FRM FOR OUTLOOK PLUGIN INSTALLATION GUIDE

FRM Solutions, Inc.

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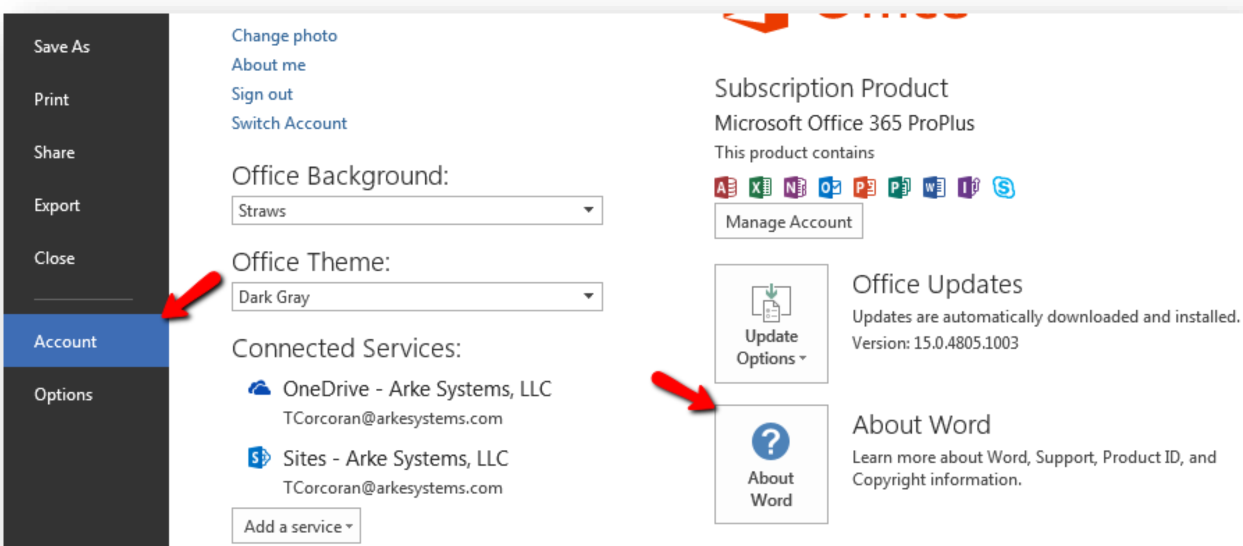
SYSTEM REQUIREMENTS

- Must be a local administrator of their PC or have the ability to download & install software
- Must have Windows XP, Windows Vista, Windows 7, Windows 8 or Windows 10
- Apple users, must have parallels or some equivalent installed.
- Users cannot have a Read Only license type

