

INSTALLING OUTLOOK CRM



FIND OUT WHETHER YOU ARE USING 32-BIT OR 64-BIT OUTLOOK

Open Outlook. To find out whether your Outlook is the 64-bit or the 32-bit version:

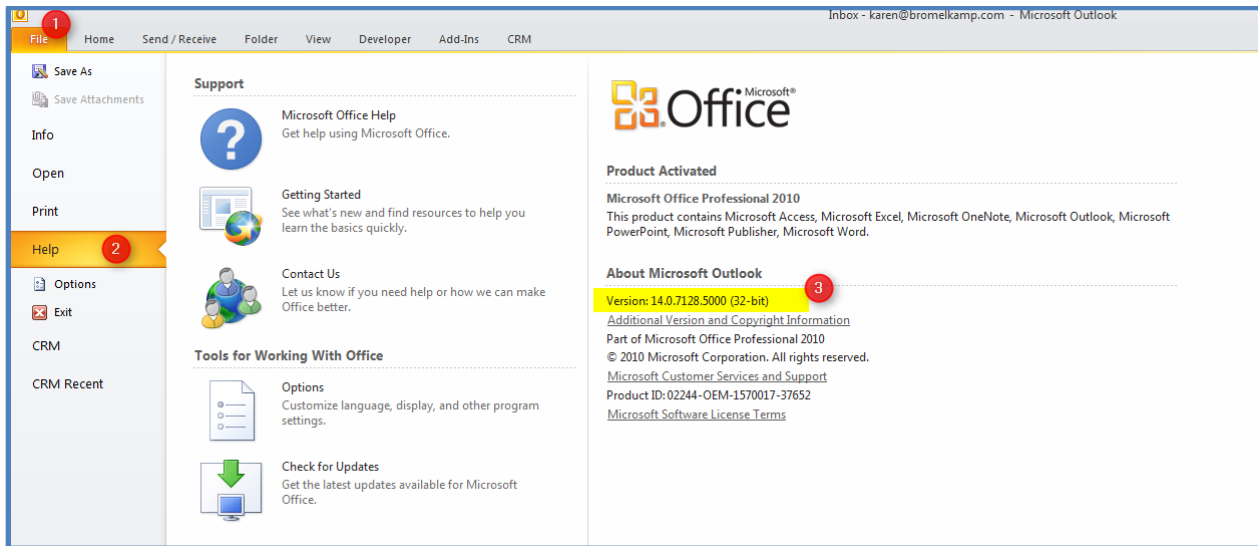
1. Click **FILE** in Outlook.

In Outlook 2013 or 2015 or 365:

1. Select **OFFICE ACCOUNT**. Click **ABOUT OUTLOOK** under **PRODUCT INFORMATION**.
2. Look for 64-BIT or 32-BIT included with the Outlook version information near the top of the **ABOUT MICROSOFT OUTLOOK** dialog.

In Outlook 2010:

2. Select **HELP**.
3. Look for 64-BIT or 32-BIT included with the Outlook version information under **ABOUT MICROSOFT OUTLOOK**.



