

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

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Step 1: Check compatibility

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

- .NET Framework 4.7
- SAP DI-API 32 bit or 64 bit (SAP Business One 9.2 PL04 or higher) matching the version of CRM for Outlook Server component you install

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

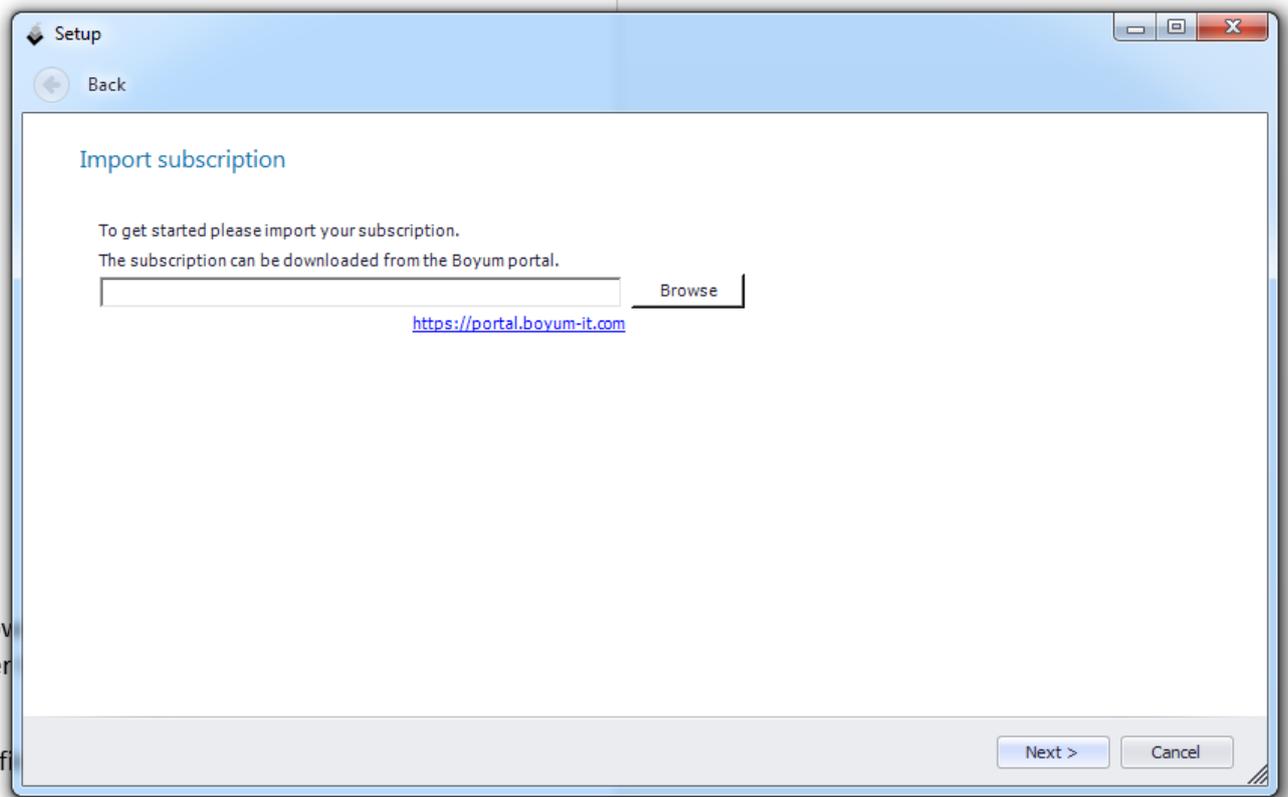
- A Boyum portal subscription file (downloaded from the portal – more information in the Boyum portal guide)
- SAP Database server information
- SAP Database login information (example manager username/password)
- SMTP information (optional)

