CRM for Outlook – Server Component Installation Guide

Welcome to the CRM for Outlook – Server Component installation guide. This document will give you the information you require to set up the server component successfully.

Before you begin installing, it is recommended that you read the Boyum Portal guide

Contents

Step 1: Check compatibility

In order to install the server component on you server you need the following installed

- .NET Framework 4.5
- SAP DI-API 32 bit (SAP Business One 8.82 PL11 or higher) or (SAP Business One 9.0 PL07 or higher)

Also verify the following

- That the server allow outgoing traffic on port 80 and 443 (Most servers have this by default).
- That DI-API can properly make a connection (SAPs DTW tool is great for testing this and is installed on most servers)

Step 2: Prepare needed data
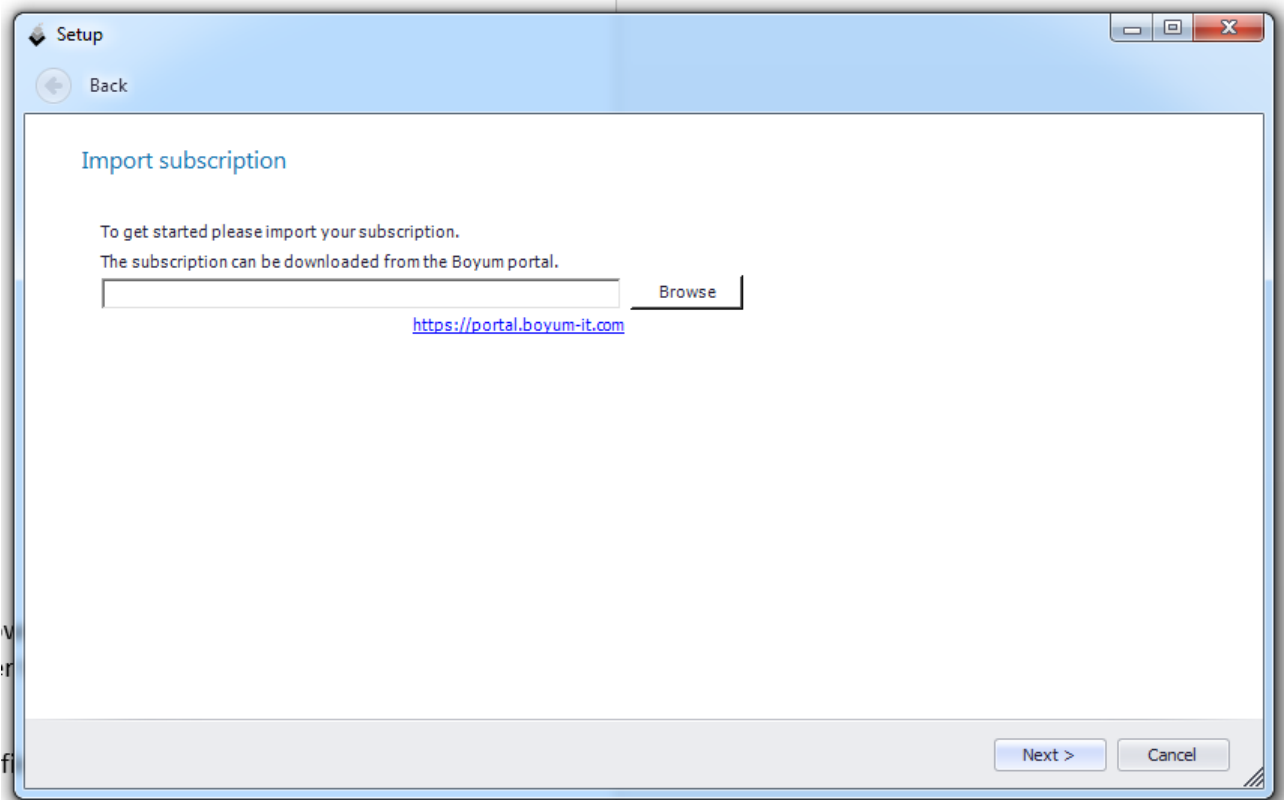
Once you begin install you need the following data

- A Boyum portal subscription file (downloaded from the portal – more information in the Boyum portal guide)
- SAP Database server information
- SAP Database login information (example manager username/password)
- SMTP information (optional)