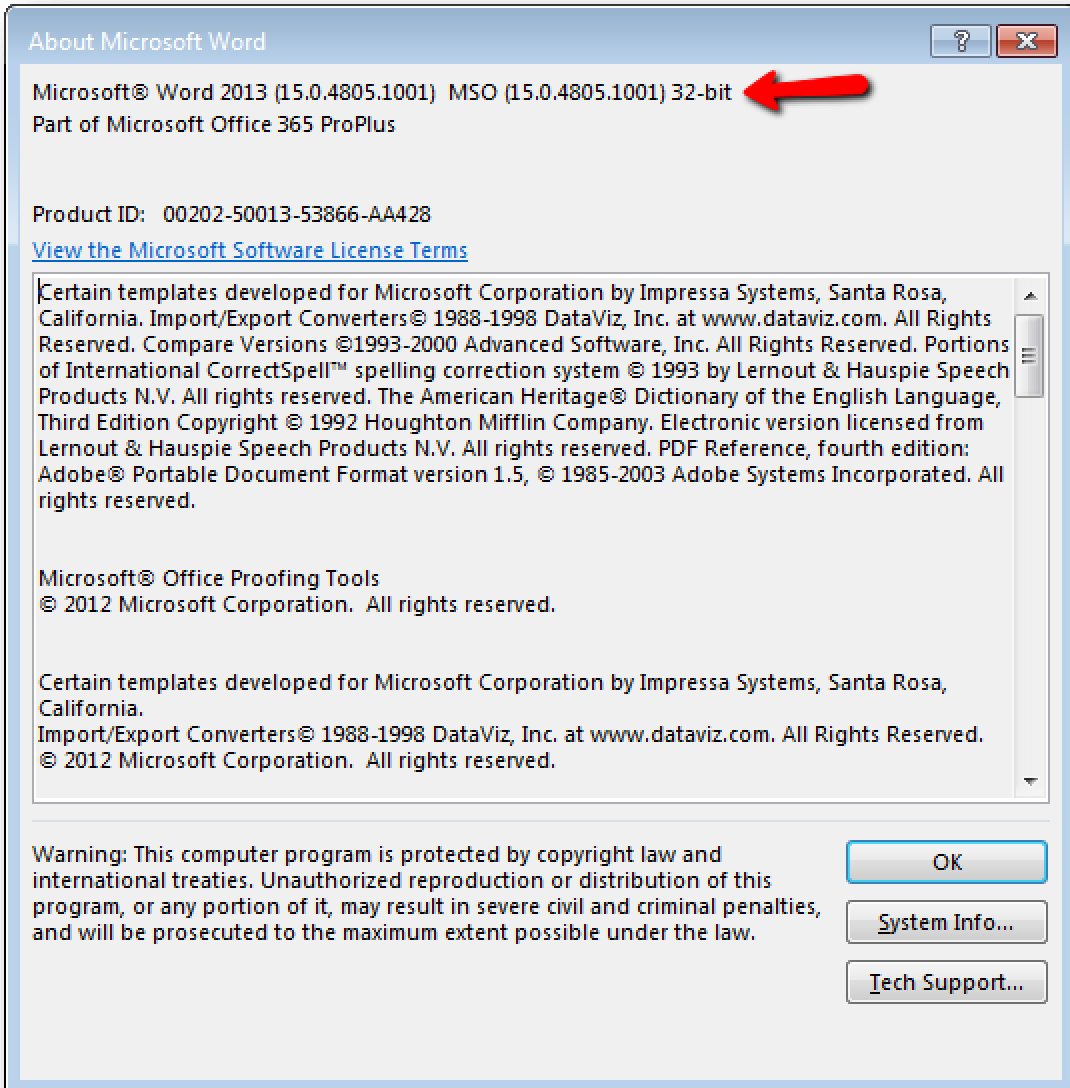
I. DETERMINING THE .BIT VERSION OF YOUR MICROSOFT OFFICE SUITE

Before installing this plugin we must determine the bit version of your Microsoft Office Suite. Please follow the below steps to determine your version.

- Open any Office application (Outlook, Word, Excel, etc.)
- Select **FILE** > **ACCOUNT**
- Click **ABOUT**



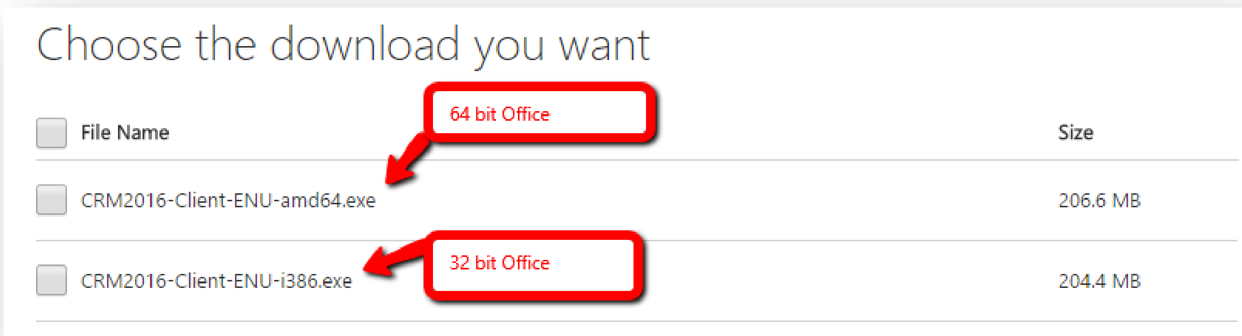
- After selecting ABOUT a dialog box will appear. Note the version (32-bit or 64-bit) as indicated in the screenshot below.



