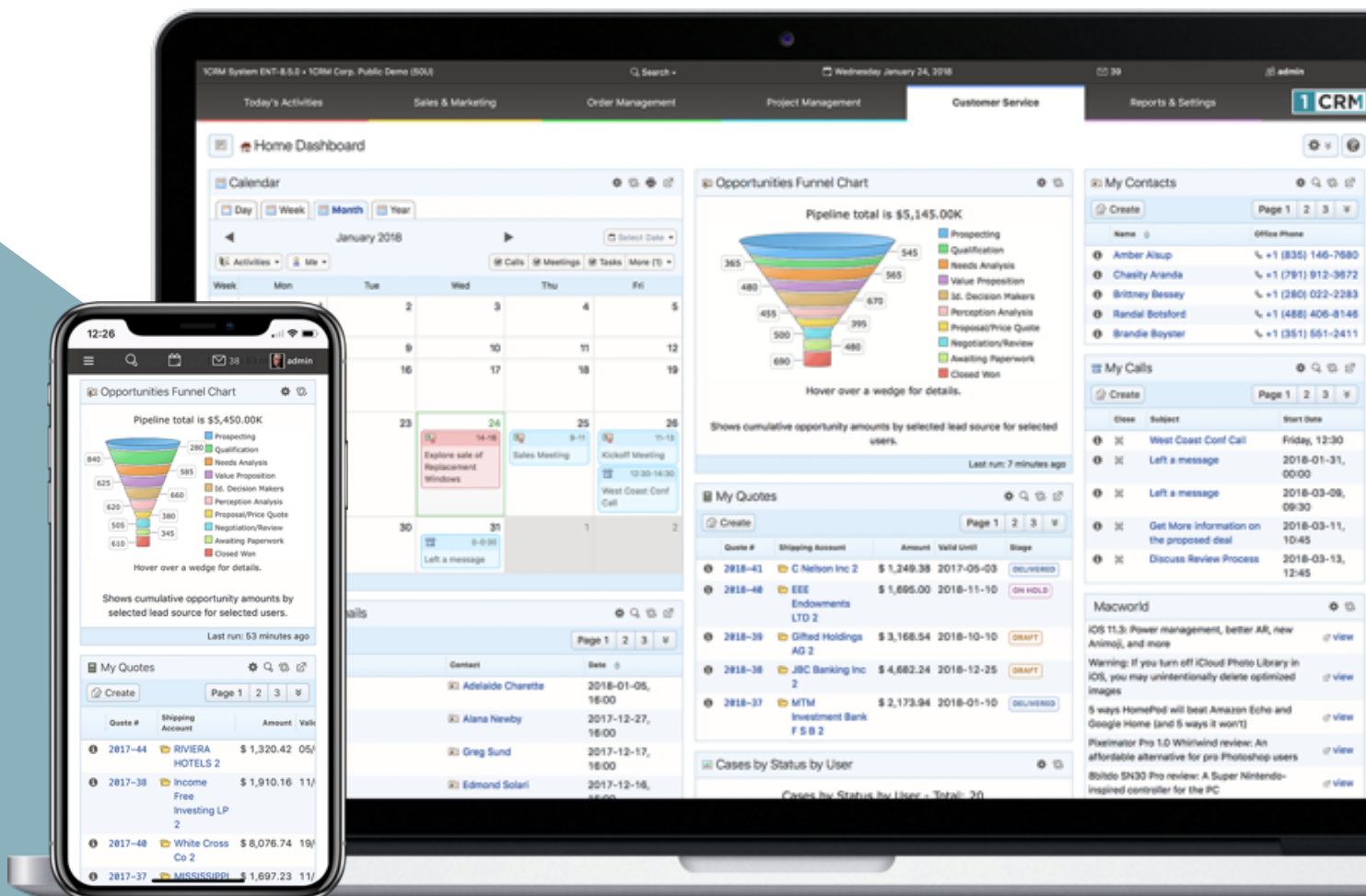


# 1CRM OUTLOOK EXTENSION

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



## 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, [visual4 GmbH](#). 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 [drop us a 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 [sales@1crm.de](mailto:sales@1crm.de).

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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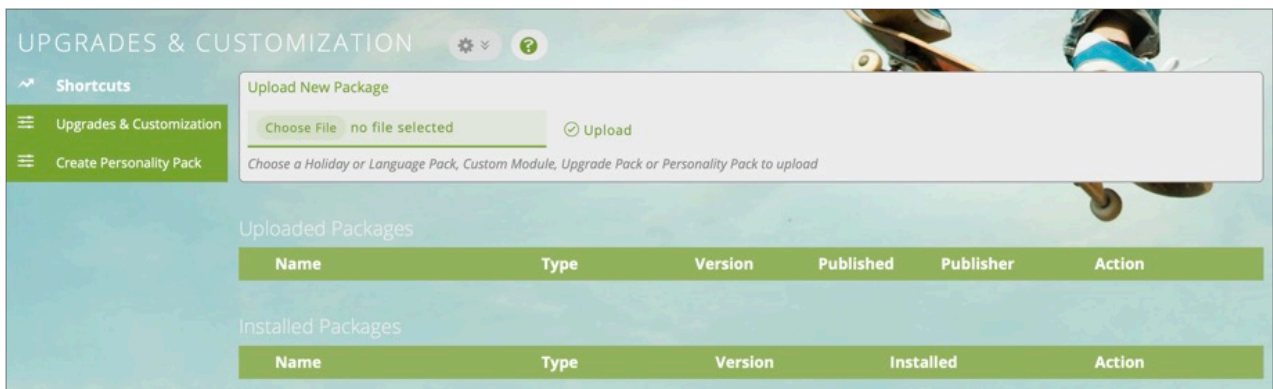
# 1.0 Installing the 1CRM Outlook Extension

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.

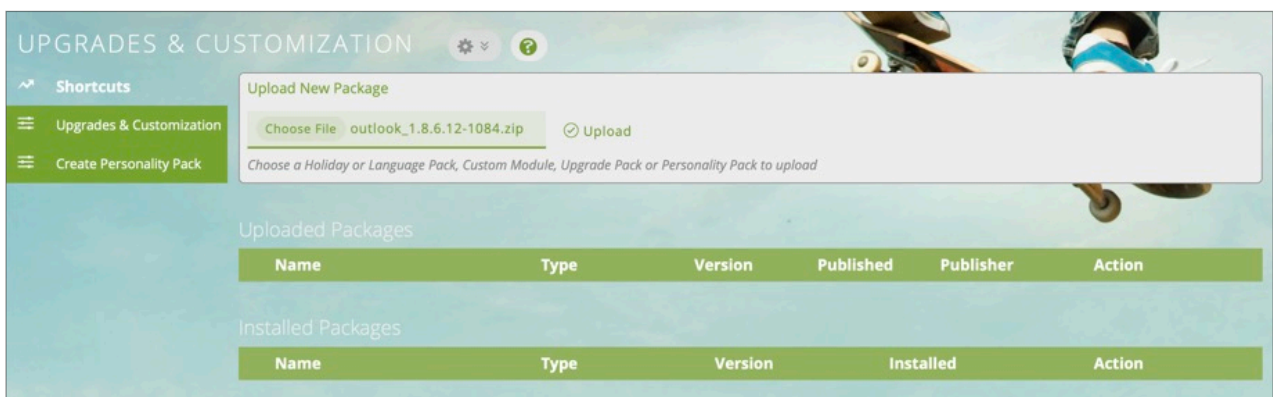
**Note:** If you need to order a license key for the 1CRM Outlook Extension, or to get the Outlook Extension Module itself, please contact [sales@1crm.de](mailto:sales@1crm.de). The cost of the extension is US\$55/user/annum.