Step 3: Install

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

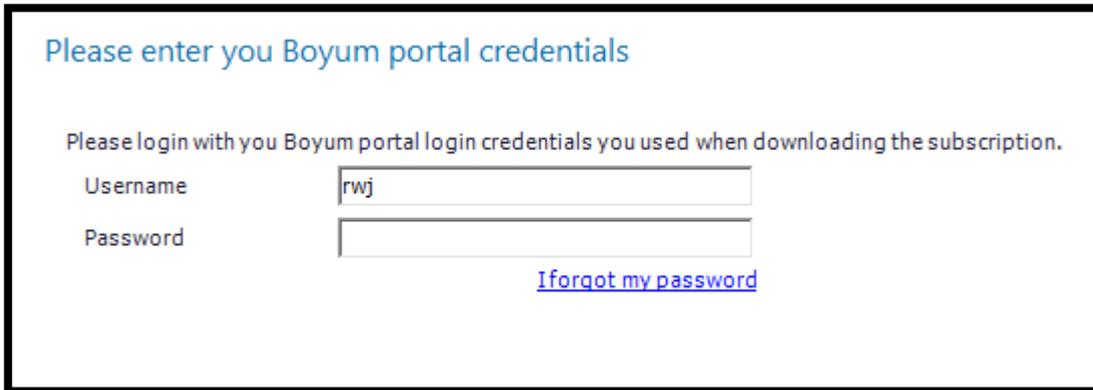
Step 4: Configure the first time

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

Setup

Please specify the database connection information

1. Server information:

Database server:

License server + port:

Database type:

2. Log on credentials

Use the following User Name and Password

Database User Name:

Database password:

Use Windows Authentication

Finally provide SAP username/password to the databases you wish should be accessible via CRM for Outlook¹ (need to be at least a user with a SAP Professional license and super-user access)

Database information

Please select the companies that you want to enable.

Database	Company	Username	Password	Status
SBODemo_DE	OEC Computers Deutschland			Not connected
SBODemoDK	OEC Computers DK			Not connected
SBODemoFI	OEC Computers Finland			Not connected
SBODemoNO	OEC Computers NO			Not connected
SBODemoUS	OEC Computers			Not connected

You have now successfully set up the server component!

Advanced topics

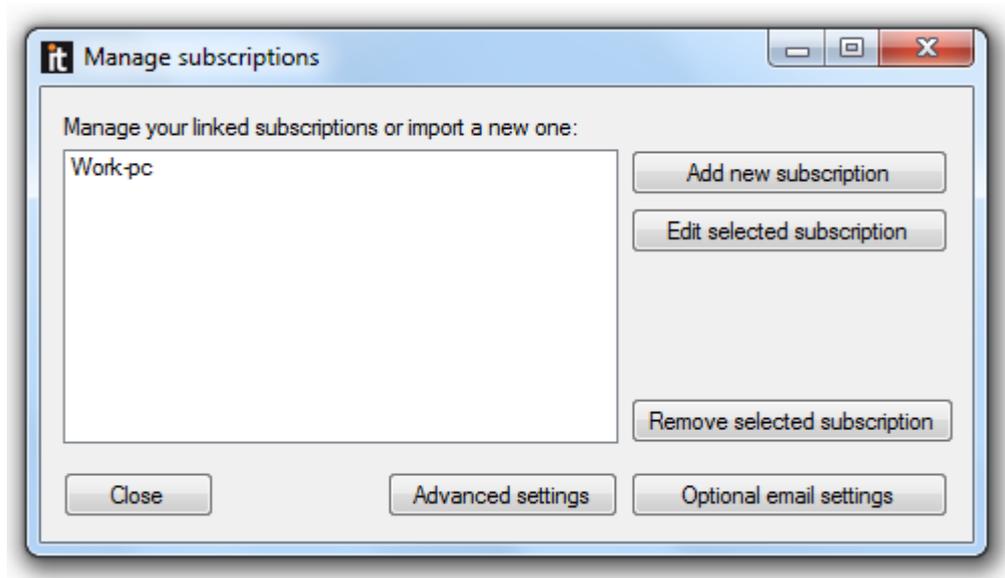
Reconfigure

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



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.

