

# Sage CRM 7.3 SP1

Installation and Upgrade Guide

# Contents

Contents.....	1
Introduction .....	2
Which versions are supported in 7.3 SP1? .....	2
Using Citrix.....	3
Installing the Outlook Plug-in for Exchange Integration .....	3
Installing the Outlook Plug-in for Classic Outlook Integration .....	4
Using Terminal Services .....	5
Workaround for using the Outlook plugins on Terminal Services .....	5

# Introduction

This Support Guide is for Sage OpCos, Sage CRM partners, and Sage CRM customers installing Sage CRM in a Terminal Services or Citrix environment.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, regional products may use different brand names.

## Which versions are supported in 7.3 SP1?

The following table is an extract from the Product Support Matrix. The full version is available here: <http://help.sagecrm.com/>.

Terminal Services / Citrix*	7.3	
	32-bit	64-bit
Windows Terminal Server 2012 R2 (Standard & Enterprise Editions) over HTTP & HTTPS		
Deployed by publishing the desktop	✓	✓
Windows Terminal Server 2008 & 2008 R2 (Standard & Enterprise Editions) over HTTP & HTTPS		
Deployed by publishing the desktop		
Windows Terminal Server 2003 R2 (Standard & Enterprise Editions) over HTTP & HTTPS		
Deployed by publishing the desktop		
Citrix XenApp v6.5 (Enterprise Edition) over HTTP & HTTPS		
Deployed by publishing the desktop	✓	
Deployed by publishing content	✓	
Citrix XenApp v6.0 (Enterprise Edition) over HTTP & HTTPS		
Deployed by publishing the desktop	✓	
Deployed by publishing content	✓	
Citrix XenApp v5.0 (Enterprise Edition) over HTTP		
Deployed by publishing the desktop		
Deployed by publishing content		
<i>* Some Sage CRM features not supported. Please see the Terminal Services and Citrix Support Guide.</i>		
<i>Support not be available for all Integrated Suites. Please consult your local support team.</i>		
<i>There's now a workaround for using Outlook plug-ins with Terminal Services.</i>		
Please see the Terminal Services and Citrix Support Guide for more details.		

## Using Citrix

The table above relates to accessing Sage CRM 7.3 SP1 over Citrix, using XenApp Server 6.5 and 6.0 over HTTP/HTTPS. This table only concerns Sage CRM 7.3 SP1 installed on a single server. No tests have been made on a CRM install accessed via remote desktop.

To make sure that your exact configuration is fully supported, we recommend performing a full User Acceptance Testing of the application.

Please be aware that, the following have not been fully tested on Citrix, which means you may encounter some performance or compatibility issues:

- Multi-Server Citrix environments.
- Sage CRM Plug-ins in Multi- server Citrix environments.

The following are not supported on Citrix:

- Multi Server CRM.
- Roaming profiles.

### **Installing the Outlook Plug-in for Exchange Integration**

MSI rollout of the Outlook plug-in for Exchange Integration is possible on Citrix Servers, and the registry key can be used to suppress the plug-in for users logging onto those servers, who should not see the plug-in. For more information, see *Exchange Integration* in the System Administrator Help.

If the Administrator user is allowing end users to install the plug-in manually then, as with Classic Outlook Administration, the Administrator should log on to the Citrix server as each user and install the Outlook Plug-in for Exchange.

## Installing the Outlook Plug-in for Classic Outlook Integration

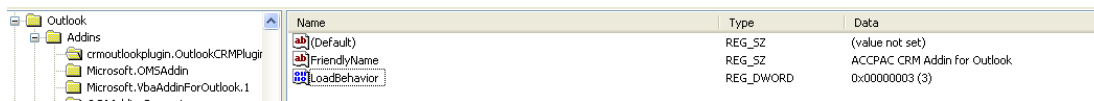
The Administrator is responsible for installing and uninstalling Sage CRM plug-ins. Particular care must be taken when uninstalling plug-ins. For example, if a user uninstalled the Classic Outlook Integration plug-in from his/her profile, the plug-in OCX/DLL may get unregistered on the server.

Please follow these general recommendations when installing the Classic Outlook Integration feature:

1. The Administrator of the site should log on for each user under their own profile and carry out the Classic Outlook Integration installation on a user-by-user basis.
2. Make sure that all the users are connecting to one Citrix server as Load Balancing with multi-server Citrix is currently not supported.

**Note:** Multi-server Citrix is not supported for Classic Outlook integration as the last sync historical data, mapping files, last sync date details and modification etc. are on the first server where it has been installed and synched from.

3. Make sure that the IE and OUTLOOK.EXE processes are not running while installing the plug-in for each user on the Citrix session.
4. Make sure that all users have disconnected from the Citrix session and no other users are connected to Citrix as this may lock registry settings or the DLL. This includes the Admin user who should not be connected to the Citrix session.
5. Provide a different plug-in installation software folder for each of the users during the installation process.
6. Make sure that none of the users uninstall the plug-in. If they do, it may uninstall for all users, which may create an issue of missing buttons and general instability with the plug-in. If this occurs, re-install the plug-in for each user as described above.
7. Make sure that Office is up to the latest service pack available from Microsoft.
8. Under the registry key  
HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Office\Outlook\Addins\crmoutlookplugin.OutlookCRMPlugin, verify the value of Load Behavior key – it should be 3.



Name	Type	Data
(Default)	REG_SZ	(value not set)
FriendlyName	REG_SZ	ACCPAC CRM Addin for Outlook
LoadBehavior	REG_DWORD	0x00000003 (3)

9. The value in step 8 should also be checked in:  
HKEY\_CURRENT\_USER\Software\Microsoft\Office\Outlook\Addins\OutlookAddIn2003

# Using Terminal Services

It is now possible to use CTI with Terminal Services via Remote Desktop. To do so, Intelli-CTI must be published via remote desktop and the user should use this application instead of the one installed on the client machine. No tests have been made on roaming profiles via Terminal Services.

To make sure that your exact configuration is fully supported, we recommend performing a full User Acceptance Testing of the application.

You can install the Outlook plug-ins for Exchange Integration or for Classic Integration in the same way that you install them on Citrix environments:

- [Installing the Outlook Plug-in for Exchange Integration](#)
- [Installing the Outlook Plug-in for Classic Outlook Integration](#)

## Workaround for using the Outlook plugins on Terminal Services

If you have an issue installing the plug-in, and you're using Sage CRM version 7.2 or greater, you can use this workaround to use the Classic Outlook integration and Exchange Outlook integration plugins on Terminal Services.

1. Perform a first installation attempt.
  - Go to your installation environment, and install the plug-in.
  - During your installation, the following folder is created:  
`C:\Users\[current user]\AppData\Local\Temp\3\otlplugin`
  - An error will occur and the installation will fail.
2. Edit the temp directory
  - Navigate to the folder that was created during your first installation attempt. Please be aware that the number marked in green in the path above may vary depending on the Windows logged in user.
  - Copy the otlplugin folder into the temp directory, so that it looks like the below:  
`C:\Users\[current user]\AppData\Local\Temp\otlplugin`
3. Reinstall the plug-in
  - Reinstall the plug-in. This time, there should be no error. Once you've done this, the plug-in options are available on the server itself, and also for the user accessing Outlook on a client machine over Terminal Services.

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