Now that we know what version of Microsoft Office you are running we are prepared to download the package and start the installation.

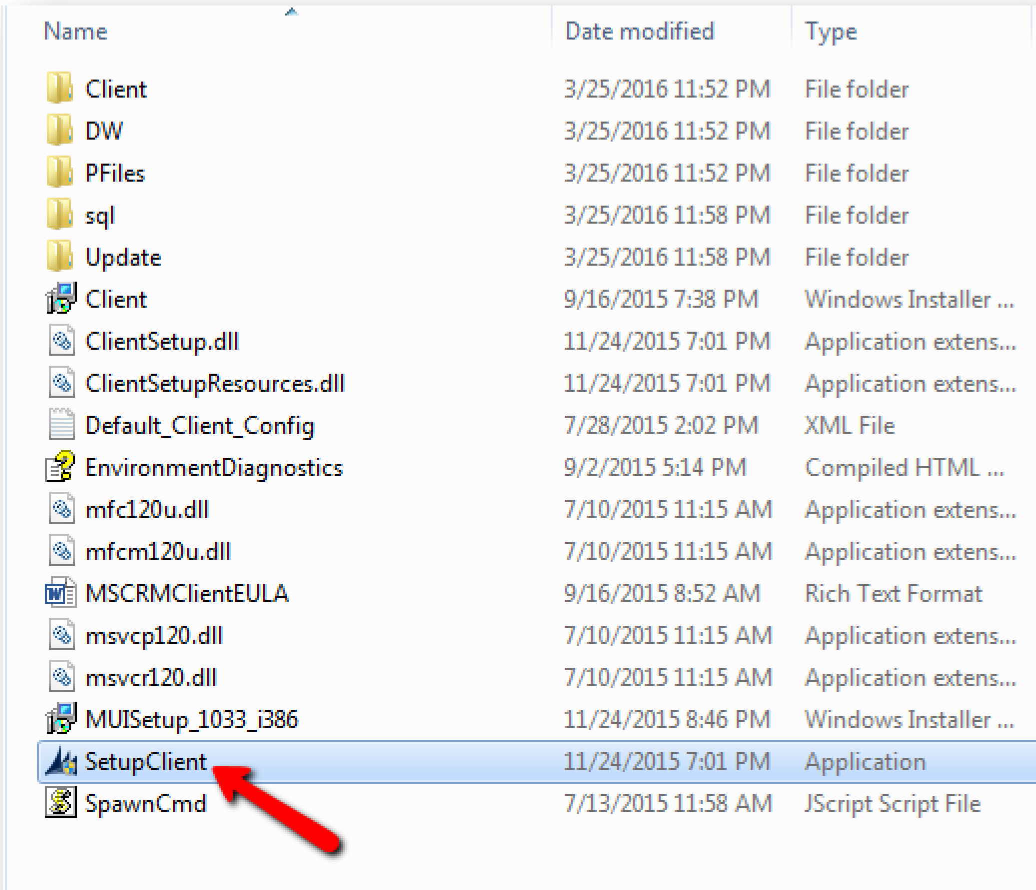
For Dynamics CRM 2016 users [CLICK HERE]

Following your selection you will be prompted by another pop-up window with options for several packages you can install. Please select the correct package as indicated below based on your Office version & FRM version:



Check the box next to the package that is correct for you and select **NEXT.** After the download is completed, run the file and follow the prompts to install and set up the Outlook client. *If you had a previous version of the add-in installed on your computer, you will be asked to upgrade. Click "Upgrade Now" and continue with the process.*