**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:

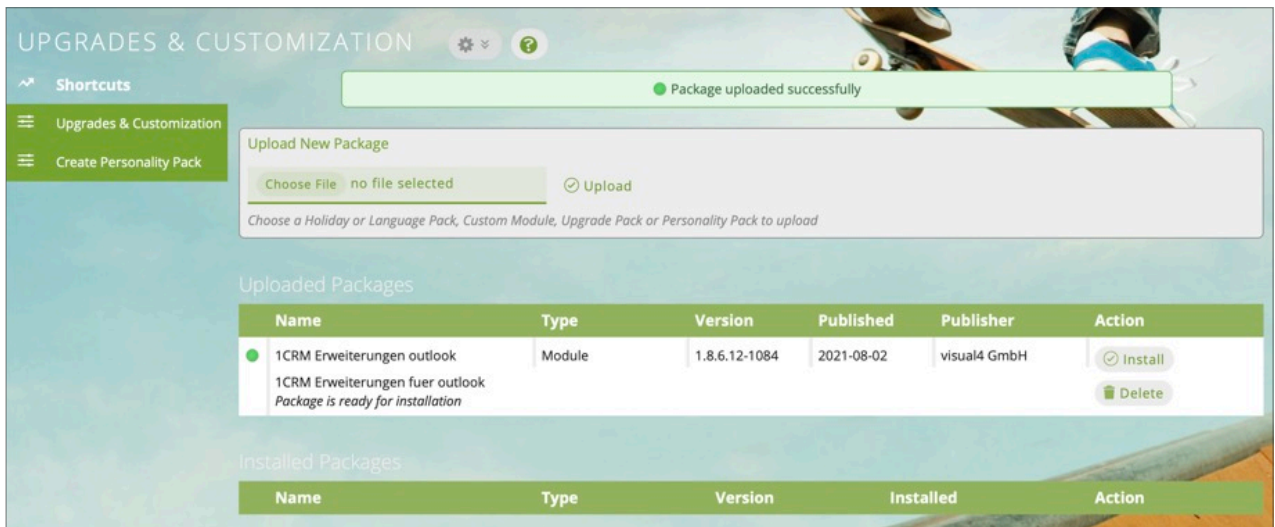


Step 1: Navigate to the Upgrades & Customization Screen in Admin, Then Click on *Choose File*

