



# Installing Infor CRM Xbar for Microsoft Outlook

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# Introduction



Infor CRM Xbar for Microsoft Outlook is an add-in to Infor CRM that seamlessly embeds the functionality of CRM into Microsoft® Outlook® 2010 or newer versions. Infor CRM Xbar for Microsoft Outlook enables you to access your most important CRM information and functionality through an intuitive, context-aware window that is “docked” within the Outlook interface.

You can access a wide range of information and activities, including interaction history, follow-up action items, leads generated from e-marketing campaigns, and opportunity management. Work with and modify the CRM information, taking actions and updating the information as necessary, all from within Outlook and without losing sight of your Microsoft Outlook inbox.

Using Infor CRM Xbar for Microsoft Outlook, you can:

- Access a contact in Outlook® by opening e-mail correspondence or calendar activities. The Xbar pane instantly displays key information, activities, and opportunities stored in CRM for that contact.
- Create entirely new contacts, accounts and opportunities, often by quickly and conveniently dragging and dropping existing information from e-mail into the Xbar interface.
- Make changes to contact, calendar and interaction history in the Xbar that automatically update within CRM in real-time, ensuring other team members can immediately see and access the updated information.
- Use Infor Outlook Sync to synchronize Contacts and Calendar between Infor CRM and Microsoft Outlook.
- Use the Infor Microsoft Outlook Integration features:
  - Send to CRM and Record to History
  - Outlook Synchronization of contacts and activities
  - Microsoft Outlook Address Book
  - Drag and Drop E-mail from Microsoft Outlook
  - Send an Infor CRM contact's information in a vCard file format via e-mail.
  - Attach documents from Infor CRM Library to a message in Outlook.

## About this Guide

This document provides instructions for installing Infor CRM Xbar for Microsoft Outlook in an environment where a supported version of Infor CRM is already installed.

## Additional Resources

The following additional documentation is available:

- Compatibility for Infor CRM v8.3 is available in the Infor Online Compatibility Matrix (OCM).
  - a. Sign in to the InforXtreme Portal web site: [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).
  - b. Expand the Environment menu, and then click Online Compatibility Matrix.

Click Help for a video explaining the features of the OCM.

- The Infor CRM Xbar help file contains tips for performing basic actions. In the Xbar sidebar, open the **Global** menu and then click **Help**.
- Infor Xbar for Outlook versions 1.3.7 and later support field level security. See the Infor CRM Web Client help for information about field level security.
- The following KB articles are available for advanced installation:
  - Command line prompts for installing Infor CRM Xbar for Microsoft Outlook are documented in KB1702323.
  - Instructions for modifying registry settings are documented in KB1885758.

To access KB articles go to infor Xtreme: [www.inforxtreme.com](http://www.inforxtreme.com).

## Prerequisites

Before installing Xbar, you must:

- Ensure the version of Saleslogix or Infor CRM installed is one of the following:
  - 8.1.0.8
  - 8.2.0.2
  - 8.3 and later.
- Ensure your version of Microsoft Outlook is the desktop version of 2010, 2013, 2016, or Office 365.



Xbar is not supported for the browser-based version of Microsoft Outlook.



Xbar requires that the following components also be installed:

- Visual Studio 2010 Tools for Office Runtime
- Microsoft .NET Framework 4.6.1 (Web Installer)
- Microsoft .NET Framework 4 (Web Installer)

If the Xbar installer detects these tools are not already installed on a user's machine, it will install them.



Do not configure Outlook sync and Infor CRM Exchange Link for the same Infor CRM user, Mailbox, and folder. Doing so may cause phantom updates to be detected and result in data exchange issues.

## Upgrading to Infor CRM Xbar for Microsoft Outlook

Outlook Integration functionality was previously released to the Infor CRM Web Client users as part of the Infor CRM Desktop Integration, and to Infor CRM Windows Client users part of the base product.

- If versions of these features are installed, and your version of Infor CRM is supported, the Infor CRM Xbar for Microsoft Outlook installation program logic will detect and uninstall the pieces.
- If your version of Infor CRM is not supported, the Infor CRM Xbar for Microsoft Outlook installation will abort.

## Tasks for Administrators

Before installing Infor CRM Xbar for Microsoft Outlook, you must:

- Ensure you meet the system requirements. See the Compatibility Guide for the hardware and software required.
- Ensure the version Infor CRM or Saleslogix installed is a supported version and that it has a functioning Web environment. (This is required even if your implementation is Windows Client only.) See the *Infor CRM Implementation Guide* for your version of Infor CRM for information on setting up a functioning Web environment.
- Have a Web Server with a valid Secured Sockets Layer (SSL) security certificate installed. This can be the Web Server where you deployed your SLX Client portal.
- Have a successfully-deployed SData portal. This means that the following IIS settings have already been configured to use SData:
  - Enable basic authentication.
  - Disable Windows Integration Authentication.

If these settings are not in place, see the Application Architect help file topic called "Configuring the SData and Process Host Portal".

You can confirm that SData is set up correctly by typing the following URL into your browser:

`http://<servername>/sdata/$system/adapters`. Enter the user credentials of the user that SData is configured under (for example, Admin). The adapters page should load and list the available feeds.

