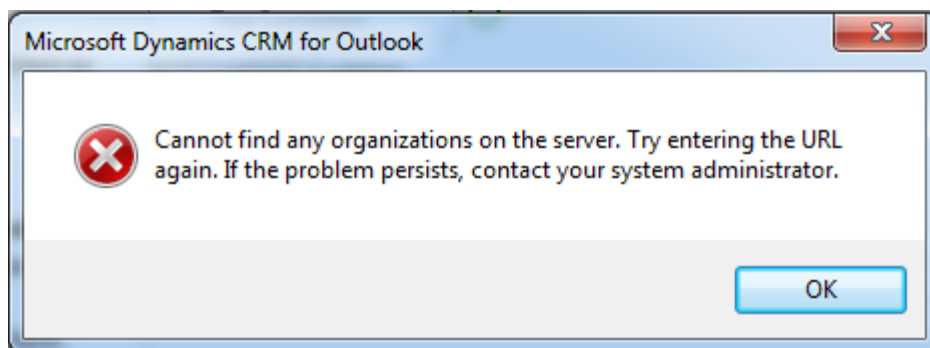


# CRM Outlook Client – Configuration

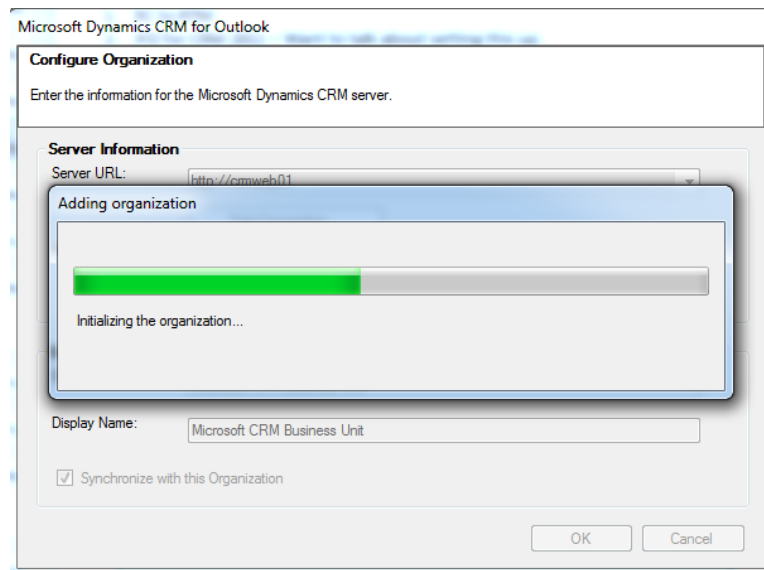
- Error if URL is incorrect or CRM server is unavailable



- Error if there are no additional un-configured organizations

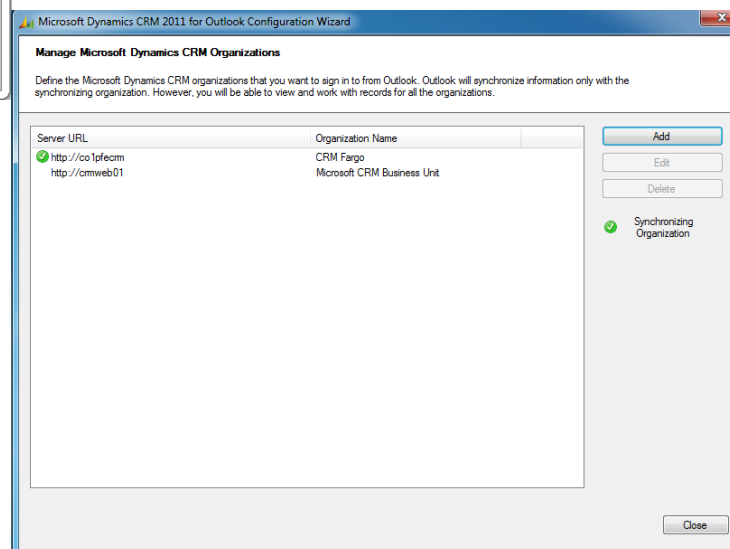


# CRM Outlook Client – Configuration



- Configuration process begins

- Configuration complete



# Silent Configuration

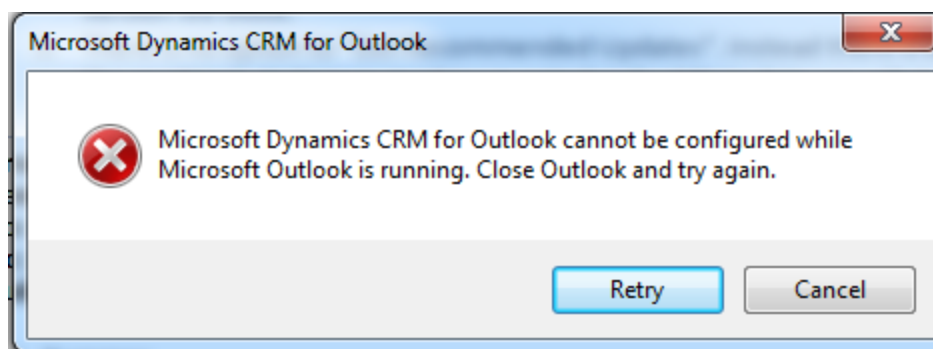
Prevents user error

Ensures consistency

```
<CRMConfiguration>
  <Client>
    <ServerUrl Type="OnPremise" ShowUser="True">
      http://crmdiscoveryservice</ServerUrl>
    <ExtranetServerUrl>http://PathToExternalDiscoveryService</ExtranetServerUrl>
    <Organization>OrganizationName</Organization>
    <CEIP option="True" />
    <Database Reuseexisting="False"/>
  </Client>
</CRMConfiguration>
```

# Steps to "Re-Configure"

- File | CRM | Manage Organizations
- Start | All Programs | Microsoft Dynamics CRM 2011 | Configuration Wizard
- Outlook must be closed before configuring client



# Class Lab

Lab: Outlook client install and configuration



# CRM Outlook Client Startup

## CRM Outlook Add-in

- Loading moved to background thread

- Monitoring for MAPI changes

- Loading Performance

## CRM Add-in State Manager

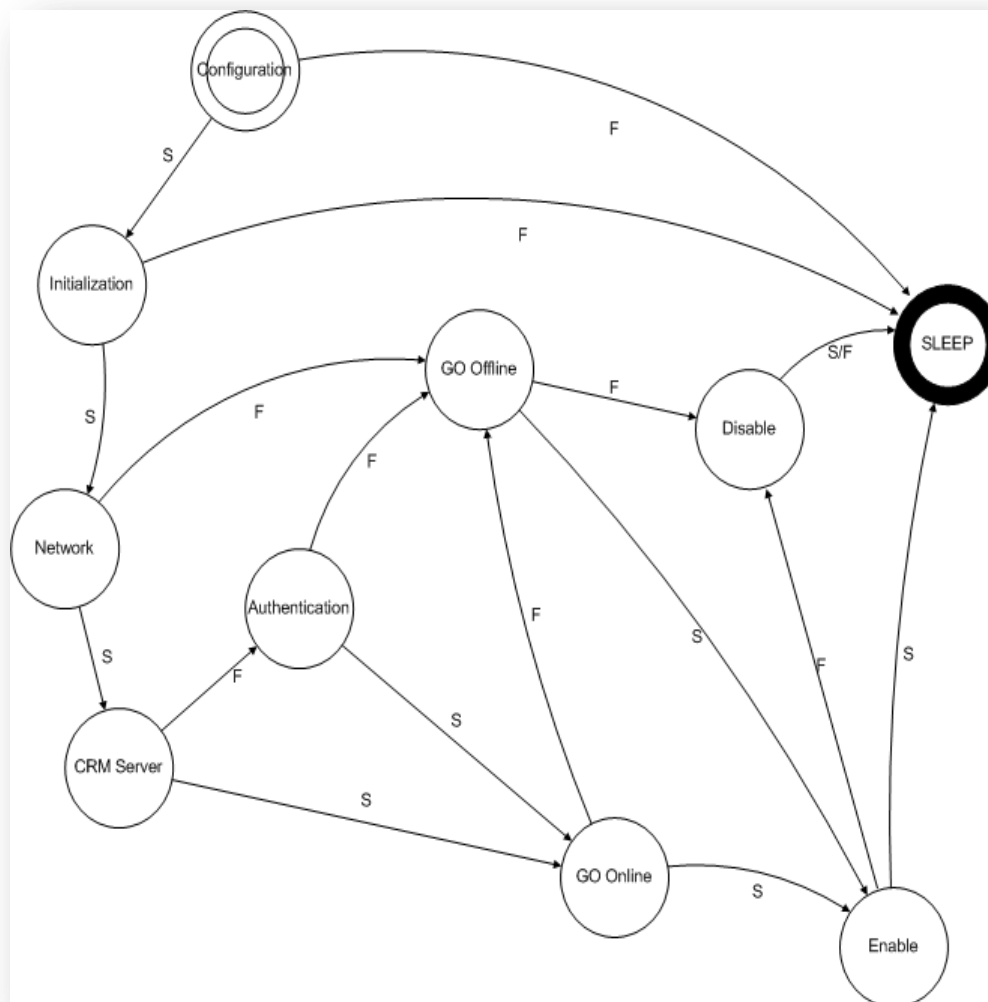
## CRM Hoster Process

- No longer displayed in Notification Area

## Online/Offline performance Enhancements

# CRM Add-in State Manager (CASM)

State Engine  
Monitor Network  
CASM Logic





# Terminal Server & Citrix

# Terminal Server & Citrix

- Administrator installs client for manual installs
- How to prevent user's from going offline:
  - Setupclient.exe /disableofflinecapability
  - Add the Dword value: LightClient = 1
    - HKLM\Software\Microsoft\MSCRMClient
  - Remove Offline privileges from user roles (Online only)
- Each user can manually run the Configuration Wizard
- Remove "Configure CRM" button
  - HKEY\_CURRENT\_USER\Software\Microsoft\Office\Outlook\Addins\crmaddin.Addin\LoadBehavior
  - DWORD value needs to be changed to 2



# CRM Outlook Client Upgrade

# Upgrade

- CRM 4.0 Outlook clients are forward compatible with CRM 2011!
  - Limitations:
    - Requires that the CRM 4.0 client be on UR7 or later
    - Online only
      - You can go back online with CRM 4.0 once if you were offline when the CRM server was upgraded
      - IMPORTANT: Do NOT upgrade the Outlook client if you are offline as you will lose any data changes that have not been uploaded.
    - Limited to available CRM 4.0 features and functionality
- CRM 4.0 UR7 is required for upgrade to CRM 2011
- No need to reconfigure

