

Microsoft Dynamics CRM for Outlook Installing Guide for use with Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2016

Microsoft Dynamics CRM

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Microsoft Dynamics CRM for Outlook Installation Instructions for use with Dynamics CRM Online

Microsoft Dynamics CRM for Outlook enables access to the same data through Microsoft Office Outlook as the Microsoft Dynamics CRM Online web client. Dynamics CRM for Outlook is targeted at Microsoft Dynamics CRM Online users who need access to CRM data while they are using the familiar Microsoft Outlook application.

After you install and configure Dynamics CRM for Outlook, an individual user can use it to access Microsoft Dynamics CRM data. If a computer is shared by several users (that is, each user has a separate logon account and is a valid Microsoft Dynamics CRM Online user), you must configure Dynamics CRM for Outlook by running Dynamics CRM for Outlook configuration for each user.

A user who has offline capability configured can access Microsoft Dynamics CRM Online data when they are not connected to a network. You can add offline capability at either of the following times:

- During installation of Dynamics CRM for Outlook.
- After installation has completed. In this case, a user can add offline capability by clicking **Go Offline** in Microsoft Outlook. This starts the installation of additional required components and stores a copy of the user's Microsoft Dynamics CRM Online data locally. Subsequent offline sessions require no additional installations, but may require updating the local copy of the user's data.

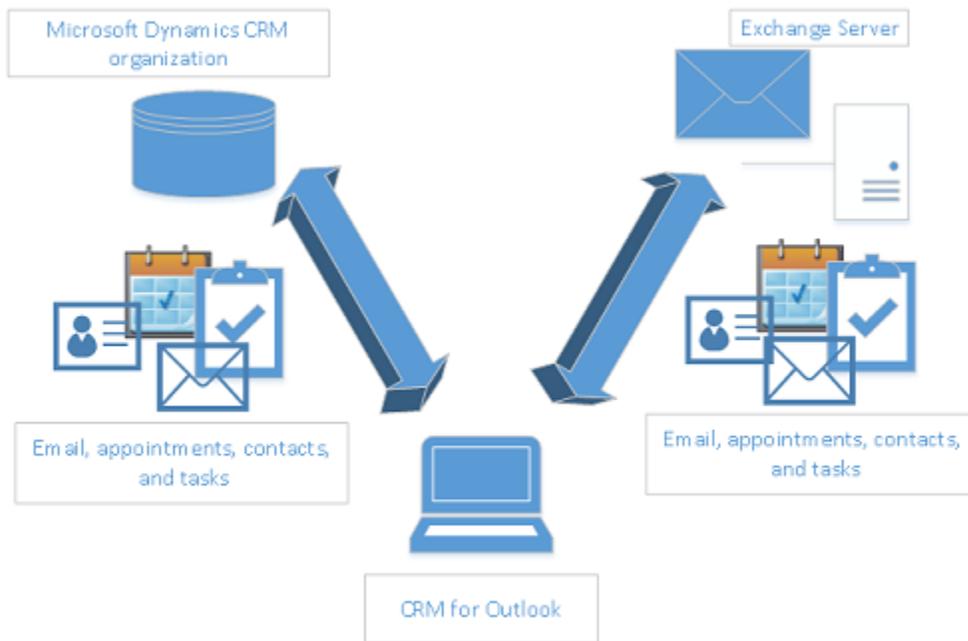


Note

Although multiple users can share a computer that uses Dynamics CRM for Outlook, only one user can go offline on that computer.

CRM for Outlook

Microsoft Dynamics CRM for Outlook can synchronize email messages, contacts, tasks, and appointments between Microsoft Office Outlook and Microsoft Dynamics CRM (client-to-server synchronization). Similar to server-side synchronization, synchronization filters are used to synchronize messaging data from Microsoft Dynamics CRM to Outlook or Exchange. Manually tracked or Inbox-rule based tracking is used to synchronize messaging data from Exchange or Outlook to Microsoft Dynamics CRM.



When you use Dynamics CRM for Outlook, there are a few synchronization concepts that are helpful to understand. Notice that, to have any of this Dynamics CRM for Outlook functionality, each Microsoft Dynamics CRM user must run the Dynamics CRM for Outlook add-in and the Microsoft Dynamics CRM user mailbox record must be configured appropriately.

When you select Dynamics CRM for Outlook as the messaging data synchronization method in the user mailbox record, email, contacts, appointments, and tasks created in Outlook are synchronized with Microsoft Dynamics CRM Online or Microsoft Dynamics CRM (on-premises).

CRM for Outlook synchronization concepts

Note the following concepts when you use Dynamics CRM for Outlook as the synchronizing agent:

1. **Synchronizing organization.** Only one organization can be designated as the synchronizing organization. If you have more than one Microsoft Dynamics CRM organization configured, you can view the synchronizing organization in the Microsoft Dynamics CRM Configuration Wizard. The Configuration Wizard is an application included with Dynamics CRM for Outlook. Notice that you can still connect to additional organizations by using Dynamics CRM for Outlook. However, when an organization is not defined as the synchronizing organization in Dynamics CRM for Outlook, messaging data in Outlook does not synchronize with that organization.
2. **Synchronizing mailbox.** Only one Exchange or POP3 mailbox can be designated for a single Microsoft Dynamics CRM user. You cannot designate multiple mailboxes and you cannot map more than one Microsoft Dynamics CRM user to a single Exchange or POP3 email mailbox. This mailbox is referred to as the primary mailbox.

3. **Synchronizing CRM for Outlook instance.** Only one Dynamics CRM for Outlook instance can be designated as the Synchronizing Dynamics CRM for Outlook instance. When you sign-in to an organization from another PC that is running Dynamics CRM for Outlook that is not the synchronizing Dynamics CRM for Outlook instance you will receive a dialog message asking whether you want to designate the current Dynamics CRM for Outlook instance as the synchronizing Dynamics CRM for Outlook instance. Notice that, when you choose not to set the Dynamics CRM for Outlook instance as the synchronizing instance, you can still connect to the Microsoft Dynamics CRM organization and perform tasks, but messaging data in Outlook will not synchronize with the Microsoft Dynamics CRM organization.
4. **Go Offline data sync.** Go offline capability uses Microsoft SQL Server Express as the local data store. When you go offline or come back online, Dynamics CRM for Outlook synchronizes the records for the entity types you choose with the Microsoft Dynamics CRM Online or Microsoft Dynamics CRM (on-premises). When you go offline or come back online, a separate synchronization process takes place that is not part of the messaging data synchronization described here. Go offline capability allows users to create, modify, or delete records offline that can be later synchronized to Microsoft Dynamics CRM Online or Microsoft Dynamics CRM (on-premises) when Dynamics CRM for Outlook comes online again.

See Also

[Set up CRM for Outlook](#)

[Help & Training: Synchronizing data with Outlook or Exchange FAQ](#)

Microsoft Dynamics CRM for Outlook hardware requirements

The following table lists the minimum recommended hardware requirements when you run Microsoft Dynamics CRM for Outlook in either online only or go offline enabled modes.

Component	Online only mode	Go Offline enabled mode
Processor	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set	x86- or x64-bit 1.9 gigahertz (GHz) or faster dual core processor with SSE2 instruction set
Memory	2-GB RAM or more	4-GB RAM or more
Hard disk	1.5 GB of available hard disk space	2 GB of available hard disk space 7200 RPM or more
Display	Super VGA with a resolution of 1024 x 768	Super VGA with a resolution higher than 1024 x 768



Note

Actual requirements and product functionality may vary based on your system configuration and operating system.

Running Microsoft Dynamics CRM on a computer that has less than the minimum recommended requirements may result in inadequate performance. For the best performance, we recommend running 64-bit versions of Microsoft Windows, Microsoft Office, and Dynamics CRM for Outlook.

Network requirements

Microsoft Dynamics CRM is designed to work best over networks that have the following elements:

- Bandwidth greater than 50 KBps (400 kbps)
- Latency under 150 ms

These values are recommendations and don't guarantee satisfactory performance. The recommended values are based on systems using out-of-the box forms that aren't customized. If you significantly customize the out-of-box forms, we recommend that you test the form response to understand bandwidth needs. More information: [Verify network capacity and throughput for Dynamics CRM clients](#)



Note

Successful network installation of Dynamics CRM for Outlook requires a reliable and high-throughput network. Otherwise, installation might fail. The recommended minimum available bandwidth of the network connection is 300 Kbps.

See Also

[CRM for Outlook](#)

[Set up CRM for Outlook](#)

Microsoft Dynamics CRM for Outlook software requirements

Dynamics CRM for Outlook works the way that you do by providing a seamless combination of Microsoft Dynamics CRM features in the familiar Microsoft Outlook environment. This section lists software requirements for Dynamics CRM for Outlook and Microsoft Dynamics CRM for Microsoft Office Outlook with Offline Access.

One of the following operating systems is required:

- Windows 10 (64-bit and 32-bit versions)*
- Windows 8.1 or Windows 8 (64-bit and 32-bit versions)
- Windows 7 Service Pack 1 (64-bit and 32-bit versions)
- Windows Server 2012 when running as a Remote Desktop Services application

*This feature is available only if your organization has updated to Microsoft Dynamics CRM Online 2015 Update 1.1, Microsoft Dynamics CRM 2015 Update 0.2 or Microsoft Dynamics CRM 2016.

In this topic

[Microsoft Dynamics CRM for Outlook software feature prerequisites](#)

[Additional Microsoft Dynamics CRM for Outlook software requirements](#)

Microsoft Dynamics CRM for Outlook software feature prerequisites

The following software must be installed and running on the computer before you run Microsoft Dynamics CRM for Outlook Setup:

Web Browser. One of the following:

- Internet Explorer 11
- Internet Explorer 10

Important

Internet Explorer 9 or earlier versions are not supported for use with Dynamics CRM for Outlook.

Microsoft Office. One of the following:

- Microsoft Office 2016 (when available)*
- Microsoft Office 2013
- Microsoft Office 2010

*This feature is available only if your organization has updated to Microsoft Dynamics CRM Online 2015 Update 1.1, Microsoft Dynamics CRM 2015 Update 0.2 or Microsoft Dynamics CRM 2016.

More information: [CRM for Outlook support matrixes](#)

Important

Dynamics CRM for Outlook isn't supported with Office for Mac versions of Microsoft Office Outlook.

To install and run the 64-bit version of Dynamics CRM for Outlook, a 64-bit version of Microsoft Office is required.

Before you run the Configuration Wizard to configure Dynamics CRM for Outlook, a Microsoft Office Outlook profile must exist for the user. Therefore, Microsoft Outlook must be run at least once to create the user's Microsoft Outlook profile.

Both the web application and Dynamics CRM for Outlook require JavaScript enabled for certain features, such as Activity Feeds, dashboard areas, and the display of certain panes or menus. Although the web application displays error messages when JavaScript is disabled, Dynamics CRM for Outlook doesn't. To verify if JavaScript is enabled in Internet Explorer, start Internet Explorer, on the **Tools** menu click or tap **Internet options**. On the **Security** tab, click or tap **Internet**, and then click or tap **Custom level**. In the **Security Settings** dialog box under **Scripting**, **Active scripting** must be set to **Enable**.

The Indexing Service (now known as the Windows Search Service, or WSS) is required by users who will set up and use Dynamics CRM for Outlook and its Help file in offline mode.

Microsoft Dynamics CRM. One of the following editions of Microsoft Dynamics CRM must be available so that Dynamics CRM for Outlook can connect to it:

- On-premises editions of Microsoft Dynamics CRM Server
- Microsoft Dynamics CRM Online

Additional Microsoft Dynamics CRM for Outlook software requirements

If needed, the following software will be installed by Microsoft Dynamics CRM for Outlook Setup:

- Microsoft SQL Server 2012 Express



Note

Installed from Microsoft Dynamics CRM for Microsoft Office Outlook with Offline Access only.

- Microsoft .NET Framework 4.5.2.
- Microsoft Windows Installer 4.5.
- Microsoft Visual C++ Redistributable.
- Microsoft Report Viewer 2010.
- Microsoft Application Error Reporting.
- Windows Identity Framework (WIF).
- Microsoft Azure AppFabric SDK V1.0.
- Windows Live ID Sign-in Assistant 6.5.
- Microsoft Online Services Sign-in Assistant 2.1.
- Microsoft SQL Server Native Client.
- Microsoft SQL Server Compact 4.0.
- Reporting Services Microsoft ActiveX control. If not installed on the computer, the user will be prompted to install the software at first attempt to print a report. This installer package is named RSCClientPrint.cab and can be found on the Microsoft SQL Server Reporting Services server at <drive>:\Program files\Microsoft SQL Server\<MSSQL>\Reporting Services\ReportServer\bin.

See Also

[CRM for Outlook](#)

[CRM for Outlook support matrixes](#)

CRM for Outlook support matrixes

The following tables show the current and historical supported software requirements for Microsoft Dynamics CRM for Outlook.



Important

For Microsoft Dynamics CRM applications, we recommend using the latest version and service pack (SP) for all required components, such as Windows Server, Microsoft SQL Server, Microsoft Office, Internet Explorer, and Microsoft Exchange Server. In some cases, there might be a delay between the availability of a component update and support for the update in CRM applications. However, you should always apply the latest update for Microsoft Dynamics CRM to fully support the latest version of a required component.

For more up-to-date CRM 2015 information, see [Compatibility with Microsoft Dynamics CRM 2015](#).

For more up-to-date CRM 2013 information, see [Compatibility with Microsoft Dynamics CRM 2013](#).

