

1CRM OUTLOOK EXTENSION

A Guide to Installing and Using the Optional Outlook Extension for 1CRM as an Outlook Add-in

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Background

One of the more important integrations for 1CRM is to integrate it with Outlook. For Outlook users it presents a new option for how to work between Outlook and 1CRM, allowing the user to perform more functions from within Outlook without going into the CRM as often.

This extension was created by the 1CRM partners for Germany, Austria and Switzerland, <u>visual4</u> <u>GmbH</u>. Simply install this extension module on your 1CRM instance, configure it, and then it can be added to Outlook as an Outlook Add-in.

If you're excited to get this capability working for your organization just keep reading, or <u>drop us a</u> line and we'll demonstrate what it can do for you! This optional extension to 1CRM is available at a cost of US\$55/user/annum, by emailing <u>sales@1crm.de</u>.

Version 1.0, October, 2021. This document is subject to change without notice.

Disclaimer

While every effort has been made to ensure the accuracy and completeness of information included in this document, no guarantee is given, or responsibility taken by 1CRM Systems Corp. for errors and omissions.

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1.0 Installing the 1CRM Outlook Extension

After ordering the 1CRM Outlook Extension you will have received an email with the license key. These instructions below will explain where to enter this license key and how to establish the connection between 1CRM and Outlook.

Note: If you need to order a license key for the 1CRM Outlook Extension, or to get the Outlook Extension Module itself, please contact <u>sales@1crm.de</u>. The cost of the extension is US\$55/user/ annum.

Note: You will need to be using an Outlook email account which uses Exchange server not IMAP to use this extension. An Office 365 account should suffice. Your 1CRM system must also be accessible by **https:** SSL secure access. You will need an edition of 1CRM with the API - so Professional or Enterprise Edition. And the API will need to be enabled in Administration.

While logged in as a 1CRM user with Administration privileges, upload the 1CRM Outlook Extension Module .zip file using the *Upgrades & Customization* option within Administration. The following 9 figures detail the steps of the process:

Shortcuts	Upload New Package					
Upgrades & Customization	Choose File no file selected	⊘ Upload				
Create Personality Pack	Choose a Holiday or Language Pack, Custo	om Module, Upgrade Pack	or Personality Pack to up	load		
	Uploaded Packages	Туре	Version	Published P	ublisher	Action
	Name	Туре	Version	Published P	ublisher	Action
		Туре	Version		Published P	Published Publisher

Step 1: Navigate to the Upgrades & Customization Screen in Admin, Then Click on Choose File

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		Upload New Package						
≡	Upgrades & Customization	Choose File outlook_1.8.6.12-1084	.zip ⊘ Upload					
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Step 2: Select the Outlook .zip File Provided and Click on Upload

			Package uploaded su	uccessfully		
Upgrades & Customization Create Personality Pack	Upload New Package Choose File no file selected	⊘ Upload				
	Choose a Holiday or Language Pack,	Custom Module, Upgrade Pack or	Personality Pack to upl	oad		
	Uploaded Packages	Туре	Version	Published	Publisher	Action
			Version 1.8.6.12-1084	Published 2021-08-02	Publisher visual4 GmbH	Action install Delete

Step 3: Wait to See the Extension Listed as Above, Then Click on Install

		STOMIZATION PREPARING PA	CKAGE INSTALLATIONE. **					
=	Upgrades & Customization	Step 1: Unzip the Package						
		Package successfully unzipped.						
	Create Personality Pack							
		Step 2: Check System Configuration						
		This step completed with warnings.						
		One or more configuration issues were found. Installation ma	ay proceed, but system functionality could be limited.					
		PHP Version	OK (ver 7.3.29)					
		MySQL Client Library	OK					
		XML Parsing	ОК					
		cURL Module	ОК					
		Multibyte String Support	ОК					
		ZLIB Compression Module	ОК					
		ZIP Archiving Module	ок					
		IMAP Module	ОК					
		OpenSSL Module	ок					
		SOAP Module	ОК					
		DOM Module	ОК					
		GD Module	ОК					
		Writable 1CRM Configuration File	ОК					
		TLS Version 1.2 Supported	OK (TLS 1.3)					
		PHP Memory Limit >= 200M	OK (512M)					
		External memory cache (APC, Zend)	None detected; installing a memory cache can substantially increase performance					
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Step 4: Wait to See the Screen Above, Then Click on Proceed

