

SATUIT TECHNOLOGIES

Outlook Add-In 3.0 Installation Guide

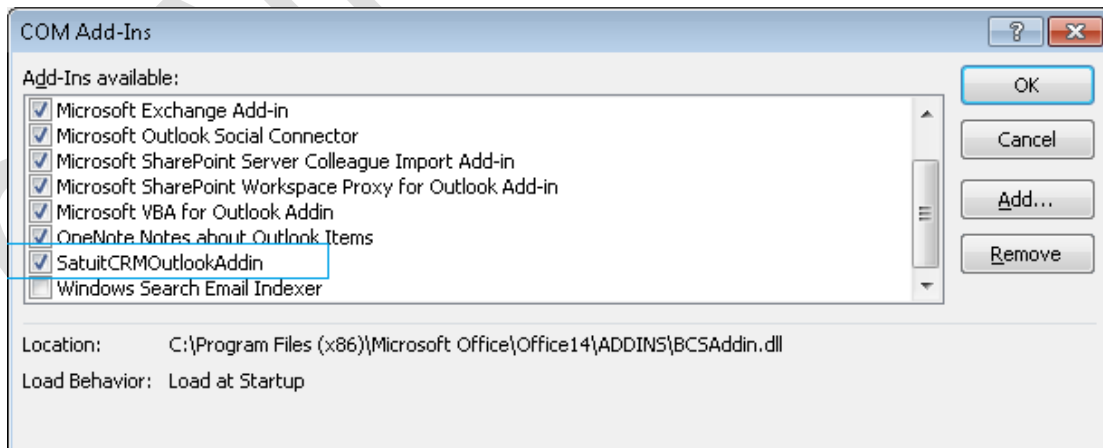
IMPORTANT: It is strongly recommended that this application be installed only by an IT Administrator.

1. Pre-Installation Notes

- SatuitCRM Outlook Add-In is a Microsoft Outlook Add-In designed to import emails, appointments, tasks, and contacts from Outlook into SatuitCRM. It is designed to work with MS Office 2007 thru 2013.
- This version of the Outlook Add-In requires SatuitCRM v12.4 or higher.
- The Add-In setup.exe file must be run as an **Administrator**. The reason for this is that the Add-In is installed for all users on the machine and therefore needs to access the machine's registry settings.

2. Installation for Individual Users

1. Right click on the setup.exe file to **Run as Administrator**
2. Follow the installation steps
3. After the installation, it is necessary to go into MS Outlook and ensure that the Add-In is enabled by:
 - a) Navigate to File -> Options -> Add-Ins -> Manage COM Add-Ins -> Go
 - b) Check the checkbox next to SatuitCRMOutlookAddin
 - c) Click OK



After successfully installing and enabling the Add-In, the user will need to navigate to configure the SatuitCRM Outlook Add-In setting in MS Outlook to connect to SatuitCRM by:

1. Select the Add-Ins menu in MS Outlook
2. Select Satuit Technologies -> Settings -> Account Information to enter the user account and SatuitCRM URL link.

SatuitCRM Settings

Account Information | **Settings**

User Name
|

Password
|

URL
|

Proxy Address
|

☐ Use Windows Single Sign-On

Test Connection

Save Cancel

3. Automated Deployment

The included msi file can be used for automatic deployment to multiple users.

Outlook Add-In On-Premise Installation

The following settings are required to enable SSO (Single Sign On) for On-Premise installations:

1. On the SatuitCRM Application's Web Server, click on Authentication. Right click on Windows Authentication and Enable the setting.
2. On the SatuitCRM Application's Web Server, click on Authentication. Right click on Anonymous Authentication and Disable the setting.

