



**User's Guide for OpenERP – Microsoft Outlook Free
Plug-in 1.0 By Axelor**
<http://www.axelor.com>

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1. Introduction

This guide provides instructions about how to install/use OpenERP – Microsoft Outlook 2003 Free Plug-in, connect to Outlook to OpenERP, and start using Plug-in.

Outlook Plug-in Free Edition Feature:

- View the Outlook Mails in OpenERP having reference to the above Modules with just one click.
- Create Partner/Contact – Archive the selected mails at the same time.

Dependencies / Prerequisites

- [OpenERP 5.0](#)
- [Microsoft Office Outlook 2003 / 2007](#)
- [Dot.NET Framework version 2.0](#)
- [Windows Installer 3.1](#)
- [Microsoft Office 2003 / 2007 Primary Inter-op Assembly](#)
- [Open ERP Server Patch for XML RPC Communication – Exception Handling](#)



Note: All dependencies are included in the installer except OpenERP Server, Client and XML-RPC Patch of OpenERP server.

More Information

- More information is available on following websites.
- <http://www.axelor.com/plugin/>



Note: If OpenERP XML-RPC Patch has not been applied on the server, no Exception – Error Message will be displayed; instead of it plugin will just show the standard Error Message – like Fault Response contains invalid FaultCode. For further information regarding this patch you can see the launchpad bug details from the following link,

- <https://bugs.launchpad.net/bugs/257581>

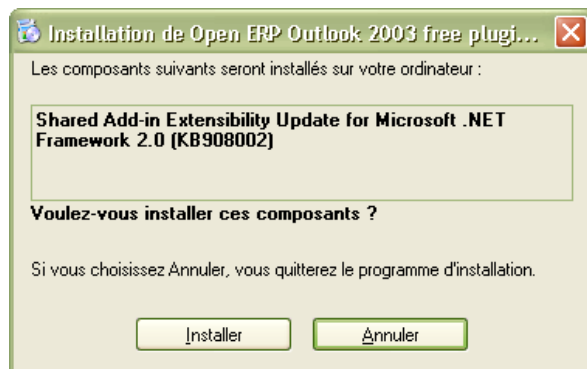
2. Installing OpenERP – Microsoft Outlook 2003 Free Plug-in

Before Installation

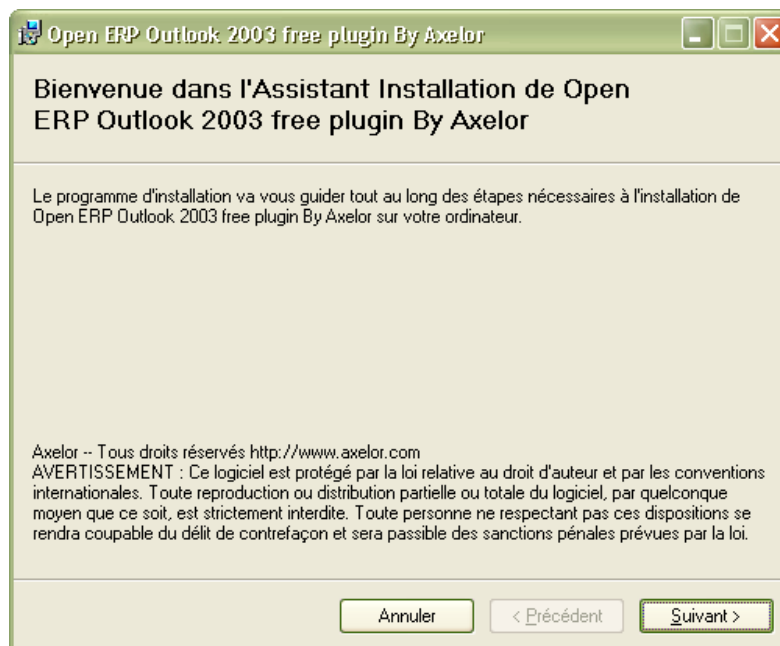
- If you have an earlier version of OpenERP Outlook Plug-in installed on your PC, the earlier version will be automatically replaced during the installation. If for some reason you need to uninstall the older version manually, the installation program prompts you to do so.