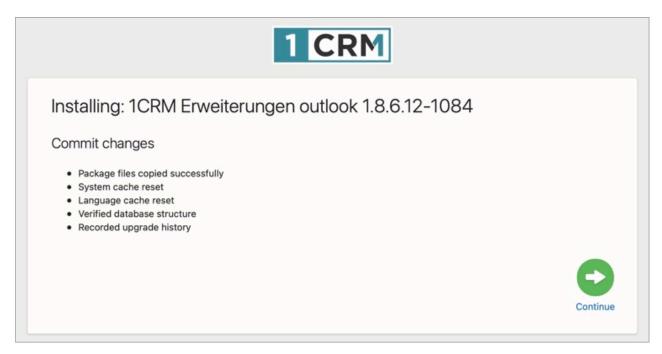
1CRM Outlook Extension and Add-in

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Step 5: Wait to See the Screen Above, Then Click on Proceed



Step 6: Wait to See the Screen Above, Then Click on Continue



Step 7: Wait to See the Screen Above, Then Click on Continue

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	Finish Upgrade

Step 8: Wait to See the Screen Above, Then Click on Continue

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	Name	Туре	Version	Published	Publisher	Action
		Туре	Version	Published	Publisher	Action
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Step 9: Wait to See the Screen Above, Then the Installation Process is Complete

2.0 Configuring the Extension

2.1 Enter the License Key

1. Within 1CRM Administration, navigate to the *System Settings* screen, and scroll down to the panel for *Office Addin Settings*.

Note: This panel was added when you installed the Outlook Extension in the section above.

Office AddIn Settings	
Office Addin Serial Number	You can get a serial number to install the office AddIn from https://1crm- system.de
Save Save	

Office Addin Settings Panel on the System Settings Screen

2. After ordering the 1CRM Outlook Extension, you should have received an email with the 16-digit license key. Enter it in the field above marked *Office Addin Serial Number*, and click on *Save*.

2.2 Activate the Extension for Each User

- 1. When you ordered your license key for the 1CRM Outlook Extension, you will have specified how many users you wished to have on the license. In this next step you will activate the use of the 1CRM Outlook Extension for each of your 1CRM users to a limit of the number of users on your Outlook Extension license key.
- 2. For each user, navigate to the *My Account* screen, and the *Integrations* tab. Click on *Edit*, then scroll down to the bottom to find the *Office Integration* panel shown below:

Office Integration				
Office AddIn Activ	0		Office AddIn Manifest URL	Activate the AddIn to get the Manifest URL
Edit Duplicate	🖶 Print 🎽	Personal Data 🗧	🔂 Change Password	

Office Integration Panel on the My Account Screen, Integrations Tab

- 3. Click on the toggle button labelled Office Addin Activ, to turn it on then click on Save.
- 4. Scroll down to that panel again and copy the Manifest URL which will now be displayed:

Office Integration		
Office AddIn Activ	Office AddIn Manifest URL	☑ yujy.1crmcloud.com/officeAddIn/getManifest.php?u=1
🖊 Edit 🕒 Duplicate 🗬 Print 🎽 Personal Dat	ta [¥] ⊕ Change Password	