- Extract the files to a new folder on your desktop.
- Once the extraction is complete open the folder and select **SetupClient**



Name	Date modified	Type
Client	3/25/2016 11:52 PM	File folder
DW	3/25/2016 11:52 PM	File folder
PFiles	3/25/2016 11:52 PM	File folder
sql	3/25/2016 11:58 PM	File folder
Update	3/25/2016 11:58 PM	File folder
Client	9/16/2015 7:38 PM	Windows Installer ...
ClientSetup.dll	11/24/2015 7:01 PM	Application extens...
ClientSetupResources.dll	11/24/2015 7:01 PM	Application extens...
Default_Client_Config	7/28/2015 2:02 PM	XML File
EnvironmentDiagnostics	9/2/2015 5:14 PM	Compiled HTML ...
mfc120u.dll	7/10/2015 11:15 AM	Application extens...
mfcm120u.dll	7/10/2015 11:15 AM	Application extens...
MSCRMClientEULA	9/16/2015 8:52 AM	Rich Text Format
msvcp120.dll	7/10/2015 11:15 AM	Application extens...
msvcr120.dll	7/10/2015 11:15 AM	Application extens...
MUISetup_1033_i386	11/24/2015 8:46 PM	Windows Installer ...
SetupClient	11/24/2015 7:01 PM	Application
SpawnCmd	7/13/2015 11:58 AM	JScript Script File

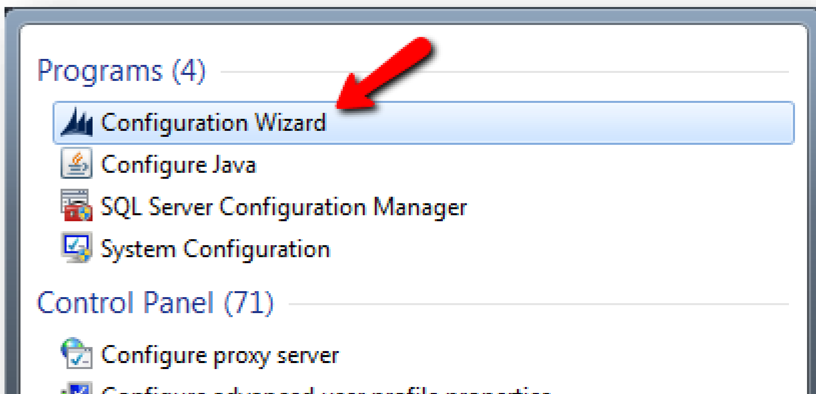
- When asked if Microsoft Dynamics can make changes to your computer select, YES.
- Next you will be asked to accept a license agreement. Accept and click NEXT.
- Package will begin installation. This may take several minutes…
- Once the installation has completed close the Setup window.

III. CONFIGURING THE OUTLOOK PLUGIN

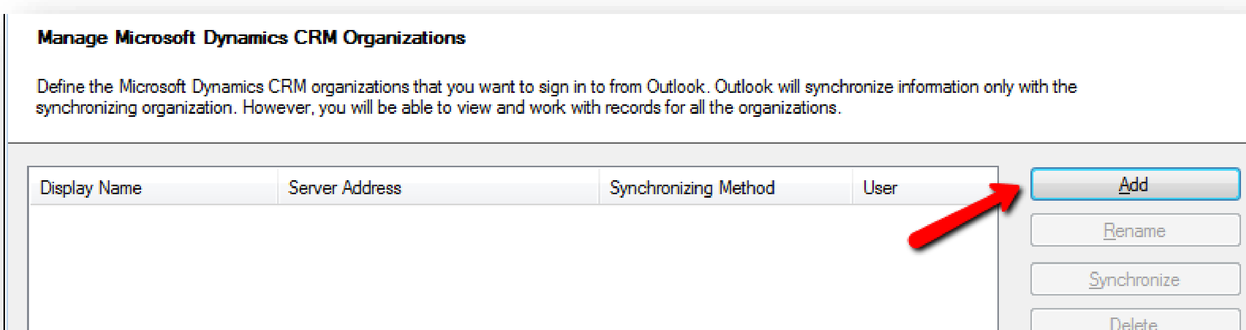
Now that your plugin has been installed it is time to move onto the configuration step. Before proceeding with configuration please close all Microsoft Office applications.