Installing Plug-in

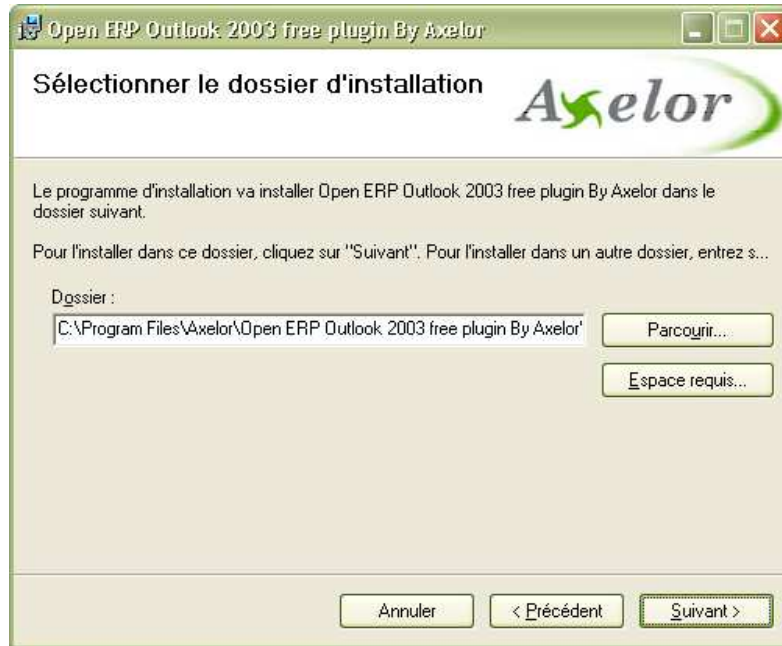
- Follow the instructions on the screen.
- Required components need to install the plug-in.



- Begin Installing OpenERP Outlook Plug-in



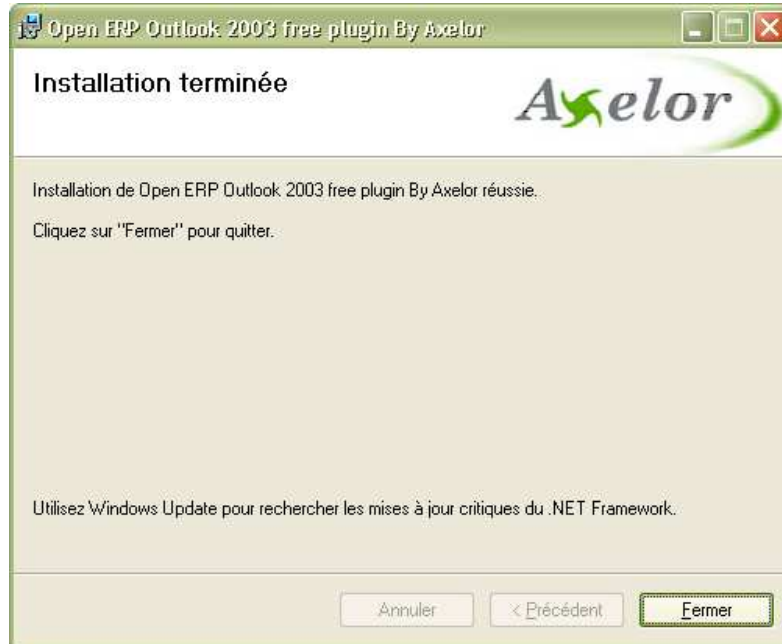
- Select the destination / installation folder



