

Installing and Configuring Microsoft Dynamics Outlook Plugin to Use with iPipeline MS CRM 2013

Downloading

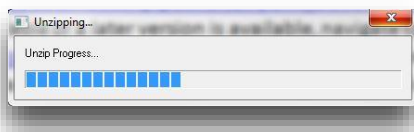
1. Download zip file for your version of **Outlook** (32-bit or 64-bit) and save to computer. (This is the version of Outlook you have, not Windows)
 - a. 32-Bit <http://downloads.ipipeline.com/CRM2013/2013CRM32SP1Full.exe>
64-Bit <http://downloads.ipipeline.com/CRM2013/2013CRM64SP1Full.exe>
2. If the file is unavailable or a later version is available, navigate to <http://downloads.ipipeline.com/CRM2013> and download the highest Update Rollup (UR) number 32 or 64 bit file (such as 2013CRM32UR## where ## is the highest number available for 32-bit Outlook) ** currently, the version is 2013CRM32SP1 until the first Update Rollup is available.

NOTE: Outlook must be closed before proceeding to install.

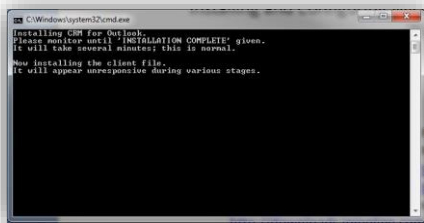
Installing

The installation process is mostly automated. Users will need to click “yes”, “next” and checking “accept” boxes as they are prompted, to complete installation. The following steps are provided in case you are unsure of, or want to more closely monitor the process.

1. Download the appropriate file and save it to your desktop. Once the download is complete right click on the icon and select 'Run As Administrator' from the menu.
2. The installer will automatically unzip all files to a temporary location on your machine.



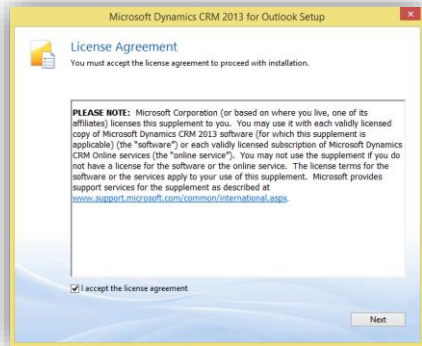
3. The installer will show a command window that will provide progress of the installation.



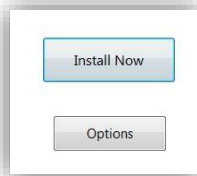
4. At times you may be prompted for ‘allowing the following program to make changes’ through the installation, choose “Yes”.



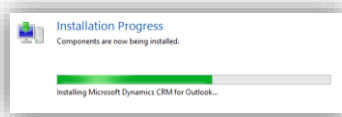
5. When the **Microsoft Dynamics CRM 2013 for Outlook** file portion begins, check the box for 'I accept the license agreement' and click "Next".



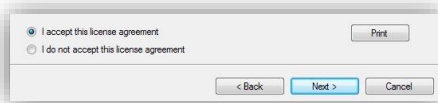
6. Choose "Install Now" or "Upgrade"



7. The progress bar for the main installation file will show. It is normal for this bar to appear stalled at about the level shown on the screenshot below for several minutes; it will resume after the processes are complete.

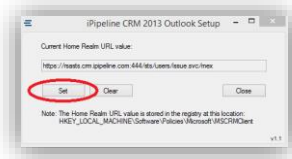


8. Click close on the **Microsoft Dynamics CRM 2013 for Outlook** when complete.
9. The command window will update with the installation progress. Click "Yes" if prompted to allow changes.
10. The Update Rollup/Service Pack file will begin installation. Click "Next" to continue.
11. Leave "I accept this license agreement" selected and click "Next".



12. A 'Ready to Install' window will open, click "Install" to continue.
13. The progress bar for the Update Rollup installation will show for a brief time and then notify of completion. Click "Finish" to continue.

14. The command window will update with the installation progress. Click “Yes” if prompted to allow changes.
15. The **iPipelineCRM2013Outlook.exe** installation will begin and display the “Current Home Realm URL value”. This may be blank or contain a pre-existing value.
16. Click the Set button (value should display after clicking as: <https://rsasts.crm.ipipeline.com:444/sts/users/issue.svc/mex>).



