Outlook Plug-in Installation Document of Mavin CRM Sync

1.) System Requirements:

Operating System : Windows 7(32-bit, 64-bit), Windows 8(32-bit, 64-bit)

Outlook : Microsoft Office Outlook 2007, Microsoft Office Outlook 2010,2013.

CRM : Zurmo CRM 2.8, Zurmo CRM 3.0.4

2.) Installation of Mavin CRM Sync:

Installation of Mavin CRM Sync Plug-in contains two parts
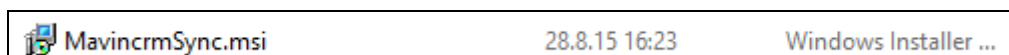
    i)   Installation of the Mavin CRM Sync
    ii)   Configuring the Server Side Settings

i) Installation of Mavin CRM Sync:

To Install Mavin CRM Sync follow the steps listed below, Before installing, the Microsoft Outlook application should be closed in your system. .Net Framework 4.5 or higher should be installed in your system to install this plug in.

Step-1:

Open the folder which contains Setup file and double click on the Setup file as shown below

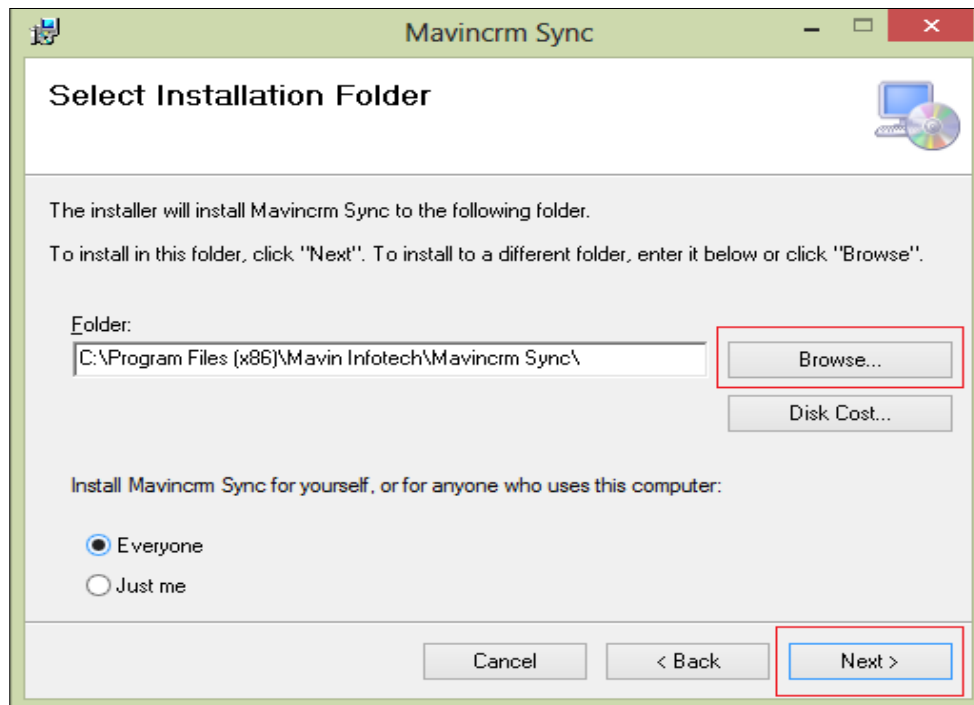|		
MavincrmSync.msi	28.8.15 16:23	Windows Installer ...

Step-2:

Clicking on Setup file will open the Installation Wizard then click on Next button then it will ask user to select Installation folder to which the Mavin CRM Sync needs to be installed. As shown below

If user want to change the installation folder click on Browse button and select the desired folder and click on Next button.

If the user wants install in the default folder(C: drive) then directly click on the Next button without changing any folder path.

Now click on Next and wait for the installation wizard to complete install process. After completing installation click on Close button to finish the process.

ii) Configuring the Server Side Settings:

To Configure CRM with Mavin CRM Sync plug-in:

Unzip the appropriate zip file from Zurmo Server files/**Zurmo _2.8**(for Zurmo CRM 2.8) and Zurmo Server files/**Zurmo_3.0.4**(for Zurmo CRM 3.0.4), then copy and paste folder to the **folderpath/app**

folderpath = folder path for zurmo crm where it is installed

Changes in Database:

Add 4 fields in conversation table pipelinestorage, salesterritory, timeframe, contacted with a type of varchar

After Completing Installation and Copying files to desired folder, Open the Outlook and observe the "Mavin CRM Sync " in Add-Ins menu as shown below