Step 3: Install

- Run setup.exe
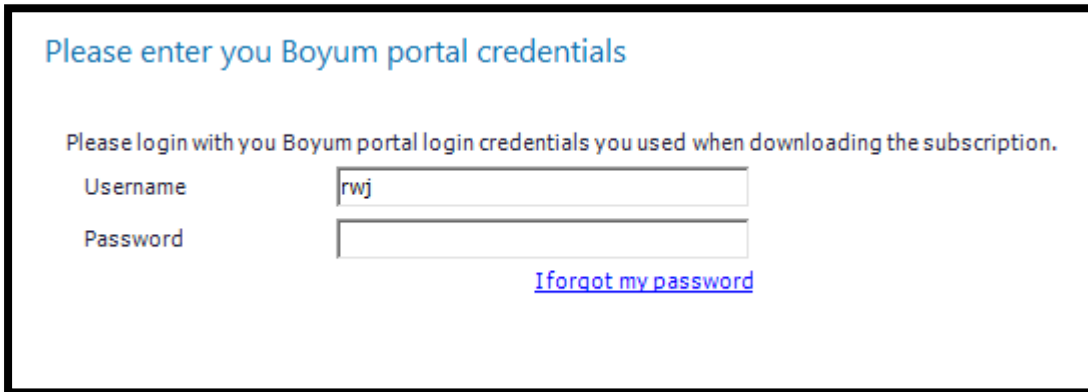- Follow the instruction on screen until the configuration window appear.

Step 4: Configure the first time

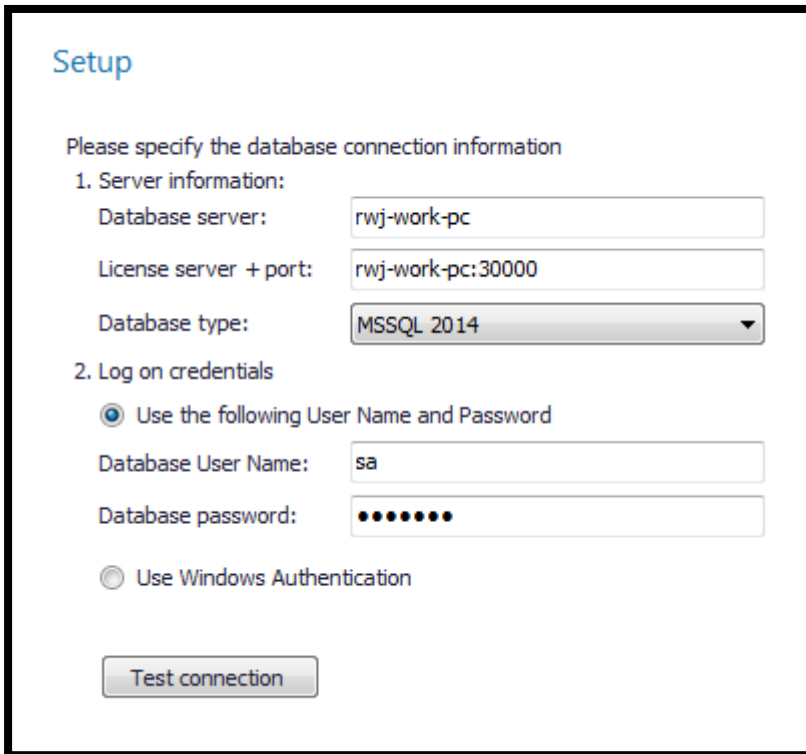After install you should see the following window.

First thing you need to do is to import your subscription that you downloaded from the Boyum Portal and press next. If you do not have your subscription file then please refer to the portal guide here http://b1crmforoutlook.com/server/ on how to acquire it.
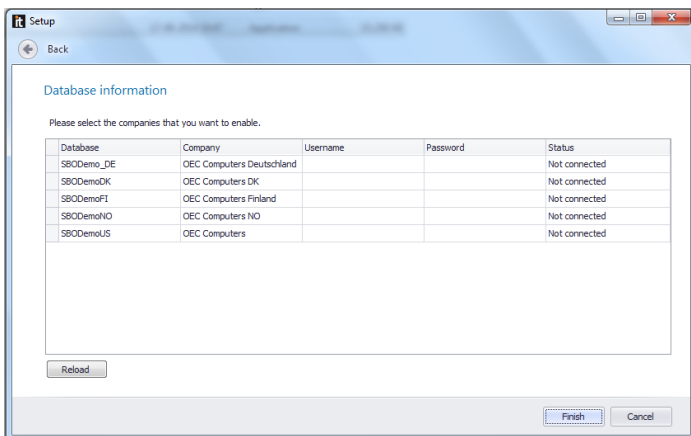
Next, please provide you Boyum portal username/password (to confirm you own the subscription)