For information about troubleshooting your SData portal deployment, see the Application Architect help topic called "Configuring the SData and Process Host Portals".

- If your installation will use the Calender SData push, ensure you have configured SData Sync. For information about configuring SData Sync, see the topic called "Using the SData Sync Configuration View" in the Infor CRM Web Client online help.
- If your Installation will use Outlook Sync, ensure that you have enabled the Sync integration in the Infor CRM Web Client. For information about enabling Outlook Sync, see the topic called "Configuring Outlook Sync Integration" in the Infor CRM Web Client online help.
- Determine if your installation will use Windows Authentication. If so, and you have not already configured Windows Authentication on the SData portal, follow the steps in the Administrator help topic called "Configuring Windows Authentication for Windows Server".
- Ensure each Xbar user has been assigned the Standard User Role in the Core product. For information on assigning user roles, see the topic called "User Detail View" in the Web Client help.
- Ensure each user who will be installing Infor CRM Xbar for Microsoft Outlook has Administrator rights for the computer where he or she will be performing the installation.
- If your installation includes Infor CRM Windows Network Client users, download the InforCRM\_Xbar\_1.3.7.zip to a convenient location and share that location with your users.
- Share the following information with each of your Xbar users:
  - **User Name:** Type your username. This is the username you use to log on to the CRM Clients.

- **Password:** Type your password. This is the password you use to log on to the CRM Clients.
- **Service URL:** This is the URL for your SData portal. For example: <http://web.address.com/Sdata>. If you do not have this information, contact your Administrator.
- **Client URL:** This is the URL for your Windows or Web Client. For example, <http://web.address.com/SLXClient>. If you do not have this information, contact your Administrator.



- This field is a connection to the Web Client. It is not required but if it is left blank, you will be unable to launch the Web Client from the icon within Xbar.
- If this field is left blank and the Windows Client is installed on your machine, clicking the icon within Xbar will open the Windows Client.

# Installing Xbar

This chapter describes the process for installing Infor CRM Xbar for Microsoft Outlook.

## Before beginning this section . . .

- Understand the prerequisites described in ["Prerequisites" on page 2](#)
- Your Administrator must have prepared the environment for Infor CRM Xbar for Microsoft Outlook installation as described in ["Tasks for Administrators" on page 3](#).



All references to the CRM Core product, CRM Clients, Web Client, LAN Client, Administrator, and database refer to your Infor CRM or Saleslogix product installation unless otherwise specified.

## To install

1. Do one of the following:
  - If you are an **Infor CRM Web Client** user:
    - a. Sign in to the **Infor CRM Web Client**, expand the **Tools** menu and then click **Options**.
    - b. In the **Options** window, click **Install Xbar for Outlook**.  
The Infor CRM Xbar Setup.exe is copied to your download folder.
  - If you are an **Infor CRM Windows Client** user:
    - a. Browse to the location provided by your Infor CRM Administrator and copy the **InforCRM\_Xbar\_1.3.7.zip** to any convenient folder.
    - b. Extract the zip file.
2. Click **Infor CRM Xbar Setup.exe**, and then click **Install**.
3. After the **Setup Successful** message appears, click **Close**.
4. Start Microsoft Outlook.
5. In **Infor CRM Connection Options**, click the **Connections** tab and complete the following.
  - **Use Windows Authentication**: Select this check box if you use your Windows user name and password to sign in to the Windows or Web Clients.
  - **User Name**: Type your username. This is the username you use to log on to the CRM Clients.
  - **Password**: Type your password. This is the password you use to log on to the CRM Clients.
  - **Service URL**: This is the URL for your SData portal. For example: `http://web.address.com/Sdata`. If you do not have this information, contact your Administrator.

- **Client URL:** This is the URL for your Windows or Web Client. For example, <http://web.address.com/SLXClient>  
If you do not have this information, contact your Administrator.



- This field is a connection to the Web Client. It is not required but if it is left blank, you will be unable to launch the Web Client from the icon within Xbar.
- If this field is left blank and the Windows Client is installed on your machine, clicking the icon within Xbar will open the Windows Client.



If you are upgrading an existing installation of Xbar, you may be automatically signed into Xbar using your prior credentials. Should you need to use different credentials, you can do so by expanding the 'Global' menu, clicking Settings, and making your changes in the Server Configuration screen.

## Getting Started

Use the information in this section to begin working with Infor CRM Xbar for Microsoft Outlook

### Getting started with the Xbar side panel

In Microsoft Outlook, click an email. A Member card for everyone listed on that email appears in the Xbar pane. A Member is anyone in the To, From, or CC fields in a Microsoft Outlook email. If a Member is not already in the CRM database as a User, Contact, or Lead, only their name and email address appears in the Member card.

### Finding Help



Click this icon in Infor CRM Xbar for Microsoft Outlook to open the Global menu and access the Xbar help file.

Help for Outlook Integration features is available to Web Client users in the Web Client help and to Windows Network Client users from the Infor CRM Outlook Sync help file.

### Changing Language

Infor CRM Xbar uses Microsoft Outlook language settings and will display in the same language as your version of Microsoft Outlook.

### Getting Started with Outlook Sync

For information about working with Outlook Sync, see the online help file available from the question mark icon in the Infor CRM Connection Options box.