In order to configure the plugin for your organization please follow the steps below:

- *For Windows 7 and below users:* Hit the Start button in the bottom-left of your screen and search & select the CONFIGURATION WIZARD
- *For Windows 8 and above users:* Access your search panel. Search & select the CONFIGURATION WIZARD

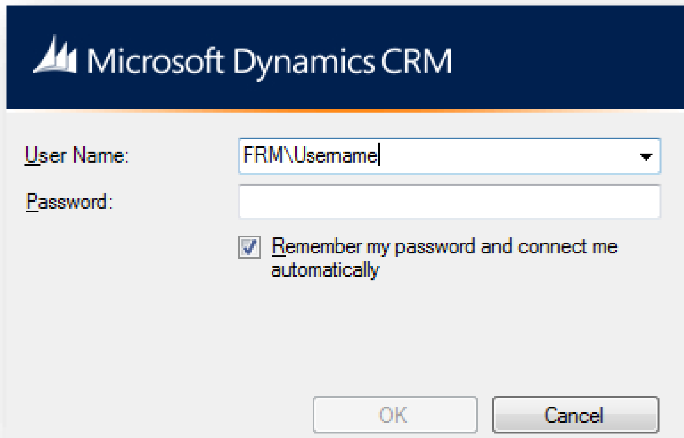


- A window will appear on your screen. Select ADD



-Type in your FRM URL. Be sure to include HTTPS:// and click CONNECT

-A window will appear prompting you for credentials. Please include your domain (FRM), Username and password given to you for logging into FRM. Click OK and please wait while the organization is configured. This may take a few minutes.



- Close the Configuration Wizard

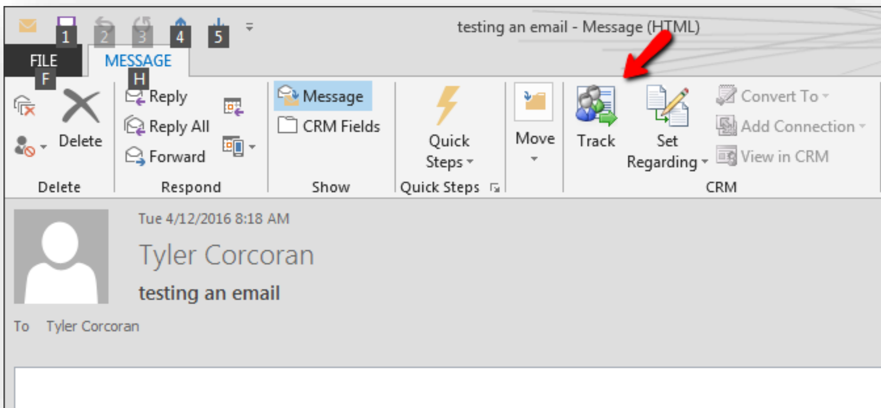
Congratulations! You have successfully installed the CRM for Outlook plugin! Please open Outlook and notice the CRM tab in your ribbon.

Please read along for additional information and FAQ's. For more information on this third-party plugin please see Microsoft's CRM for Outlook Basics eBook here.

IV. COMMON QUESTIONS

Q: ***How do I track an email conversation to a contact?***

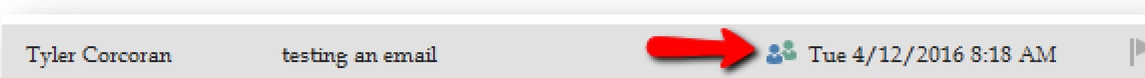
A: In order to track an email conversation to a specific contact in FRM first open the email you would like to track and select TRACK in the ribbon



By hitting track you will assign this email as an Activity in FRM to the sender & receiver of the message. If more emails follow all those part of the conversation will be tracked into FRM as well UNLESS you hit the button indicated in the screenshot above again.