Microsoft Office

The following versions of Microsoft Office are supported for Dynamics CRM for Outlook.

	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM Online 2015 Update 1.1 or Microsoft Dynamics CRM 2015 Update 0.2	Microsoft Dynamics CRM Online 2015 Update 1 or Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
Microsoft Office 2016	Yes	Yes	No	No
Microsoft Office 2013	Yes	Yes	Yes	Yes
Microsoft Office 2010	Yes	Yes	Yes	Yes
Microsoft Office 2007	No	No	No	Yes
Microsoft Office 2003	No	No	No	No

Internet Explorer

The following versions of Internet Explorer are supported for Dynamics CRM for Outlook.

	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM Online 2015 Update 1 or Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
Internet Explorer 11	Yes	Yes	Yes for Microsoft Dynamics CRM 2013 Update Rollup 13
Internet Explorer 10	Yes	Yes	Yes
Internet Explorer 9	No but not blocked	No but not blocked	Yes
Internet Explorer 8	No but not blocked	No	Yes
Internet Explorer 7	No	No	No
Internet Explorer 6	No	No	No

Microsoft Windows

The following versions of Microsoft Windows are supported for Dynamics CRM for Outlook.

	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM Online 2015 Update 1.1 or Microsoft Dynamics CRM 2015 Update 0.2	Microsoft Dynamics CRM Online 2015 Update 1 or Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
Windows 10	Yes	Yes	No	No
Windows 8.1	Yes	Yes	Yes	No
Windows 8	Yes	Yes	Yes	Yes
Windows 7 Service Pack 1	Yes	Yes	Yes	Yes
Windows Vista Service Pack 2	No	No	No	Yes
Windows Server 2012 R2	Yes	Yes	Yes	Yes
Windows Server 2012	Yes	Yes	Yes	Yes

	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM Online 2015 Update 1.1 or Microsoft Dynamics CRM 2015 Update 0.2	Microsoft Dynamics CRM Online 2015 Update 1 or Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013
Windows Server 2008 R2	Yes	Yes	Yes	Yes
Windows Server 2008	No	No	No	Yes

Microsoft Dynamics CRM on-premises editions

The following versions of Microsoft Dynamics CRM (on-premises) are supported for Dynamics CRM for Outlook.

	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013 Service Pack 1 (SP1)	Microsoft Dynamics CRM 2013 Update Rollup 1 or 2
Dynamics CRM for Outlook Microsoft Dynamics CRM 2016	Full	No	No	No
Dynamics CRM for Outlook Microsoft Dynamics CRM 2015	Online	Full	No	No
Dynamics CRM for Outlook Microsoft Dynamics CRM 2013 Service Pack 1 (SP1)	No	Online	Full	Full
Dynamics CRM for Outlook	No	Online	Full	Full

	Microsoft Dynamics CRM 2016	Microsoft Dynamics CRM 2015	Microsoft Dynamics CRM 2013 Service Pack 1 (SP1)	Microsoft Dynamics CRM 2013 Update Rollup 1 or 2
Microsoft Dynamics CRM 2013 Update Rollup 1 or 2				

Full: CRM for Outlook in online or offline mode.

Online: CRM for Outlook in online mode.



Important

Dynamics CRM for Outlook 2013 is not supported with Microsoft Dynamics CRM 2015. You first need to update to Dynamics CRM for Outlook Microsoft Dynamics CRM 2013 Update Rollup 1 or 2 or Dynamics CRM for Outlook Microsoft Dynamics CRM 2013 Service Pack 1 (SP1).

See Also

[Microsoft Dynamics CRM for Outlook hardware requirements](#)

[Microsoft Dynamics CRM for Outlook software requirements](#)

[CRM for Outlook](#)

Set up CRM for Outlook

If your users run a recent version of Microsoft Outlook, they can use Microsoft Dynamics CRM for Outlook. Dynamics CRM for Outlook makes it easier for your team to work with CRM data in the familiar Outlook environment.

This section covers installing and deploying Dynamics CRM for Outlook.

In This Section

[Permissions required for CRM for Outlook tasks](#)

[Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online](#)

[Uninstall or repair Microsoft Dynamics CRM for Outlook](#)

[Configure synchronization for appointments, contacts, and tasks](#)

[Install Microsoft Dynamics CRM for Outlook using a command prompt](#)

[Microsoft Dynamics CRM for Outlook failure recovery](#)

[Control field synchronization between CRM and Outlook or Exchange](#)

[What fields can be synchronized between CRM and CRM for Outlook?](#)

[How field security affects synchronization between CRM and CRM for Outlook](#)

[Troubleshooting and things to know about Microsoft Dynamics CRM for Outlook](#)

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM for Outlook, when you go offline, a copy of the data you are working on is created and stored on your local computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and a link is maintained between the local copy and CRM Online. The next time you sign in to CRM Online, the local data will be synchronized with CRM Online.

An administrator determines whether or not an organization's users are permitted to go offline with Microsoft Dynamics CRM for Outlook by using security roles.

Users and administrators can configure which entities are downloaded via Offline Sync by using the **Sync Filters** setting in the **Options** dialog box. Alternatively, users and Administrators can configure which fields are downloaded (and uploaded) by using **Advanced Options** in the **Sync Filters** dialog box.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current

between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

Permissions required for CRM for Outlook tasks

The following table shows the default security roles required to perform Dynamics CRM for Outlook tasks, and whether the task can be performed while using Dynamics CRM for Outlook offline.

Dynamics CRM for Outlook Tasks	Default Security Roles and Required Privileges	Can Task Be Done Offline?
Go Offline	Security roles: Any Privileges: Go Offline	Yes
Set synchronization options Microsoft Dynamics CRM to Outlook	Security roles: Any Privileges: Sync to Outlook	Yes
Set local data synchronization options	Security roles: Any Privileges: Go Offline	Yes
Synchronize Microsoft Dynamics CRM to Outlook	Security roles: Any Privileges: Sync to Outlook	Yes
Save and link Outlook tasks and appointments in Microsoft Dynamics CRM	Security roles: Any Privileges: For the record type: Write, Append To	Yes
Save and link Outlook contacts in Microsoft Dynamics CRM	Security roles: Any Privileges: Contact record type: Write, Append To	Yes
Remove tracking in Microsoft Dynamics CRM from a record	Security roles: Any Privileges: Contact record type: Write, Append To For the record type: Write, Append To	Yes

See Also

[Set up CRM for Outlook](#)

Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online

Microsoft Dynamics CRM for Outlook enables access to the same data through Microsoft Outlook as the Microsoft Dynamics CRM Web client. Dynamics CRM for Outlook is for Microsoft Dynamics CRM users who need access to CRM data while they are using the familiar Outlook application.

Important

Before you and your users install Dynamics CRM for Outlook, be sure to have completed your desired customizations. In particular, for best performance, you should ensure that you enable only the minimum required entities and views for offline use in Dynamics CRM for Outlook. For more information about customization, see the **Customize your CRM system**. For more information about setting up entities for synchronization, see **Create and edit entities**.

Installing Dynamics CRM for Outlook using System Center Operations Manager isn't supported.

Security

After you install Dynamics CRM for Outlook, you have to set some options so that users can send and receive email from Dynamics CRM for Outlook and to specify what data is synchronized.

Users who log on locally to a device that has Microsoft Dynamics CRM for Outlook installed can potentially access CRM data stored locally. Shared use of a device running Dynamics CRM for Outlook is not supported.

More information:

[Help & Training: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#)

[Help & Training: Set address book options in Microsoft Dynamics CRM for Outlook](#)

For upgrade information, see [Upgrade to Microsoft Dynamics CRM 2016 for Outlook](#).

To download and install Dynamics CRM for Outlook, see [Task 1: Install Microsoft Dynamics CRM for Outlook](#).

After you install and configure Dynamics CRM for Outlook, an individual user can use it to access Microsoft Dynamics CRM data. If a computer is shared by several users (that is, each user has a separate logon account and is a valid Microsoft Dynamics CRM user), you must configure Dynamics CRM for Outlook by running Dynamics CRM for Outlook configuration for each user.

Note

We do not guarantee synchronization will work as expected if Cached Exchange Mode is turned off in Microsoft Outlook. For example, sometimes, tracking email from the Outlook Search folder gives an error when Cached Exchange Mode is off when you set up your Exchange email account in Outlook. The best practice is to turn on Cached Exchange Mode when you set up your Exchange email account in Outlook. More information: [Turn on Cached Exchange Mode](#)

To install or upgrade Dynamics CRM for Outlook, you must have administrator permissions on the computer where you perform the installation or upgrade steps. The exception to this is when you install an update from [Microsoft Update](#), in which case administrator privileges are not required. You can install Dynamics CRM for Outlook with offline capability. A user who has this capability installed can access Microsoft Dynamics CRM data when they are not connected to the LAN. You can add offline capability at either of the following times:

- During installation of Dynamics CRM for Outlook.
- After installation has completed. In this case, a user can add offline capability by clicking **Go Offline** in Microsoft Outlook. This starts the installation of additional required components and stores a copy of the user's Microsoft Dynamics CRM data locally. Subsequent offline sessions require no additional installations, but may require updating the local copy of the user's data.



Note

Although multiple users can share a computer that uses Dynamics CRM for Outlook, go offline capability is not supported in a shared computer environment, such as when you use remote desktop services (formerly Terminal Services).

[Using Folder Redirection](#) with offline files is not supported for Dynamics CRM for Outlook. If the CRM data is stored with redirected offline files, users may be unable to use Dynamics CRM for Outlook.

See Also

[Set up CRM for Outlook](#)

Upgrade to Microsoft Dynamics CRM 2016 for Outlook

There are three steps to follow for a smooth upgrade to Microsoft Dynamics CRM 2016 for Outlook.

1. Upgrade all Dynamics CRM for Outlook to Microsoft Dynamics CRM 2015 for Outlook.
2. Upgrade your CRM server to Microsoft Dynamics CRM 2016 – for on-premises editions.
3. Upgrade Dynamics CRM 2015 for Outlook to Dynamics CRM 2016 for Outlook.

In this topic

[Microsoft Dynamics CRM for Outlook upgrade requirements](#)

[Task 1: Upgrade CRM 2015 for Outlook to CRM 2016 for Outlook](#)

[Task 2: Configure CRM 2016 for Outlook](#)

[Cross-architecture upgrade of Microsoft Dynamics CRM for Outlook](#)

Microsoft Dynamics CRM for Outlook upgrade requirements

Requirement	Description
Understand Dynamics CRM 2016 for Outlook compatibility requirements	Dynamics CRM 2016 for Outlook has a variety of software dependencies that must be understood and adhered to for a successful upgrade. For a current and historical view of these dependencies, see CRM for Outlook support matrixes
Use a PC that has sufficient hardware	For the best performance when you run Dynamics CRM 2016 for Outlook, make sure your PC is running 64-bit Windows and 64-bit Microsoft Office and has sufficient hard disk and RAM. More information: Microsoft Dynamics CRM for Outlook hardware requirements
Verify that you have appropriate permission	To install or upgrade Dynamics CRM for Outlook, you must have local administrator permission on the computer where you perform the installation or upgrade.
Verify base language	To upgrade Dynamics CRM for Outlook, the base language of Dynamics CRM 2016 for Outlook must match the base language of Dynamics CRM 2015 for Outlook.
Verify Dynamics CRM 2015 for Outlook is in online mode	You cannot upgrade Dynamics CRM 2015 for Outlook when it is in Go offline mode. You must bring Dynamics CRM 2015 for Outlook online before you can upgrade to Dynamics CRM 2016 for Outlook. To check, in Outlook: click File > CRM and verify the tile says Go Offline .

Task 1: Upgrade CRM 2015 for Outlook to CRM 2016 for Outlook

Follow this procedure to upgrade to Dynamics CRM 2016 for Outlook on a computer that has Dynamics CRM 2015 for Outlook installed.



1. Log on to the computer as a user who has local Administrators group permissions.
2. Best practice: Make sure that all Microsoft Office security updates are installed. To verify, visit [Microsoft Update](#).
3. Locate and run the appropriate installation file:
 - To install from a DVD, double-click **SetupClient.exe** in the installation folder for the architecture (32-bit or 64-bit) of Microsoft Office that you've installed:
 - ... \Client\amd64 for 64-bit
 - ... \Client\i386 for 32-bit
 - To install from the web, open the [Microsoft Dynamics CRM 2015 for Outlook \(Outlook Client\)](#) download page and then download and run the installation package.
 - To install from the Microsoft Dynamics CRM user interface, click **Get CRM for Outlook** on the message bar. If you see any dialog boxes titled **Security Warning**, click **Run** in each.

The **Microsoft Dynamics CRM 2016 for Outlook Setup** wizard starts.

4. On the **License Agreement** page, review the information. If you accept the license agreement, select **I accept the license agreement**, and then click **Next**.
5. On the **Upgrade** page, click **Upgrade Now**.
6. Setup stores your configuration information, installs the program features, and displays a progress indicator. Your configuration information is reapplied in the new installation.
7. On the completion page of the **Microsoft Dynamics CRM 2016 for Outlook Setup** wizard, click **Close**.

Task 2: Configure CRM 2016 for Outlook

After the upgrade from Dynamics CRM 2015 for Outlook, Dynamics CRM for Outlook attempts to use the configuration information that was used by Dynamics CRM 2015 for Outlook.

When you restart Outlook after the upgrade of Dynamics CRM for Outlook, you will know that reconfiguration is necessary if the Configuration Wizard automatically starts.