- Installation is in Progress



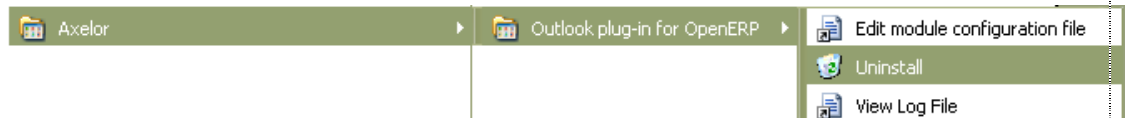
- Installation Complete



2.3 Uninstalling Plug-in

1. Classical Method

- a. **Start > Programs > Axelor -> Outlook plug-in for OpenERP -> Uninstall.**

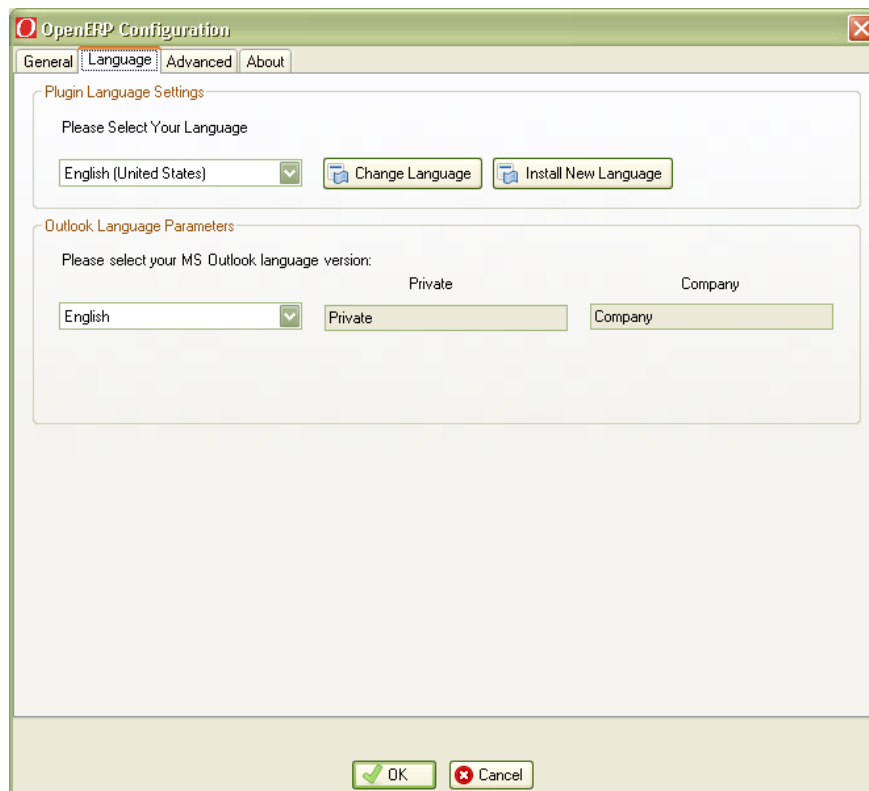


2. Uninstall From Operating System Control Panel

- Click **Start > Settings > Control Panel**. (If you are using Windows XP, use the Classic View of Control Panel.)
- Double-click **Add/Remove Programs**.
- From the list of Currently Installed Programs, select **OpenERP Outlook 2003 Free Plug-in by Axelor**.
- Click **Change/Remove**.
- Follow the instructions on the screen until the program files are removed.

2.4 Changing the Language according to your Office Localization

- If you have successfully installed OpenERP Outlook Plug-in, you can change the language from the menu **Tools → OpenERP Options**.



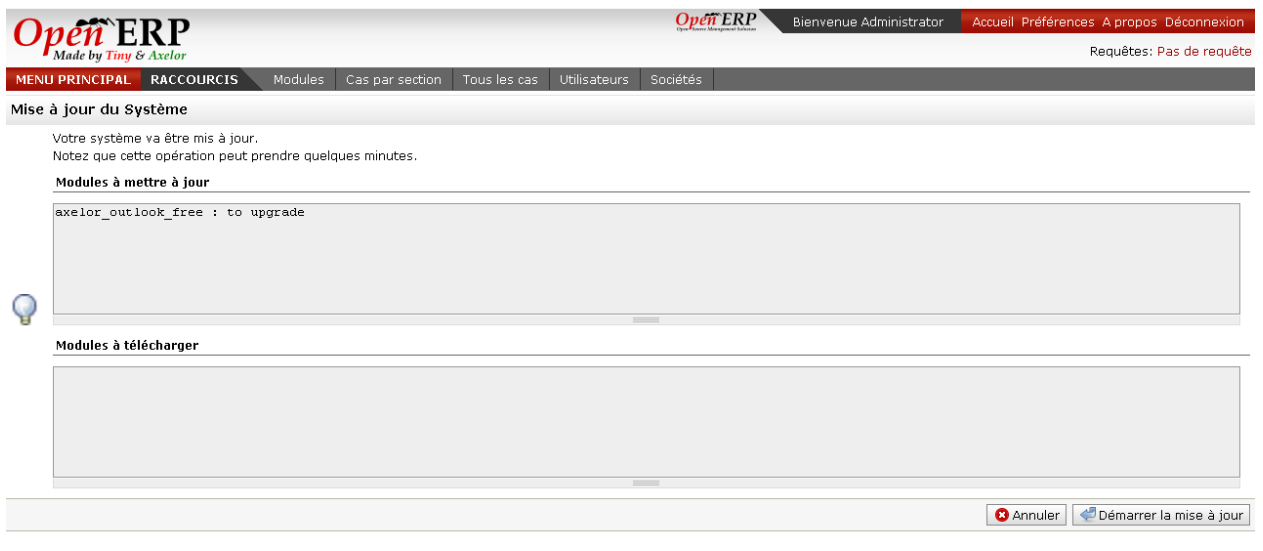
3. Installing OpenERP Server module for Outlook Integration