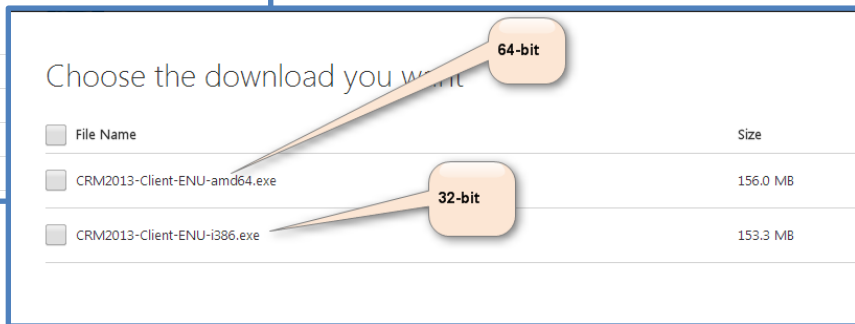
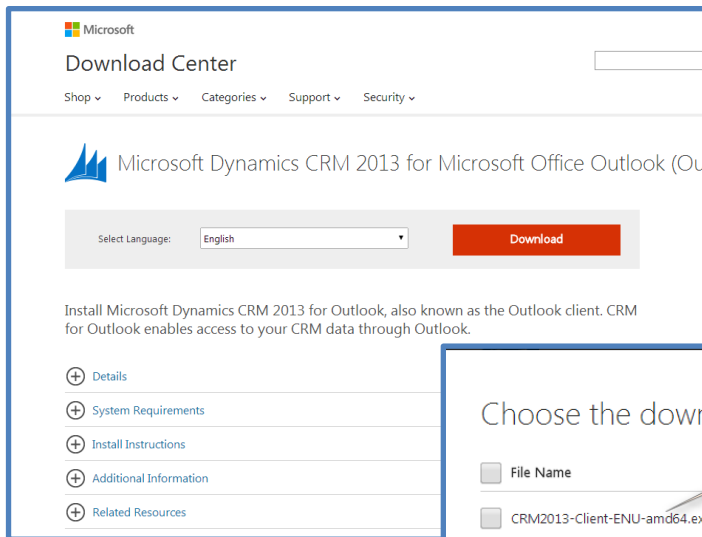
BEFORE YOU BEGIN THE DOWNLOAD AND INSTALLATION OF OUTLOOK CRM:

- Be sure you have closed Akoya and Outlook before you begin this process (we recommend you close all programs.)
- If you do not have permissions to update/install files on your computer, you may need to have a system administrator complete this installation for you.

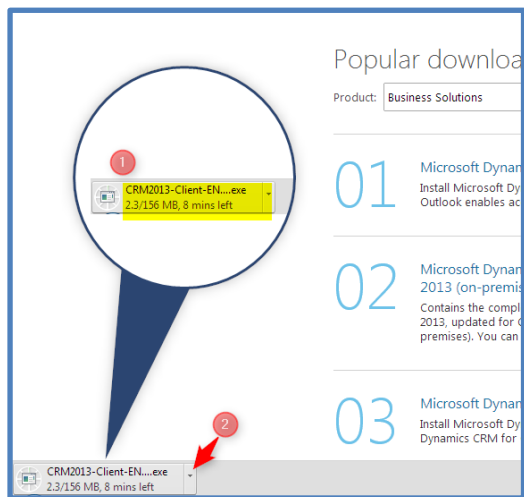
DOWNLOAD THE APPROPRIATE UPDATE FILE

In Outlook 2010 or 2013:

Go to the following website: <http://www.microsoft.com/en-us/download/details.aspx?id=40344> and click on the **DOWNLOAD** button. Select the appropriate version of the update.

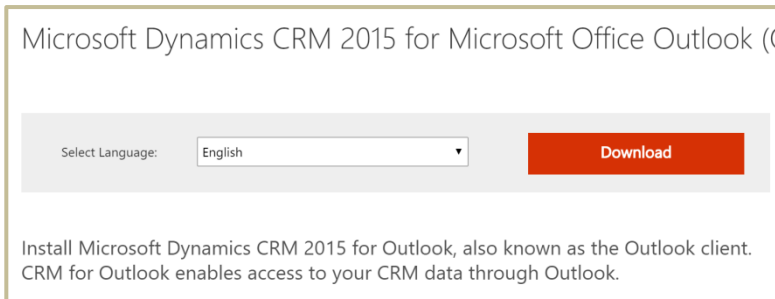


When the file download has completed, click on the dropdown arrow and select **View File in Folder**.



In Outlook 2015:

Go to the following website: <https://www.microsoft.com/en-us/download/details.aspx?id=45015> and click on the **DOWNLOAD** button. Select the appropriate version of the update.