If you don't want to configure Dynamics CRM for Outlook immediately after you install it, click **Cancel** on the **Configure Organization** page of the wizard. A **Configure Microsoft Dynamics CRM for Outlook** button then appears on the Outlook toolbar and remains there until you configure Dynamics CRM for Outlook.

If the Configuration Wizard doesn't start automatically, you can start it as described in the following procedure.

► To configure Microsoft Dynamics CRM for Outlook

1. Start the Configuration Wizard: On the Start screen, click **Configuration Wizard** or on earlier versions of Windows click **Start > All Programs > Microsoft Dynamics CRM 2016 > Configuration Wizard**. Alternatively, click **Configure Dynamics CRM for Outlook** on the **CRM** tab in Outlook.
2. Click **Delete** or **Add** to remove or add a CRM organization.

3. To add an organization, choose the option appropriate for you.
 - To connect to a Microsoft Dynamics CRM Online organization, choose **CRM Online** from the drop-down menu.
 - To connect to an on-premises deployment of CRM 2016, type the discovery-service URL for Microsoft Dynamics CRM in the format `https://orgname.contoso.com` for Internet-facing deployments (IFD) or `http://crmserver:5555` for internal deployments. Contact your system administrator for the correct URL.
4. Click **Connect**.

If you are prompted for credentials, select from the following options.

 - For a Microsoft Dynamics CRM Online organization, enter your Microsoft Online Services user name and password, and then click **OK**. This information should have been sent to you in email when your account was added.
 - For an on-premises deployment of CRM 2016, you may not be prompted because Microsoft Dynamics CRM will use your Active Directory domain credentials.
5. Click **Close**.
6. If you are a member of more than one organization, restart the Configuration Wizard to designate a different organization as your current organization.

Silent installation and configuration

You use the command prompt to install and configure Dynamics CRM 2016 for Outlook. More information: [Install Microsoft Dynamics CRM for Outlook using a command prompt](#)

Cross-architecture upgrade of Microsoft Dynamics CRM for Outlook

If you intend to change to a different architecture (move from 32-bit to 64-bit) while upgrading, note the following:

- **In-place cross-architecture upgrade is not supported.** If you are running Dynamics CRM 2015 for Outlook 32-bit, you can perform an in-place upgrade only to 32-bit Dynamics CRM 2016 for Outlook. This also applies to Microsoft Office: If you are running and intend to retain a 32-bit version of Microsoft Office, you can upgrade only to 32-bit Dynamics CRM 2016 for Outlook.
- **Cross-architecture upgrade requires uninstalling and reinstalling.** If you have a 64-bit PC running a 64-bit version of Microsoft Windows, you can change from 32-bit to 64-bit Dynamics CRM 2016 for Outlook by performing the following steps in the order listed.
 - a. Make sure that your PC has a 64-bit version of Windows. [How to determine whether a computer is running a 32-bit version or 64-bit version of the Windows operating system](#).
 - b. Uninstall Dynamics CRM 2015 for Outlook.
 - c. Uninstall Microsoft Office.
 - d. Install a 64-bit edition of Microsoft Office.
 - e. Install the 64-bit edition of Dynamics CRM 2016 for Outlook.

For more information about installing Dynamics CRM 2016 for Outlook, see [Install CRM for Outlook](#).

See Also

[Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online](#)

Install CRM for Outlook

To set up Microsoft Dynamics CRM for Outlook on a user's computer, you need to install the software, and then configure it. This topic describes how to set up and configure Dynamics CRM for Outlook, and also how to enable multi-factor authentication (MFA) through OAuth. Using MFA can help make client authentication more secure, especially for mobile users.

For information about installing Dynamics CRM for Outlook at a command prompt (silent installation), see [Install Microsoft Dynamics CRM for Outlook using a command prompt](#). Note that you can't install Dynamics CRM for Outlook by using System Center Configuration Manager.

Important

You can't install Dynamics CRM for Outlook on a computer running Microsoft Exchange Server.

In This Topic

[Install Dynamics CRM for Outlook](#)

[Configure Dynamics CRM for Outlook](#)

[Enable multi-factor authentication through OAuth](#)

Install Dynamics CRM for Outlook

You can add offline capability for the user either during this installation or at a later time.



1. Meet the Dynamics CRM for Outlook requirements specified in [Microsoft Dynamics CRM for Outlook hardware requirements](#) and [CRM for Outlook support matrixes](#).
2. Log on to the computer as Local Administrator.
3. Make sure that the latest Microsoft Office updates are installed, including all security updates. To verify, visit [Microsoft Update](#).
4. Locate and run the appropriate installation file by choosing one of the following three methods:
 - To install from the web, go to [Microsoft Dynamics CRM 2016 for Microsoft Office Outlook \(Outlook Client\)](#), and then download and run the executable file that matches the installed Microsoft Office architecture.
 - To install from a DVD, double-click **SetupClient.exe** in the installation folder for the architecture (32-bit or 64-bit) of Microsoft Office that you've installed:
 - ... \Client\amd64 for 64-bit
 - ... \Client\i386 for 32-bit
 - To install from the Microsoft Dynamics CRM web application:

Click the **Settings** icon , and then click **Apps for Dynamics CRM**.

- ii. On the **Apps for Dynamics CRM** page, click **Download from Microsoft Download Center**.
- iii. If you see any dialog boxes titled **Security Warning**, click **Run** in each.

The **Microsoft Dynamics CRM 2016 for Microsoft Office Outlook Setup** wizard starts.

5. On the **License Agreement** page, review the information. If you accept the license agreement, select **I accept the license agreement**, and then click **Next**.
6. If the **Get Recommended Updates** page appears, indicate whether you want to obtain updates through the Microsoft Update program, and then click **Next**.



Note

Microsoft releases improvements to Dynamics CRM for Outlook as software updates. If you click **Get Recommended Updates**, those updates will be installed automatically. The exact level of automation, for example, whether any user interaction is required during the installation, is determined by the group policy of your organization.

7. Click **Install Now** or **Options**.
 - To install Dynamics CRM for Outlook with offline capability, click **Options**, select **Offline Capability** on the **Customize Installation** page, and then click **Install Now**. Although offline capability lets you run Microsoft Dynamics CRM without a network or Internet connection, it does require the installation of additional technologies and places more demand on your computer's processor and memory. For more information about the minimum recommended requirements, see [Microsoft Dynamics CRM for Outlook hardware requirements](#).
 - To install Dynamics CRM for Outlook without offline capability, click **Install Now**.



Important

If you don't install offline capability at this point, the user will initially have no offline capability. If you click **Install Now**, the Outlook user can add offline capability later by clicking **Go Offline** in Outlook.

The program features are installed and a progress indicator is displayed. You may be asked to restart your computer to complete the installation.

8. On the completion page of the **Microsoft Dynamics CRM 2016 for Microsoft Office Outlook Setup** wizard, click **Close**.

Configure Dynamics CRM for Outlook

After Dynamics CRM for Outlook is installed, it must be configured. When you restart Outlook after you've installed Dynamics CRM for Outlook, the configuration wizard starts automatically.



Note

If you don't want to configure Dynamics CRM for Outlook immediately after you install it, click **Cancel**. A **Configure Microsoft Dynamics CRM for Outlook** button then appears on the Outlook toolbar and will remain there until you configure Dynamics CRM for Outlook.

If the wizard doesn't start automatically, you can start it as follows: On the Start screen, click **Configuration Wizard** or on earlier versions of Windows click **Start > All Programs > Microsoft Dynamics CRM 2016**, and then click **Configuration Wizard**. Alternatively, click **Configure Microsoft Dynamics CRM for Outlook** on the **CRM** tab in Outlook.



1. To add an organization, choose one of the following:
 - To connect to a Microsoft Dynamics CRM Online organization, choose **CRM Online** from the drop-down menu.
 - To connect to an on-premises deployment of Microsoft Dynamics CRM, type the discovery-service URL for Microsoft Dynamics CRM in the format `https://orgname.contoso.com` for Internet-facing deployments (IFD) or `http://crmserver:5555` for internal deployments.
2. Click **Connect**.

If you are prompted for credentials, select from the following options.

 - For a Microsoft Dynamics CRM Online organization, enter your Microsoft Online Services user name and password, and then click **OK**. This information should have been sent to you in email when your account was added.
 - For an on-premises deployment of Microsoft Dynamics CRM, you may not be prompted because Microsoft Dynamics CRM will use your Active Directory domain credentials.
3. Click **Close**.
4. If you're a member of more than one organization, restart the Configuration Wizard to designate a different organization as your current organization.

Enable multi-factor authentication through OAuth

In the Microsoft Dynamics CRM for Outlook Configuration Wizard, System Administrators can enable multi-factor authentication through the OAuth 2.0 Framework. [OAuth 2.0](#) is an open framework for authorization that lets users provide access tokens, instead of credentials, to access data hosted by a given service provider (such as CRM). Using MFA can help make client authentication more secure, especially for mobile users. CRM Online and on-premises versions of Microsoft Dynamics CRM 2016 can take advantage of MFA; Microsoft Dynamics CRM 2016 on-premises requires at least Windows Server 2012 R2. CRM Online automatically uses OAuth. If you have upgraded your authentication server to use OAuth **prior** to installing Dynamics CRM 2016 for Outlook, Dynamics CRM 2016 for Outlook will automatically check for and use OAuth for MFA. Users will see the OAuth sign-in form the first time they use Dynamics CRM 2016 for Outlook.

If you upgrade your authentication server to use OAuth **after** rolling out Dynamics CRM 2016 for Outlook, you have two options to set Dynamics CRM 2016 for Outlook to use OAuth.

1. Reconfigure Dynamics CRM for Outlook on all computers. Run the Microsoft Dynamics CRM for Outlook Configuration Wizard and remove and re-add your organization.

-- OR --

2. Use Group Policy to update the following registration key:

```
HKEY_CURRENT_USER\Software\Microsoft\MSCRMClient\{orgid}.
```

Set `AuthenticationProvider` to 0

After the registry change, Dynamics CRM 2016 for Outlook will automatically check for and use OAuth for MFA.

See Also

[Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online](#)

[Deploy Microsoft Dynamics CRM for Outlook by using Group Policy](#)

Advanced deployment options for Microsoft Dynamics CRM for Outlook

This section describes advanced deployment options that can be used for a large scale deployment of Microsoft Dynamics CRM 2016 for Outlook.

In This Section

[Deploy Microsoft Dynamics CRM for Outlook by using Group Policy](#)

[Install Microsoft Dynamics CRM for Outlook for desktop virtualization](#)

[Install CRM 2016 for Outlook without an Internet connection](#)

See Also

[Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online](#)

[CRM for Outlook](#)

Deploy Microsoft Dynamics CRM for Outlook by using Group Policy

Group Policy provides an infrastructure for centralized configuration management of the operating system and applications, such as Microsoft Dynamics CRM for Outlook, that run on the operating system. The Group Policy settings you create are contained in a Group Policy Object (GPO). To create and edit a GPO, use the Group Policy Management Console (GPMC). By using the GPMC to link a GPO to selected Active Directory sites, domains, and organizational units (OUs), you apply the policy settings in the GPO to the users and computers in those Active Directory objects. More information: [TechNet: Group Policy Overview](#)

Using Group Policy, you can deploy Dynamics CRM for Outlook. This topic shows you how to perform a Group Policy-based software deployment that publishes Dynamics CRM for Outlook

making it available for users to install from Control Panel. When you publish software for users, you give them the opportunity to decide if and when they want to install it.

 **Important**

You must run the Microsoft Dynamics CRM for Outlook Setup program (SetupClient.exe) by using the administrative installation option (/A) to create a Windows Installer package (CRMClient_bitversion.msi) for Group Policy deployment. You cannot use the Windows Installer package (Client.msi) that is included with the Dynamics CRM for Outlook installation files to deploy by using Group Policy. For more information about how to perform an administrative installation, see [Install Microsoft Dynamics CRM for Outlook using a command prompt](#).

To complete this procedure, you must be a member of the Domain Administrators security group, the Enterprise Administrators security group, or the Group Policy Creator Owners security group.

Preparing CRM for Outlook for a Group Policy deployment

Use this procedure to create the CRMClient_bitversion.msi file that is required for a Dynamics CRM for Outlook Group Policy deployment.

 **Create the CRMClient_bitversion.msi file**

1. Before you build the CRMClient_bitversion.msi file, you can edit the Default-Client_Config.xml file that is included with the installation files. This file is used by the Microsoft Dynamics CRM for Outlook Configuration Wizard to establish settings, such as the organization URL, after Dynamics CRM for Outlook is installed on the user's computer. Although this step is optional, it can simplify Dynamics CRM for Outlook configuration for Microsoft Dynamics CRM users. More information: [Step 2: Configure Microsoft Dynamics CRM for Outlook by using an XML configuration file](#)
2. Determine the distribution share, and then run Microsoft Dynamics CRM for Outlook Setup to build the administrative installation files.

 **Important**

The CRMClient_bitversion.msi file is used as the package for Group Policy software installation. After you follow this procedure, users can select Dynamics CRM for Outlook in Control Panel for on-demand installation. You can't use the CRMClient_bitversion.msi file directly to install Dynamics CRM for Outlook.

- a. Create a network share that all Dynamics CRM for Outlook users will have access to. This share will be the distribution location for the GPO.
- b. Run SetupClient.exe at the command prompt by using the /A and /targetdir parameters. The /A parameter specifies an administrative installation, and /targetdir parameter specifies the distribution share that you created in the previous step. For more information about Microsoft Dynamics CRM for Outlook Setup command prompt parameters, see [Step 1: Install files](#).