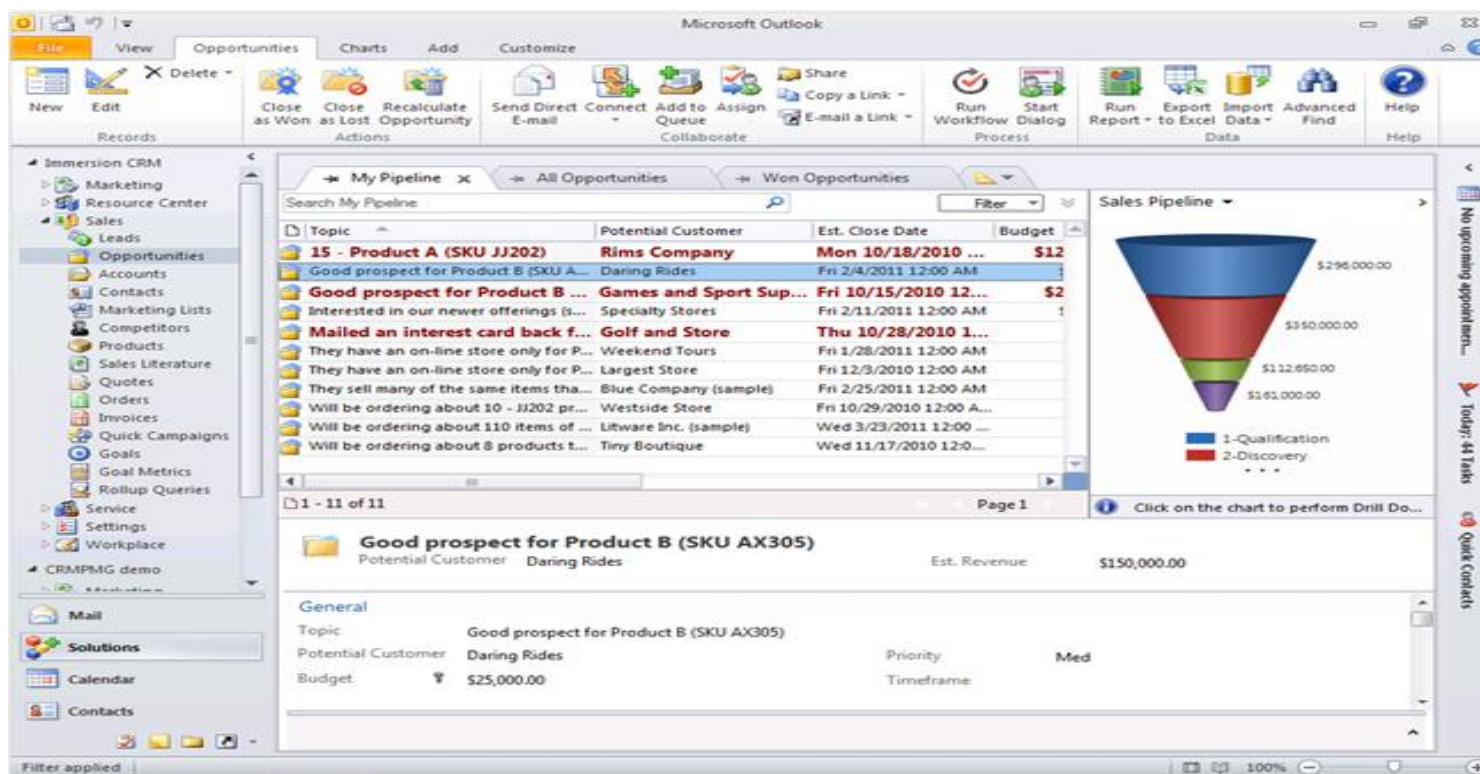


The background of the slide is a detailed architectural blueprint of a building, likely a stadium or arena, showing seating tiers, structural elements, and various annotations. The blueprint is rendered in a light blue/gray color scheme.

# CRM Outlook Client GUI

# Next Generation UI

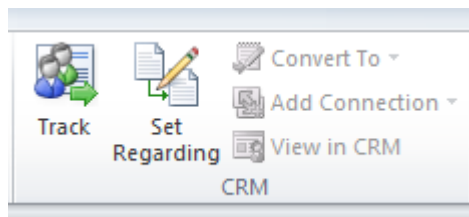
- Multiple Organizations
- Immersion CRM
- CRMPMG Demo



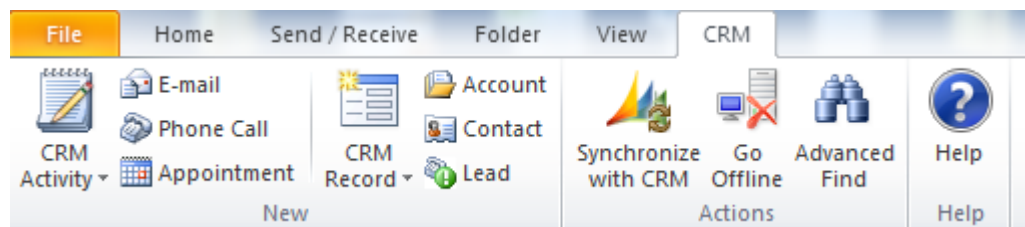


# CRM Ribbon

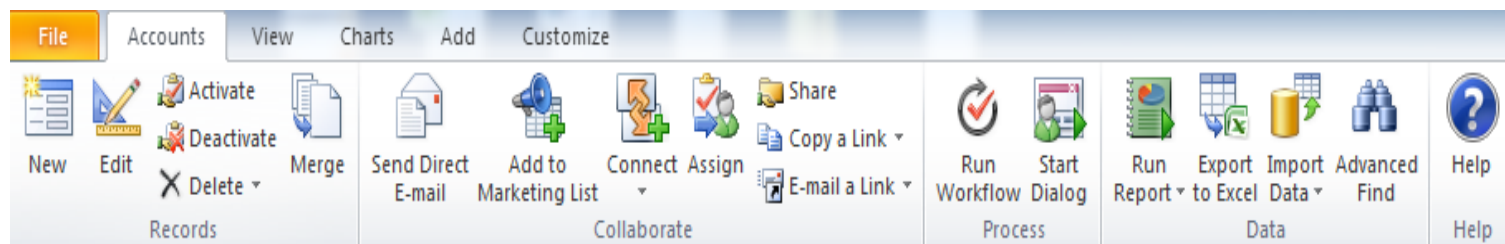
- Ribbon from Home tab



- CRM tab on ribbon from Inbox

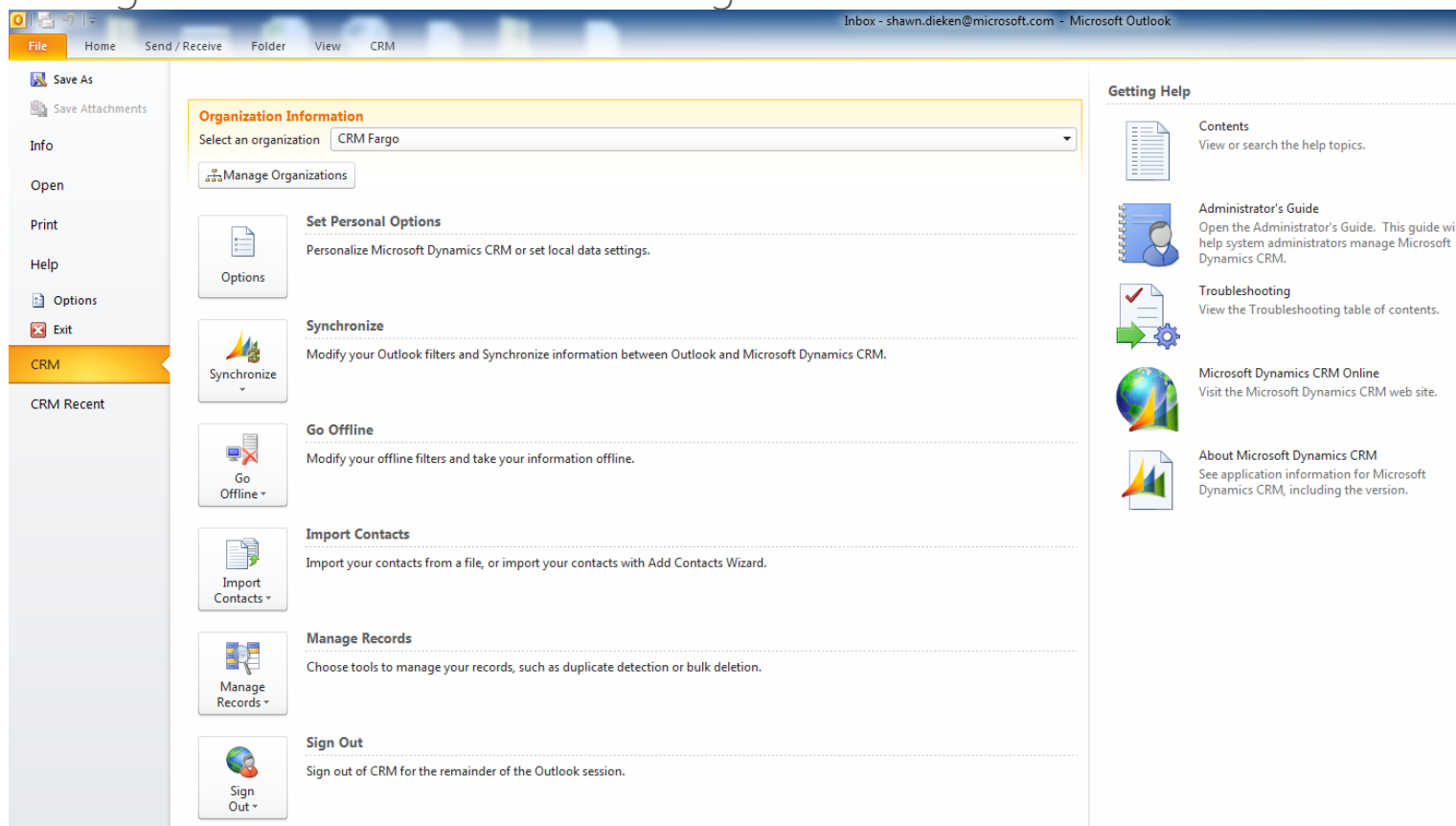


- Ribbon from Accounts



# CRM Menu in Outlook "Backstage"

## Manage CRM from Outlook "Backstage"



## CRM | Personal Options

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General | Synchronization | Workplace | Formats | E-mail Templates | E-mail | Address Book | Local Data | Privacy | Languages

**Select the setting for Get Started panes**

☐ Show Get Started panes on all lists

**Select which forms to use**

By default, Microsoft Dynamics CRM for Outlook uses standard Outlook forms for activities. However, Microsoft Dynamics CRM forms might have custom fields that are more specific to your needs. To use Microsoft Dynamics CRM forms instead, select the check boxes for those activities.

☐ Appointment ☐ Task  
☐ Contact ☐ E-mail

**Set the number of records shown per page in any list of records.**

Records Per Page: 50

**Select the default mode in Advanced Find**

Advanced Find Mode: ☒ Simple ☐ Detailed

**Select a default currency**

Currency: USD - US Dollar

**Support high contrast settings**

Select this option if you are using the High Contrast settings in your browser or operating system.

☐ Enable high contrast

View your user information.

Help OK Cancel

## CRM | Personal Options

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General Synchronization Workplace Formats E-mail Templates E-mail Address Book Local Data Privacy Languages

**Synchronize Microsoft Dynamics CRM items with my default Outlook folders**  
Your [Outlook Filters](#) determine the data that is synchronized with your Outlook folders.

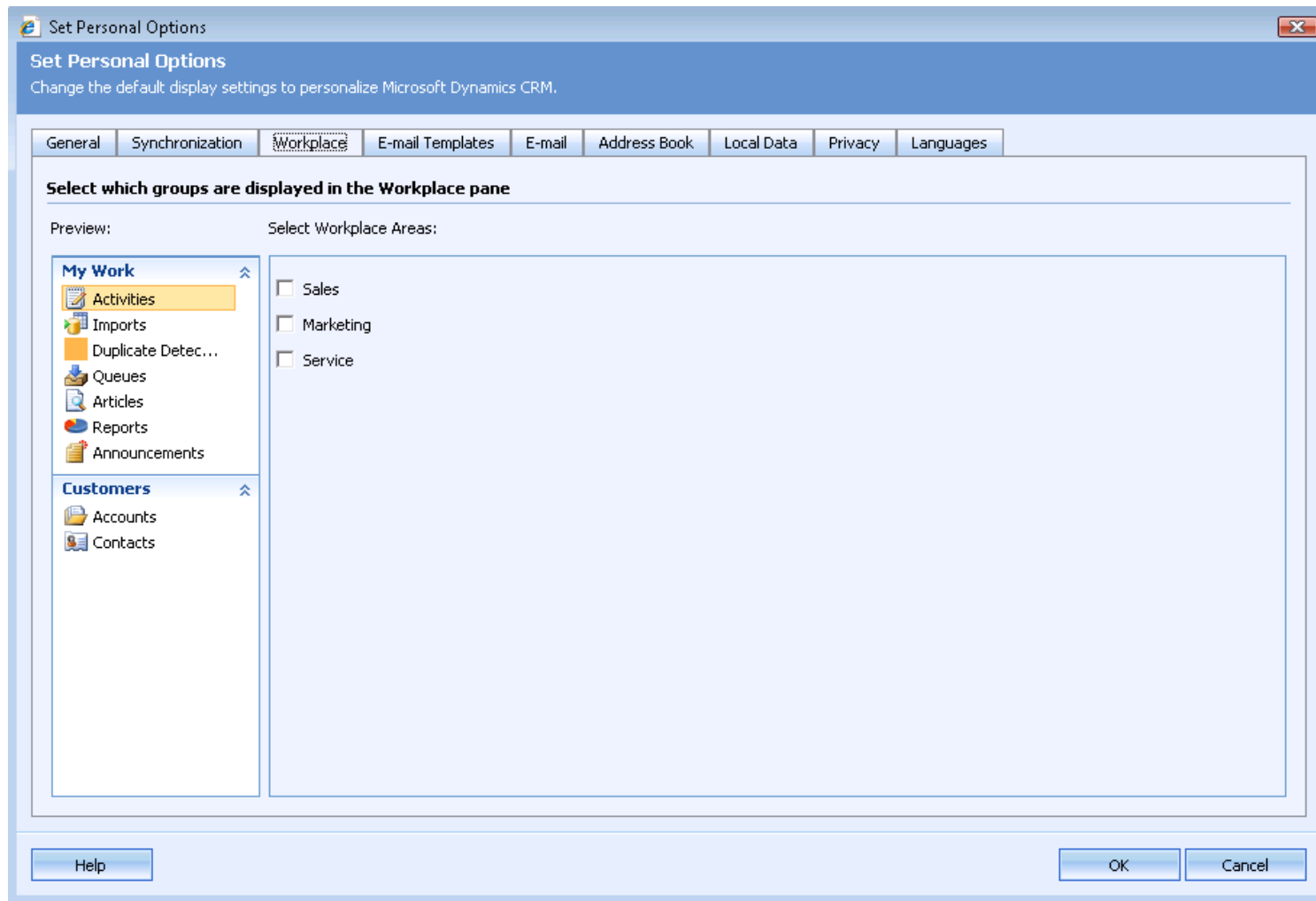
**Update the company field for Outlook contacts**  
During synchronization, the parent account of Microsoft Dynamics CRM contacts can be inserted or used to overwrite the names in the Company field of the Outlook contacts. Changes are not synchronized in Microsoft Dynamics CRM.  
☒ Update Company fields with parent account names