Copy the Office Addin Manifest URL

5. You will need this URL in the next step, when you connect Outlook with 1CRM.

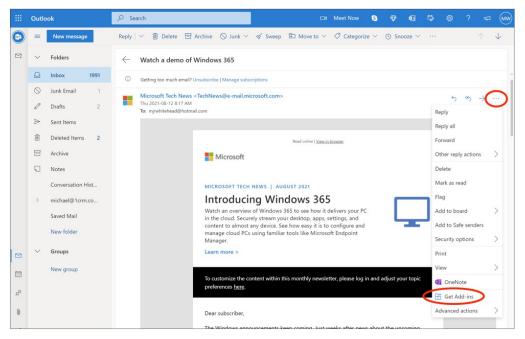
3.0 Configuring the Add-in

3.1 Install Add-in: Outlook Online

1. In this section we will cover adding the 1CRM Outlook Add-in to the Outlook Online client, which you can reach at https://outlook.com. Each user that plans to use the 1CRM Outlook Add-in will need to perform this process. A similar process can be performed for the native Outlook client application, documented in the next section.

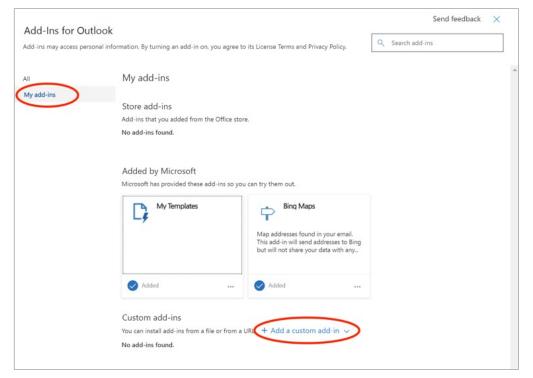
Note: Adding the Outlook Add-in via the Outlook Online client will cause it to be available when using the native Outlook client app, and vice-versa - there is no need to do it twice.

- 2. Navigate to https://outlook.com, then login using your Microsoft credentials, and select the Outlook application.
- 3. Within Outlook Online, open any email. Your screen should look approximately like this:



Outlook Online: Click on ... Then on Get Add-ins

4. The next screen is entitled *Add-ins for Outlook*:



Add-ins for Outlook: Click on My add-ins Then on Add a custom add-in

5. Now, underneath the Add a custom add-in dropdown, choose Add from URL...:

dd-Ins for Out	look		Send feedback 🛛 🗙
	onal information. By turning an add-in on, you agree	to its License Terms and Privacy Policy.	Q Search add-ins
I	My add-ins		
ly add-ins			
	Store add-ins		
	Add-ins that you added from the Office st	ore.	
	No add-ins found.		
	Added by Microsoft Microsoft has provided these add-ins so y	ou can try them out.	
	My Templates	Bing Maps	
		Map addresses found in your email. This add-in will send addresses to Bing but will not share your data with any	
	Added	Added	
	100 C		
	Custom add-ins		
	You can install add-ins from a file or from		

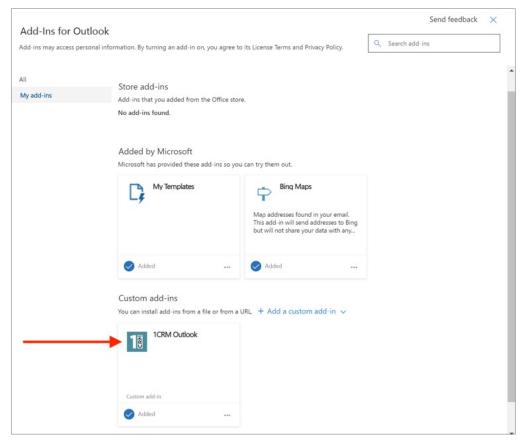
6. In this popup screen, enter the URL you copied and then click OK.

Add-Ins for Outloo	k		Send feedback 🛛 🗙
Add-ins may access personal i	ins		
All	Enter the URL of the add-in's manifes	t file:	_
My add-ins	https://yujy.1crmcloud.com/officeAdd	lln/getManifest.php?u=1	
	OK Cancel		
			_
	Added by Misseer ft		
	Added by Microsoft Microsoft has provided these add-ins so you	i can try them out.	
	My Templates	Bing Maps	
	-7	Map addresses found in your email.	
		This add-in will send addresses to Bing but will not share your data with any	
	Added	Added	
	Custom add-ins		
	You can install add-ins from a file or from a l	URL. + Add a custom add-in $ \sim $	
	No add-ins found.		