- In order to use the outlook plug-in, you need to install and configure the OpenERP sever module called “axelor_outlook_free”.
- Here are the steps to install/configure it.
- Update your module list and mark axelor_outlook_free module for installation



The screenshot shows the OpenERP Admin interface. At the top, there's a navigation bar with 'OpenERP Made by Tiny & Axelor' and 'OpenERP OpenERP Management Solution'. The user is logged in as 'Administrateur'. The main menu includes 'MENU PRINCIPAL', 'RACCOURCIS', 'Modules', 'Cas par section', 'Tous les cas', 'Utilisateurs', and 'Sociétés'. The 'Module' page is active, showing details for 'axelor_outlook_free'. The description is 'Microsoft Outlook Plugin Integration'. The 'Dépendances' tab is selected, showing a description: 'Outlook Module is required for the Microsoft Office Outlook Integration, This Module Provides Server Side functionalities for the MS Outlook plugin.' Other details include 'Dernière version: 5.0.1.0', 'Auteur: Axelor', 'URL: http://www.axelor.com/', 'Licence: GPL-2', and 'État: À mettre à jour'. There is an 'Annuler la Mise à Jour' button.

- Start the Installation from the right side Actions.



The screenshot shows the 'Mise à jour du Système' (System Update) screen in the OpenERP Admin interface. It indicates that the system will be updated and that the operation may take a few minutes. Under 'Modules à mettre à jour' (Modules to update), it lists 'axelor_outlook_free : to upgrade'. There is a lightbulb icon next to this entry. Under 'Modules à télécharger' (Modules to download), there is an empty list. At the bottom, there are two buttons: 'Annuler' (Cancel) and 'Démarrer la mise à jour' (Start update).

- Start Module configuration

The screenshot shows the OpenERP administrator interface. At the top, there is a navigation bar with the OpenERP logo and the text "Made by Tiny & Axelor". To the right, it says "OpenERP" and "Bienvenue Administrator" with links for "Accueil", "Préférences", "A propos", and "Déconnexion". Below this is a menu bar with "MENU PRINCIPAL" and "RACCOURCIS" highlighted, followed by "Modules", "Cas par section", "Tous les cas", "Utilisateurs", and "Sociétés". The main content area displays the message "Mise à jour du Système terminée" (System update completed) and "Mise à jour du Système terminée" (System update completed). It states: "Les modules ont été mis à jour / installés ! Vous devrez réinstaller quelques packs de langue. Nous vous suggérons de recharger l'onglet menu (Ctrl+t ctrl+r)". At the bottom right, there are two buttons: "Fermer" (Close) and "Démarrer la Configuration" (Start Configuration). At the very bottom, there is a copyright notice: "Copyright © 2007-2009 Tiny ERP Pvt. Ltd. Tous droits réservés. Plus d'informations sur <http://openerp.com>. Le client web est développé par Axelor (<http://axelor.com>) et Tiny (<http://tiny.be>). Serveur courant : socket://localhost:8070 - database: outlook".

- Click on the continue button to proceed for the module configuration.

The screenshot shows a dialog box titled "Prochaine Étape de la Configuration" (Next Step of Configuration). It contains the text: "Following Configuration Step will allow you to Map Outlook Mails with OpenERP CRM Case." Below this text is a progress bar labeled "Progression de la Configuration:" which is at 75%. At the bottom right, there are two buttons: "Passer l'Étape" (Skip Step) and "Continuer" (Continue). There is also a "[PERSONNALISER]" link on the left side.

- Select the desired section that you want to map with outlook email.