**Set Synchronizing Client**  
Only one client computer per user can run automatic synchronization. This client should be the computer that is most often online (such as a desktop computer) or the user's primary computer.  
☒ Set this computer to be the Synchronizing client

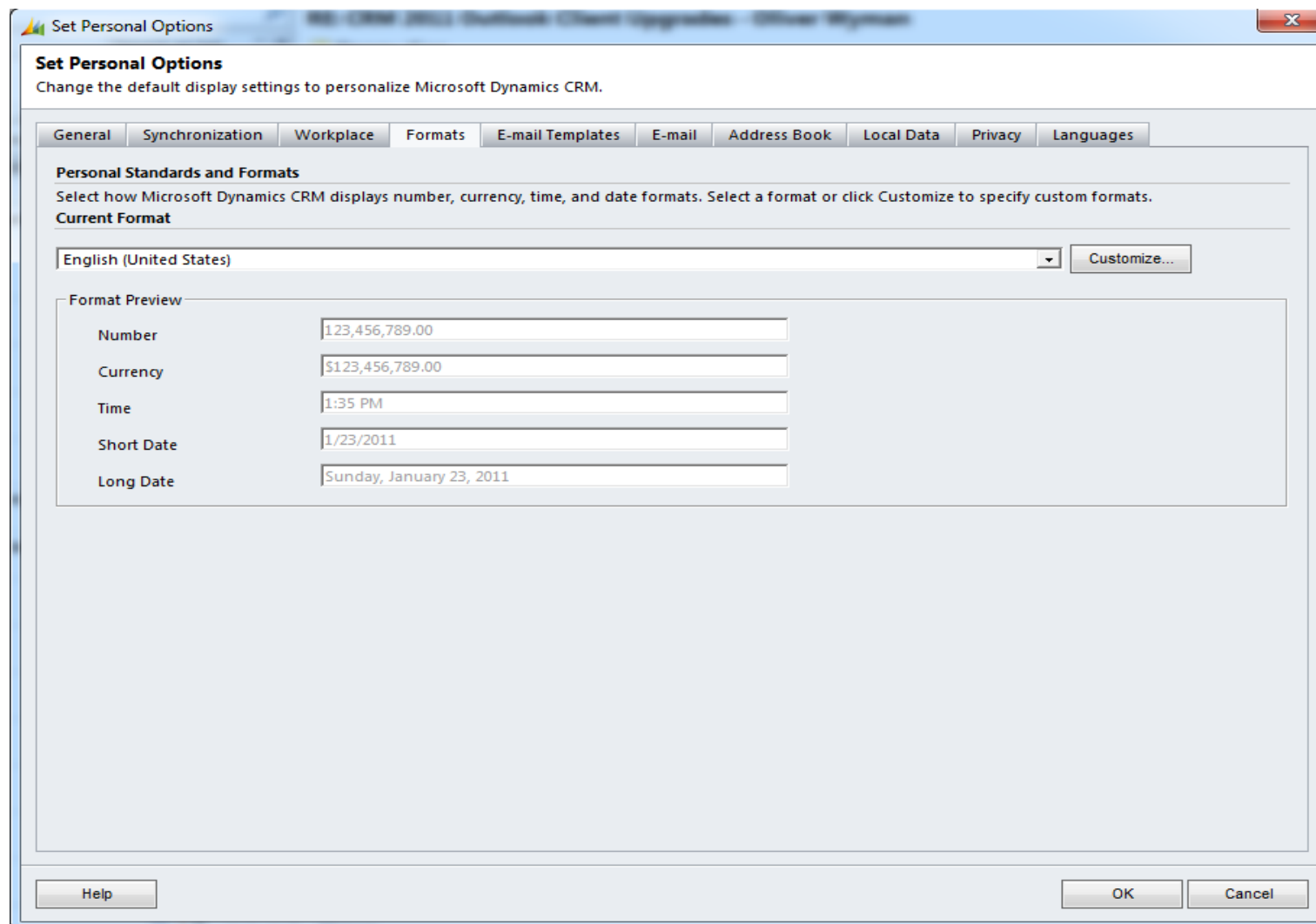
**Schedule automatic synchronization with Outlook**  
☒ Synchronize the CRM items in my Outlook folders every  minutes Minimum allowed minutes is: 15 minutes

Help OK Cancel

## CRM | Personal Options



## CRM | Personal Options



**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General Synchronization Workplace **Formats** E-mail Templates E-mail Address Book Local Data Privacy Languages

**Personal Standards and Formats**  
Select how Microsoft Dynamics CRM displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

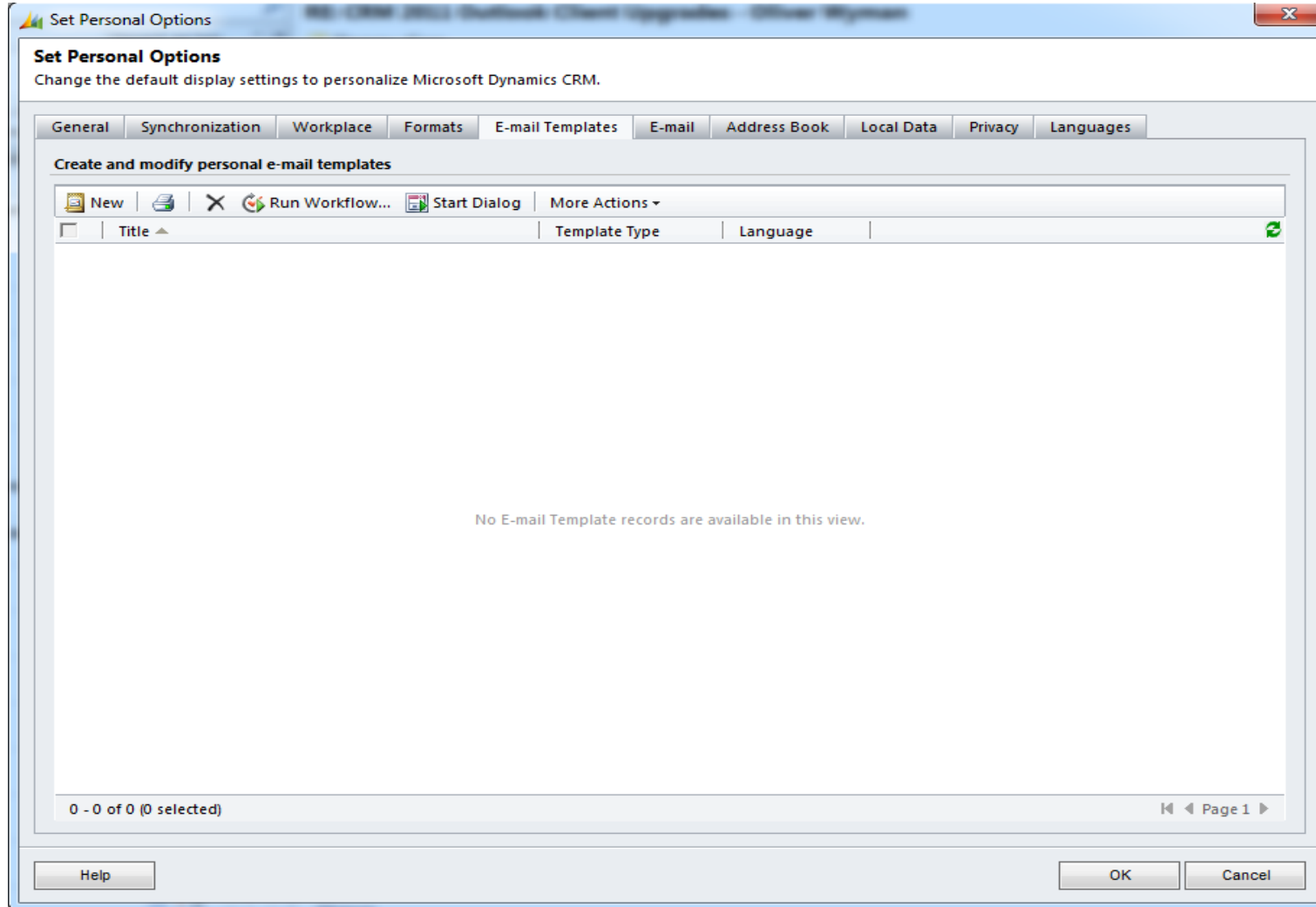
**Current Format**  
English (United States) Customize...

**Format Preview**

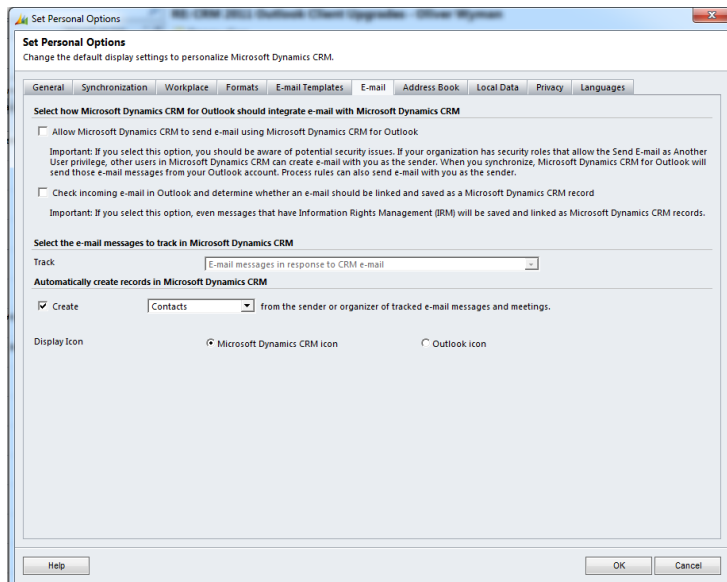
Number	123,456,789.00
Currency	\$123,456,789.00
Time	1:35 PM
Short Date	1/23/2011
Long Date	Sunday, January 23, 2011

