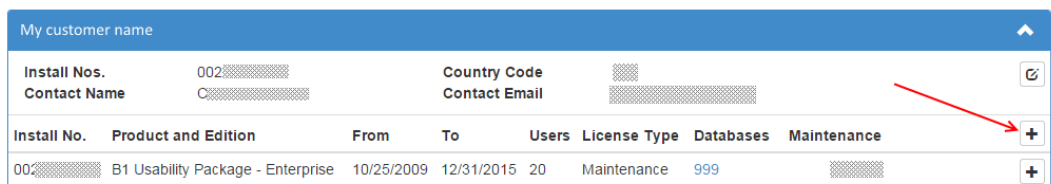# CRM for Outlook – First time installation checklist

It is recommended to print this check and check each step in the process.
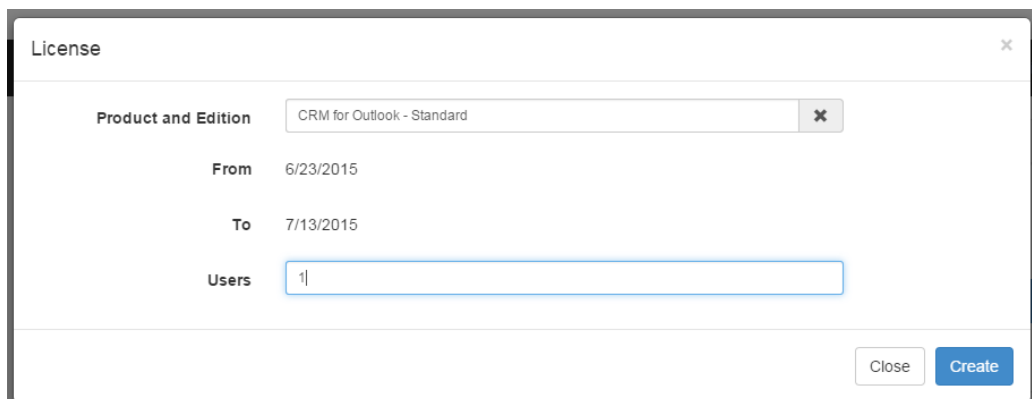
The following show in checklist form what you need to do to get started with CRM for Outlook. For details read the portal, server and client guide.

## Server part

- ☐ Go to https://portal.boyum-it.com/
  - ☐ Log into the portal with provided credentials
  - ☐ Press Customers in the sidebar and find the customer you wish to add a license for (if it is a brand new customer who do not have any existing products then please used the "Trial for New Customer" button instead)
  - ☐ Press the Create new subscription button

| My customer name | | | | | | | ▲ |
|---|---|---|---|---|---|---|---|
| Install Nos. | 002░░░░░ | | Country Code | ░░░ | | | ☑ |
| Contact Name | C░░░░░░ | | Contact Email | ░░░░░░ | | | |
| Install No. | Product and Edition | From | To | Users | License Type | Databases | Maintenance |
| 002░░░░ | B1 Usability Package - Enterprise | 10/25/2009 | 12/31/2015 | 20 | Maintenance | 999 | ░░░░ | + |

- ☐ Choose CRM for Outlook as the product and the number of users the company need (What company will later pay for once trial is over)

| License | | ✕ |
|---|---|---|
| Product and Edition | CRM for Outlook - Standard | ✕ |
| From | 6/23/2015 | |
| To | 7/13/2015 | |
| Users | 1 | |
| | Close | Create |

- ☐ Press the create button
- ☐ You should now see the following listed on the customer card

| CRM for Outlook - Standard | 6/23/2015 | 7/13/2015 | 1 | Demo | N/A | + 👤 |
|---|---|---|---|---|---|---|
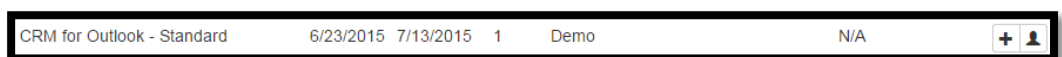
- ☐ Press the 👤 button at the far right to begin setting up the subscription
- ☐ In the top right section of the screen where is say "Setup" press the B1Connector link (to get the server component software)
- ☐ Go back and press the Download subscription file (needed for the server component install)

- ☐ Go to you SAP Server
    - ☐ Install the Server component (for details see server component guide)
        - ☐ Provide connection info
        - ☐ Provide what databases you wish to connect
- ☐ Go back to the portal
    - ☐ (Optional) Create usergroups [If you don't there is a default with full access to all defined databases]
    - ☐ Create new user (make yourself/default contact the first user)
        - ☐ Provide email, description (Example users Name)
        - ☐ Select usergroup
        - ☐ Check that you wish to send Activation mail

## End-user part

- ☐ Go to the Outlook client of the user you created
    - ☐ Navigate to the sent activation mail
    - ☐ Press the "download the setup file" link
    - ☐ Download and install the Outlook add-in
    - ☐ Restart Outlook
    - ☐ Navigate back to the activation mail to complete the activation