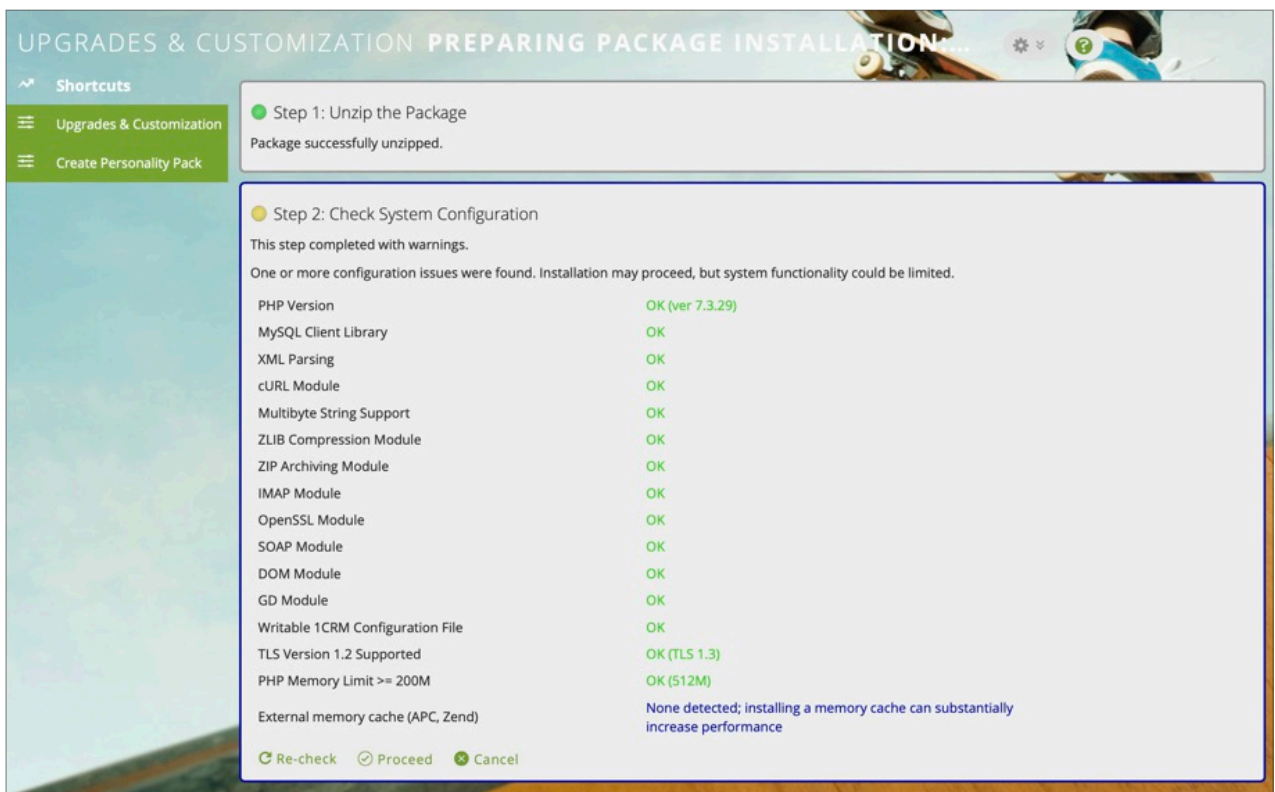


Step 2: Select the Outlook .zip File Provided and Click on *Upload*

# 1CRM Outlook Extension and Add-in

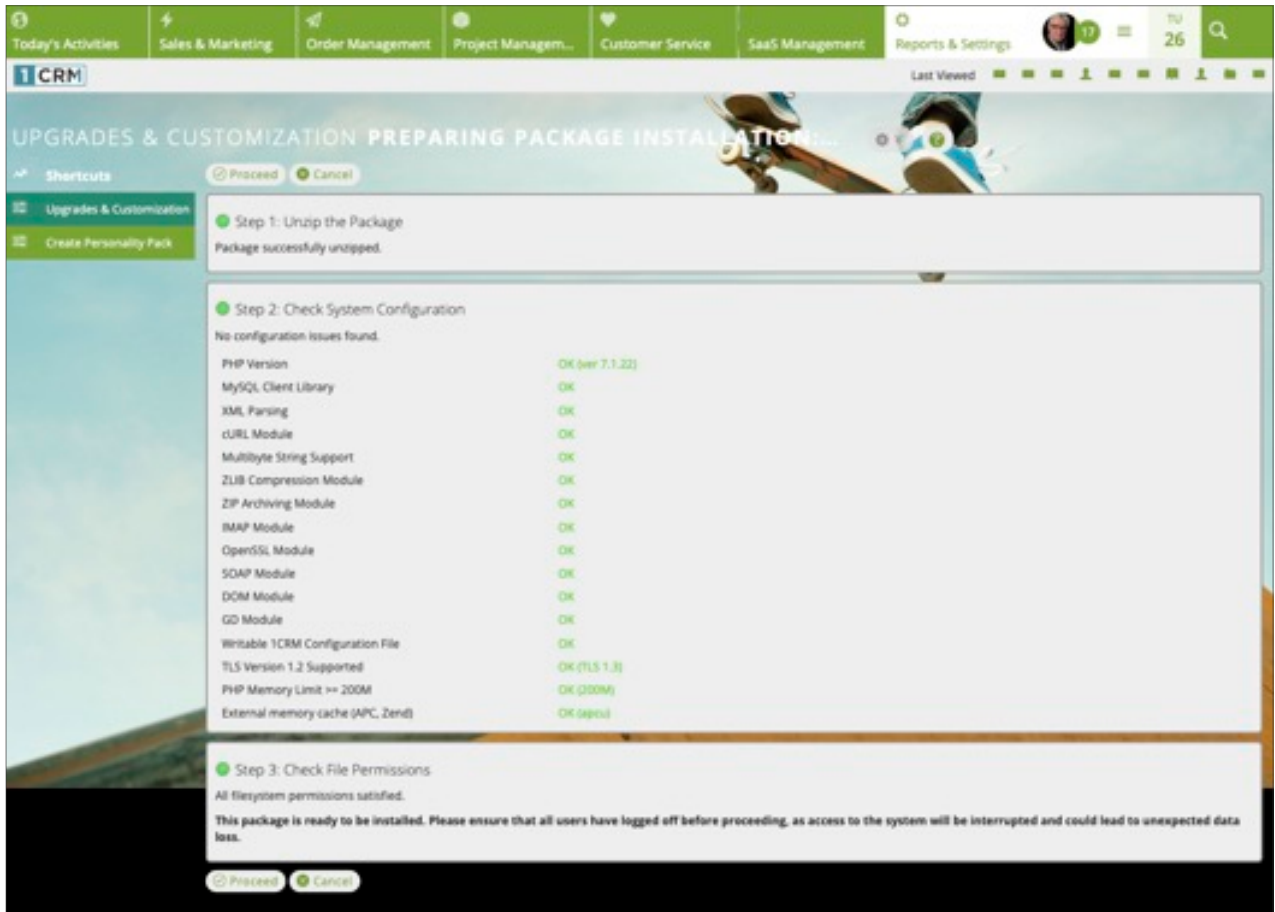


Step 3: Wait to See the Extension Listed as Above, Then Click on *Install*



Step 4: Wait to See the Screen Above, Then Click on *Proceed*

## 1CRM Outlook Extension and Add-in



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



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



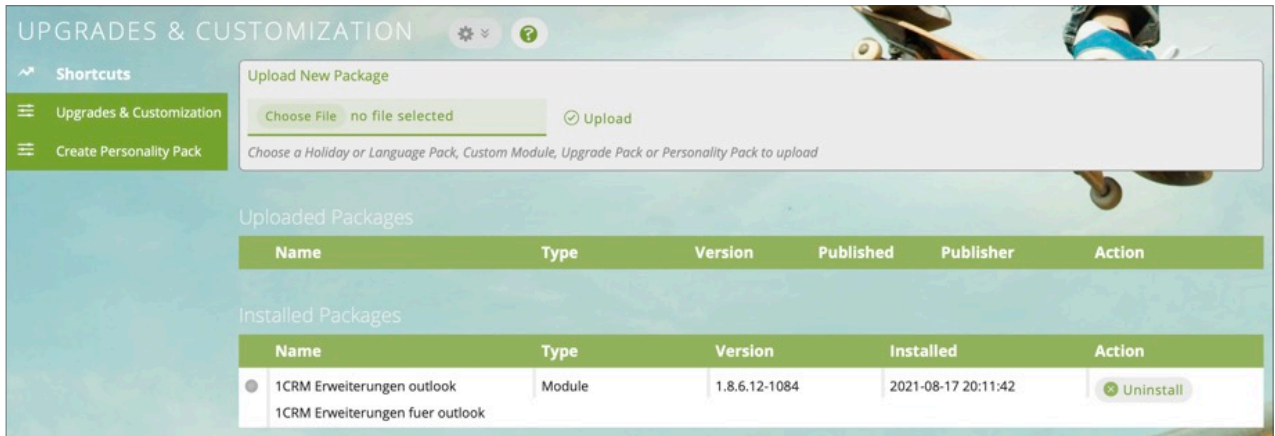
Step 7: Wait to See the Screen Above, Then Click on *Continue*



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



# 1CRM Outlook Extension and Add-in



Step 9: Wait to See the Screen Above, Then the Installation Process is Complete

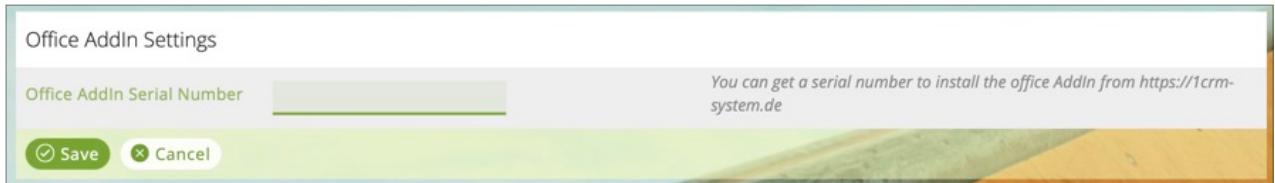


# 2.0 Configuring the Extension

## 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.

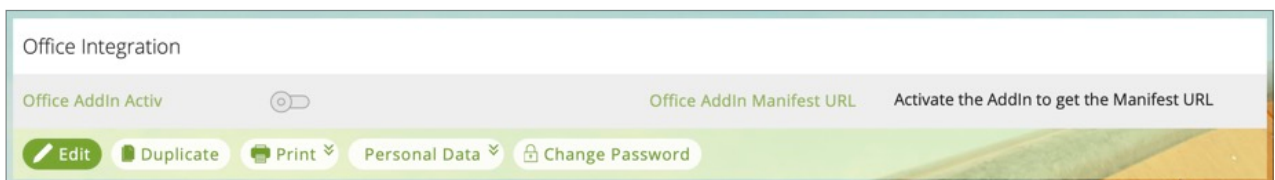


*Office Addin Settings Panel on the System Settings Screen*

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*.

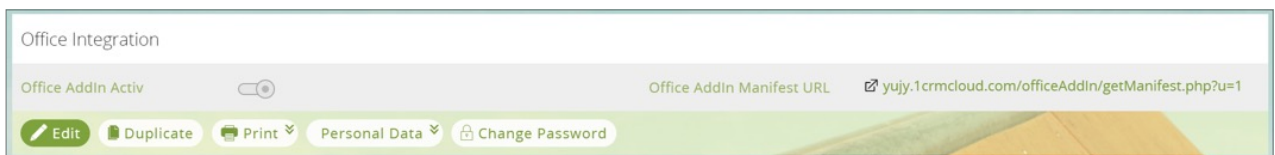
## 2.2 Activate the Extension for Each User

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 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:



*Copy the Office Addin Manifest URL*

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

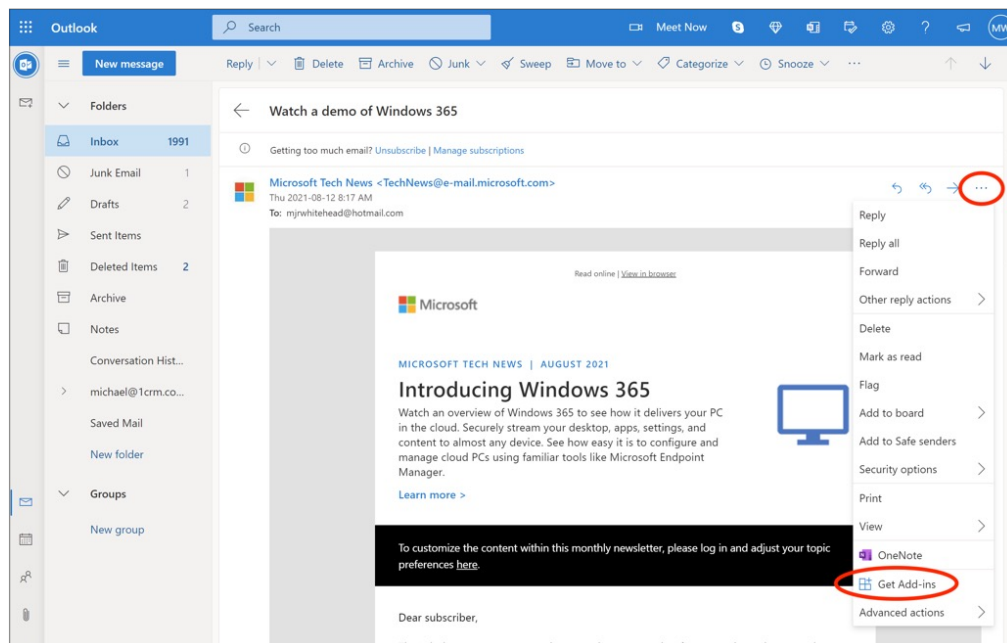
# 3.0 Configuring the Add-in

## 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.

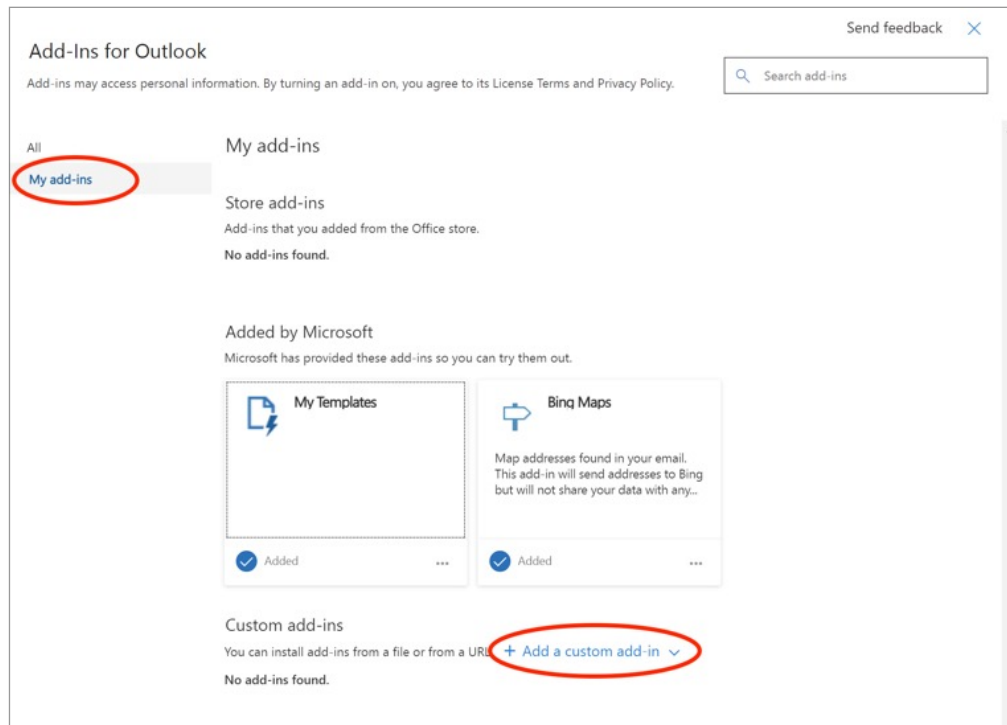
2. Navigate to <https://outlook.com>, then login using your Microsoft credentials, and select the Outlook application.
3. Within Outlook Online, open any email. Your screen should look approximately like this:



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

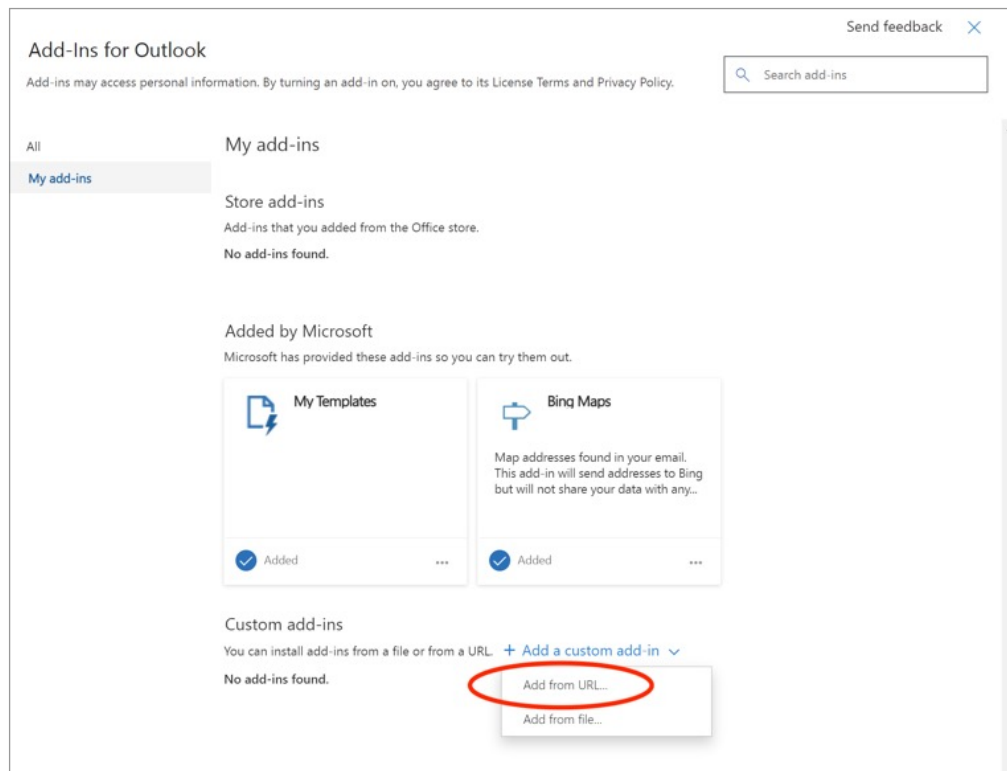
# 1CRM Outlook Extension and Add-in

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



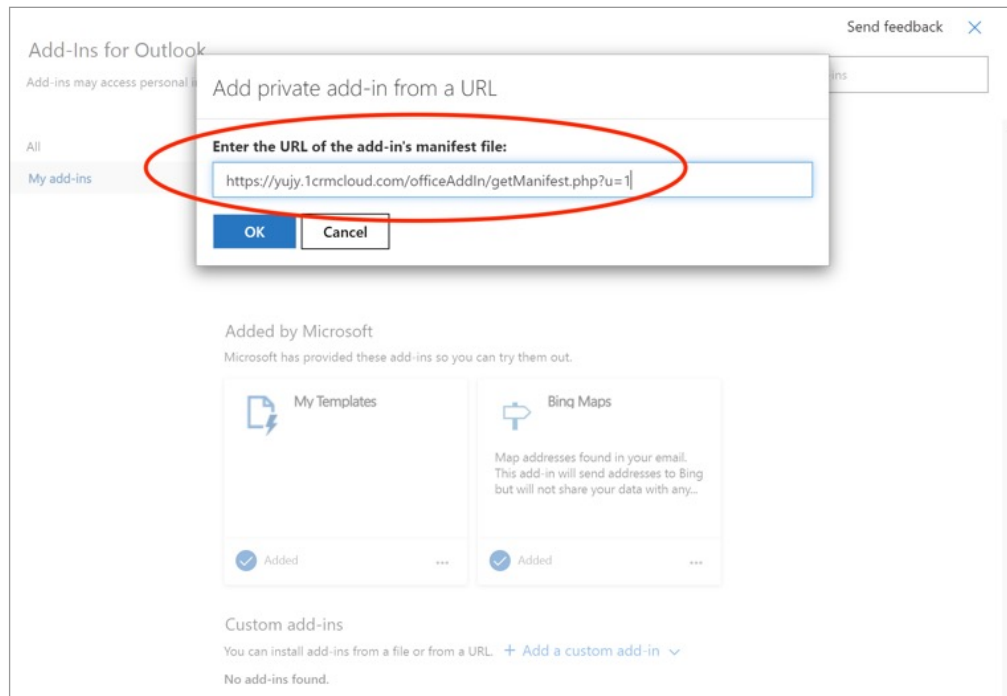
Add-ins for Outlook: Click on *My add-ins* Then on *Add a custom add-in*