Help OK Cancel

## CRM | Personal Options

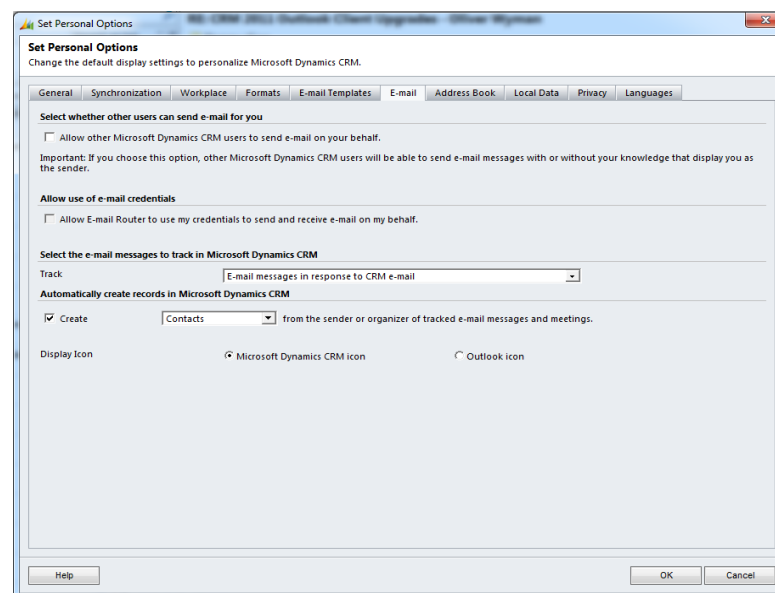


## CRM | Personal Options



- Options if you have Outlook\Outlook

- Options if you have FWD MB\Router OR
- Options if you have Router\Router





## CRM | Personal Options

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General Synchronization Workplace Formats E-mail Templates E-mail Address Book Local Data Privacy Languages

**Select how e-mail recipients are reconciled with Microsoft Dynamics CRM records**

You can select the Microsoft Dynamics CRM record types to synchronize with your Outlook Address Book. For the record types you select, the names and e-mail addresses in your To, Cc, and Bcc fields are matched with the corresponding Microsoft Dynamics CRM records. Also, the e-mails are linked as activities to those records.

Contacts:

- ☒ Match only against contacts synchronized to Microsoft Dynamics CRM
- ☐ Match all contacts in Microsoft Dynamics CRM

Other record types:

- ☒ Do not match
- ☐ Match only the items I own
- ☐ Match all items in Microsoft Dynamics CRM

Change the record types being synchronized to your Address Book.

Queue;User;Lead;Account;Facility/Equipment

Help OK Cancel

## CRM | Personal Options

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General Synchronization Workplace Formats E-mail Templates E-mail Address Book **Local Data** Privacy Languages

**Select how often to update local data**

To help you to go offline more quickly, Microsoft Dynamics CRM periodically checks for and updates local data with changes to Microsoft Dynamics CRM data. Your local data groups determine what data is checked.

☐ Update local data every  minutes Minimum allowed minutes is: **15 minutes**

**Select how duplicate records should be handled during synchronization**

Enabling duplicate detection when going from offline to online will prevent duplicate records from being synchronized to the CRM system. Note: If there are new related records, and the parent record is a duplicate, child records will not be synchronized.

☐ Enable duplicate detection during offline to online synchronization

Help OK Cancel

## CRM | Personal Options

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General Synchronization Workplace Formats E-mail Templates E-mail Address Book Local Data Privacy Languages

**Participate in the Customer Experience Improvement Program**

We invite you to join our Customer Experience Improvement Program (CEIP) to help improve the quality, reliability, and performance of Microsoft software and services.

If you accept, we'll collect anonymous information about your hardware configuration and how you use our software and services, to identify trends and usage patterns.

We will not collect your name, address, or any other personally identifiable information. There are no surveys to complete, no salesperson will call, and you can continue working without interruption. It is simple, user friendly, and completely anonymous.

Learn more about what Microsoft Dynamics CRM data will be collected and sent to Microsoft.

☐ Yes, I am willing to participate anonymously in the Customer Experience Improvement Program

**Select your error notification preference**

Please help us to improve your experience with Microsoft Dynamics CRM by reporting Web application errors to Microsoft.

Every time that a Web application error occurs when I run Microsoft Dynamics CRM:

☐ Ask me for permission to send an error report to Microsoft

☒ Automatically send an error report to Microsoft without asking me for permission

☐ Never send an error report to Microsoft about Microsoft Dynamics CRM

[View Privacy Statement](#)

Help OK Cancel

## CRM | Options

The screenshot shows the 'Set Personal Options' dialog box with the 'Languages' tab selected. The dialog has a title bar with a close button. Below the title bar, the text 'Set Personal Options' is followed by the instruction 'Change the default display settings to personalize Microsoft Dynamics CRM.' The 'Languages' tab is active, displaying the heading 'Select the language you prefer to see Microsoft Dynamics CRM displayed in' and a sub-instruction 'You can change the display language used for items such as menus and dialog boxes.' There are three language settings: 'Base Language' with a text box containing 'English', 'User Interface Language' with a dropdown menu showing 'English', and 'Help Language' with a dropdown menu showing 'English'. A blue highlight is visible under the 'English' option in the 'Help Language' dropdown. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons.

**Set Personal Options**  
Change the default display settings to personalize Microsoft Dynamics CRM.

General Synchronization Workplace Formats E-mail Templates E-mail Address Book Local Data Privacy **Languages**

Select the language you prefer to see Microsoft Dynamics CRM displayed in

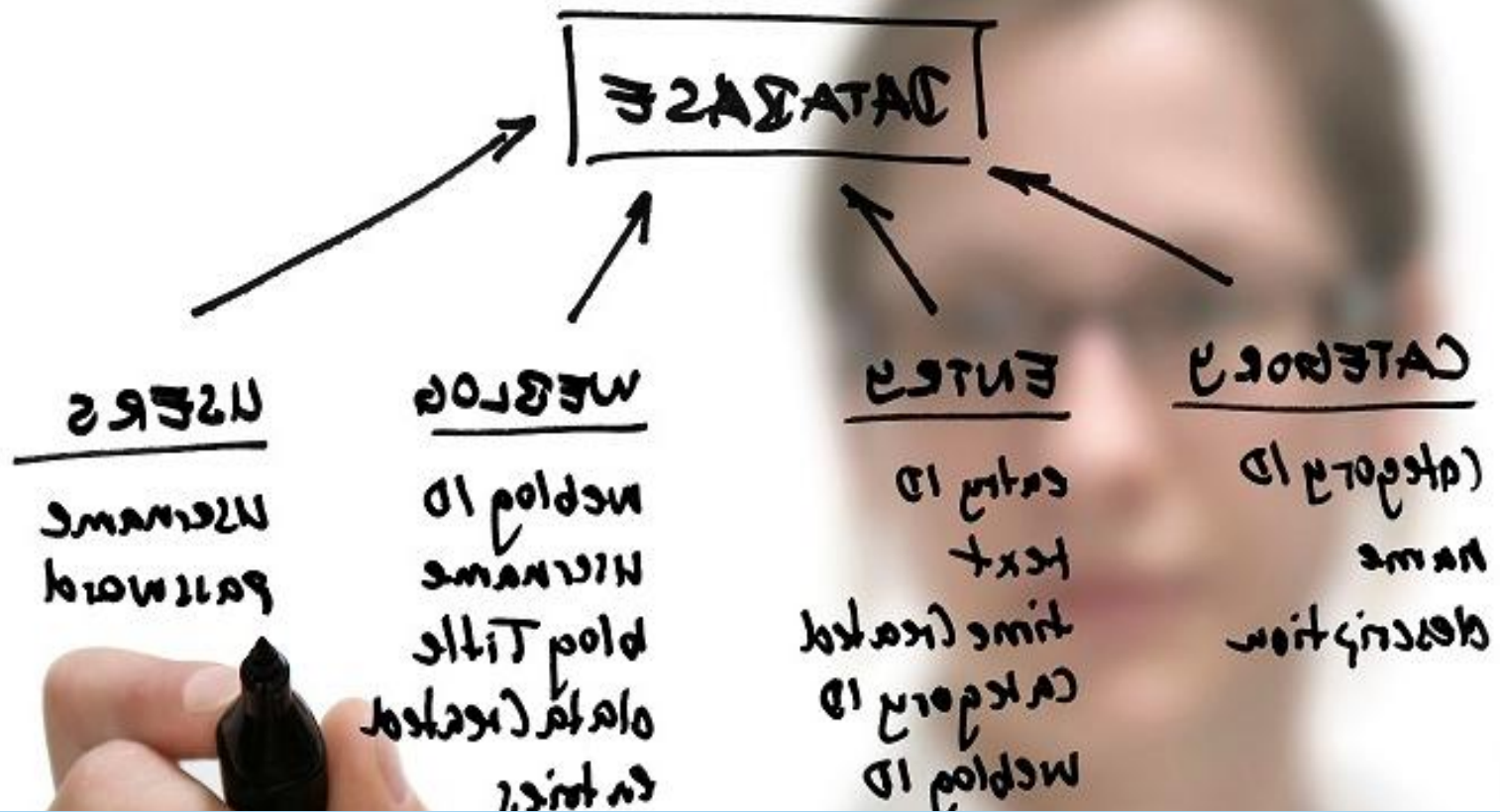
You can change the display language used for items such as menus and dialog boxes.