7. Your next popup looks like this. Just click on Install

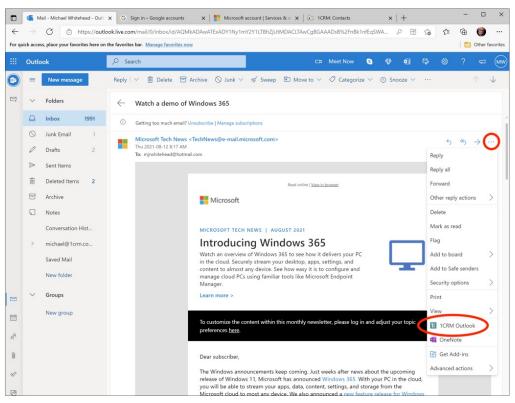
Add-Ins for Outlo	ook					Send feedback	×
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All My add-ins	My add-ins Store add-ins Add-ins that you added No add-ins found. Added by Microsoo Microsoft has provided t	data and send it It hasn't been ve you trust the so Inst		ce.			
	My Templar		Map addresses foun This add-in will send but will not share you	d in your email. addresses to Bing			
	Added Custom add-ins		Added				

8. And now the 1CRM Add-in will be shown as installed:



3.2 Activating the 1CRM Outlook Sidebar

1. The 1CRM Outlook Add-in is now available for you to use. To bring up the interface within Outlook Online, just open any email:



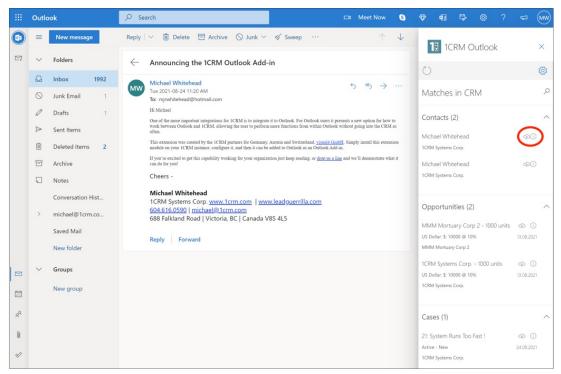
Now Click on ... Then on 1CRM Outlook

- 2. Now you see the Add-in but you will need to configure it before you can use it. First click on the gear icon shown in the figure below.
- 3. Next, as shown by the four arrows in the figure below, you will need to enter several values.
- 4. The first value is the URL of your 1CRM system's API. This will be your system's base URL, followed by /api.php. See an example in the figure below.
- 5. Next choose the Authentication type Username/Password.
- 6. The next value to be entered is your username used when logging in to 1CRM.
- 7. And then enter the password you use when logging in to 1CRM.
- 8. Finally click on Save.

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		Archive	Microsoft	Username/ Password ~
		Notes Conversation Hist	MICROSOFT TECH NEWS AUGUST 2021	To be able to sign in using username/ password, 'Basic Authentication' has to be enabled in 1CRM Administration under 'API Settings'.
	>	michael@1crm.co	Introducing Windows 365	admin
		Saved Mail	Watch an overview of Windows 365 to see how it delivers your PC in the cloud. Securely stream your desktop, apps,	admin
		New folder	settings, and content to almost any device. See how easy it is to configure and manage cloud PCs using familiar tools like Microsoft Endpoint Manager.	Modulauswahl ~
	\sim	Groups	Learn more >	
		New group	To customize the content within this monthly newsletter, please log in and adjust your topic preferences <u>here</u> .	CTI Integration ~
R ^R			Dear subscriber,	