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

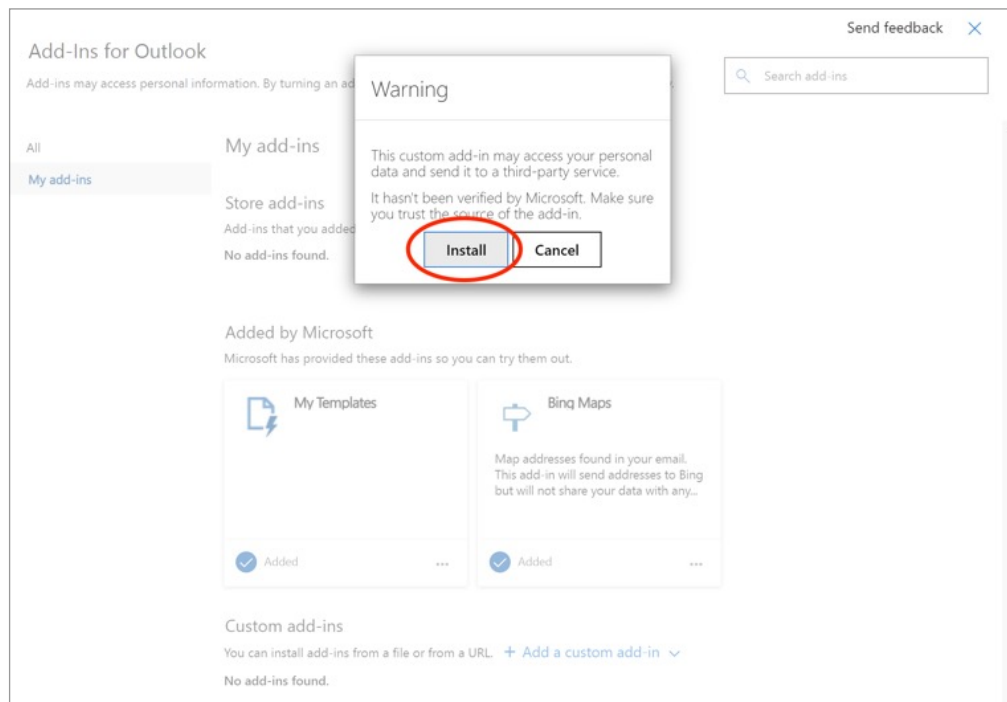


## 1CRM Outlook Extension and Add-in

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

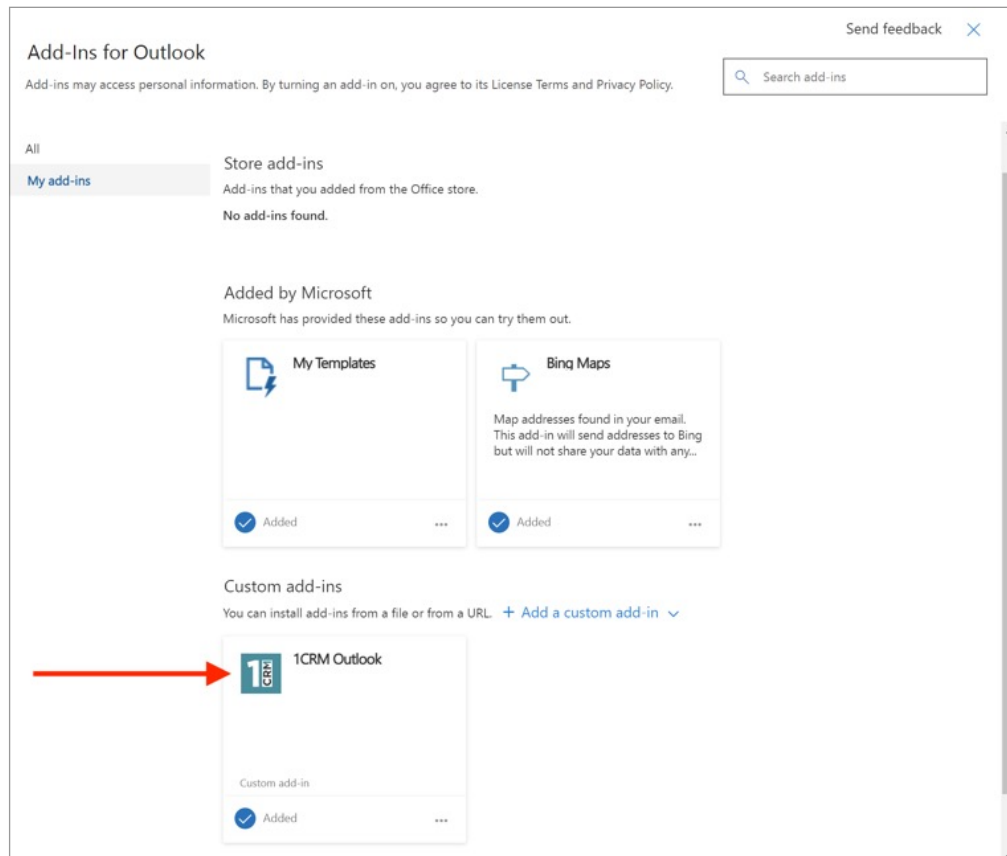


7. Your next popup looks like this. Just click on *Install*



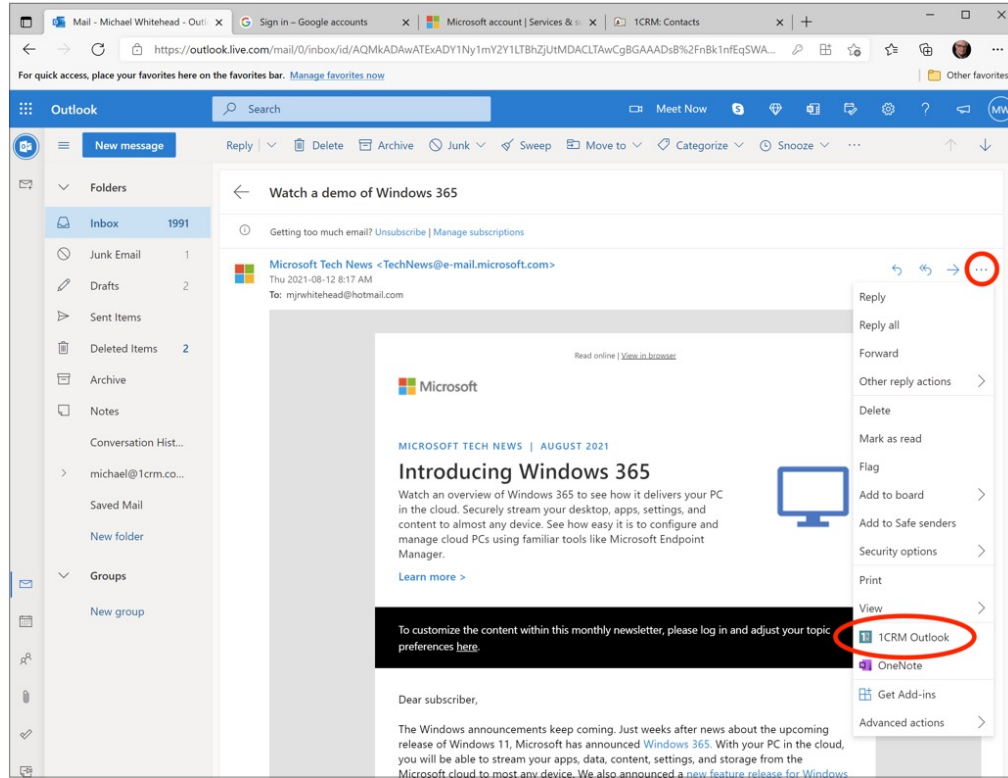
# 1CRM Outlook Extension and Add-in

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:

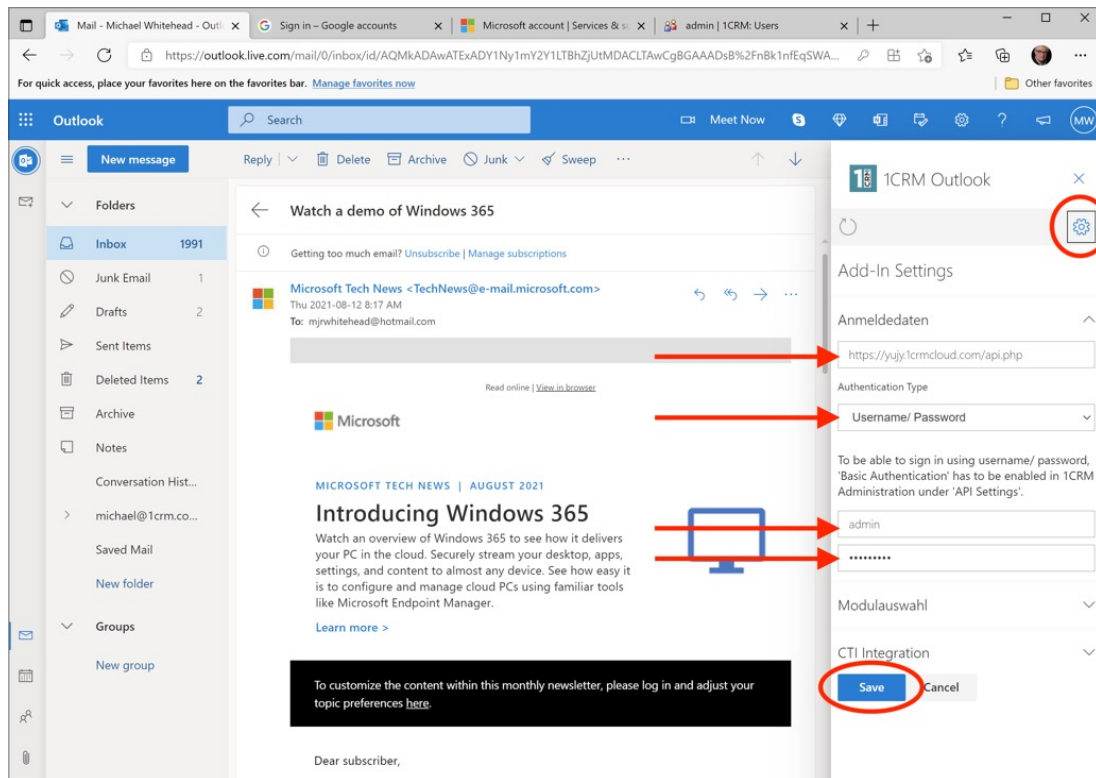


Now Click on ... Then on *1CRM Outlook*

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*.