Base Language English

User Interface Language English

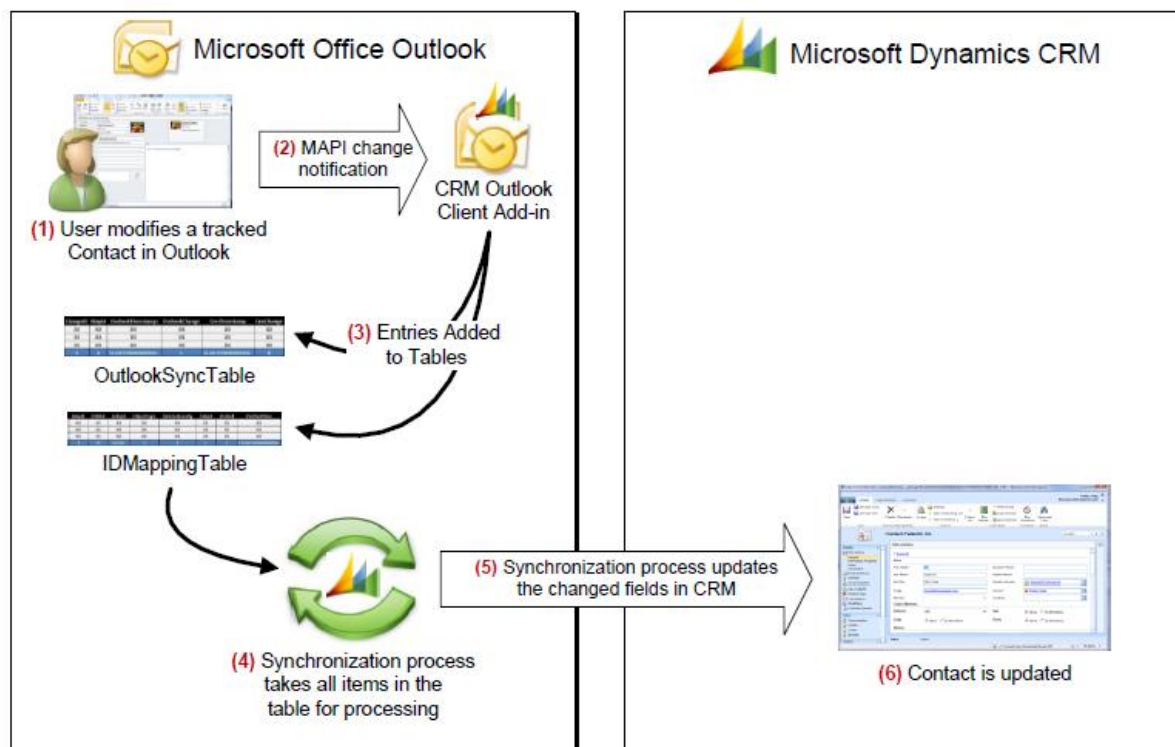
Help Language English

Help OK Cancel

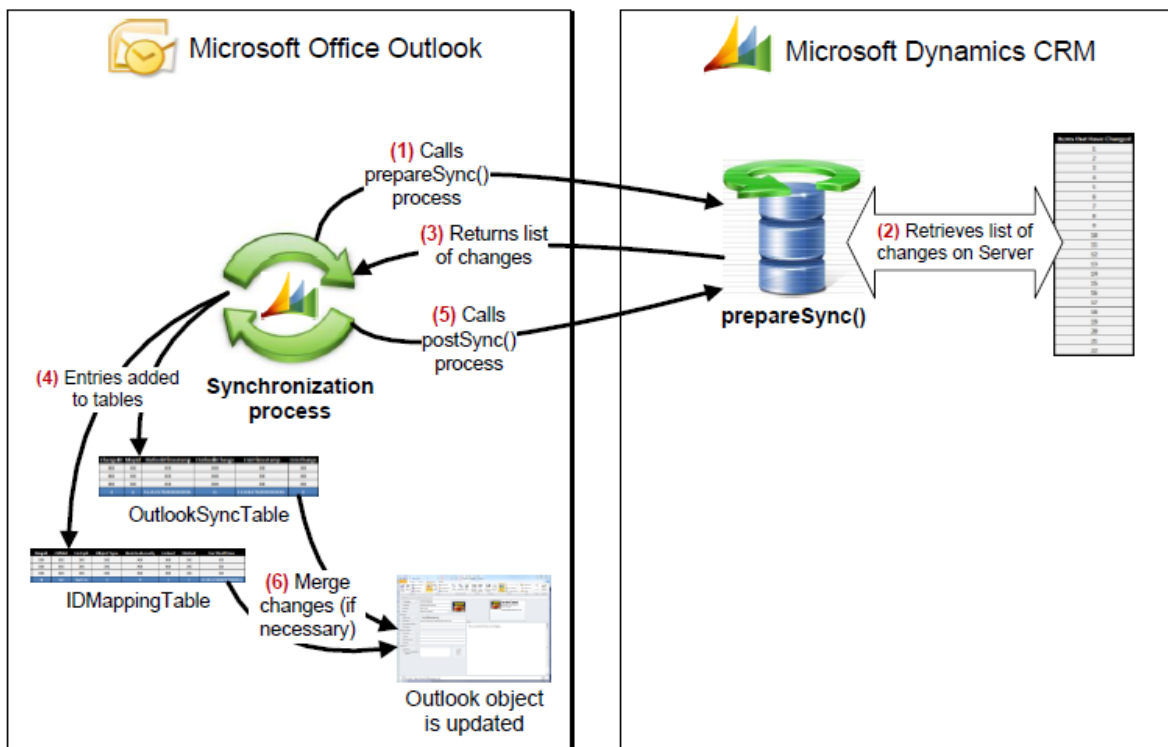


# CRM & Outlook Synchronization

# Changes to Items in Outlook



# Changes to Items in Dynamics CRM







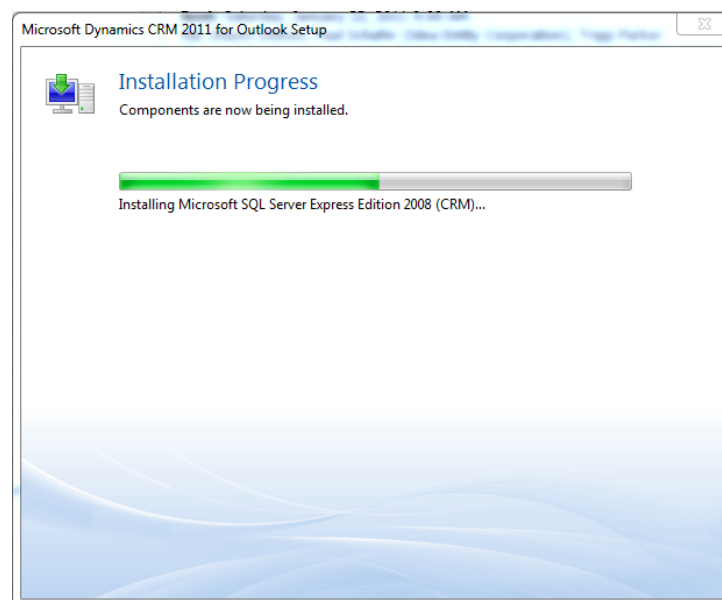
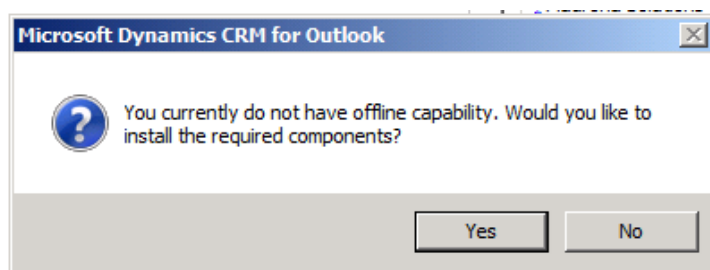
# CRM Go Offline Process





## Go Offline

- When a user clicks "Go Offline" they will be prompted to install required components (SQL Express)



# Data Filters

- Overview
  - What Are Data Filters
- Data Filters Enhancements
- Shared and System Data Filter Configuration
- Individual Data Filters Configuration
- Personal CRM Options

# Offline Synchronization

Modes

Changing between modes

Go Offline Process

Offline Mode

Go Online Process

Performance Enhancements

Offline White Paper (CRM 4.0)

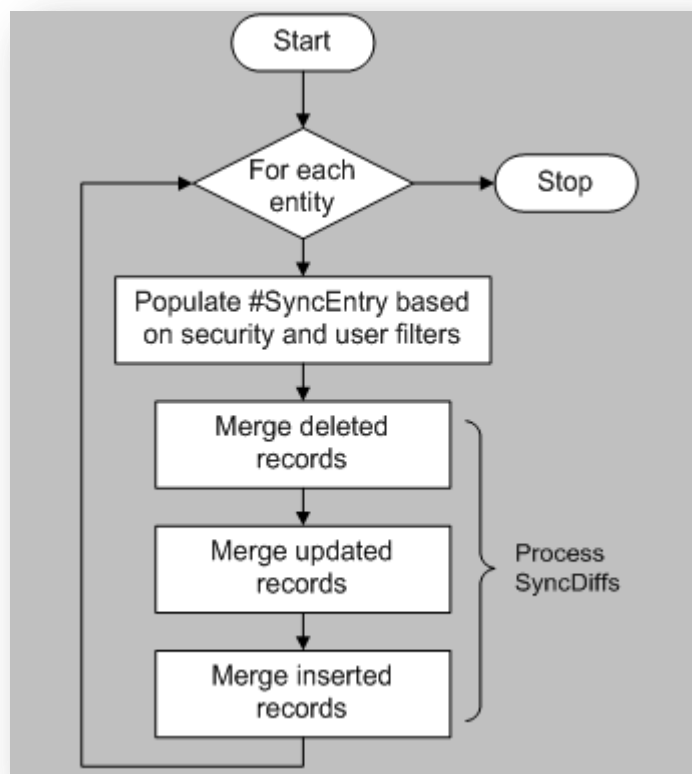
Bing Search: CRM Outlook Nuts and Bolts

# The GoOffline Process

- PrepareSync
  - SyncState
- Propagate Schema Changes
- Move Data
- PostSync API

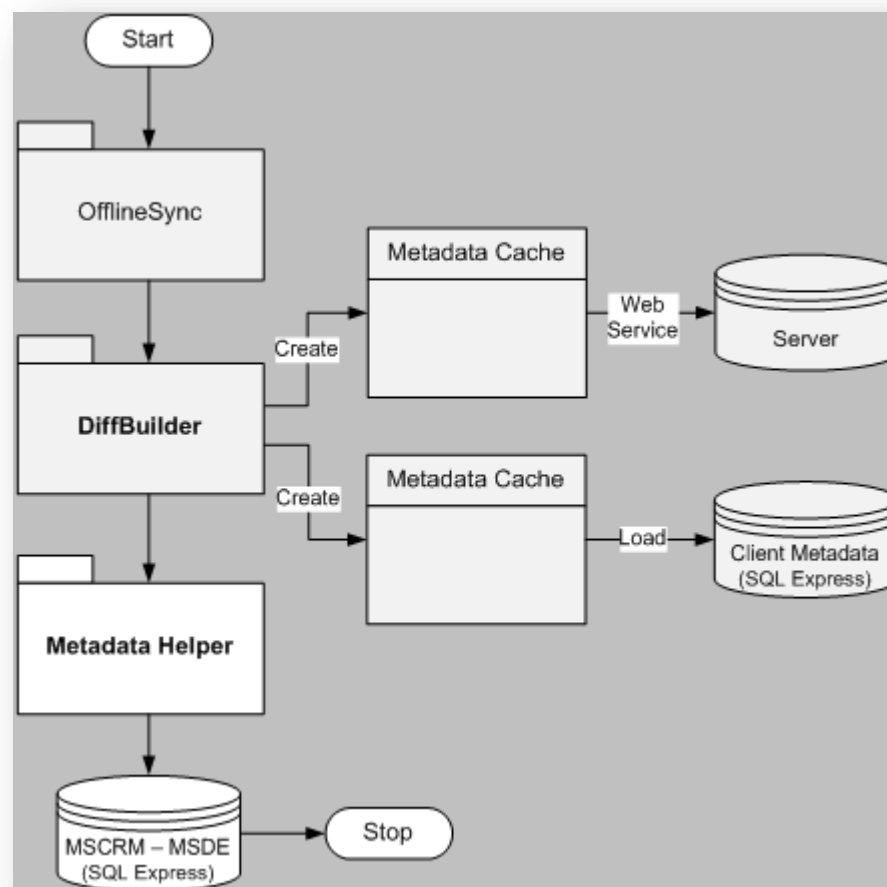
# The GoOffline Process

## PrepareSync



# The GoOffline Process

## Propagate Schema Changes

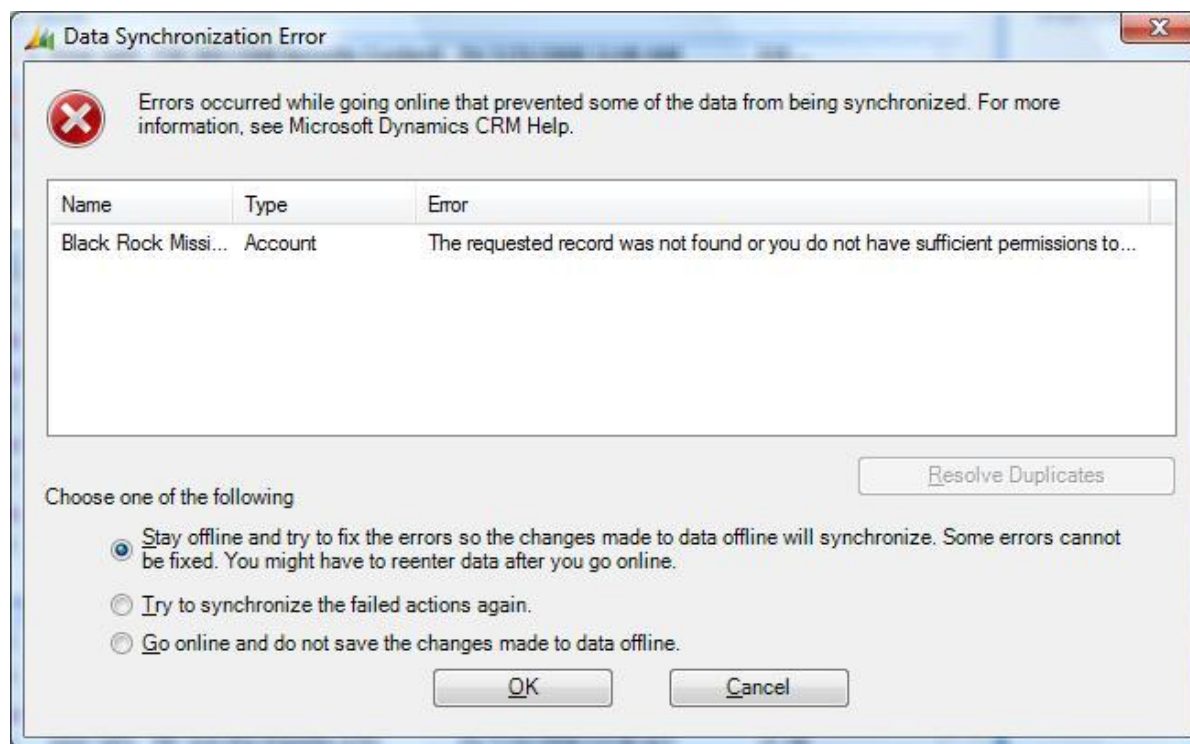


# While in Offline Mode

- Changes queued
- Replay to ensure business logic

# The GoOnline Process

## Conflict Resolution





# Additional Resources

- White Paper - Outlook Synchronization (CRM 4.0)
  - Bing Search: Outlook Synchronization in Microsoft Dynamics CRM 4.0

A photograph of chess pieces on a reflective surface. In the foreground, a large black king piece is on the left, and a row of white pawns is in the center. The background is a bright, out-of-focus light source. A blue horizontal band is overlaid across the middle of the image.