Entering the Configuration Settings for the 1CRM Outlook Add-in

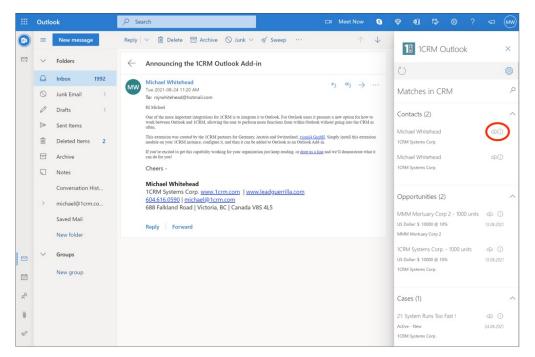
9. You have now successfully added and activated the Outlook Add-in for 1CRM. Open an email from one of your CRM contacts. You should now see the information available in CRM in the sidebar. In order for 1CRM to recognize your contact, the email address in Outlook must match the email address stored in CRM.



4.0 Using the 1CRM Outlook Add-in

4.1 Basic Usage

 The 1CRM Outlook Add-in is now available for you to use. To bring up the interface within Outlook Online, just open any email. You will notice that the Add-in shows any Contacts, Opportunities and Cases it finds in your linked 1CRM system, based on the email address of the email's sender. (We'll see shortly how to also show Quotes, Sales Orders and Projects.)

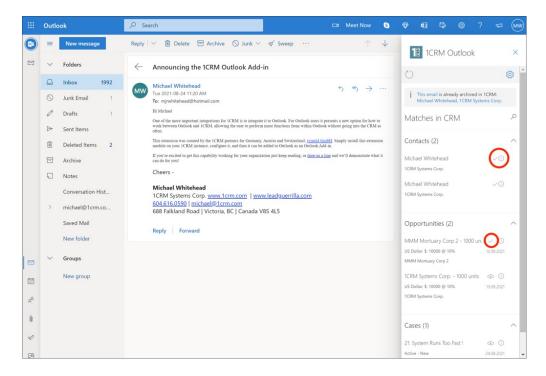


Now Click on ... Then on 1CRM Outlook

2. To the right of each Contact, Opportunity and Case shown, you will notice two icons - the *cloud* icon and an *info* icon, as highlighted in the figure above. Click on the *cloud* icon to upload information to your 1CRM system. This will upload the email to your 1CRM Inbox if it is not in your 1CRM system already, and will link the email to the Contact, Opportunity or Case - depending on which item's icon you click on.

Note: If you sync an email while in the Outlook Sent folder, it will be sync'ed into your user's Sent folder inside the CRM. This is a really handy feature, as it allows the Add-in to work for both Sent and Received emails.

In the figure below, we have just clicked on the *cloud* icon for the first opportunity. We see that the *cloud* icon becomes a checkmark, to indicate the upload has been performed, the link has been established between the Opportunity and the email, and between the Contact and the email.



If we look in the CRM system, we see that indeed, this email is now linked in the history panel of the Opportunity.

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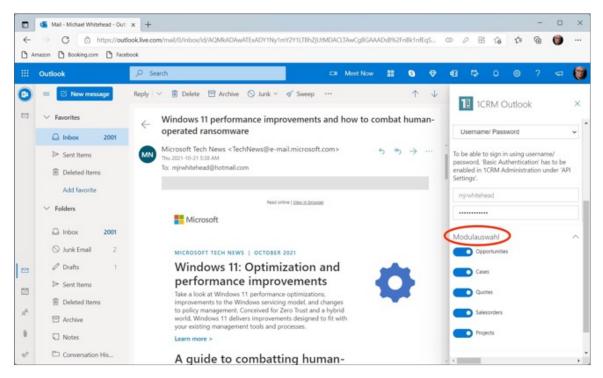
And we also see below that the email has been synced into the CRM, and the email shows its link to the Opportunity.