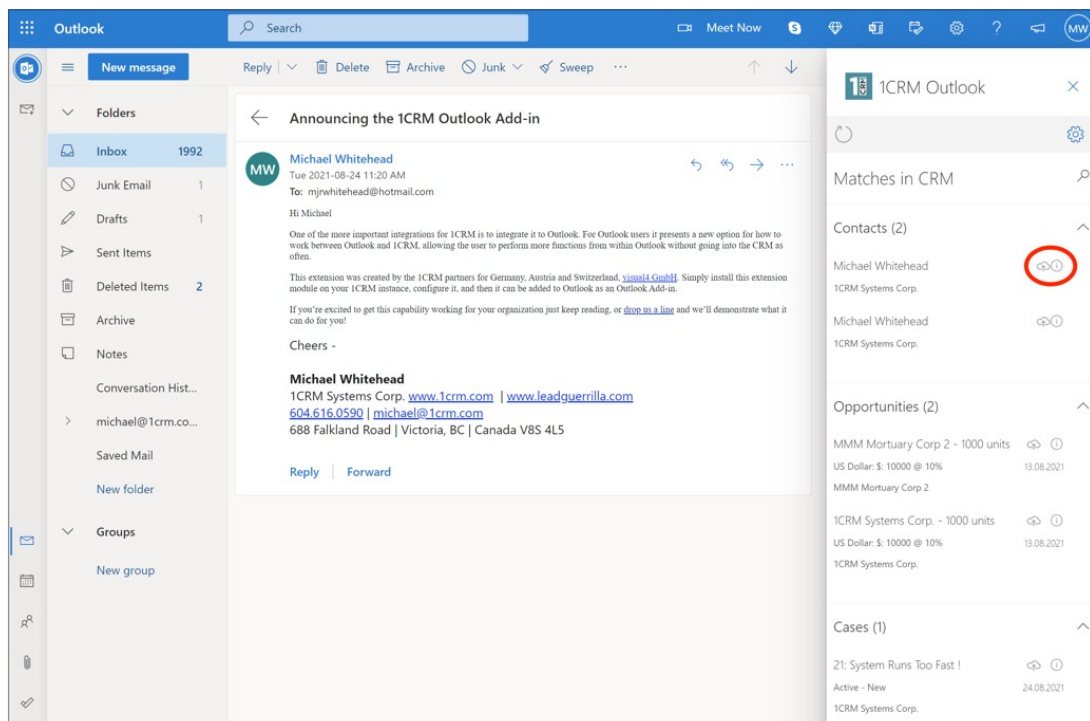


# 1CRM Outlook Extension and Add-in



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

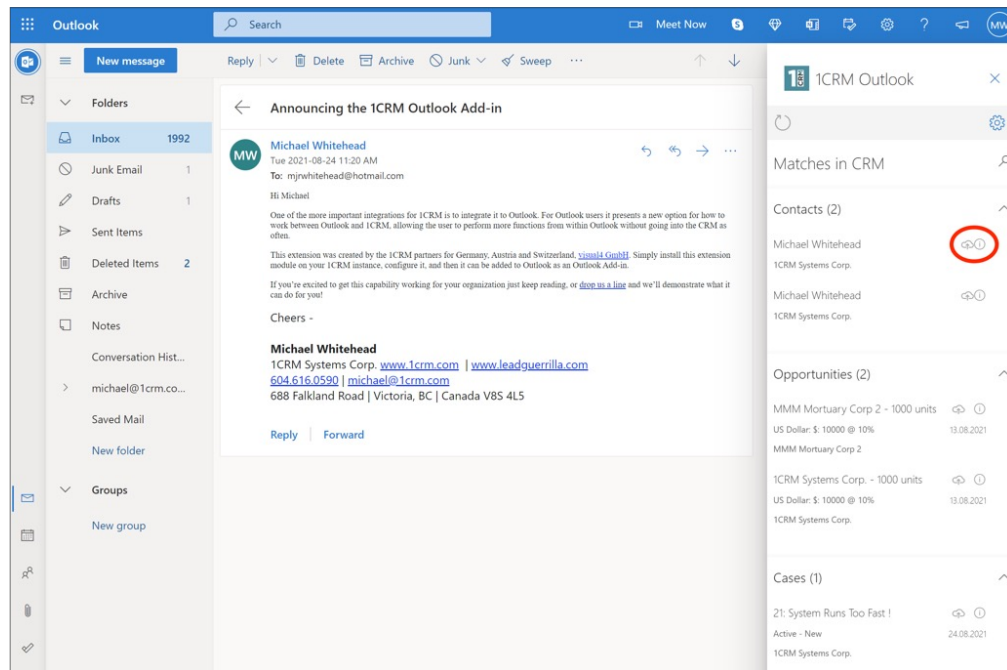
9. You have now successfully added and activated the Outlook Add-in for 1CRM. Open an email from one of your CRM contacts. You should now see the information available in CRM in the sidebar. In order for 1CRM to recognize your contact, the email address in Outlook must match the email address stored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



# 4.0 Using the 1CRM Outlook Add-in

## 4.1 Basic Usage

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. 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.)



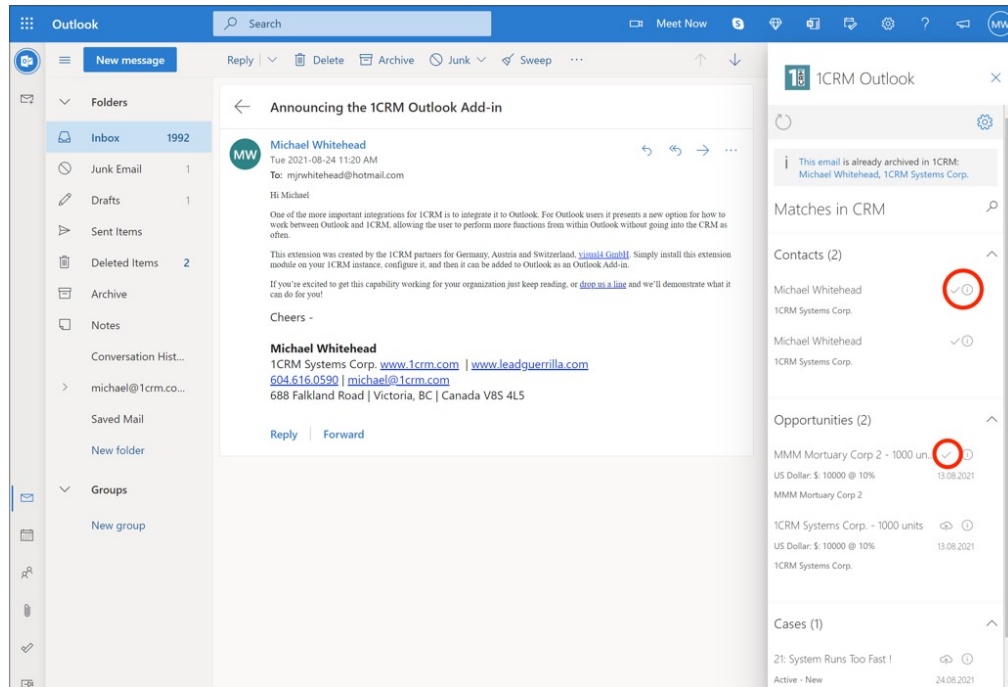
Now Click on ... Then on *1CRM Outlook*

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.