Example:

```
setupclient.exe /a /q /targetdir \\FileShare\CRMforOutlook
```

- c. Consider using Microsoft Distributed File System (DFS) to help improve the security and availability of your distribution points. For more information about DFS, see [DFS Namespaces and DFS Replication Overview](#). We recommend that you understand the DFS features before you configure your distribution point servers.
3. Create the Group Policy Object (GPO) and target the application to Microsoft Dynamics CRM users. To do this, follow these steps:
 - a. On a domain controller in the domain where Microsoft Dynamics CRM is installed, start Group Policy Management.
 - b. In Group Policy Management, expand **Forest, Domains** right-click the domain, and then click **Create a GPO in this domain, and Link it here**.
 - c. In the **New GPO** dialog, type a name for the GPO, such as *Microsoft Dynamics CRM Users*, and then click **OK**.

Creating a GPO at the domain level configures the GPO with domain-wide scope.
 - d. In the group policy pane, right-click the GPO that you created in the previous step, and then click **Edit**.

The Group Policy Management Editor opens.

- e. In **Group Policy Management Editor**, under **User Configuration**, expand **Policies**, and then expand **Software Settings**.
- f. Right-click **Software Installation**, point to **New**, and then click **Package**.
- g. Type the full path or locate the Dynamics CRM for Outlook Windows Installer package (CRMClient_64.msi or CRMClient_32.msi) that was created by the administrative installation, and then click **Open**. For more information about how to create an administrative install package for Dynamics CRM for Outlook, see the /A parameter in [Install Microsoft Dynamics CRM for Outlook using a command prompt](#).

Important

The Dynamics CRM for Outlook administrative installation folders must be on a network share that can be read-accessed by Microsoft Dynamics CRM users in the domain.

Tip

By default, the package name is *Microsoft Dynamics CRM <version> for Outlook* for both 32-bit and 64-bit packages. Consider renaming the package to *Dynamics CRM for Outlook <version> 64-(bit)* or *Dynamics CRM for Outlook <version> (32-bit)*. This name appears in Control Panel in the list of programs to install from the network.

- h. In the Deploy Software dialog, select **Publish** to publish the Dynamics CRM for Outlook application, and then click **OK**.
- i. By default, Dynamics CRM for Outlook is available in Control Panel for all authenticated users the next time that they log on to the domain. To limit the scope to

a specific organizational unit (OU), group, or individual user, in Group Policy Management, expand **Group Policy Objects**, and click the GPO named *Microsoft Dynamics CRM Users*, and then add or remove the security objects that you want, such as a group, in the **Security Filtering** area of the publication on the **Scope** tab.

Publish versus Assign

When you publish an application by using GPO deployment, it is made available for users to install by using Program and Features (or in previous versions of Windows, Add or Remove Programs) in Control Panel. Assigned applications are installed when a user logs on to the domain.



Note

Dynamics CRM for Outlook doesn't support application assignment through GPO installation. For more information about publishing versus assigning software, see the Group Policy deployment documentation for your operating system.

See Also

[Advanced deployment options for Microsoft Dynamics CRM for Outlook](#)

[Install Microsoft Dynamics CRM for Outlook for desktop virtualization](#)

Install or upgrade Language Packs for Microsoft Dynamics CRM

Install Microsoft Dynamics CRM for Outlook for desktop virtualization

This topic describes how to install Dynamics CRM for Outlook with roaming user profiles by using Windows Server Remote Desktop Services. Remote Desktop Services, formerly Terminal Services, is a server role in Windows Server that provides technologies that enable users to access session-based desktops, virtual machine-based desktops, or applications in the data center from both within a corporate network and from the Internet.

In This Topic

[Roaming user profiles](#)

[Windows Server Remote Desktop Services](#)

[Support for Citrix XenApp 6.5 and 7.0-7.6 session virtualization for Microsoft Dynamics CRM for Outlook on a single XenApp instance](#)

Roaming user profiles

A roaming user profile is a copy of the local user profile that is copied to, and stored on, a server share. The advantage of roaming user profiles is that users do not have to create a profile on each computer that they use on a network. Their profile is downloaded to each computer that they log on to on a network. Changes made to a roaming user profile are synchronized with the server copy of the profile when the user logs off.

While the roaming user profile moves with the user, software applications such as Dynamics CRM for Outlook do not. Identical applications have to be installed on each computer that the user logs on to.

Windows Server Remote Desktop Services

Dynamics CRM for Outlook is supported for running on Windows Server 2012 Remote Desktop Services. When users run an application on Remote Desktop Services, the application execution occurs on the server. Only keyboard, mouse, and display information are transmitted over the network. Users see only their own individual sessions, which are managed transparently by the server operating system and remain independent of any other client session.

More information: [Remote Desktop Services](#)

Deploy CRM for Outlook to use as a Remote Desktop Services application

The following is the basic procedure required to deploy Dynamics CRM for Outlook to use as a Remote Desktop Services application.

1. Provide at least one Microsoft Windows Server that is running the Remote Desktop Services server role. More information: [Remote Desktop Services](#)
2. Install Dynamics CRM for Outlook using the /disableofflinecapability parameter on the Remote Desktop Services server. Go offline mode is not supported when Dynamics CRM for Outlook is installed for Remote Desktop Services use. More information: [Install Microsoft Dynamics CRM for Outlook using a command prompt](#)

Important

The Dynamics CRM for Outlook offline database is not supported for roaming profile use.

3. Run the Microsoft Dynamics CRM Configuration Wizard on the Remote Desktop Services server. For instructions, see [Task 2: Configure Microsoft Dynamics CRM for Outlook](#).
4. Disable the Microsoft Dynamics CRM Configuration Wizard on all desktops that will be used to connect to Remote Desktop Services and run Dynamics CRM for Outlook. For details, see the section below.

Disable the CRM for Outlook Configuration Wizard

Note

The information in this topic applies to Dynamics CRM for Outlook deployments that use Remote Desktop Services. To remove only the **Get CRM for Outlook** button for Dynamics CRM for Outlook deployments that don't use Remote Desktop Services, see the "Set whether users see CRM for Outlook message" setting in [Help & Training: System Settings dialog box – Outlook tab](#).

The Dynamics CRM for Outlook Configuration Wizard starts every time a roaming user connects to a Windows Server that is running Remote Desktop Services. In addition, users will see the option to configure Dynamics CRM for Outlook when they run Microsoft Office Outlook.

Tip

Instead of manually creating the registry key as described here, you can use Group Policy or a logon script to create the registry key for the Remote Desktop Services users who do not use Dynamics CRM for Outlook.

Warning

Serious problems might occur if you modify the registry incorrectly by using Registry Editor or by using another method. These problems might require you to reinstall the operating system and Microsoft Dynamics CRM. We can't guarantee that these problems can be resolved. Modify the registry at your own risk.

To disable the Dynamics CRM for Outlook Configuration Wizard and the option to configure Dynamics CRM for Outlook, follow these steps on the client computer.

► **Disable the Configuration Wizard**

1. On the computer where Microsoft Office is installed, start Registry Editor (regedit.exe).
2. Locate the following registry subkey:
HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins
3. Right-click **Addins**, point to **New**, and then click **Key**.
4. Type **crmaddin.Addin**, and then press ENTER.
5. Right-click **crmaddin.Addin**, point to **New**, and then click **DWORD Value** or **DWORD (32-bit) Value**.
6. Type **LoadBehavior** and then press ENTER.
7. Right-click **LoadBehavior**, and then click **Modify**.
8. Type **8** in the **Value Data** box, click **Decimal**, and then click **OK**.
9. Exit Registry Editor.

Support for Citrix XenApp 6.5 and 7.0-7.6 session virtualization for Microsoft Dynamics CRM for Outlook on a single XenApp instance

Microsoft will support Citrix XenApp 6.5 and 7.0 -7.6 with session virtualization for Microsoft Dynamics CRM 2015 for Outlook on a single XenApp instance.

Please note that Citrix deployment may include a complex configuration topology based on other configurations, and these are not supported. For example, these configurations are not supported:

- Citrix products like XenApp (except for versions 6.5 and 7.0-7.6), XenDesktop, and XenServer and versions of these products
- Application streaming modes
- Modes of application deployment
- Application virtualization layered on top of other virtualization technologies (such as Network and storage virtualization technologies)

See Also

[Advanced deployment options for Microsoft Dynamics CRM for Outlook](#)

Install or upgrade language packs for Microsoft Dynamics CRM

[Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online](#)

Install CRM 2016 for Outlook without an Internet connection

This section applies to Microsoft Dynamics CRM for Outlook when you use either Microsoft Dynamics CRM 2016 (on-premises) or Microsoft Dynamics CRM Online.

There may be occasions when you have to install Dynamics CRM for Outlook where there is no Internet connection available. Common occasions are when you are creating virtual demonstration environments, such as when you use Hyper-V, and environments that use firewalls or other security requirements that block Internet access.

To install Dynamics CRM for Outlook without an Internet connection, you must first download all prerequisite components. To do this, you will need a computer that has an Internet connection to download all the prerequisites beforehand.

Notice that, when you download the CRM 2016 ISO from MSDN, or have a physical DVD that you are installing from, you will already have the Redist folder and all the prerequisites downloaded. However, if you download the Dynamics CRM for Outlook installation media from the Microsoft Download Center, you must manually build this Redist prerequisite folder structure.

In This Topic

[Step 1: Create the Redist folder structure](#)

[Step 2: Create the subfolders under the Redist folder](#)

[Step 3: Download the prerequisite files](#)

[Step 4: Run CRM for Outlook Setup](#)

Step 1: Create the Redist folder structure

First, create the Redist folder structure in the installation media *at the same level* as the Client folder.

The installation media folder structure will appear similar to the following list.

- Client
- Redist
- Depending on the installation media, there may be additional files such as autorun.inf, msvp100.dll, and so on.

Important

You must put the **Redist** folder in the parent directory where the installation files are initially extracted. For example, if the Dynamics CRM for Outlook installation files are extracted to *C:\mscrinstaller*, then the Redist folder must be located in *C:\mscrinstaller\Redist*.

Step 2: Create the subfolders under the Redist folder

Create the following subfolders directly under the Redist folder.

1. dotNETFX
2. ReportViewer
3. SQLCE
4. SQLExpr – Required if you use the Go offline capability with Dynamics CRM for Outlook

5. SQLExprRequiredSp - Required in order to upgrade SQL Express 2008 to 2012. Not required for a new install of SQL Express 2012.
6. VCRedist
7. VCRedist10
8. WindowsIdentityFoundation

Step 3: Download the prerequisite files

Download the prerequisite components and copy them into the Redist folder under the appropriate subfolders, by using the following list.

1. dotNETFX

Description	File name and direct download link
Microsoft .NET Framework 4.5.2 (Offline Installer (64 and 32-bit))	NDP452-KB2901907-x86-x64-AllOS-ENU.exe

2. ReportViewer

Description	File name and direct download link
Microsoft Report Viewer 2012 Runtime	ReportViewer.msi

3. SQLCE

Description	File name and direct download link
Microsoft SQL Server Compact 4.0 SP1 (64-bit)	SSCERuntime_x64-ENU.exe
Microsoft SQL Server Compact 4.0 SP1 (32-bit)	SSCERuntime_x86-ENU.exe

4. SQLExpr

Description	File name and direct download link
SQL Express 2012 Express SP2 x86 (32-bit, used by both 64 and 32-bit versions of Dynamics CRM for Outlook)	SQLEXPRESS_x86_ENU.exe

5. SQLExprRequiredSp

Description	File name and direct download link
SQL Express 2008 R2 SP3	SQLEXPRESS_x86_ENU.exe

6. VCRedist

Description	File name and direct download link
Microsoft Visual C++ 2013 Redistributable (64-bit) - 12.0.21005	vcredist_x64.exe
Microsoft Visual C++ 2013 Redistributable (32-bit) - 12.0.21005	vcredist_x86.exe

7. VCRedist10

Description	File name and direct download link
Microsoft Visual C++ Redistributable SP 1 (64-bit) - 10.0.40219	vcredist_x64.exe
Microsoft Visual C++ Redistributable SP 1 (32-bit) - 10.0.40219	vcredist_x86.exe

8. WindowsIdentityFoundation

Description	File name and direct download link
Windows Identity Foundation, Windows 7 (64-bit) - 6.1.7600.0	Windows6.1-KB974405-x64.msu
Windows Identity Foundation, Windows 7 (32-bit) - 6.1.7600.0	Windows6.1-KB974405-x86.msu



Note

By default, Windows Identity Framework is already included with Windows 8.

Step 4: Run CRM for Outlook Setup

Now that you have all the prerequisites downloaded and saved in the correct folders, you can run Dynamics CRM for Outlook Setup without an Internet connection.

See Also

[Advanced deployment options for Microsoft Dynamics CRM for Outlook](#)

Uninstall or repair Microsoft Dynamics CRM for Outlook

If other users run Dynamics CRM for Outlook on the same device, those users should sign out of Microsoft Windows before uninstalling Dynamics CRM for Outlook. This is especially true for Citrix or Remote Desktop environments where additional sessions are common and should be closed before uninstalling Dynamics CRM for Outlook.