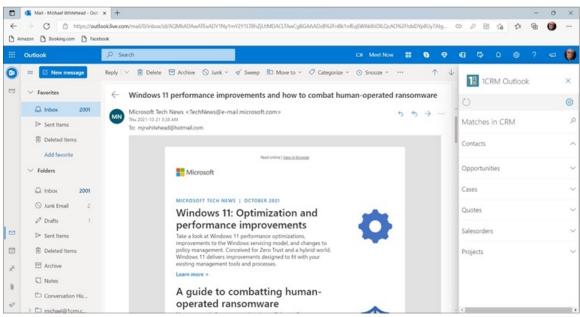
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3. If instead you click on the *info* icon, your computer will bring up a browser window with the selected Contact, Case or Opportunity displayed. This is a very synergistic use of Outlook and your CRM - letting you drill down in your CRM directly to the related data item immediately from your email inbox.

4.2 Additional Modules

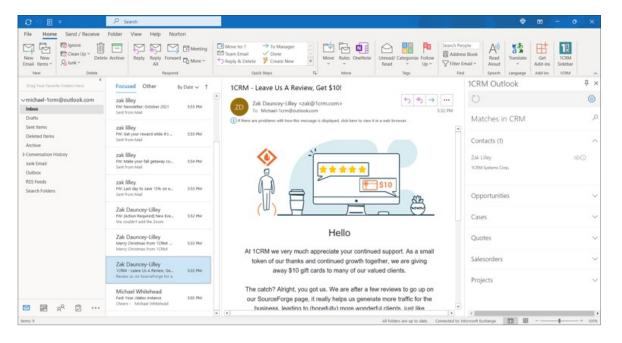
- 1. While the Outlook Add-in initially supports linkages with the Contacts, Cases and Opportunities modules, you can enable more modules if they are useful to you. These are the Quotes, Sales Orders and Projects modules.
- 2. You enable these additional modules using the Gear icon in the add-on choose the Modulauswahl (Module selection) option as shown below to select which modules to enable.





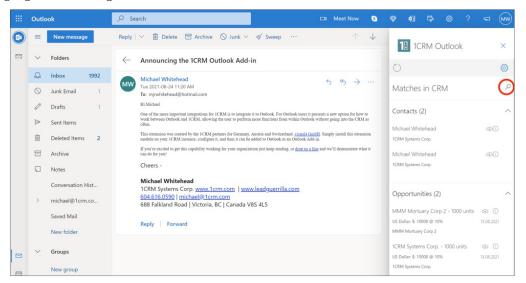
4.3 Outlook for Windows, Native App

 In the figure below you can see the 1CRM Sidebar pinned to the right side pane of the Outlook native client for Windows. It behaves much the same as documented above for Outlook Online. In the image shown the optional modules have been enabled for Quotes, Sales Orders and Projects.

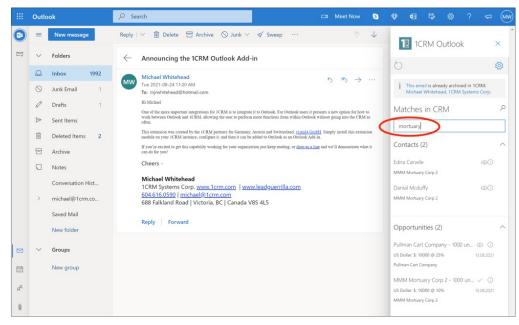


4.4 Search

 An email in your Outlook Inbox may very well relate to something not automatically displayed in the 1CRM Add-in sidebar. Or you might want to link this mail to something not shown in the sidebar - for example you receive a Quote from a supplier that relates to a specific client opportunity you are working on. In these situations you would click on the Search icon as highlighted in the figure below:



2. Then simply type in some text intended to find the Contact, Opportunity or Case you want to link to:



3. And again, simply click on the appropriate *Cloud* icon to create a relationship between this email and the item desired.



1CRM OUTLOOK EXTENSION

A Guide to Installing and Using the Optional Outlook Extension for 1CRM as an Outlook Add-in

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