# CRM E-mail Tagging

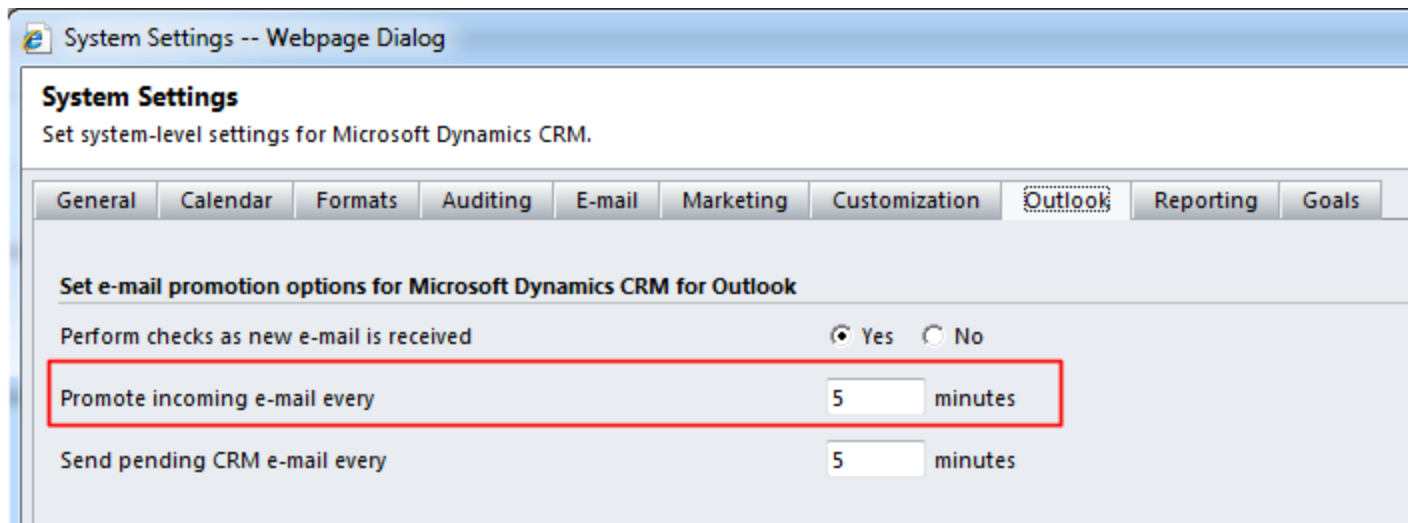
# Introducing the E-mail Tagging process

- Performance Challenges
- CRM 4.0 UR7 CRM Outlook Client Changes
- Triggers to the e-mail tagging process
  - The expiration of a timer
  - The arrival of a new e-mail

# Triggers

Schedule

Arrival of new e-mails



# The E-mail tagging Process

- Client query
- The EmailCache SDF database
- RecentEmailsTable
- EmailIdMappingTable
- Tagging

A look at the tables  
EmailIdMappingTable:

## RecentEmailsTable:

Results:			
	Id	MessageId	EntryId
▶	4	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC22@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D
	5	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC21@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D
	3	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC1A@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D
	6	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC20@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D
	7	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC1F@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D
	8	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC1E@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D
	9	<F9B9119FA8793D4391B268C5E7B5B7224356F2BC1D@DJWDC.Wentz.local>	00000000B2D16CA788D1DE4D999FB7104AE824B50700F9B9119FA8793D

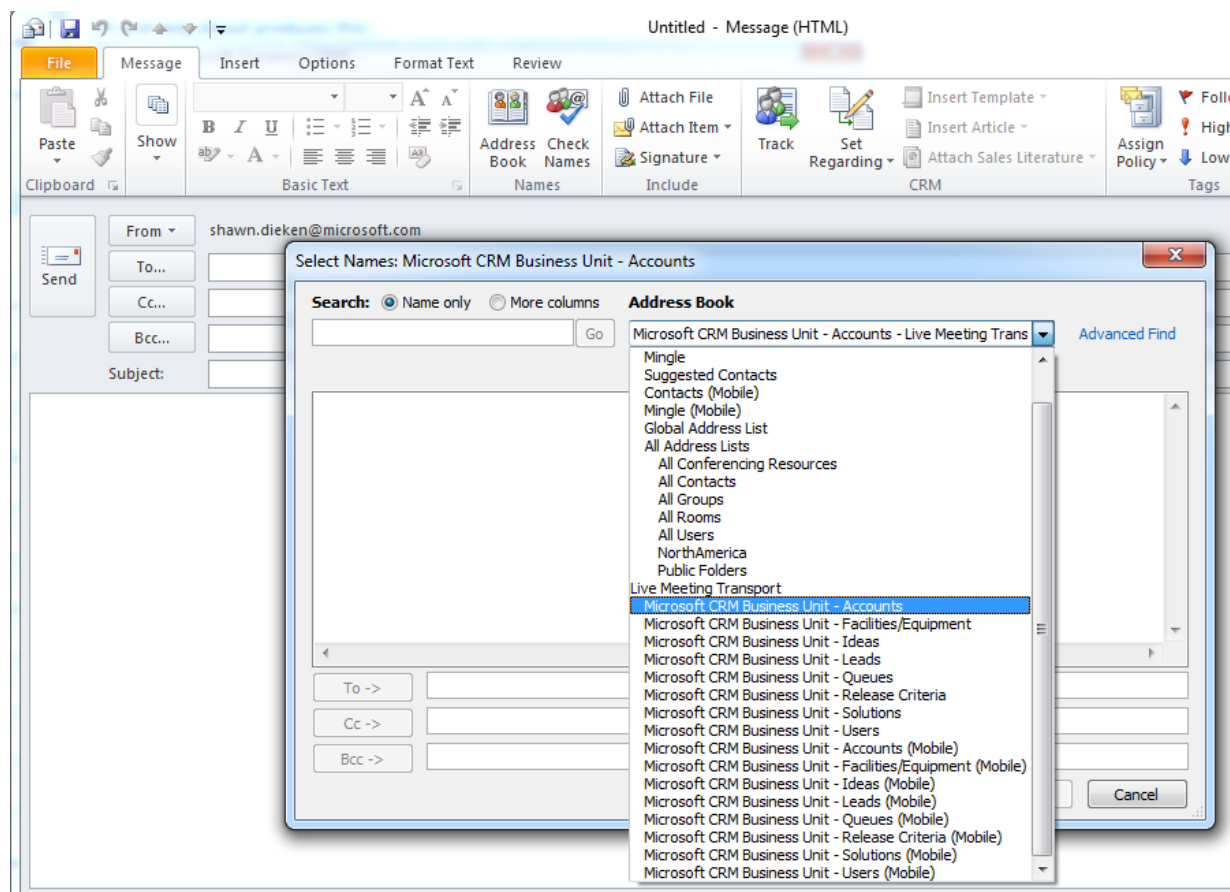
Results:						
	Id	MessageId	EntryId	CmlId	RegardingId	IsDeletedLocally
▶	1	<0EA3BD8C-0F15-DF11-A9E5-00155D40DA04>	00000000B2D16CA788D1DE4D999FB7104AE824B507...	16a1cd8e-0f15-df11-bbb4-00155d40da01		False
	2	<F9B9119FA8793D4391B268C5E7B5B7224356F...	00000000B2D16CA788D1DE4D999FB7104AE824B507...	35c89f24-af15-df11-bbb4-00155d40da01		False
	3	<F9B9119FA8793D4391B268C5E7B5B7224356F...	00000000B2D16CA788D1DE4D999FB7104AE824B507...	2bc89f24-af15-df11-bbb4-00155d40da01		False
	4	<F9B9119FA8793D4391B268C5E7B5B7224356F...	00000000B2D16CA788D1DE4D999FB7104AE824B507...	21c89f24-af15-df11-bbb4-00155d40da01		False
	5	<F9B9119FA8793D4391B268C5E7B5B7224356F...	00000000B2D16CA788D1DE4D999FB7104AE824B507...	17c89f24-af15-df11-bbb4-00155d40da01		False
	6	<2ECF0302-B015-DF11-A9E5-00155D40DA04>	00000000B2D16CA788D1DE4D999FB7104AE824B507...	d2f580ff-af15-df11-bbb4-00155d40da01		False