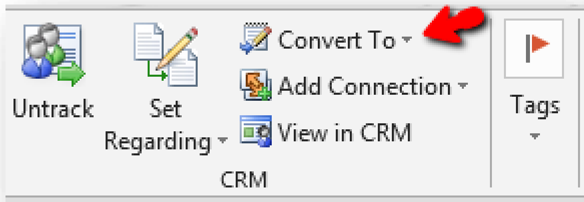
Q: ***How can I tell if an email in my inbox is part of a tracked conversation?***

A: Tracked emails in your inbox are indicated by the icon below



Q: ***How can I convert an email from a contact to a Lead or Opportunity?***

A: Having the email from the contact you would like to convert to a lead open, select CONVERT TO > select LEAD



When converting to an Opportunity, you will be prompted for some information required for the Opportunity record. You must complete that dialog and click CONVERT. This will create a new Opportunity in FRM as well as attach the email in the closed activities.

The opportunity you created will show up under your My Opportunities view in FRM.

Q: ***What happens if a colleague and I track the same email conversation? Will a duplicate activity be created in FRM?***

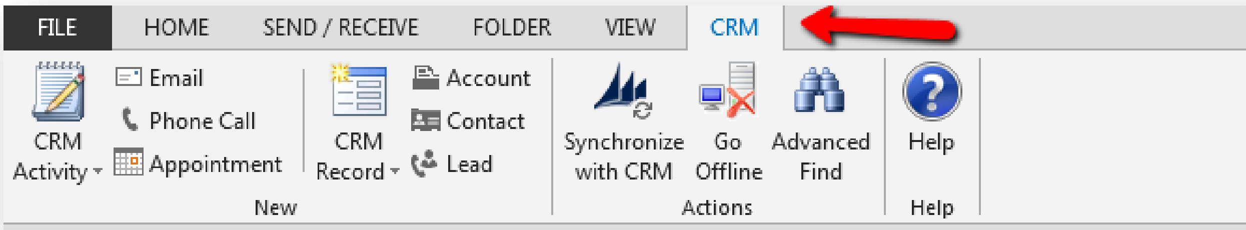
A: No, duplicate activities will not be created.

Q: ***How can I track multiple emails at once?***

A: In order to track multiple emails at one time please select all emails in your inbox you would like to track. You can do this by holding control and clicking multiple emails. With each of those selected please right click and select Track. This may take a moment to process but if completed correctly when the process is finished you will notice the "tracked email" icon appear next to each email.

Q: ***Can I create contacts or activities from Outlook?***

A: Absolutely! The CRM ribbon that is added to Outlook upon installation provides the opportunity to create any record in FRM. With Outlook open please select the CRM tab in your ribbon.



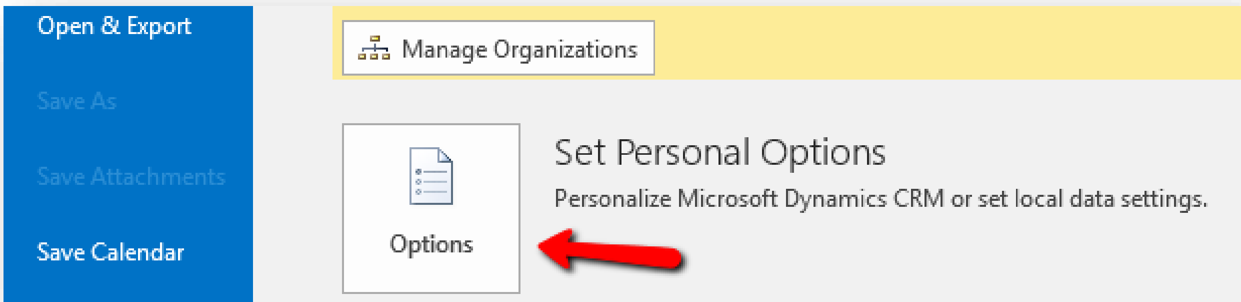
From this ribbon you are able to create Accounts, Leads, Contacts and any kind of activity you would like.