The screenshot shows a dialog box titled "Install Pre-Configured Features". It contains the text: "Map Outlook Mails with CRM Section for Outlook - OpenERP Synchronization." Below this text, there are two input fields: "Section for Outlook Sent mails:" with the value "Sent Mail" and "Section for Outlook Received mails:" with the value "Rendez-vous". At the bottom, there are two buttons: "Cancel" and "Next". There is also a "[PERSONNALISER]" link on the left side.

- Click Next Button to finish the Module configuration wizard.

Prochaine Étape de la Configuration

Your database is now fully configured.
Click 'Continue' and enjoy your OpenERP experience...

Progression de la Configuration:

[PERSONNALISER]

- Later on you can change the settings under the Company Profile.

OpenERP Made by Tiny & Axelor

Bienvenue Administrator Accueil Préférences A propos Déconnexion

Requêtes: Pas de requête

MENU PRINCIPAL RACCOURCIS Modules Cas par section Tous les cas Utilisateurs Sociétés

Société Recherche Formulaire Calendrier Gantt Graphe Processus

Enregistrer Enregistrer et Modifier Annuler

<< Premier < Précédent [1/1] Suivant > Dernier >>

Nom de la société: Tiny sprl

Partenaire: Tiny sprl Société Mère:

Information générale En-tête/Pied de page En-tête/Pied-de-page Interne Configuration Outlook Plugin Configuration

Following CRM Sections will be used while synchronizing Mails from Outlook

Outlook Sent Mails: Sent Mail Outlook Received Mail: Rendez-vous

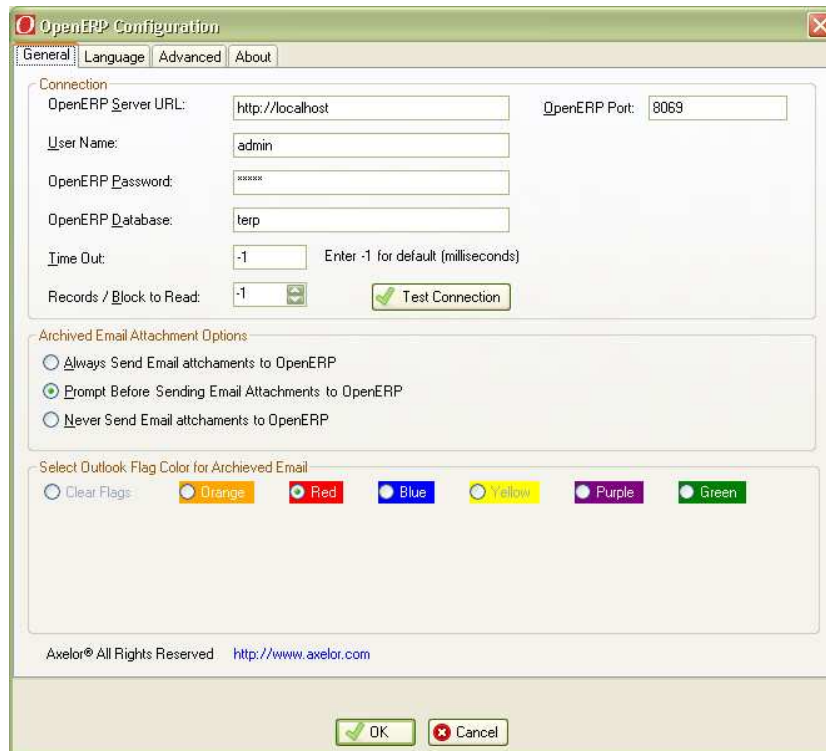
[PERSONNALISER]

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Le client web est développé par Axelor (<http://axelor.com>) et Tiny (<http://tiny.be>).
Serveur courant : socket://localhost:8070 - database: outlook

4. Connecting to OpenERP Server.

- You can change OpenERP Server Parameters from the menu **Tools → OpenERP Options**.
- OpenERP server URL may be the IP Address or Domain Name where OpenERP Server is installed.
- Connection is based only on XML-RPC Protocol, so you need to provide the **XML-RPC** port on which OpenERP Server is running.
- Enter Username / Password of OpenERP User according to the Database you have selected.
- You can Test Connectivity with the OpenERP Server.