Now specify the SAP server login details

Finally provide SAP username/password to the databases you wish should be accessible via CRM for Outlook[1] (need to be at least a user with a SAP Professional license and super-user access)
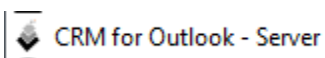

You have now successfully set up the server component!
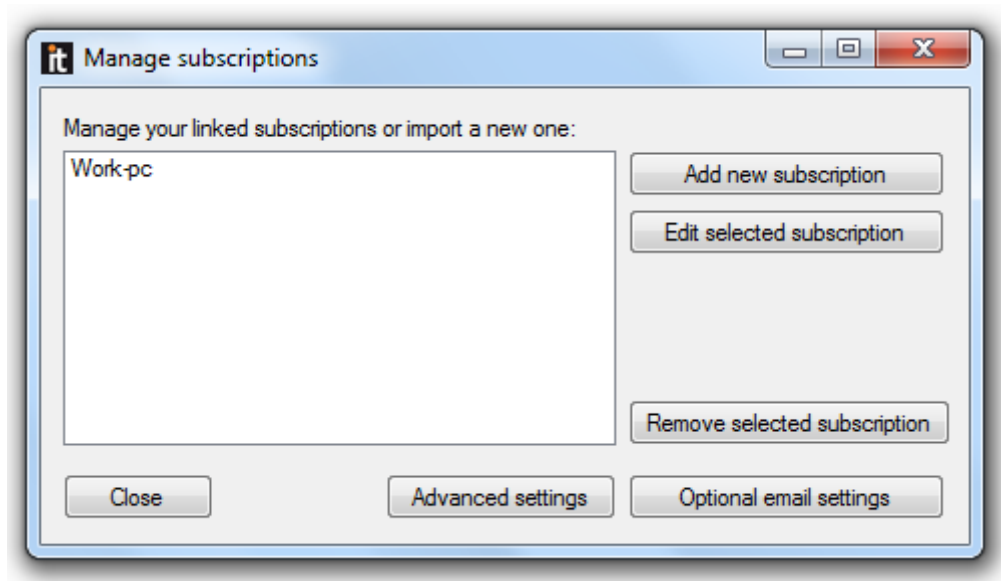
Advanced topics

Reconfigure

Should you at any time need to re-define you configuration or add email-settings you need to open up the CRM for Outlook – Server menu-item in the Windows start menu

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[1] You can later set individual user permissions

This will present you with the following screen

You can from here:

- Add additional subscriptions (see Advanced: Multiple subscriptions)
- Edit an existing subscription (to define new server-data and/or SAP databases to access)
- Remove a subscription (if you do not wish to use it anymore)
- Set up advance settings (port to be used over local LAN connection)
- Setup optional email settings (if you wish to get a mail if there is any issues with the server component)

Multiple subscriptions

While it is normal only to have a single subscription, you can with CRM for Outlook, have multiple subscriptions on the same server. This is used in scenarios where you have multiple customers hosted on same server. From a configuration standpoint, you should see each subscription as a separate configuration (managed in a single server-component)

NB: All clients will need to run the same CRM for Outlook version and same SAP version for this to work.

Switching to a new server vs. subscription files

A subscription file is only meant to be used on a single server. If you are in the scenario of switching to a new server, please note that the last started server is always the live version. For that reason if you need to move to a new server it is recommended that you do tests with a new (demo) subscription instead before moving the subscription over.

Upgrade

To upgrade just run the new server installer setup.exe (no need to uninstall first). You can download latest version here: http://b1crmforoutlook.com/server/. Once server is upgrade the connected clients will automatically be asked to upgrade via the client auto-upgrade system.

Uninstall

Uninstall is done standard Windows way by using Add/Remove programs