If you upgrade from an old (before version 1.0.100) or a 32 bit version to a 64 bit version you will need to either move the "C:\Program Files (x86)\Boyum IT\CRM for Outlook Server\Subscriptions.xml" file to

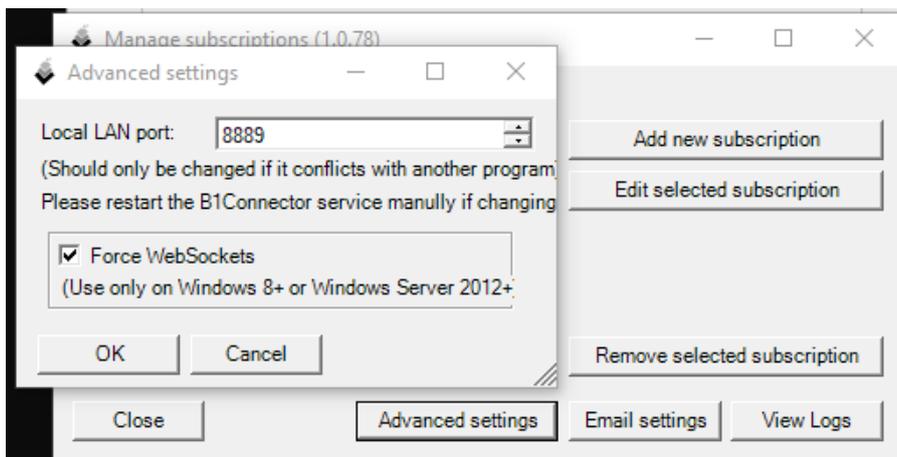
“C:\Program Files\Boyum IT\CRM for Outlook Server\Subscriptions.xml” and restart the server or set up the server component again using the setup wizard.

Uninstall

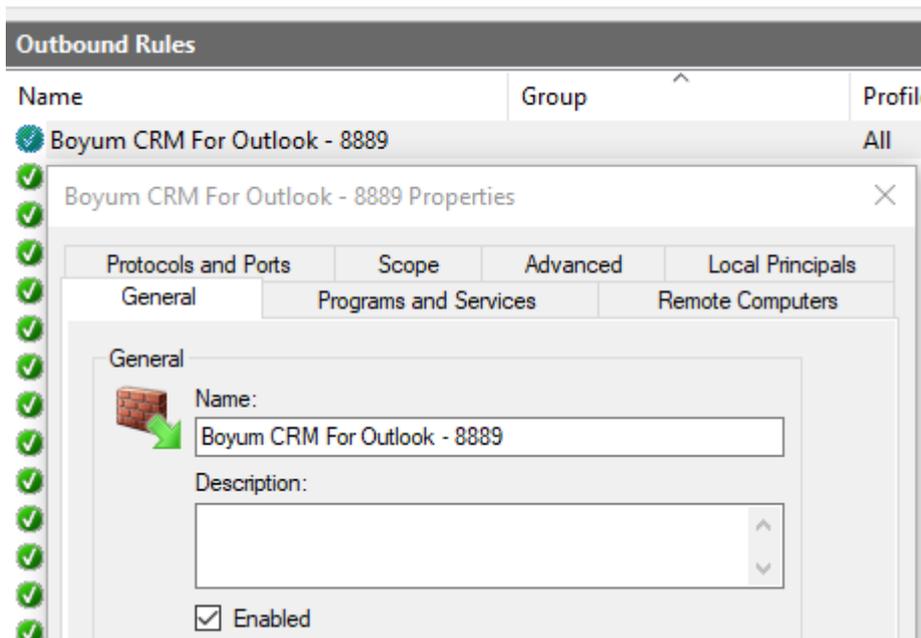
Uninstall is done standard Windows way by using Add/Remove programs

Local Lan connections and automatic firewall rule

CRM for Outlook server component will by default use a cloud component in order to communicate between server and Outlook clients. If however, you are on the local domain, the system will after the initial connection try to establish a local Lan connection (in order to work faster). This is done by default via port 8889 (You can change what port it use in the advanced settings)



During startup the server component will automatically create a firewall rule to allow access on this port in Microsoft Windows.



If you do not wish to have this happen you can set Local Lan port to 0 (zero) and Local Lan functionality will be disabled.