# CRM Address Book Provider (ABP)

# Address Book

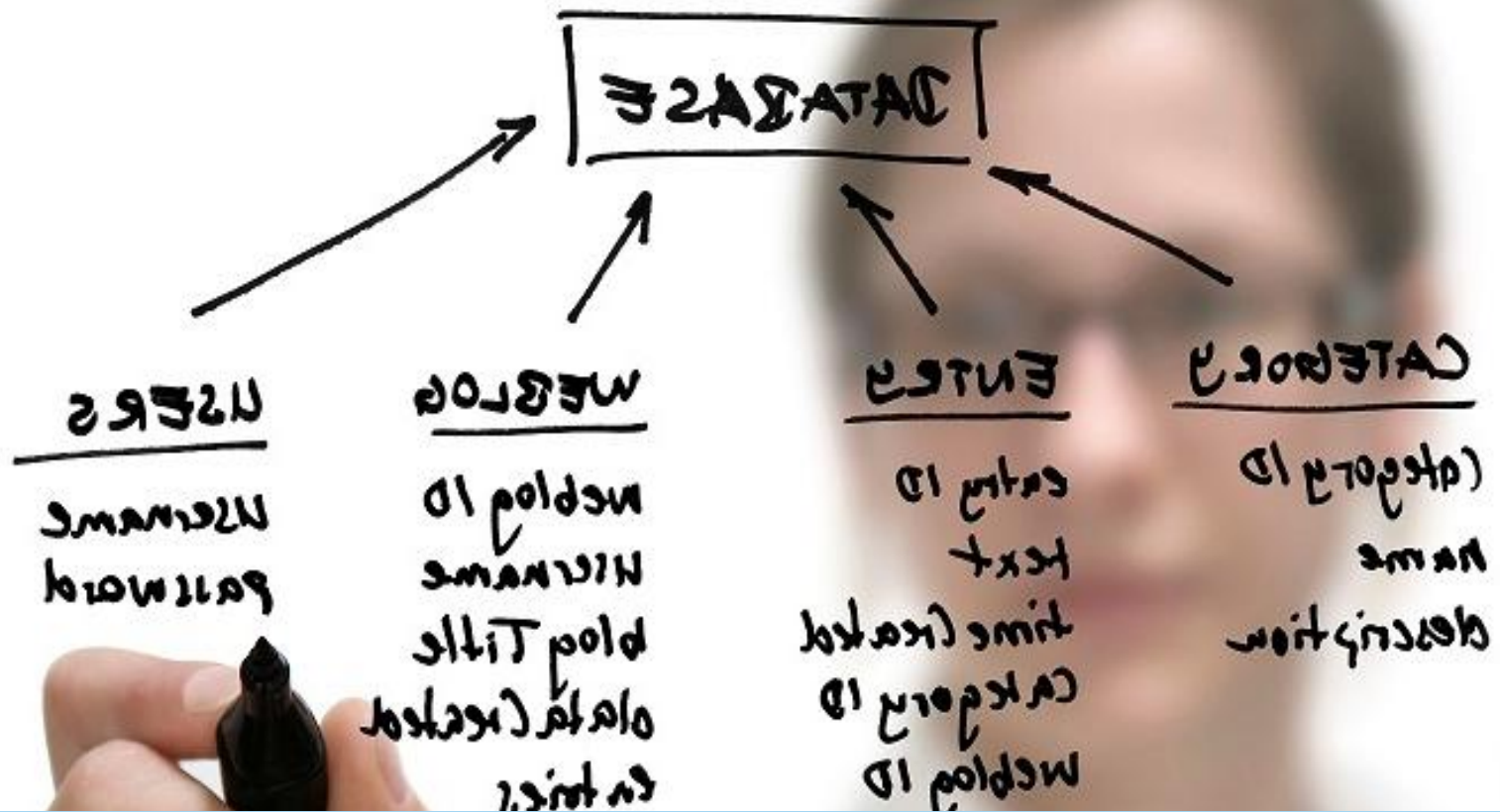
- CRM Address Book available in Outlook





# ABP Location

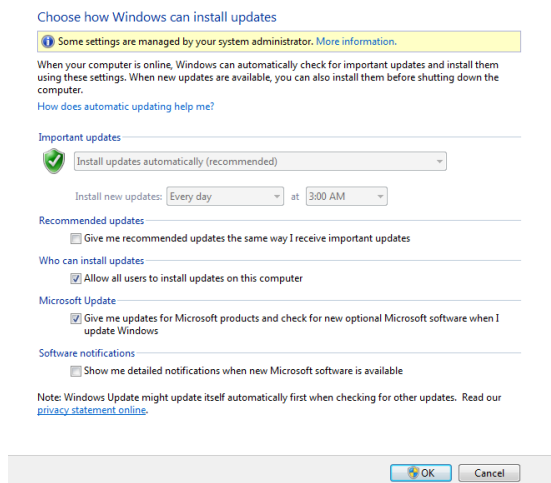
- CRM ABP Data is stored in a SQL CE file
  - OrganizationIDFalse.sdf
  - C:\Users\<user>\AppData\Local\Microsoft\MSCRM\Client



# CRM Updates via Microsoft Update

# CRM Updates via Microsoft Update

- Microsoft Dynamics CRM is now included with Microsoft updates
  - Setup Updates
  - Update Rollups
- The CRM Outlook client will respect the Microsoft Updates settings within the clients Windows Microsoft Updates options



# Timezones in CRM Outlook client

- The first time you start Outlook:
  - 1. Get the OS Timezone
  - 2. Make a call to CRM to change the user's CRM Timezone to the OS Timezone
  - 3. Save the OS Timezone in the local registry.
- Subsequently:
  - 1. Get the OS Timezone
  - 2. If is the same as the registry value, do nothing
  - 3. Else;
    - Make a call to CRM to change the user's CRM Timezone to the OS Timezone
    - Save the OS Timezone in the local registry.
- Example: If you take a laptop to Japan and your OS TZ changes, appointments for example will sync correctly to Outlook.

# Mail Merge

- Mail merge allows you to send personalized messages to a large group of people at once without them knowing who else you have sent it to.
- Available via the web and Outlook clients
- Outlook Client allows for additional functionality
  - Creates activities to track mail merge
  - Upload template to CRM for future use
  - Ability to create Quick Campaigns

# Mail Merge (cont.)

- Mail Merge is available to users who have the correct security privileges assigned.
  - Additional security settings are available for Mail Merge templates
  - Leads, Accounts, Contacts, Opportunities, Quotes and custom entities

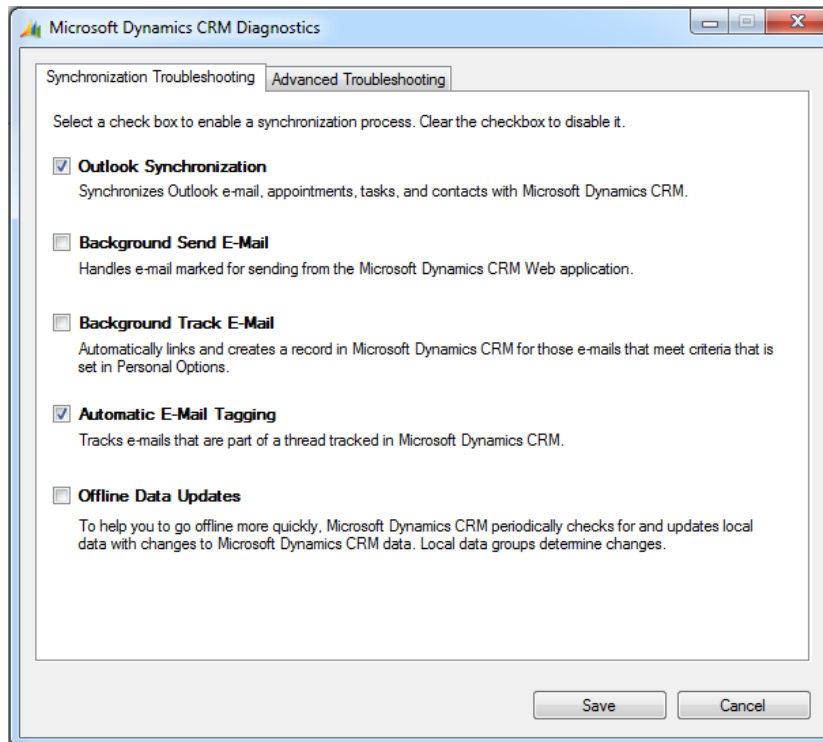


# Troubleshooting



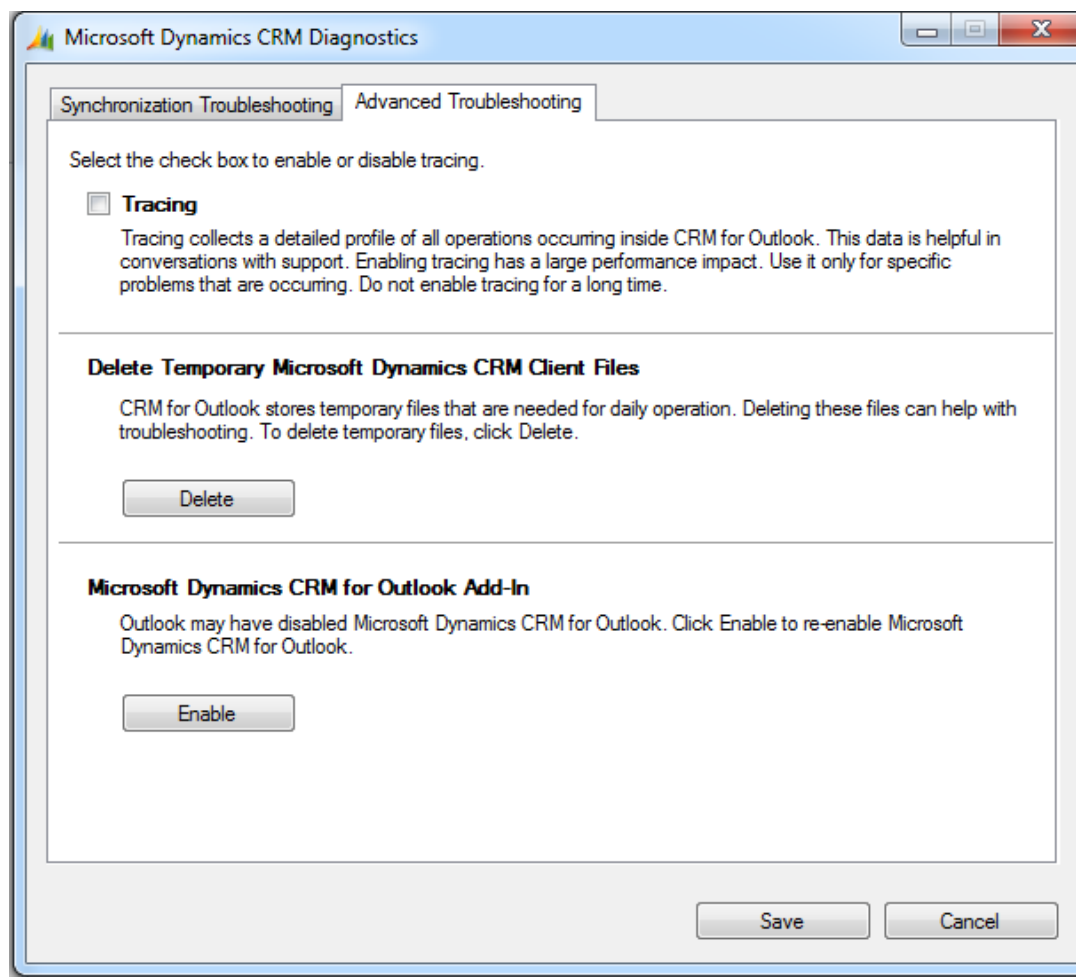
# Microsoft Dynamics CRM Diagnostics

- Available on every CRM Outlook client
  - Start | All Programs | Microsoft Dynamics CRM 2011 | Diagnostics