■ Configuration Window:

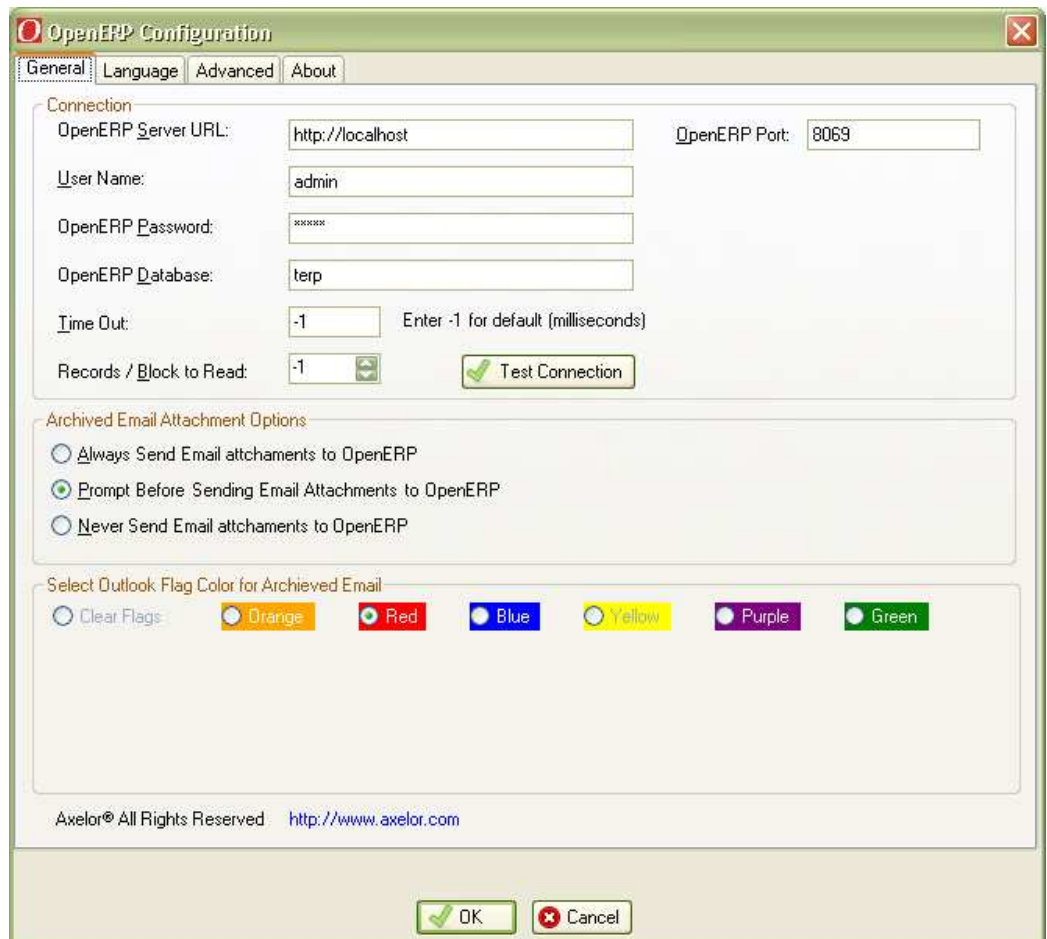


■ Test Connection Button Result:



Troubleshooting Connection

- If you are not able to connect Outlook to OpenERP Server you should check following thing.
- Make sure Server is actually running on specified OpenERP Server URL
- Check the IP Address / Domain Name
- Check your Port, it should be **XML-RPC Port**, make sure you are not providing **NET-RPC** port.
- If Server is not running on local intranet check the **internet connectivity**.
- Check your **firewall settings**.
- If you are using proxy server you can provide the proxy settings under **Advanced Settings** from **Tools → OpenERP Options**.



OpenERP Configuration

General | Language | Advanced | About

Connection

OpenERP Server URL: OpenERP Port:

User Name:

OpenERP Password:

OpenERP Database:

Time Out: Enter -1 for default (milliseconds)

Records / Block to Read:

Archived Email Attachment Options

Always Send Email attachments to OpenERP

Prompt Before Sending Email Attachments to OpenERP

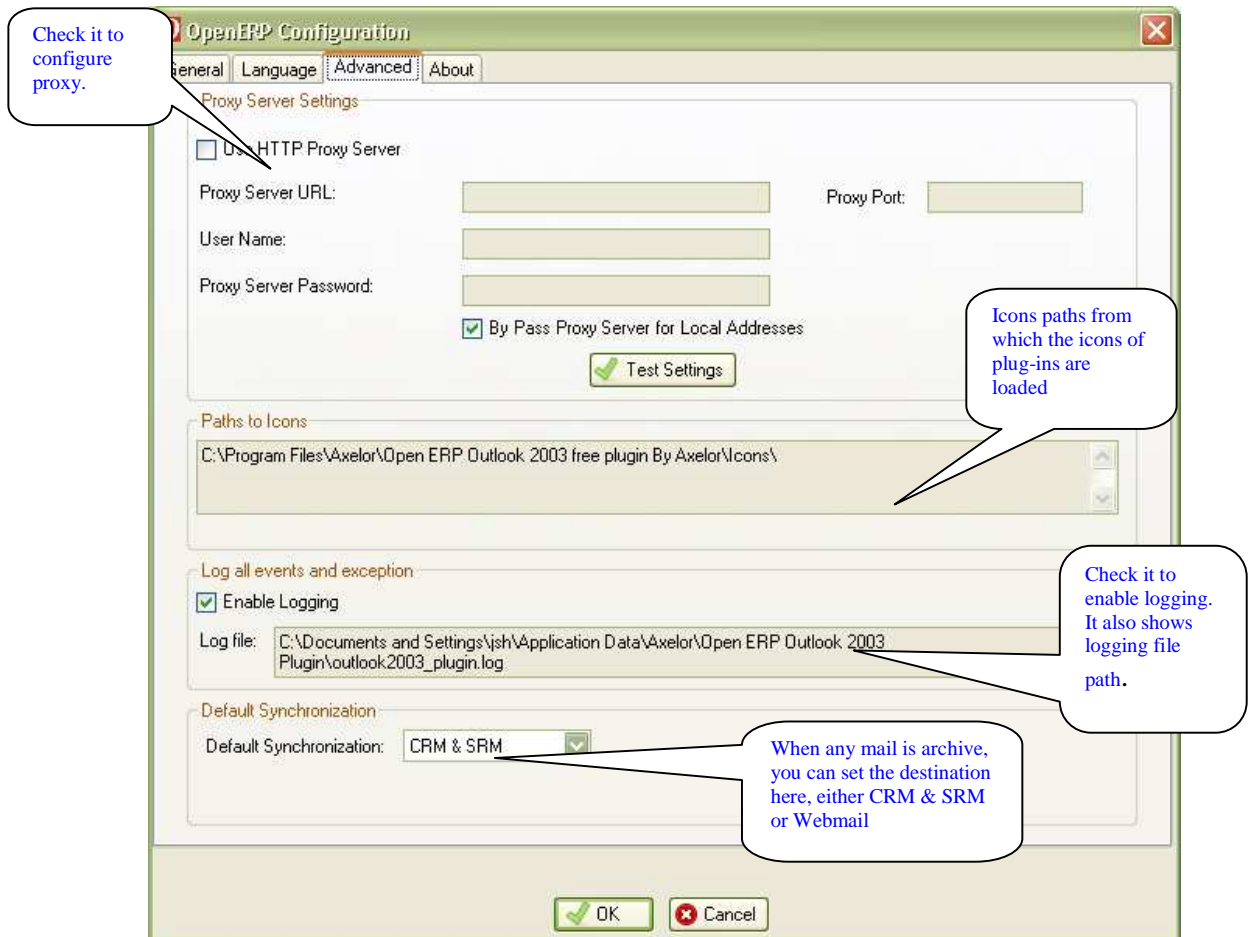
Never Send Email attachments to OpenERP

Select Outlook Flag Color for Archived Email

Clear Flags: Orange Red Blue Yellow Purple Green

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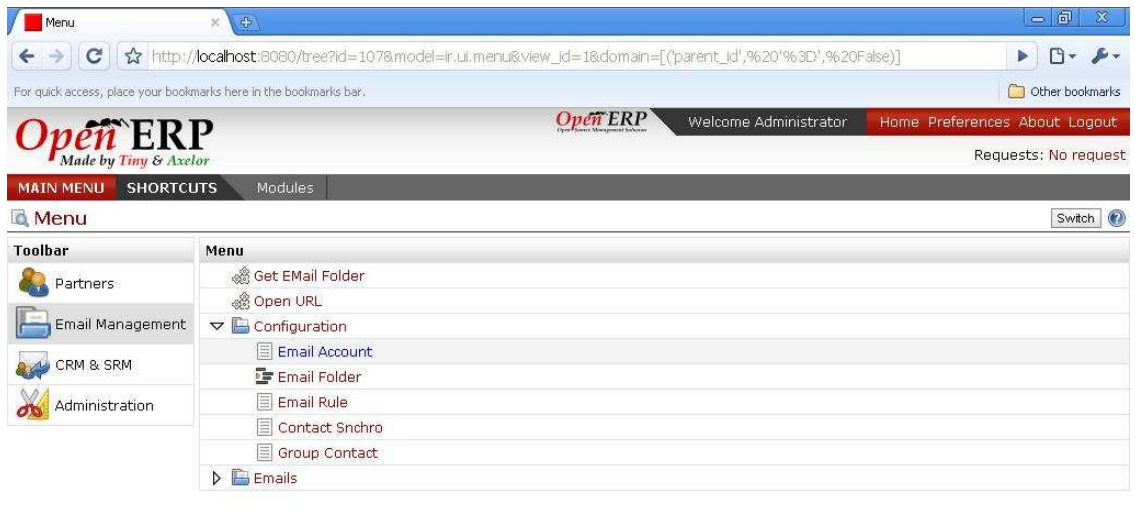
- OpenERP Configuration Window



- If you are still not able to connect then check [Proxy Server Settings under Internet Explorer](#).