Tip

You might want to disable Dynamics CRM for Outlook instead of uninstalling it. To disable Dynamics CRM for Outlook, go to **File > Options**. Click **Add-Ins**, click the **Go** button next to **Manage: COM Add-ins**, clear both **Microsoft Dynamics CRM** add-ins, and then click **OK**.



1. Start **Programs and Features** in the Control Panel.
2. On the **Uninstall or change a program** page, select the version of Dynamics CRM for Outlook you want to uninstall, and then click **Uninstall/Change**.
3. In the Setup wizard, on the **Choose the installation you want** page, click **Uninstall** or **Repair**.
4. When the wizard finishes, click **Close**.
5. If prompted, restart your computer.



Note

If an uninstallation is not completed while you are logged on to the client computer as the user who originally installed the application, the offline database will remain attached to the instance of Microsoft SQL Server Express. After the uninstall is complete, you can manually detach the offline database.

Files not removed during a Microsoft Dynamics CRM for Outlook uninstall

The following files aren't removed when you uninstall Dynamics CRM for Outlook.

- *Program Files\Microsoft Dynamics CRM\Client\ConfigWizard\CrmForOutlookInstaller.exe
- Windows\CrmClient.mif

*The default folder name is **Program Files** or **Program Files (x86)**.

See Also

[Set up CRM for Outlook](#)

Uninstall, repair, and change Microsoft Dynamics CRM

Uninstall or repair a Microsoft Dynamics CRM Language Pack

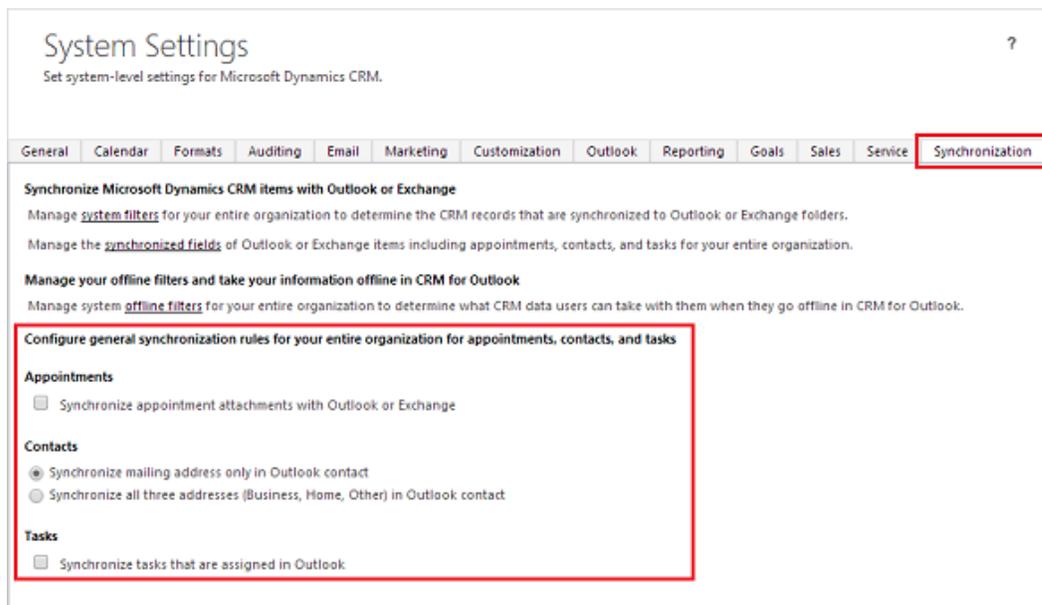
Configure synchronization for appointments, contacts, and tasks

By default, some synchronization between Microsoft Dynamics CRM and Outlook for CRM is disabled so organizations can control what gets synced according to their business requirements. CRM admins can enable synchronization using **Settings > Administration > System Settings > Synchronization**.

Note

Users should have the latest [CRM for Outlook](#) installed.

This topic covers the highlighted settings below.



System Settings
Set system-level settings for Microsoft Dynamics CRM.

General | Calendar | Formats | Auditing | Email | Marketing | Customization | Outlook | Reporting | Goals | Sales | Service | **Synchronization**

Synchronize Microsoft Dynamics CRM items with Outlook or Exchange
Manage [system filters](#) for your entire organization to determine the CRM records that are synchronized to Outlook or Exchange folders.
Manage the [synchronized fields](#) of Outlook or Exchange items including appointments, contacts, and tasks for your entire organization.

Manage your offline filters and take your information offline in CRM for Outlook
Manage system [offline filters](#) for your entire organization to determine what CRM data users can take with them when they go offline in CRM for Outlook.

Configure general synchronization rules for your entire organization for appointments, contacts, and tasks

Appointments
 Synchronize appointment attachments with Outlook or Exchange

Contacts
 Synchronize mailing address only in Outlook contact
 Synchronize all three addresses (Business, Home, Other) in Outlook contact

Tasks
 Synchronize tasks that are assigned in Outlook

Enable appointment attachment synchronization with Outlook or Exchange

Note

This section applies to message synchronization done through Microsoft Dynamics CRM for Outlook or server-side synchronization. More information: **Set up and manage email processing and CRM for Outlook**

Users can attach documents, pictures, recordings, etc. to the appointments they create in the CRM web application or Dynamics CRM for Outlook. By default, appointment attachment synchronization is disabled. To enable:

1. Go to **Settings > Administration**. ([How do I get there?](#))
2. Choose **System Settings**, then choose **Synchronization**.
3. Choose **Synchronize appointment attachments with Outlook or Exchange**

Considerations

- When you disable attachment synchronization, the attachments will not appear in appointments in CRM but will remain in CRM for Outlook appointments.
- Recurring appointment attachment synchronization is not supported. When users synchronize recurring appointments with attachments, the attachments do not sync.
- Attachments could affect synchronization times so you may want to use attachments sparingly if attached to a low bandwidth network.
- Service activity attachment synchronization is not supported.

Address synchronization for Contacts



Note

This section applies to message synchronization done through Dynamics CRM for Outlook or server-side synchronization. More information: **Set up and manage email processing and CRM for Outlook**

Admins have two options they can specify for how contact synchronization occurs.

Synchronize mailing address only in Outlook contact

By default, just one Outlook mailing address field is synchronized between CRM and Outlook. This is sufficient for most organizations.

Synchronize all three addresses (Business, Home, Other) in Outlook contact

Choose this option to synchronize all three Outlook mailing address fields (Business, Home, and Other fields) between CRM and Outlook.



Warning

Enabling this option can cause data loss if you have existing data. This is due to the remapping of the attributes for existing tracked contacts. We recommend you test this option prior to deployment to understand how the re-mapping affects your environment and your data. In most cases, you should have the full data in one side (normally in CRM) and have them sync to the other side (normally Outlook or Exchange).

More information: [What fields can be synchronized between CRM and CRM for Outlook?](#)

Enable synchronization for tasks that are assigned in Outlook



Note

This section applies to message synchronization done through Dynamics CRM for Outlook only. More information: **Set up and manage email processing and CRM for Outlook**

By default, task synchronization is disabled. User created tasks in Dynamics CRM for Outlook are not synchronized with the CRM web application. To enable:

1. Go to **Settings > Administration**. ([How do I get there?](#))
2. Choose **System Settings**, then choose **Synchronization**.
3. Choose **Synchronize tasks that are assigned in Outlook**

Considerations

- Recurring task synchronization is not supported. When users synchronize recurring tasks, the tasks do not synch.
- The person assigning the task and the person the task is assigned to must be in the same organization.
- Tasks cannot be synchronized to multiple email addresses.

See Also

[Set up CRM for Outlook](#)

Install Microsoft Dynamics CRM for Outlook using a command prompt

Installing Microsoft Dynamics CRM for Outlook is a two-step procedure. First, you must run Setup to install the files on the computer. Next, run the Microsoft Dynamics CRM Configuration Wizard to configure the application and complete the installation.

Important

If there's a conflict between a value in the configuration file and a value in the command-line parameters, the command-line parameter takes precedence.

In This Topic

[Step 1: Install files](#)

[Step 2: Configure CRM for Outlook by using an XML configuration file](#)

[Command examples for the CRM for Outlook configuration](#)

[CRM for Outlook XML configuration file elements](#)

[User credentials are required when you run the Configuration Wizard](#)

[Sample CRM for Outlook XML configuration file for configuration](#)

Step 1: Install files

The following command displays the available options to run Microsoft Dynamics CRM for Outlook Setup at the command prompt:

```
Setupclient.exe [/A] [/Q] [/X] [/L or /LV "[drive:][[ path] logfile.log]" [/targetdir "[drive:][ path]"] [/installofflinecapability] [/disableofflinecapability] [/ignoreofflinequeue]
```

Command examples for CRM for Outlook installation

For users who travel or who are not always connected to the Microsoft Dynamics CRM Server, Microsoft Dynamics CRM for Microsoft Office Outlook with Offline Access provides access to their customer data. To install Microsoft Dynamics CRM for Microsoft Office Outlook with Offline Access in quiet mode:

```
Setupclient /Q /l c:\clientinstalllog.txt /installofflinecapability /targetdir
"c:\Program Files\Microsoft Dynamics CRM Client"
```

To uninstall Microsoft Dynamics CRM for Microsoft Office Outlook with Offline Access in quiet mode:

```
SetupClient /x /q
```

Parameters for CRM for Outlook installation

Parameter	Description
None	Used without parameters, Setupclient.exe will run with all display screens.
installofflinecapability	Determines whether offline capability will be installed. When you include this parameter, offline capability and components are installed. If you don't specify this parameter, the online-only client is installed.
/targetdir <"drive:\path">	Specifies the folder in which Dynamics CRM for Outlook files will be installed.
/A	<p>Creates an administrative installation of Dynamics CRM for Outlook by creating a Windows Installer package. This package lets users run Setup from a network share or lets non-administrative users run Setup that is driven from a group policy. This parameter must be used with the /targetdir parameter described earlier. When using this parameter, the /targetdir value doesn't have to be located on the local computer. A mapped drive or network share, such as <code>\\share\mscrm_client_admin</code>, can be used.</p> <p> Important If you don't specify a target folder by using the /targetdir parameter, Setup installs the administrative installation to the default folder <code><drive:> Program Files\Microsoft Dynamics CRM</code>.</p> <p>For example, the command:</p> <pre>Setupclient /Q /A /targetdir "\\share\mscrm_client_admin"</pre>

Parameter	Description
/Q	Quiet mode installation. This parameter requires a configuration file in XML format. The <i>/i</i> parameter contains the name of the XML configuration file. No dialog boxes or error messages will appear on the display screen. To capture error message information, include the log file parameter (<i>/L</i> or <i>/LV</i>).
/L [drive:][[path] logfilename.log]	Creates a log file of installation activity. You must specify the file name of the log file and where to put it, but the path can't be a relative path, such as %appdata%\CRMLogs.
/LV [drive:][[path] logfilename.log]	Creates a verbose log file of installation activity. You must specify the file name of the log file and where to put it, but the path can't be a relative path, such as %appdata%\CRMLogs.
disableofflinecapability	When you specify this parameter, Dynamics CRM for Outlook is configured to hide the "go offline" button in the application. This button lets users switch to Dynamics CRM for Outlook with offline capability.
ignoreofflinequeue	When you specify this parameter, Setup will not attempt to synchronize items that may remain in the offline queue during upgrade.
/X	Uninstalls Dynamics CRM for Outlook. This is a maintenance mode option that is only available when the application is already installed.

Sample CRM for Outlook XML configuration file for installation

The following configuration-file example installs Dynamics CRM for Outlook without offline access capability into the Program Files folder.



Note

You can use the same file that includes both the installation and configuration elements. Setup and the Configuration Wizard ignore the elements that aren't relevant to the operation.

```
<Deployments>
```

```
<TargetDir>c:\program files\Microsoft Dynamics CRM\Client</TargetDir>
```

```
<InstallOfflineCapability>>false</InstallOfflineCapability>
```

</Deployments>

Step 2: Configure CRM for Outlook by using an XML configuration file

After you install Dynamics CRM for Outlook, you must configure it. You can do this by running the Dynamics CRM for Outlook Configuration Wizard at the command prompt. The Configuration Wizard file is named **Microsoft.Crm.Application.Outlook.ConfigWizard.exe** and is located in the Client\ConfigWizard folder where Dynamics CRM for Outlook is installed. By default, the folder is C:\Program Files\Microsoft Dynamics CRM.



Note

The credentials of the user who will run Dynamics CRM for Outlook are used to authenticate to Microsoft Dynamics CRM. Therefore, to perform a silent configuration of Dynamics CRM for Outlook, you must run the Configuration Wizard under the user's context, such as by running a user-invoked batch file or as a one-time entry in a logon script. For more information, see [User credentials are required when you run the Configuration Wizard](#). To deploy Dynamics CRM for Outlook by using Microsoft Group Policy, see [Deploy Microsoft Dynamics CRM for Outlook by using Group Policy](#).

If a path to the configuration file isn't specified, the Configuration Wizard looks for the default configuration file (**default_client_config.xml**) in the non-roaming profile folder (%localappdata%\Microsoft\MSCRM\). If the file isn't located in the non-roaming profile folder, the Configuration Wizard looks for the folder where Dynamics CRM for Outlook is installed. By default, Dynamics CRM for Outlook is installed in the C:\Program Files\Microsoft Dynamics CRM folder.

If the configuration file is located in the roaming location used by other applications (AppData\Roaming\Microsoft\MSCRM\), it won't be honored.