Q: How can I automatically track emails from my FRM contacts, leads or accounts?

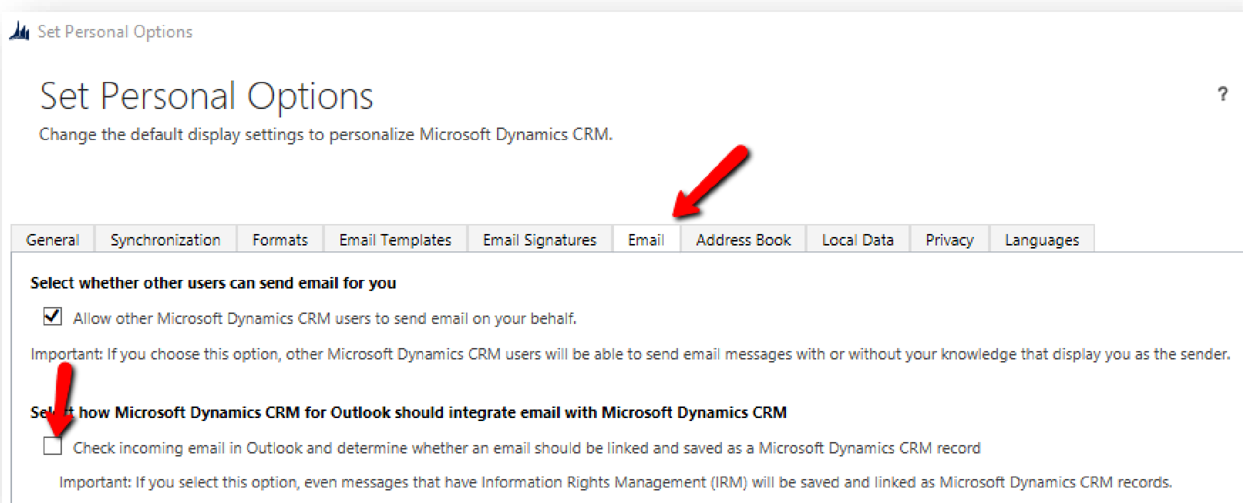
A: If you would like to automatically track emails from your FRM leads or contacts you may enable this option in the plugin settings.

- Within Outlook select File > CRM.

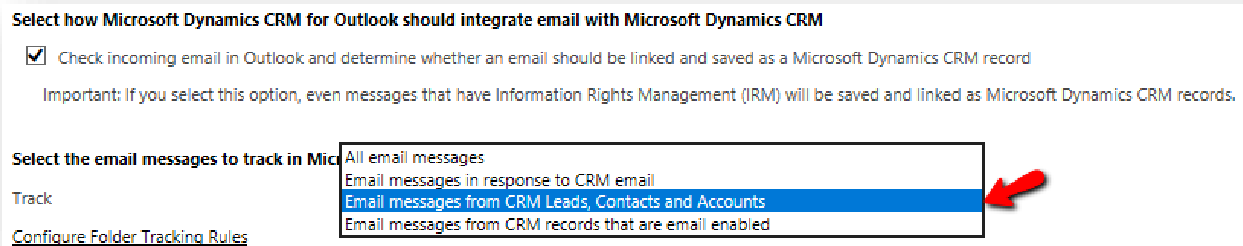
- Select Set Personal Options



- In the pop-up window select the Email tab. Check the indicated box below:



- Select the option indicated below to auto-track emails from your FRM leads, contacts and accounts



- Click ok to commit the change of settings