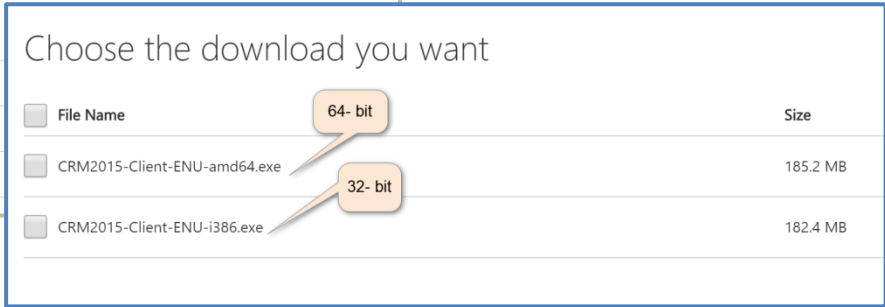


Microsoft Dynamics CRM 2015 for Microsoft Office Outlook (C

Select Language: English Download

Install Microsoft Dynamics CRM 2015 for Outlook, also known as the Outlook client. CRM for Outlook enables access to your CRM data through Outlook.

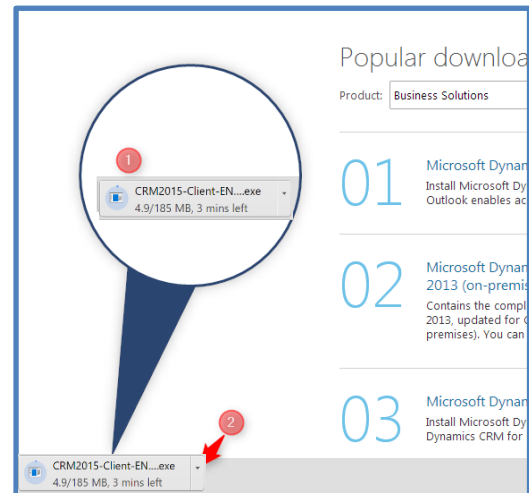
- + Details
- + System Requirements
- + Install Instructions
- + Related Resources



Choose the download you want

File Name	Size
CRM2015-Client-ENU-amd64.exe	185.2 MB
CRM2015-Client-ENU-i386.exe	182.4 MB

When the file download has completed, click on the dropdown arrow and select **View File in Folder**.



Popular download

Product: Business Solutions

- 01 Microsoft Dynar
Install Microsoft Dy
Outlook enables ac
- 02 Microsoft Dynar
2013 (on-premis
Contains the compl
2013, updated for C
premisses). You can
- 03 Microsoft Dynar
Install Microsoft Dy
Dynamics CRM for

In Office 365:

Go to the following website: <https://www.microsoft.com/en-us/dynamics/crm-customer-center/set-up-dynamics-365-for-outlook.aspx> and click on the CRM 2015 for Outlook (your Office may be 365, but the CRM version is 2015).

Set up Dynamics 365 for Outlook

Dynamics 365 for Outlook CRM 2015 for Outlook CRM 2013 for Outlook

If you're like many people, you use Microsoft Office Outlook as your communications, scheduling, and contact management hub for business. You can continue to use the familiar Outlook interface and integrate Microsoft Dynamics 365 at the same time by using Microsoft Dynamics CRM 2015 for Outlook. Dynamics CRM 2015 for Outlook can also provide access to Dynamics 365 data while you're offline. More information: [Do your Dynamics 365 work in Outlook using Dynamics 365 for Outlook](#)

Watch a video on setup, configuration, and upgrading (5:19)

Important

- To install and use Dynamics CRM 2015 for Outlook, your organization must be running Microsoft Dynamics CRM Server 2015.
- Microsoft Dynamics CRM 2013 for Microsoft Office Outlook is not compatible with Microsoft Dynamics CRM Server 2015. At a minimum, you must update CRM 2013 for Outlook to UR1 to use it with Microsoft Dynamics CRM Server 2015. More information: [TechNet: Upgrading from CRM 2013 for Outlook to CRM 2015 for Outlook](#)

Step 1: Review installation prerequisites

Step 2: Download the software

Step 3: Configure Dynamics 365 for Outlook

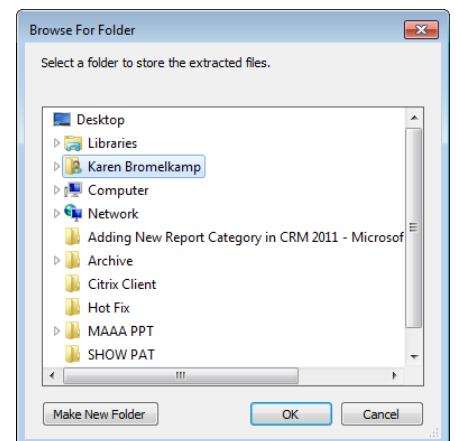
RUN THE UPDATE

Double click on the file that was downloaded; this will begin the extraction and update process.