Command examples for the CRM for Outlook configuration

The following command configures Microsoft Dynamics CRM for Outlook with Offline Access by using a file named **config_client.xml** in quiet mode, and outputs a log file named **clientinstall.log**:

```
Microsoft.Crm.Application.Outlook.ConfigWizard.exe /Q /i c:\config_client.xml /xa /l  
c:\clientinstall.log
```

The **/Q** quiet mode configuration parameter requires a configuration file in XML format. No dialog boxes or error messages will appear on the display screen. To capture error message information, include the log file parameter (**/L**) or verbose logging (**/LV**).



Important

Valid user credentials stored in the Windows Vault are required to run the Configuration Wizard in quiet mode. More information: [User credentials are required when you run the Configuration Wizard](#)

The **/i [drive:] [[path] configfilename.xml]** command-line parameter provides Microsoft Dynamics CRM for Outlook Setup with required information. It is the same information that each installation

screen requires. The XML elements must be in English (US); special or extended characters can't be used. An XML configuration file that has localized XML elements will not work correctly. An explanation of each XML element and a sample XML file follows:

The /xa parameter, when used with the /q parameter, removes all organizations that are configured for Dynamics CRM for Outlook.

The /R parameter may be used to suppress the Configuration Wizard user interface and only display the progress dialog box. This parameter requires a valid XML Setup file that is named Default_Client_Config.xml and must be located in either the local user AppData or Client installation folder.

CRM for Outlook XML configuration file elements

Element	Description
<Deployments> </Deployments>	The configuration file must be a valid XML file that uses <Deployment> as the root element.
<InstallOfflineCapability>true/false</InstallOfflineCapability >	Specifies the type of Dynamics CRM for Outlook installation. Specifying <i>true</i> will install Microsoft Dynamics CRM for Outlook with Offline Access capability.
<TargetDir>drive:\path</TargetDirectory>	Specifies the folder in which Dynamics CRM for Outlook files will be installed.
<Deployment> </Deployment>	Parent element for all of the following elements.
<DiscoveryUrl>https://website:portnumber</DiscoveryUrl>	Specifies the URL for the Microsoft Dynamics CRM Discovery Web Service. For an on-premises deployment of Microsoft Dynamics CRM Server, the supported binding can be HTTPS or HTTP. If the Discovery Web Service is using a port other than the default ports 80 (HTTP) or 443 (HTTPS), you must specify the port number. If this is a Full Server deployment of Microsoft Dynamics CRM Server, the

Element	Description
	<p>Discovery Web Service URL is the same as the one for the web application, such as <code>http://crmserver</code> .</p> <p>For Microsoft Dynamics CRM Online, use the full organization URL, such as <code>https://orgname.crm.dynamics.com</code> , or depending on your online environment and location, use the discovery service URL, in the form <code>https://disco.crm.dynamics.com</code>. For a list of URLs, see MSDN: Discovery service.</p>
<code><Organizations> </Organizations></code>	<p>This is the parent element for the following <Organization> element.</p>
<code><Organization FriendlyName="My Friendly Organization Name" IsPrimary="true"/"false">OrganizationName</Organization></code>	<p>Specifies the name of the organization that the client will connect to.</p> <p>FriendlyName. Specifies a different display name other than the organization name in Outlook.</p> <p>IsPrimary. Specifies the organization that will be configured as the synchronizing organization in Dynamics CRM for Outlook.</p> <p> Note <i>OrganizationName</i> is case-sensitive.</p>
<code><CEIPNotification>true/false</CEIPNotification></code>	<p>Specifies whether Dynamics CRM for Outlook will display the “I want to join the Customer Experience Improvement Program” notification banner. The default setting is true and the notification banner is displayed. If you specify false, the notification banner doesn’t appear in Dynamics CRM for Outlook. More information: Microsoft</p>

Element	Description
	Customer Experience Improvement Program

User credentials are required when you run the Configuration Wizard

The Configuration Wizard requires user credentials. During a silent configuration, by using /Q with the Microsoft.Crm.Application.Outlook.ConfigWizard.exe file, the Configuration Wizard will look for the user's credentials in the Windows Vault. If the Configuration Wizard can't find the credentials, or the credentials aren't in the required format, the configuration will not finish and an error will be recorded to the configuration log file. Notice that the Configuration Wizard doesn't support adding the user UPN or password in the XML configuration file. For information about how to add user credentials from a command script to the Windows Vault, see the blog post [Silent configuration of CRM for Outlook client in CRM 2011 claims enabled environment](#). For more information about the Windows Vault and Credential Manager, see [What is Credential Manager](#)

Sample CRM for Outlook XML configuration file for configuration

The following configuration file example configures Dynamics CRM for Outlook to connect to a primary organization named *Contoso* and another organization named *AdventureWorksCycle* on the Microsoft Dynamics CRM Server that is named *crmserver*.



Note

You can use the same file that includes both the installation and configuration elements. Setup and the Configuration Wizard will ignore the elements that aren't relevant to the operation.

Example Default_Client_Config.xml file

```
<Deployments>
<Deployment>
<DiscoveryUrl>http://crmserver</DiscoveryUrl>
<Organizations>
<Organization IsPrimary='true'>Contoso</Organization>
<Organization>AdventureWorksCycle</Organization>
</Organizations>
<CEIPNotification>>false</CEIPNotification>
</Deployment>
</Deployments>
```



Note

The preceding example specifies two different organizations that the user has access to and configures Dynamics CRM for Outlook to not display the “I want to join the Customer Experience Improvement Program” notification banner. The value in the **Organization** element can’t contain special characters or spaces. For Microsoft Dynamics CRM (on-premises), you can find the organization unique name by running the Get-CrmOrganization Windows PowerShell cmdlet or in the **Name** column in the **Organizations** area of Deployment Manager.

► Configure CRM for Outlook by using a script

1. Write a script that automatically updates the configuration settings for users of Dynamics CRM for Outlook. You could use lines such as the following to perform the basic configuration actions, based on a new configuration file that is stored on the computer indicated as *<servername>*.

In the following script, the default client configuration file is overwritten, previously configured organizations are removed, user credentials are added to the Windows Vault, and the new organization is installed.

```
copy /y \\<servername>\share\Default_Client_Config.xml
"c:\Program Files\Microsoft Dynamics
CRM\Default_Client_Config.xml"

"C:\Program Files\Microsoft Dynamics
CRM\Client\ConfigWizard\Microsoft.Crm.Application.Outlook.Con
figWizard.exe" /q /xa

cmdkey
/generic:Microsoft_CRM_https://contoso.crm.dynamics.com/
/user:user@contoso.com /password{password_goes_here}

"C:\Program Files\Microsoft Dynamics
CRM\Client\ConfigWizard\Microsoft.Crm.Application.Outlook.Con
figWizard.exe" /q /i

"C:\Program Files\Microsoft Dynamics
CRM\Default_Client_Config.xml"
```

Tip

Consider running your script as a logon script, or forcing the script to run at a specific time, such as by using Microsoft System Center 2012 Configuration Manager.

In the script, you might also want to include detection logic that determines whether the client computer has already been configured. If it has, you can have the script exit without taking action.

Example Default_Client_Config.xml file

```
<Deployment>
```

```

<DiscoveryUrl>http://CrmDiscoveryUrl</DiscoveryUrl>
<Organizations>
<Organization IsPrimary='true'>Organization1</Organization>
</Organizations>
</Deployment>

```

2. Run the script on each client computer in the organization whose server has changed. You can run the script in various ways, including through the **Profile** tab of the user properties dialog box in Active Directory Users and Computers (ADUC), or through Group Policy Objects (GPO).

See Also

[Set up CRM for Outlook](#)

Install Microsoft Dynamics CRM Server by using a command prompt

[CRM for Outlook](#)

Microsoft Dynamics CRM for Outlook failure recovery

Microsoft Dynamics CRM for Outlook with “Go offline” capability uses Microsoft SQL Server Express for local data storage on the user’s computer. This enables Microsoft Dynamics CRM users to work offline and later synchronize local data with SQL Server (on-premises) or Microsoft Dynamics CRM Online when Dynamics CRM for Outlook is brought online again.

In some cases, Microsoft Dynamics CRM users may want to back up the local Microsoft SQL Server Express database. This is especially useful when Microsoft Dynamics CRM users are offline for prolonged periods. The following table indicates different methods that can be used for backing up the SQL database used with Dynamics CRM for Outlook.

Backup method	What to back up	Comments
Offline backup	<p>Contents of Microsoft Dynamics CRM data directory.</p> <p>The default location of 64-bit Microsoft Office on 32-bit Windows: %programfiles%\Microsoft Dynamics CRM\LocaleCode\sql\7</p> <p>The default location of 32-bit Microsoft Office on 64-bit Windows: %programfiles(x86)%\Microsoft Dynamics CRM\LocaleCode\sql\7</p>	<p>Before you start the backup, make sure that the SQL Server (CRM) service is stopped. Restart the service after the backup is complete.</p> <p><i>LocaleCode</i> is the 4-digit number representing the language locale.</p>
Online backup using Microsoft tools	<p>MSDE_MSCRM7.mdf</p> <p>MSDE_MSCRM7_log.LDF</p>	Use Microsoft SQL Server Management Studio

Backup method	What to back up	Comments
		Express (SSMSE) or sqlcmd.exe (a command-line tool).
Online backup using non-Microsoft tools	MSDE_MSCRM7.mdf MSDE_MSCRM7_log.LDF	Look for tools that are compatible with Microsoft SQL Server Express.

Backup and recovery tools

Microsoft SQL Server 2012 Express provides a graphical management tool (SQL Server Management Studio Express (SQLManagementStudio)) that includes backup and recovery features. You can download SQL Server Management Studio Express at [Microsoft SQL Server® 2012 Service Pack 2 \(SP2\) Express](#).

Restoring from backup

If there is a problem with Dynamics CRM for Outlook offline synchronization, the backup can be used to restore Microsoft Dynamics CRM functionality. Dynamics CRM for Outlook should be in offline mode before you restore the backup. When restored, you can then connect to Microsoft Dynamics CRM (online mode). The data that isn't already on the server will be transferred to the server from the client. Be careful when reconnecting to the server. If you restore from an outdated backup, the existing data on the server may have subsequently changed and you run the risk of overwriting current data on the server with older data from the offline client backup.

See Also

[Set up CRM for Outlook](#)

Microsoft Dynamics CRM failure recovery

Control field synchronization between CRM and Outlook or Exchange

With field synchronization, admins can set the sync direction between Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook fields. You can control synchronization when using either Outlook synchronization or server-side synchronization (Exchange).

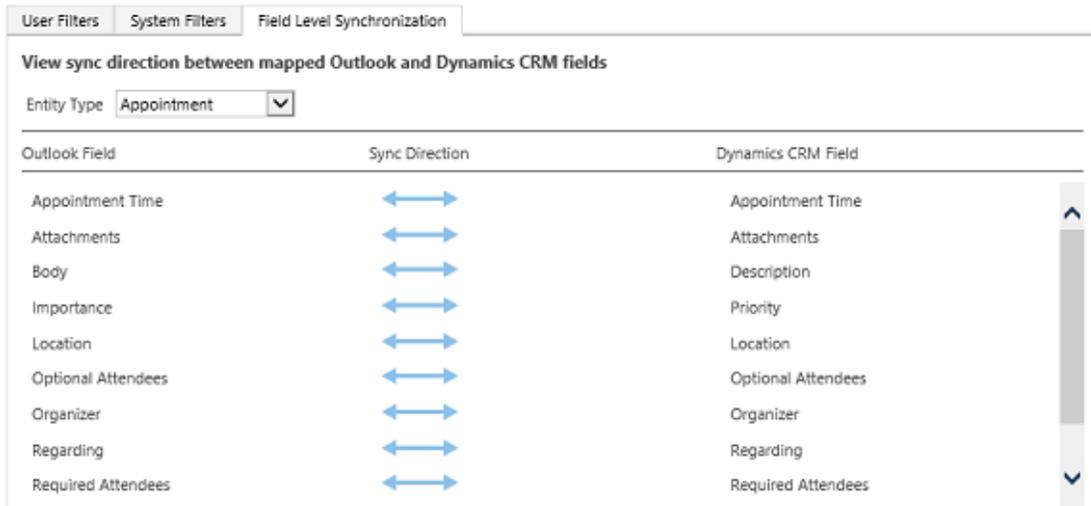
For example, a salesperson may want to take personal notes about a contact and not want the notes to synchronize with CRM data available to all users. You can set the Personal Notes field for contacts in Outlook to not Dynamics CRM for Outlook with CRM so the salesperson's notes will remain private.

 **Tip**

 Check out the following video: [Configurability in Synchronizing Data with Outlook or Exchange in Microsoft Dynamics CRM 2015](#)

► Set field synchronization between CRM and CRM for Outlook

1. In CRM, Go to **Settings > Email Configuration**. ([How do I get there?](#))
2. Choose **Email Configuration Settings**.
3. Choose the **Synchronization** tab > **synchronized fields**
4. For the fields you want to change synchronization, choose the arrows in the Sync Direction column. Each choice will change the direction.



View sync direction between mapped Outlook and Dynamics CRM fields

Entity Type: Appointment

Outlook Field	Sync Direction	Dynamics CRM Field
Appointment Time	↔	Appointment Time
Attachments	↔	Attachments
Body	↔	Description
Importance	↔	Priority
Location	↔	Location
Optional Attendees	↔	Optional Attendees
Organizer	↔	Organizer
Regarding	↔	Regarding
Required Attendees	↔	Required Attendees



Tip

Hover over a field name to see the fields mapped to it.