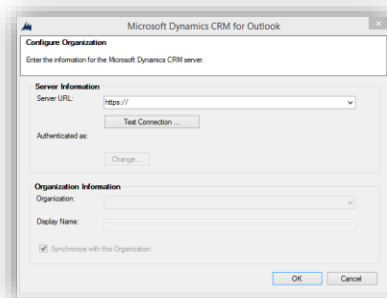
17. Click Close.
18. The command window will stall for a brief time as the installer removes the temporary installation files, and then provide an “Installation Complete” message. Press any key to continue and close the installation command window.



19. The original file unzip progress bar will update to ‘Finished’. You may need to minimize all other windows to see it. Click OK.

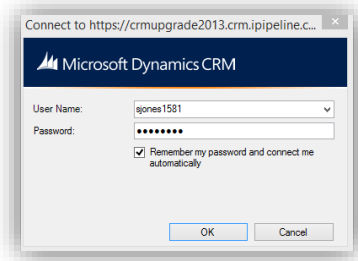
Configuring

1. Once the installation steps are complete, start Outlook. The configuration for the client should start automatically.
2. Follow prompts leaving all options as the default, **excepting that Server URL needs to be changed from http:// to https:// (insert the s)**.
3. You will be asked to enter a website address.

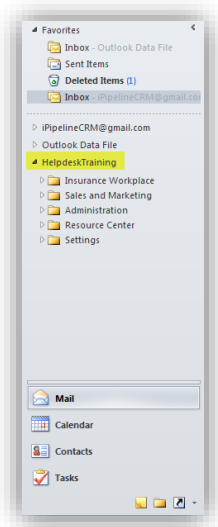


This web address should be provided to you by your Implementation Manager from iPipeline, typically looks like this: <https://myagency.crm.ipipeline.com>. Click the Test Connection button. If it fails the first time, try again.

4. You will be asked to enter your user name and password. The User Name and password will also be provided by your Implementation Manager from iPipeline.



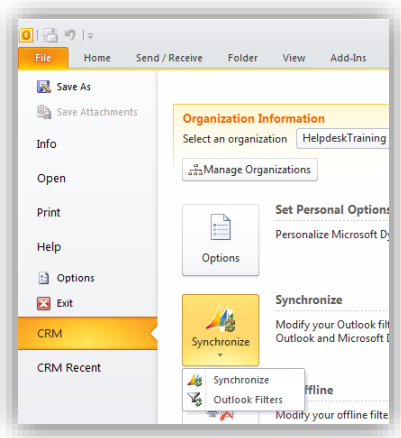
5. When you click OK, your user name and password will be authenticated and you will return to the Configuration Organization window. Your Organization name will appear in the Organization Information section. Click OK.
6. You now have configured your Outlook with MS Dynamics CRM. Take note of left-hand navigation of Outlook for a new CRM Dynamics folder with your agency name.



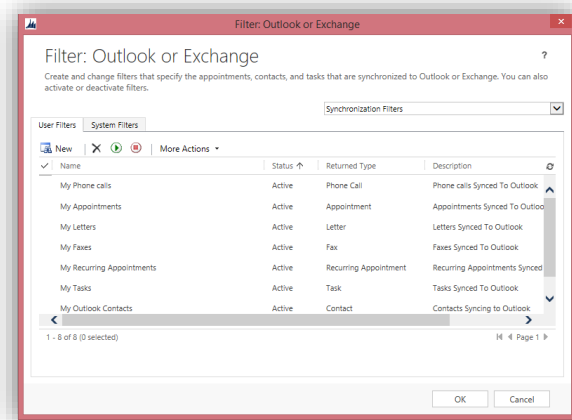
Customizing synchronization filters:

By default, the Outlook Client synchronizes all CRM contacts owned by the user. In some cases, you may wish to limit this even further by only synchronizing agents and prospect contact records owned by the user. To accomplish this, follow these steps:

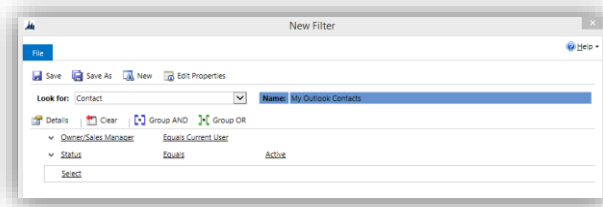
In Outlook go to your CRM options and go to the Filters option.



The screen should look like this:



Click on "My Outlook Contacts." Screen should look like this:



By default, the Synchronization features will synchronize all Contacts for which you are the owner. Most sales managers will not want to synchronize Insured and Policy Owner contacts to Outlook. You can add the relationship type options to synchronize just agent and prospect contacts, but exclude Insureds.