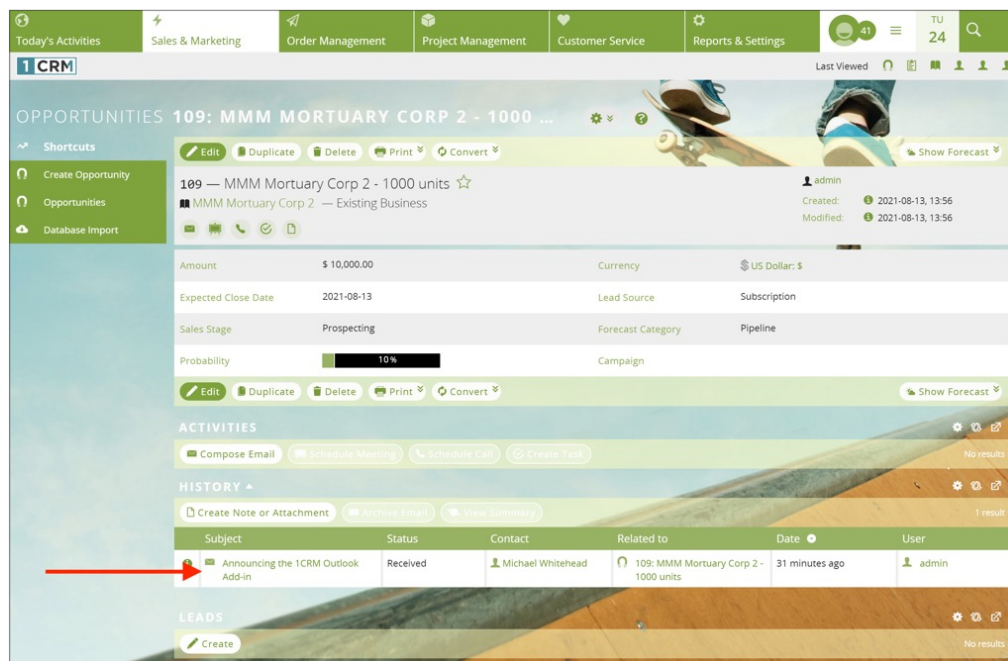
**Note:** If you sync an email while in the Outlook Sent folder, it will be sync'ed into your user's Sent folder inside the CRM. This is a really handy feature, as it allows the Add-in to work for both Sent and Received emails.

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.

# 1CRM Outlook Extension and Add-in

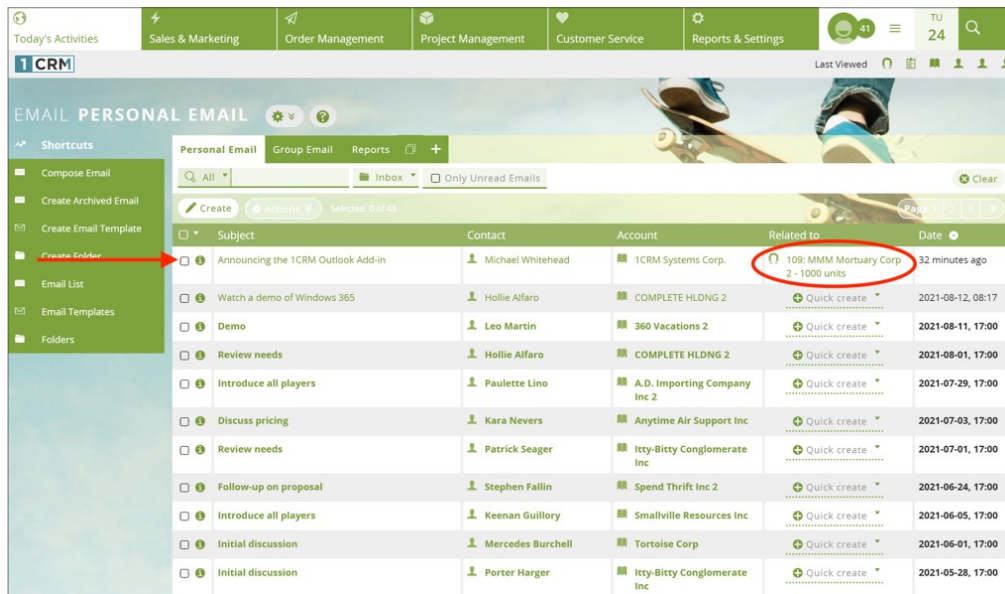


If we look in the CRM system, we see that indeed, this email is now linked in the history panel of the Opportunity.



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

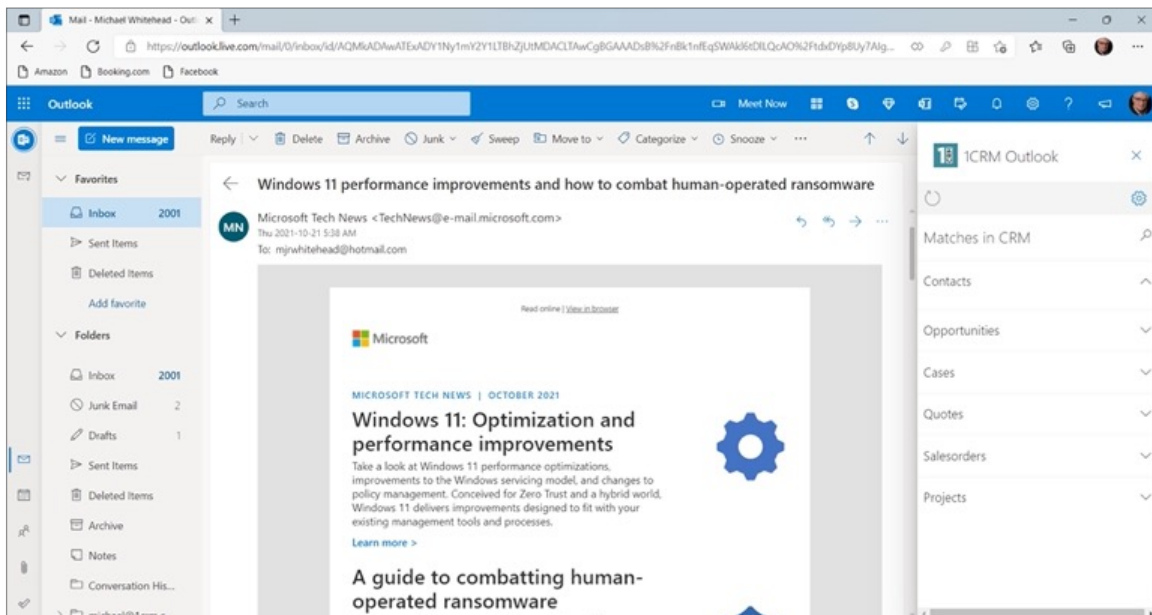
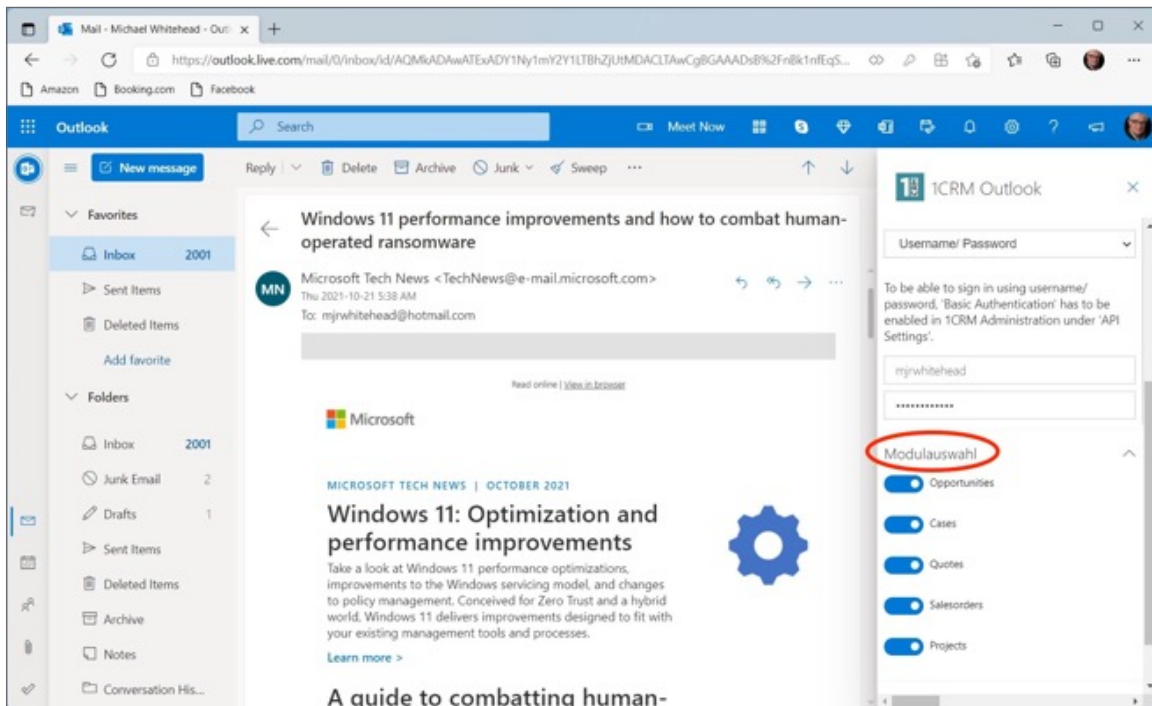
# 1CRM Outlook Extension and Add-in