5. Choose **OK > OK** to close the open dialog boxes.

Let your users know they can view (not change) the synchronization settings. More information: [What fields can be synchronized between CRM and CRM for Outlook?](#)

Performance and synchronization

Configuring synchronization might have an impact on the time it takes to sync between Dynamics CRM for Outlook and CRM. You should test your configuration before deploying to ensure satisfactory sync times.

Permissions and synchronization

Role-based security controls access to a specific entity type, record-based security controls access to individual records, and field-level security controls access to specific fields. All these can impact what is synchronized between CRM and Dynamics CRM for Outlook or Exchange.

Best practice is to review the security settings for these security methods to ensure field synchronization is processed as desired. For more information see:

- Securing roles: **Create or edit a security role**
- Securing fields: [Help & Training: Add or remove security from a field](#)

More information: [How field security affects synchronization between CRM and CRM for Outlook](#) and **Security concepts for Microsoft Dynamics CRM**

See Also

[Set up CRM for Outlook](#)

What fields can be synchronized between CRM and CRM for Outlook?

CRM administrators can set whether a sync occurs and the sync direction for Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook fields.

Outlook Field	Sync Direction	Dynamics CRM Field
Appointment Time	↔	Appointment Time
Attachments	↔	Attachments
Body	↔	Description
Importance	↔	Priority
Location	↔	Location
Optional Attendees	↔	Optional Attendees
Organizer	↔	Organizer
Regarding	↔	Regarding
Required Attendees	↔	Required Attendees

You can set synchronization for the entities listed in the following tables. For information on how to set field synchronization, see [Control field synchronization between CRM and Outlook or Exchange](#)

Entity: Appointment

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Appointment Time	↔	↔	Appointment Time	Aggregation of Start Time, End Time, Duration, All Day Event, etc.

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Attachments	↔	Computed	Attachments	Changes to ↔ based on System Settings.
Body	↔	↔, →, ←, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Importance	↔	↔	Priority	Outlook has High Importance, Low Importance.
Location	↔	↔, →, ←, ↔	Location	
Optional Attendees	↔	↔	Optional Attendees	
Organizer	↔	↔	Organizer	See below.
Regarding	↔	↔	Regarding	See below.
Required Attendees	↔	↔	Required Attendees	
Show Time As	↔	↔	Appointment Status	
Subject	↔	↔, →, ←, ↔	Subject	

Notes

1. **Organizer:** In Outlook sync, an appointment created in CRM will not result in filling in the Outlook Organizer field until it is further modified in Outlook. This applies to Appointment, Recurring Appointment, and Service Activity. In server-side sync, a service activity created in CRM will result in filling in the Exchange Organizer field with the person who synchronizes this appointment.
2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.

Entity: Contact

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Anniversary	↔	↔, →, ←, ↔	Anniversary	
Assistant's Name	↔	↔, →, ←, ↔	Assistant	
Assistant's Phone	↔	↔, →, ←, ↔	Assistant Phone	
Birthday	↔	↔, →, ←, ↔	Birthday	
Business Fax	↔	↔, →, ←, ↔	Fax	
Business Phone	↔	↔, →, ←, ↔	Business Phone	
Business Phone 2	↔	↔, →, ←, ↔	Business Phone 2	
Callback	↔	↔, →, ←, ↔	Callback Number	
Children	↔	↔, →, ←, ↔	Children's Names	
Company Main Phone	↔	↔, →, ←, ↔	Company Phone	
Department	↔	↔, →, ←, ↔	Department	
E-mail	↔	↔, →, ←, ↔	Email	
E-mail 2	↔	↔, →, ←, ↔	Email Address 2	
E-mail 3	↔	↔, →, ←, ↔	Email Address 3	
FTP Site	↔	↔, →, ←, ↔	FTP Site	
Full Name	↔		Full Name	
Government ID	↔	↔, →, ←, ↔	Government	

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Number		↔, ↔		
Home Address	↔	↔, →, ↔, ↔	Address 2	Changes to ↔ based on System Settings.
Home Phone	↔	↔, →, ↔, ↔	Home Phone	
Home Phone 2	↔	↔, →, ↔, ↔	Home Phone 2	
Job Title	↔	↔, →, ↔, ↔	Job Title	
Mailing Address/Business Address	↔	↔, →, ↔, ↔	Address 1	Mailing Address changes to Business Address based on System Settings.
Manager's Name	↔	↔, →, ↔, ↔	Manager	
Mobile	↔	↔, →, ↔, ↔	Mobile Phone	
Nickname	↔	↔, →, ↔, ↔	Nickname	
Notes	↔	↔, →, ↔, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Other Address	↔	↔, →, ↔, ↔	Address 3	Changes to ↔ based on System Settings.
Other Phone	↔	↔, →, ↔, ↔	Telephone 3	

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
		←→, ↔		
Pager	←→	←→, →, ←→, ↔	Pager	
Parent (Regarding)	←→		Company Name (Regarding)	See Notes below.
Spouse/Partner	←→	←→, →, ←→, ↔	Spouse/Partner Name	
Web Page	←→	←→, →, ←→, ↔	Website	
Yomi First Name	←→	←→, →, ←→, ↔	Yomi First Name	
Yomi Last Name	←→	←→, →, ←→, ↔	Yomi Last Name	

Notes

1. **Parent (Regarding):** When you do a **Set Regarding**, the Company field in Outlook is replaced by the name of the regarding object from CRM. If not syncing, the set regarding action in Dynamics CRM for Outlook and in CRM should not change the Company field in Outlook. Users can control updating the Company field for Outlook contacts in Dynamics CRM for Outlook. More information: [Help & Training: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange](#)
2. When the Contact entity is deactivated (**Status Reason: Inactive**), the Outlook field in Outlook will have **Category [CRM] Inactive**. This is to help differentiate the inactive vs. active status from a pool of tracked Outlook contacts.

Entity: Fax

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Date Completed	←→	←→, →, ←→, ↔	Actual End	
Due Date	←→	←→, →, ←→, ↔	Due Date	See Notes below.
Importance	←→		Priority	Outlook has High Importance, Low Importance.

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Notes	↔	↔, →, ←, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Regarding	↔		Regarding	See Notes below.
Start Date	↔	↔, →, ←, ↔	Start Date	
Status	↔		Status	Computed from Activity Status and Status Reason.
Subject	↔	↔, →, ←, ↔	Subject	

Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to CRM. However, when a task has Due Time set in CRM, it will be synchronized to reminder time in Outlook.

If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; If there is Start Date value but no Due Date value in CRM, CRM will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and CRM independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.

Entity: Letter

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Date Completed	↔	↔, →, ←, ↔	Actual End	

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Due Date	↔	↔, →, ←, ↔	Due Date	See Notes below.
Importance	↔		Priority	Outlook has High Importance, Low Importance.
Notes	↔	↔, →, ←, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Regarding	↔		Regarding	See Notes below.
Start Date	↔	↔, →, ←, ↔	Start Date	
Status	↔		Status	Computed from Activity Status and Status Reason.
Subject	↔	↔, →, ←, ↔	Subject	

Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to CRM. However, when a task has Due Time set in CRM, it will be synchronized to reminder time in Outlook.

If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; if there is Start Date value but no Due Date value in CRM, CRM will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and CRM independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.

Entity: Phone Call

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Date Completed	↔	↔, →, ←, ↔	Actual End	
Due Date	↔	↔, →, ←, ↔	Due Date	See below.
Importance	↔		Priority	Outlook has High Importance, Low Importance.
Notes	↔	↔, →, ←, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Regarding	↔		Regarding	See Notes below.
Start Date	↔	↔, →, ←, ↔	Start Date	
Status	↔		Status	Computed from Activity Status and Status Reason.
Subject	↔	↔, →, ←, ↔	Subject	

Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to CRM. However, when a task has Due Time set in CRM, it will be synchronized to reminder time in Outlook.

If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; if there is Start Date value but no Due Date value in CRM, CRM will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and CRM independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.

Entity: Recurring Appointment

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Body	↔	↔, →, ←, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Importance	↔		Priority	Outlook has High Importance, Low Importance.
Location	↔	↔, →, ←, ↔	Location	
Optional Attendees	↔		Optional Attendees	
Organizer	↔		Organizer	See Notes below.
Recurrence Pattern	↔		Recurrence Pattern	
Regarding	↔		Regarding	See Notes below.
Required Attendees	↔		Required Attendees	
Show Time As	↔		Appointment Status	Computed by Activity Status and Status Reason.
Subject	↔	↔, →, ←, ↔	Subject	

Notes

1. **Organizer:** In Outlook sync, an appointment created in CRM will not result in filling in the Outlook Organizer field until it is further modified in Outlook. This applies to Appointment, Recurring Appointment, and Service Activity. In server-side sync, a service activity created in CRM will result in filling in the Exchange Organizer field with the person who synchronizes this appointment.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.

Entity: Service Activity

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
Appointment Time	←		Appointment Time	Aggregation of Start Time, End Time, Duration, All Day Event, etc.
Importance	←		Priority	Outlook has High Importance, Low Importance.
Location	←		Location	
Notes	←		Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Optional Attendees	←		Optional Attendees	
Organizer	←		Organizer	See Notes below.
Regarding	←		Regarding	See Notes below.
Required Attendees	←		Required Attendees	
Show Time As	←		Appointment Status	Computed by Activity Status and Status Reason.
Subject	←		Subject	

Notes

1. **Organizer:** In Outlook sync, an appointment created in CRM will not result in filling in the Outlook Organizer field until it is further modified in Outlook. This applies to Appointment, Recurring Appointment, and Service Activity; in server-side sync, a service activity created in

CRM will result in filling in the Exchange Organizer field with the person who synchronizes this appointment.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.

Entity: Task

CRM for Outlook field	Default sync	Settable sync	CRM field	Notes
% Complete	↔	↔, →, ←, ↔	Percent Complete	
Date Completed	↔	↔, →, ←, ↔	Actual End	
Due Date	↔	↔, →, ←, ↔	Due Date	See Notes below.
Importance	↔		Priority	Outlook has High Importance, Low Importance.
Notes	↔	↔, →, ←, ↔	Description	Outlook and Exchange can contain things like images and links. CRM can only contain multiple lines of text.
Regarding	↔		Regarding	See Notes below.
Start Date	↔	↔, →, ←, ↔	Start Date	See Notes below.
Status	↔		Status	Computed from Activity Status and Status Reason.
Subject	↔	↔, →, ←, ↔	Subject	

Notes

1. **Due Date:** Includes Date and Time. When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to CRM.

However, when a task has Due Time set in CRM, it will be synchronized to reminder time in Outlook.

If there is a Start Date value but no Due Date value in Outlook/Exchange, Outlook/Exchange will auto fill the Due Date value with the Start Date whenever you change the Start Date directly in Outlook; if there is Start Date value but no Due Date value in CRM, CRM will auto fill the Due Date value with the Start Date. These are controlled by Outlook/Exchange and CRM independently, not controlled by sync directions here.

2. **Regarding:** When you do a **Set Regarding**, the Regarding field in Outlook is replaced by the name of the regarding object from CRM. Until you sync, the **Set Regarding** action in Dynamics CRM for Outlook and in CRM should not change the Regarding field in Outlook.
3. **Start Date:** When a task is created and tracked in Outlook, the system assigns the task a reminder time. Reminder information is not synced from Outlook to CRM. However, when a task has Due Time set in CRM, it will be synchronized to Reminder Time in Outlook.

See Also

[Set up CRM for Outlook](#)

[What fields can be synchronized between CRM and CRM for Outlook?](#)

How field security affects synchronization between CRM and CRM for Outlook

Securing a field in Microsoft Dynamics CRM with field level security can impact synchronization between CRM and Microsoft Dynamics CRM for Outlook. Consider the following scenario.



Note

We do not recommend securing a field in CRM when the field is set to sync. Best practice is to NOT secure any sync fields. If you do decide to secure sync fields, you'll need to do the following:

1. Secure the field using field level security. More information: see "Set field level security" below.
2. Change the sync direction so that sync does not attempt to update or write the field during synchronization. More information: [Control field synchronization between CRM and Outlook or Exchange](#)

Scenario: Restrict users from changing Job Title

The Contoso company wants to promote consistent data entry. While sales personnel are out in the field, it's easy for them to create different data entries to describe the same thing. For example, the same job title could be entered as "Construction Manager", "Foreman", or "Site Manager". To prevent this, the Job Title field is secured. This has consequences for synchronization.

Set field level security

John, the CRM admin for Contoso, sets security on several fields.



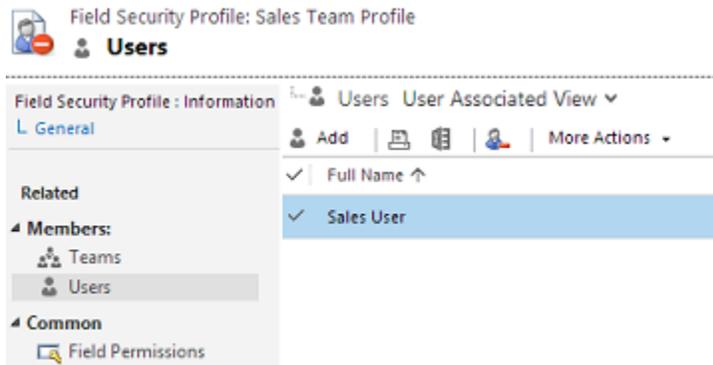
He did the following steps:

1. Go to **Settings > Customizations**. ([How do I get there?](#))
2. Choose **Customize the System**.
3. Expand **Entities > Contact**.
4. Choose **Fields** and select **jobtitle**. There are a lot of Contact fields so you'll need to advance several pages.
5. Choose **Edit**.
6. For Field Security, choose **Enable > Save and Close**.
7. Choose **Publish All Customizations**.