If you see any security messages that ask if you'd like to **RUN** or **CANCEL** the process, click **RUN**.

You will be prompted about where the extracted files should be stored. We suggest you accept the default, but you can select any folder you'd like.

- Once the files have been extracted, you will be asked to review and accept the License Agreement. Click on the "I accept..." check box, then click the **NEXT** button
- The actual installation of Outlook CRM will take anywhere between 10 – 30 minutes. BE PATIENT. It may look like the update has 'stalled' (the install progress bar will be almost complete), but it is still working.

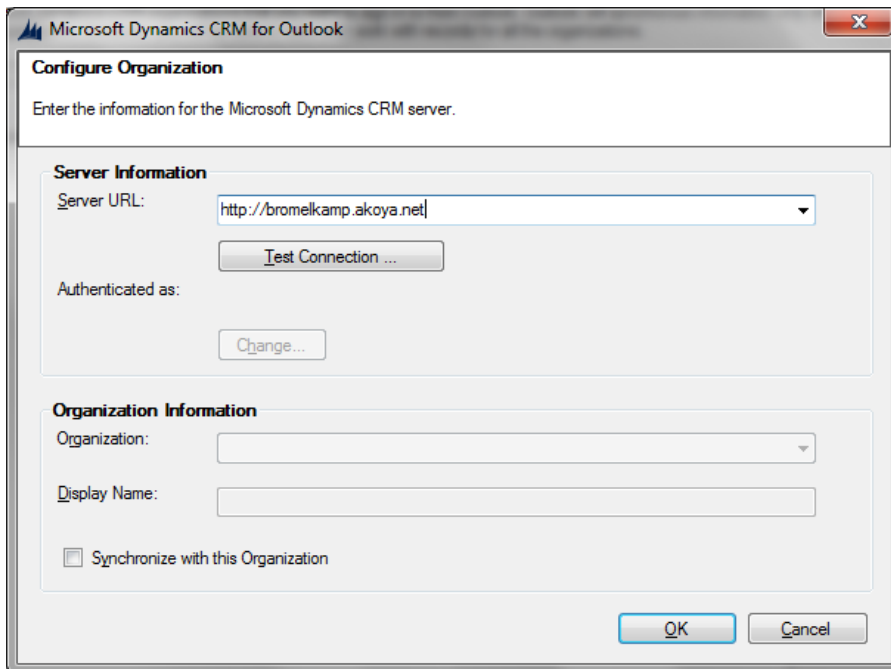


- Some of you may notice that the process is checking for additional Microsoft updates that are needed for Outlook CRM to work. Let the process finish.
- At the end of the installation process, you will be prompted to restart your computer. You must restart the computer for the installation to be complete.

ADDING OR CHANGING URL THAT OUTLOOK CRM SYNCs TO:

1. Close Outlook.
2. Go to **Start, All Programs**.
3. Find **Microsoft Dynamics 2013** or **Microsoft Dynamics 2015** – click on it, and select the sub-item **Configuration Wizard**.
4. This will either be blank if you've never had Outlook CRM operational, or there is an existing connection listed.
 - a. Although you can have multiple connections, you can only sync to one at a time
5. Delete the existing connection.
6. Click the **Add** button and add the new connection:
Enter your organization's Akoya site URL (<https://{{foundation}}.akoya.net>).

Example below we are using: <https://bromelkamp.akoya.net>



7. Make sure you check the **Synchronize with This Organization** button, add the organization and display names – the Display Name shows on the Outlook Navigation pane.
8. Do the **Test Connection** – you will need to know your Akoya user name (email) and password.