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

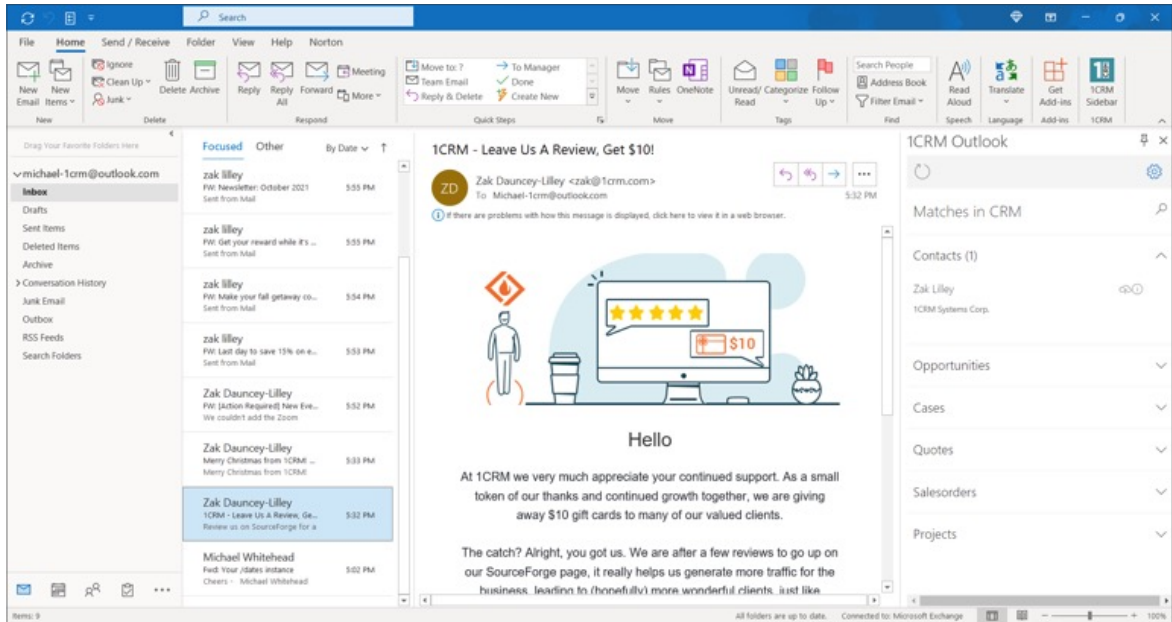
1. While the Outlook Add-in initially supports linkages with the Contacts, Cases and Opportunities modules, you can enable more modules if they are useful to you. These are the Quotes, Sales Orders and Projects modules.
2. You enable these additional modules using the Gear icon in the add-on - choose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





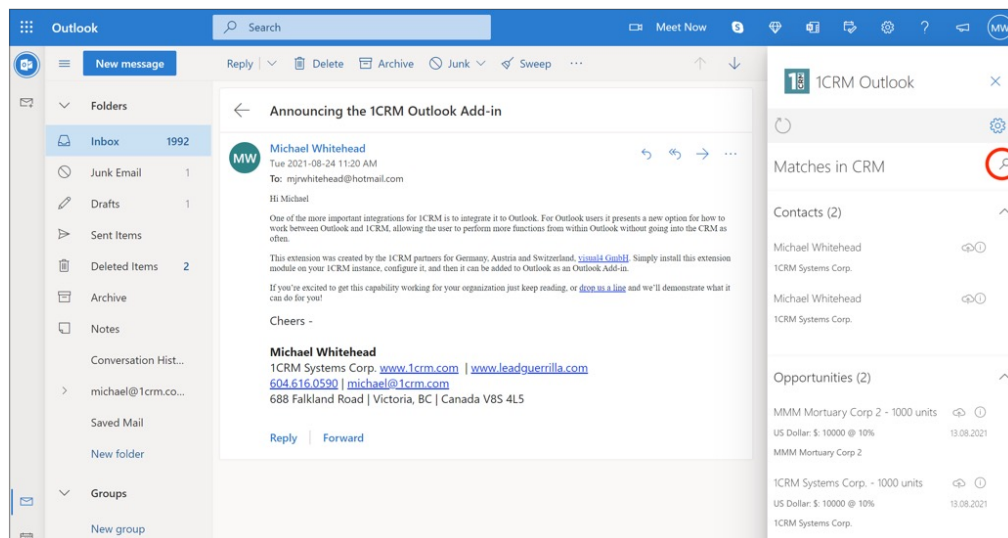
### 4.3 Outlook for Windows, Native App

1. 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.

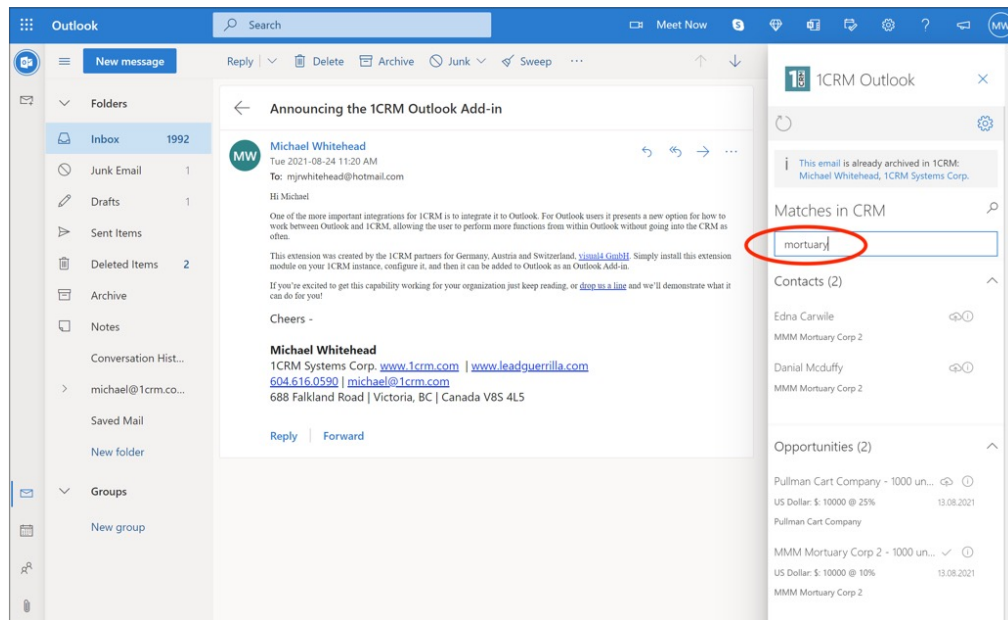


## 4.4 Search

1. 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.



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