John also secured the following Contact fields so they won't appear in CRM: ftpsiteurl, governmentid

Create and configure a field security profile

John creates a field security profile and assigns sales team members to the profile.



He did the following to create the field security profile:

1. Go to **Settings > Security**. ([How do I get there?](#))
2. Choose **Field Security Profiles**.
3. Create a profile. Choose **New** and enter a Name.
4. Choose **Save and Close**.
5. Choose the new profile > **Users > Add**

6. Select users and then choose **Select > Add**.

Set field permissions

With a field security profile created and users added to the profile, John can now set permissions on the fields to match his organization's requirements.

The screenshot shows the 'Field Permissions' configuration for a 'Sales Team Profile'. A table lists fields with their permissions. The 'jobtitle' field is selected, and an 'Edit Field Security' dialog is open, showing settings for 'Allow Read' (Yes), 'Allow Update' (No), and 'Allow Create' (No).

Name	Display Name	Type	Entity	Read
ftpsiteurl	FTP Site	Single Line of Text	Contact	No
governmentid	Government	Single Line of Text	Contact	No
jobtitle	Job Title	Single Line of Text	Contact	No

Edit Field Security -- Webpage Dialog

Edit Field Security
Change permission for the selected fields

Allow Read Yes
Users can view this field

Allow Update No
Users can change the information in this field

Allow Create No
Users can add information to this field when the record is created

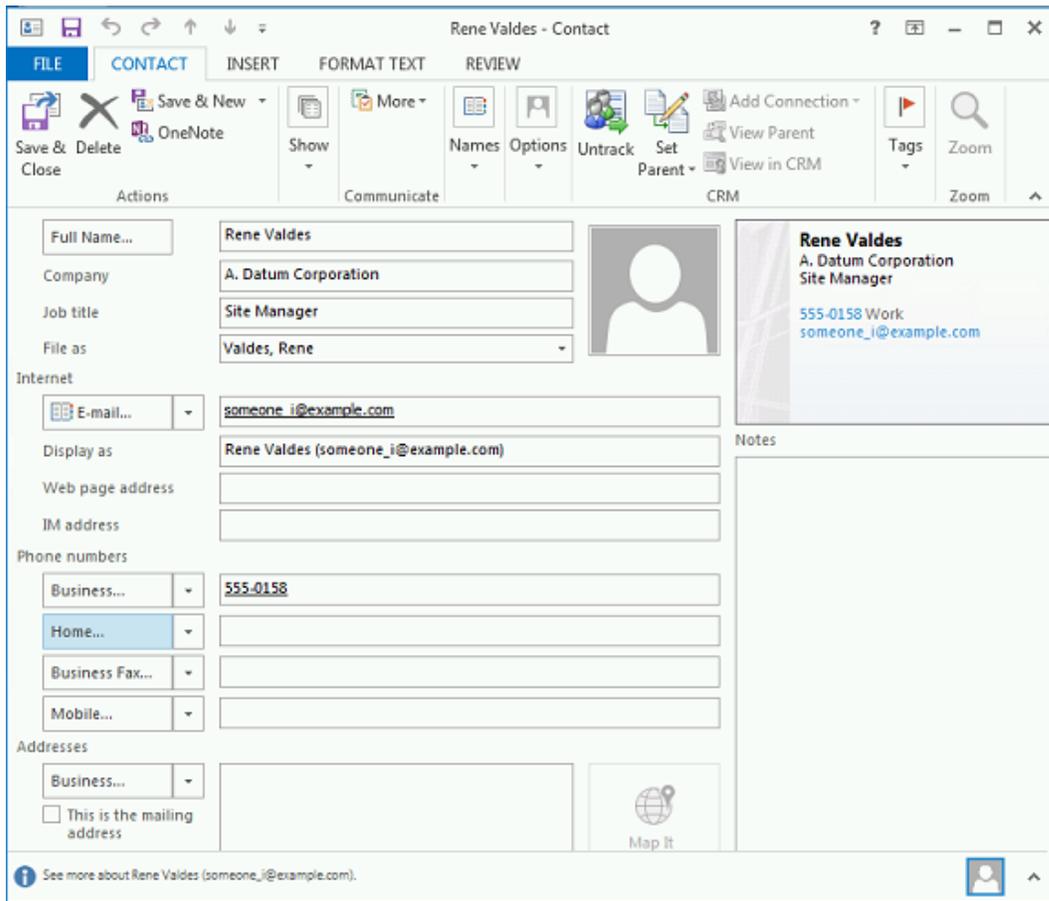
OK Cancel

Local intranet | Protected Mode: Off

1. Go to **Settings > Security**. ([How do I get there?](#))
2. Choose **Field Security Profiles > your profile**.
3. Choose **Field Permissions > the field to secure > Edit**
4. Change the security settings to match your company's requirements and then choose **OK > Save and Close**.

What the user sees

Nancy, a salesperson at Contoso, uses Dynamics CRM for Outlook and creates a new contact and tracks it in CRM.



When Nancy synchronizes with CRM, she notices that the Job Title field is gone from the contact. This is because Nancy doesn't have update rights for the Job Title field.

A screenshot of a contact form window. The window has a title bar with a close button (X) in the top right corner. On the left side, there is a placeholder for a profile picture. To the right of the picture, the text "Name" is above a text input field containing "Rene Valdes". Below the name field, there are two tabs: "CONTACT" (selected) and "NOTES". The form is organized into two columns. The left column contains three sections, each with a plus icon in a circle: "Email" with a sub-label "Email" and a text input field containing "someone_i@example.com"; "Phone" with a sub-label "Work" and a text input field containing "555-0158"; and "IM". The right column contains a section "Changes Saved To Outlook (Contacts)" followed by three sections, each with a plus icon in a circle: "Work" with a sub-label "Company" and a text input field containing "A. Datum Corporation"; "Address"; and "Birthday". At the bottom of the window, there are two buttons: "Save" and "Cancel".

Nancy's manager, with update rights to the Job Title field, fills in the field with the correct job title: Construction Manager.

Nancy synchronizes again with CRM and now the Job Title field is in the contact with the correct title.

Name
Rene Valdes

CONTACT | NOTES

+ Email
Email
someone_i@example.com

+ Phone
Work
555-0158

+ IM

Changes Saved To
Outlook (Contacts)

+ Work
Title
Construction Manager

Company
A. Datum Corporation

+ Address

+ Birthday

Save Cancel

See Also

[Set up CRM for Outlook](#)

Field level security

Troubleshooting and things to know about Microsoft Dynamics CRM for Outlook

This section describes how to troubleshoot Dynamics CRM for Outlook installation and upgrade issues.

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Potential issues and resolutions

Assigned tasks not updated in Outlook after updated in CRM

Consider the following scenario:

- In Outlook, User 1 assigns Outlook task to User 2.
- In Outlook, User 2 accepts and tracks the task.
- In CRM, User 2 opens the task and makes a change such as changing the subject or marking the task complete.

Result: for User 1, in Outlook, the task status remains unchanged.

To force a status change: User 2, in Outlook, can open the Outlook task and click **Send Status Report** to update User 1's Outlook with the latest information.

Enabling the following settings in Outlook Task options (**Home tab > New Items > Task > Assign Task**) do not impact this issue:

- Keep an updated copy of this task on my task list.
- Send me a status report when this task is complete.

This is a known issue and is not supported.

Can't add a related record type when offline

If you're offline, you can't add a related record type by using the **Add** button (+). Add the related record type while you're online, and then go offline.

Inserted picture replaced by text after sync

Inserting a picture from a file into an appointment is not supported.

Some fields synchronize data when an activity is created despite synchronization settings

When an activity is created, such as a task, some fields may synchronize even if field synchronization is set to not sync. This is a known issue as some fields cannot have an empty value.

Users in a different domain cannot install CRM for Outlook

If the user domain account is in a domain different from the CRM organization, the user will receive an error message (see below) when installing Dynamics CRM for Outlook. This is not a supported scenario.

Error message

There is a problem communicating with the Microsoft Dynamics CRM server. The server might be unavailable. Try again later. If the problem persists, contact your system administrator.

The caller was not authenticated by the service.

No synchronization support on non-Cached Exchange Mode

Synchronization might not work as expected if Cached Exchange Mode is set to non-cached in Outlook. For example, sometimes, tracking email from the Outlook Search folder gives an error when Cached Exchange Mode is off when you set up your Exchange email account in Outlook. The best practice is to turn on Cached Exchange Mode when you set up your Exchange email account in Outlook. More information: [Turn on Cached Exchange Mode](#)

Automatic email tagging off by default

This setting is in the Microsoft Dynamics CRM Diagnostics tool included with Dynamics CRM for Outlook. Click **Start > All Programs > Microsoft Dynamics CRM 2016 > Diagnostics > Synchronization Troubleshooting** tab.

Automatic email tagging is set to be off by default. If you enable this setting but reinstall Dynamics CRM for Outlook, automatic email tagging will be off.

Service Appointments and Activities don't synchronize from Outlook to CRM

Changes made to Service Appointments and Activities in CRM will update in Dynamics CRM for Outlook when you synchronize, but the reverse is not true. When you make changes to Service Appointments or Activities in Dynamics CRM for Outlook, the changes are not synchronized to CRM.

Different time value in date and time fields with User Local or Time-Zone Independent behavior

If you have system out-of-the box or custom date and time fields with User Local or Time-Zone Independent behavior, the date/time information for years before 1900 won't display as entered when viewing in the list of records and reading pane in Dynamics CRM for Outlook. The date and time values are correct in the database and will appear as expected in the CRM web application.

Microsoft Dynamics CRM Online with Office 365

When you try to connect to an organization that is part of your Microsoft Office 365 subscription by using the Configuration Wizard or Microsoft Dynamics CRM Online for Outlook, you cannot connect. To resolve this issue, verify, and if necessary, correct the following:

- Make sure that you can connect to the organization by using Internet Explorer. There may be incomplete information with your Microsoft Online Services account that is preventing you from authenticating with the service. The URL for the organization is provided in the invitation email message you should have received from Microsoft Online Services, and is typically in the form of `https://OrganizationName.onmicrosoft.com` or `https://OrganizationName.crm.dynamics.com`. If you are not certain of the URL, contact your system administrator

Log files

When you install and configure Dynamics CRM for Outlook, the system creates log files that you can use for troubleshooting.

By default, the location of the Setup log files (including crmsetup.log and crm60clientmsi.log files), where User is the account of the user who ran Setup, is as follows:

- Windows 10, Windows 8, and Windows 7:
SystemDrive:\Users\<User>\AppData\Local\Microsoft\MSCRM\Logs

By default, the location of the configuration log files (including crm50clientconfig.log), where User is the account of the user who ran Configuration Wizard, is as follows:

- Windows 10, Windows 8, and Windows 7:
SystemDrive:\Users\<User>\AppData\Local\Microsoft\MSCRM\Logs

Important

By default, the AppData folder is hidden. To view the AppData folder, use **Folder Options** in **Control Panel** to enable viewing for hidden files and folders.

Tip

You can use the shortcut path to access the AppData folder, %LocalAppData%\Microsoft\MSCRM\Logs.

Event Viewer

To access event logging information for Dynamics CRM for Outlook, open Event Viewer from the client computer where Dynamics CRM for Outlook is installed, and then view the entries in the Application log.

To view the Application log in Event Viewer:

1. On the computer where Dynamics CRM for Outlook is installed, start Event Viewer.
2. In the navigation pane, expand **Windows Logs** and then click **Application**.
3. To make it easier to locate events that apply to Dynamics CRM for Outlook, use **Create Custom View** or **Filter Current Log** and then select the following **Event sources**:
 - Event sources that begin with MSCRM (such as MSCRMAddin and MSCRMAddressBook)
 - MSSQL\$CRM

Disable the CRM for Outlook notification bar on the Web application

By default, if a user does not have Dynamics CRM for Outlook installed and configured, the Microsoft Dynamics CRM web application displays a **Get CRM for Outlook** button on the notification bar. This button provides a link for users to download and install software features that configure a local Microsoft SQL Server Express data store. If you do not want users to have this capability, you can remove the button.

Remove the Get CRM for Outlook button from the Microsoft Dynamics CRM web application

By default, if a user does not have Dynamics CRM for Outlook installed and configured, the Microsoft Dynamics CRM web application displays a **Get CRM for Outlook** button on the notification bar. This button provides a link for users to download and install software features

that configure a local Microsoft SQL Server Express data store. If you do not want users to have this capability, you can remove the button.

▶ **Remove the Get CRM for Outlook button from the Microsoft Dynamics CRM web application**

4. 0.1. With a security role that has read and write permissions (for example, the System Administrator role), start the Microsoft Dynamics CRM web application.
2. Go to **Settings > Administration**. ([How do I get there?](#))
3. Click **System Settings**.
4. Click the **Outlook** tab.
5. Set the value for **Users see “Get CRM for Outlook” option displayed in the message bar** to **No**.
6. Click **OK** to close System Settings.

See Also

[Planning and installing CRM for Outlook for Microsoft Dynamics CRM 2016 and Dynamics CRM Online](#)

Troubleshooting server-side synchronization

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