

# CRM for Outlook – Upgrade checklist

It is recommended to print this check and check each step in the process.

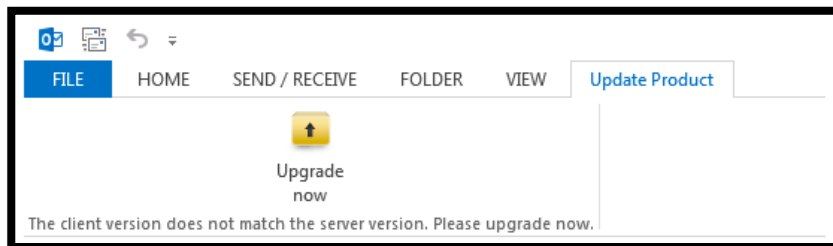
The following show in checklist form what you need to do in order to upgrade an existing CRM for Outlook installation to the latest version. For details read the portal, server and client guide.

## Server part

- ☐ Go to <http://b1crmforoutlook.com/server/>
  - ☐ Download the version you wish to install
  - ☐ On the SAP Server run the new Setup.exe
  - ☐ Follow the guide steps
  - ☐ If upgrading from a 32bit version to the new 64bit versions 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.

## End-user part

- ☐ Open the Outlook client
- ☐ When you navigate to a mail, instead of the normal ribbon you will see the following



- ☐ Press the upgrade button and let the auto-upgrader replace the files. Once complete restart Outlook and you are not on the new version.
- ☐ NB: In order to upgrade windows administrator rights are needed. You will be prompted for this if Outlook is not running as administrator
- ☐ NB: For new B1 Outlook clients that have not had the add-in installed you can download the new installer here: <http://b1crmforoutlook.com/install/>