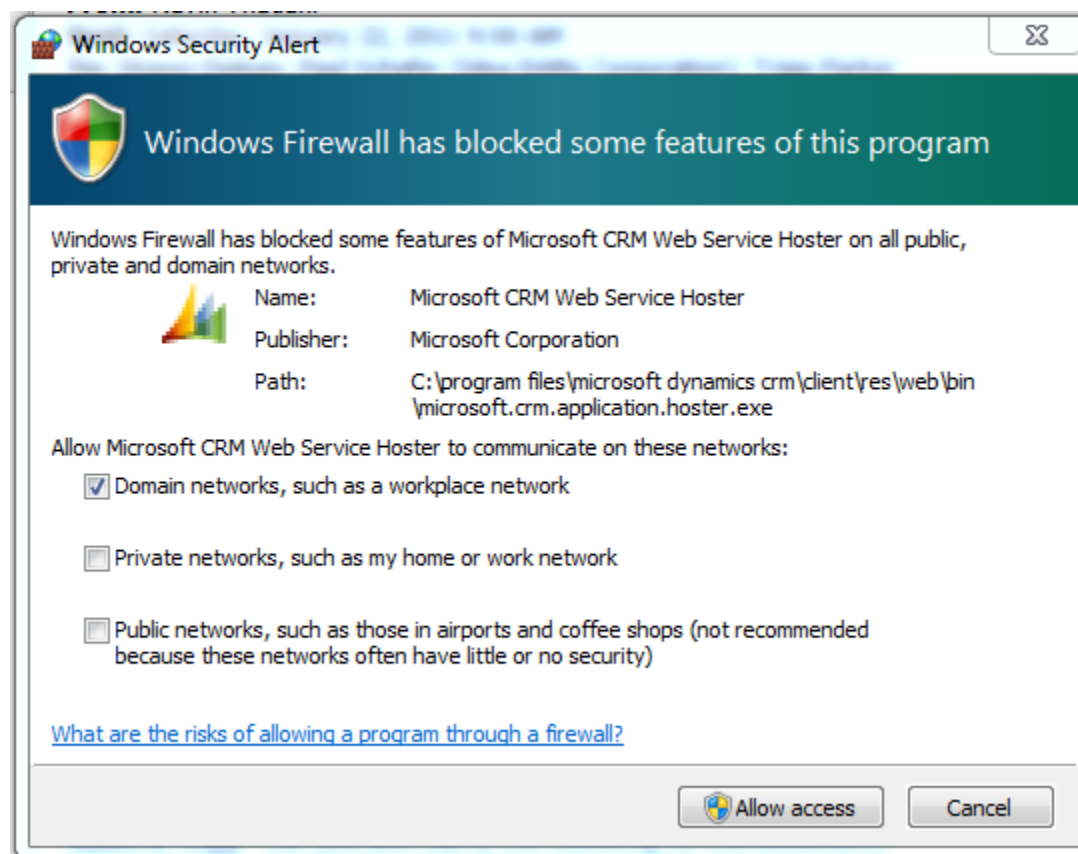


# Microsoft Dynamics CRM Diagnostics



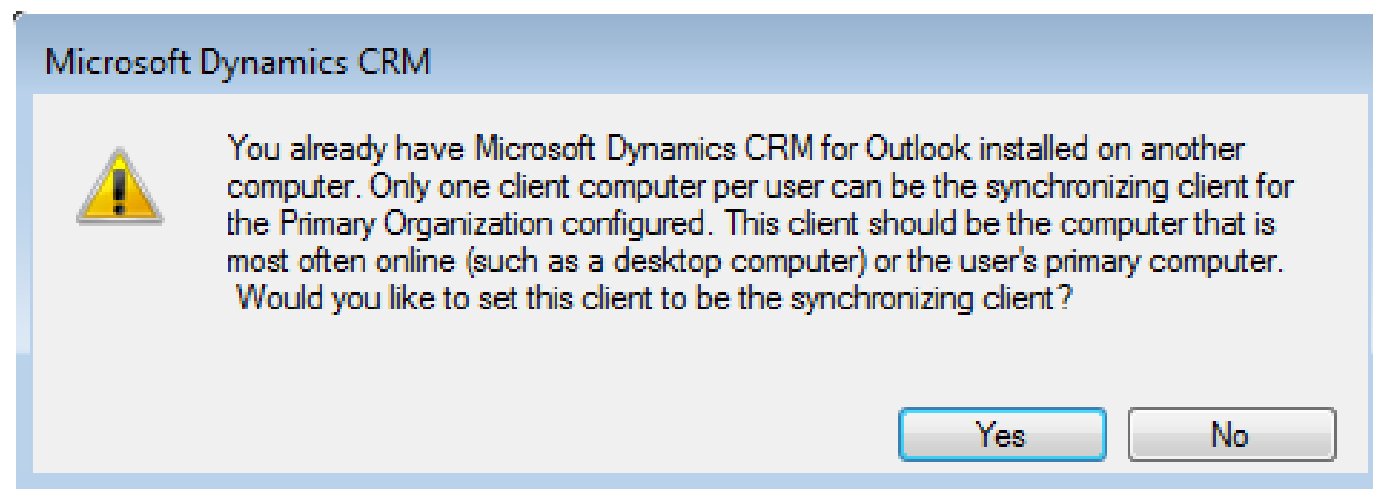
# Troubleshooting

- Message when trying to use CRM client offline



# Troubleshooting

- Message when installing 2<sup>nd</sup> client
- Example: Laptop & Desktop scenario or Retiring old machine
  - Resolution: In Outlook go to CRM > Options and make the client the primary synch client on the Synchronization Tab



# Troubleshooting

- Client Configuration Issues

- Confirm that user is not prompted for login credentials when accessing web client
  - Managed Passwords
- Verify DNS is setup correctly and NSlookup's resolve
  - KB 814591 – Install and Configure DNS on Win2K3 Server
  - KB 200525 – Using Nslookup.exe
  - KB 911353 – Removing Duplicate SPN's
- Check Deployment Properties table in MSCRM\_Config
  - KB 970630 – Error during CRM Outlook configuration
  - KB 947423 – Updating port # or host header (NLB)

# Troubleshooting

- Client Login Issues
  - Can the user login to the web client successfully?
  - Does the CRM user have a role assigned?
  - Confirm Managed Passwords are not out of date
  - Temporarily disable other 3<sup>rd</sup> party Addin's
  - If using IFD – Confirm IFD URL is configured correctly

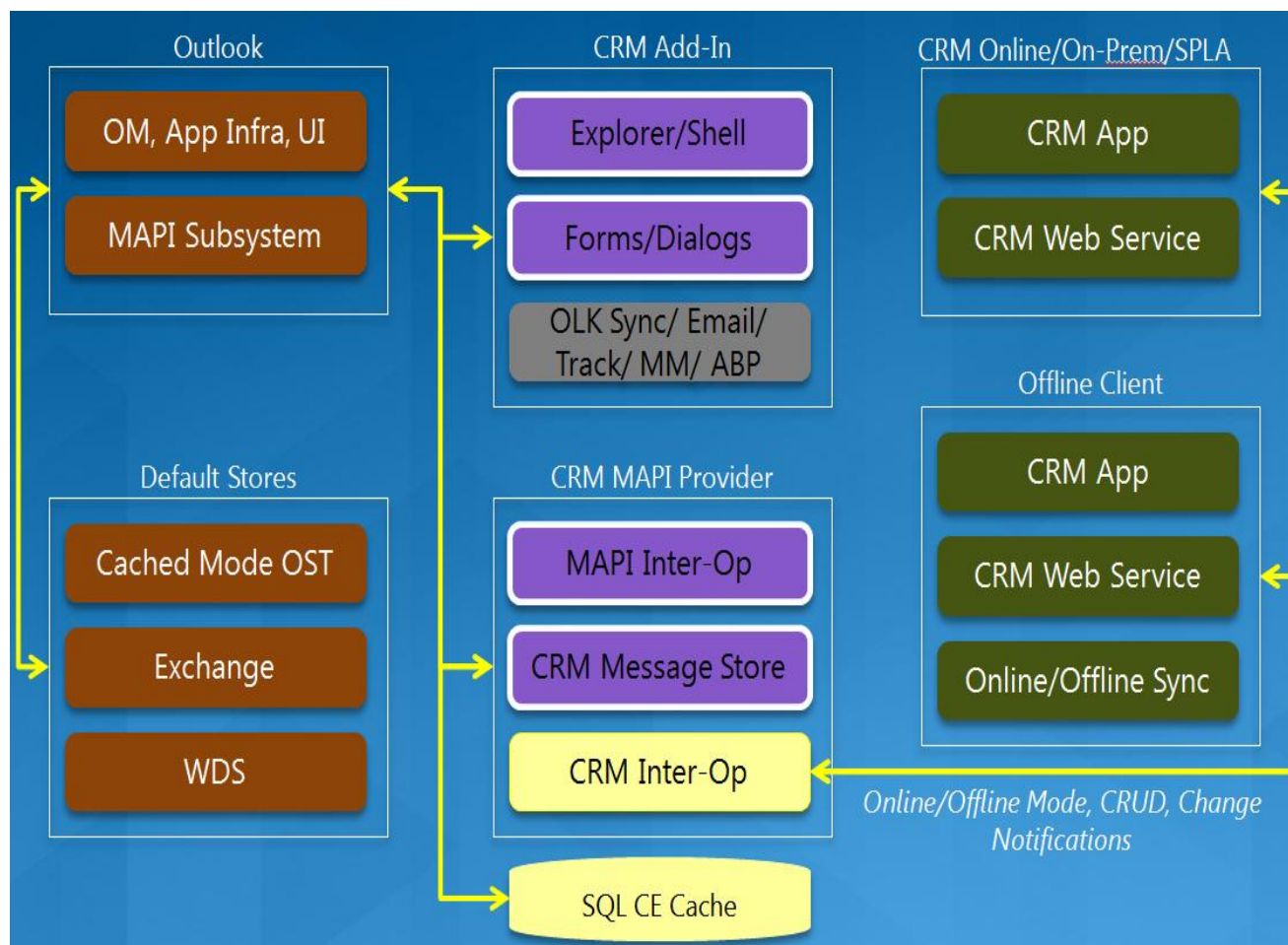
# Troubleshooting

- Client Performance
  - Install latest Update Rollup
  - Temporarily disable synchronizations
  - Temporarily disable other 3<sup>rd</sup> party Addin's and re-enable one by one
  - Gather crash and/or hang dumps
    - KB 286350 – ADPlus Tool
  - Monitor Performance Counters

# Uninstall

- Add\Remove Programs
- Select Microsoft Dynamics CRM for Outlook and then click Change.
- Select Uninstall
- Delete the Microsoft Dynamics CRM folder <systemdrive>:\Program Files\Microsoft Dynamics CRM.
- Offline Client: Delete the database folder (and files) <systemdrive>:\Program Files\Microsoft SQL Server\MSSQL\$CRM.

# MAPI Integration





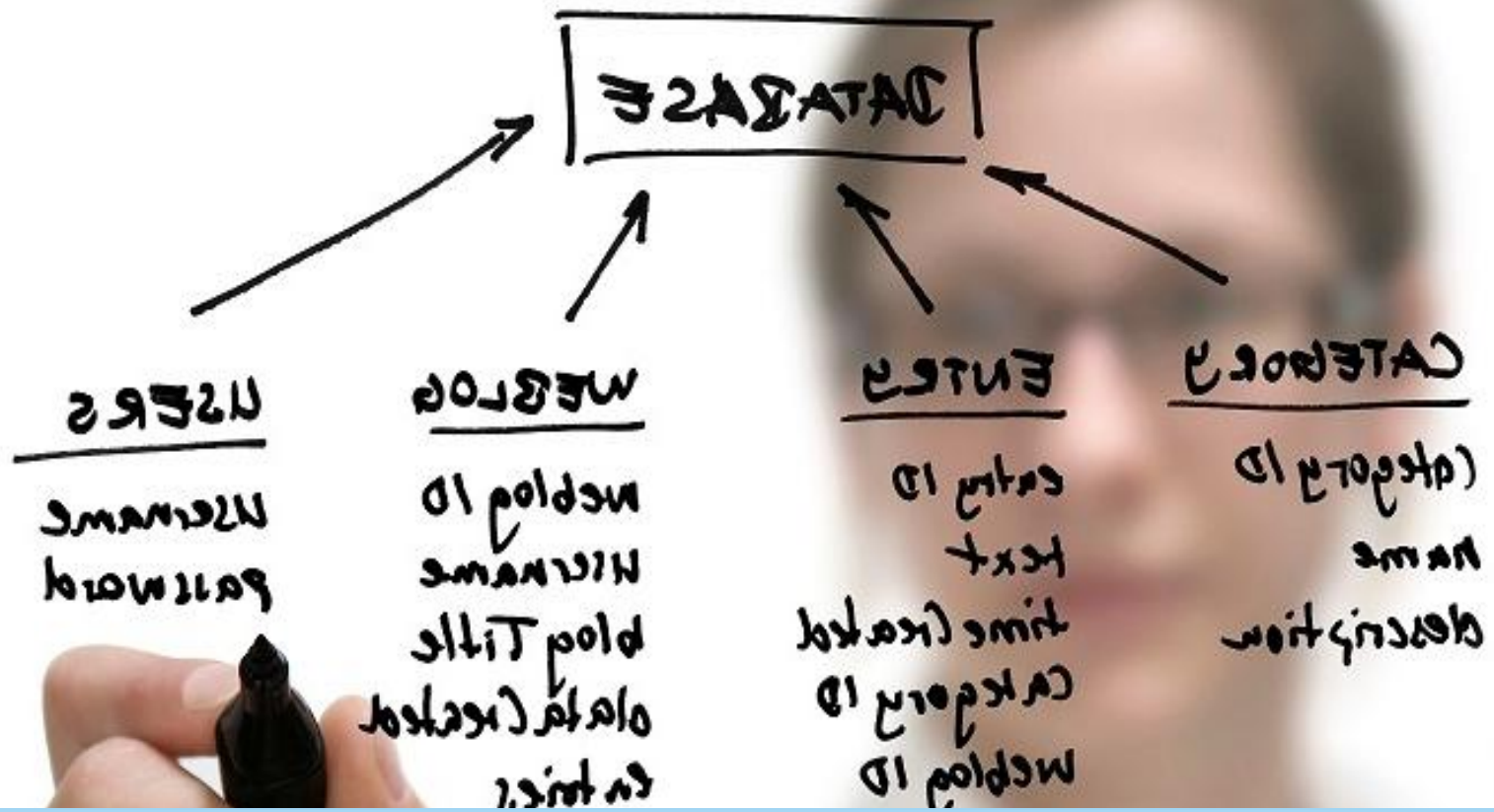
# Summary

- New Features
- CRM Outlook Clients
- Install and Configuration
- What is installed
- Client Configuration
- Terminal Server & Citrix
- Upgrade Flow
- CRM Outlook Client GUI
- CRM & Outlook Synchronization
- Go Offline Process
- CRM E-mail Tagging
- CRM Address Book Provider
- CRM Updates
- Troubleshooting



The background of the slide is a detailed architectural blueprint. It features a complex network of lines, circles, and text, typical of a technical drawing. A prominent semi-circular structure, possibly a stadium or arena, is visible in the upper right quadrant. Various dimensions and labels are scattered throughout the drawing.

# CRM Outlook Client Lab



# Questions?