- If you have provided invalid proxy server settings under Internet Explorer, you will not able to connect to OpenERP Server, though you have not specified proxy server settings in OpenERP Options.

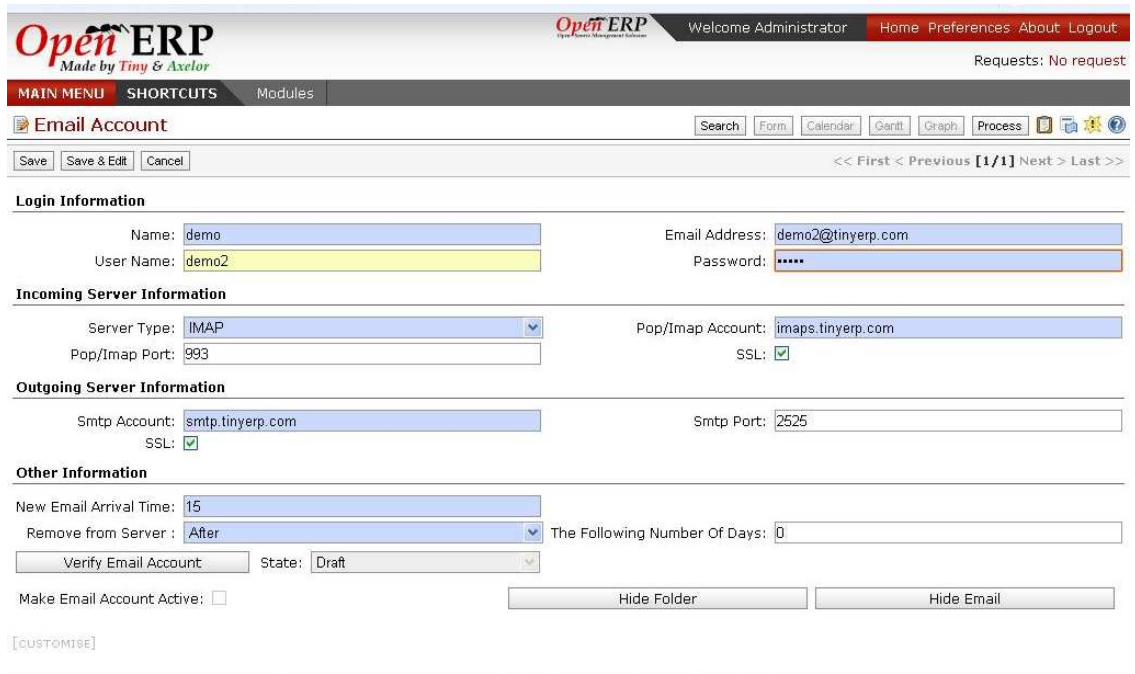
Configure Web-mail:

- Configure Email account first.



The screenshot shows the OpenERP web client interface. The browser address bar displays the URL: `http://localhost:8090/tree?id=1078&model=ir.ui.menu&view_id=1&domain=[('parent_id', '%20' % 3D', '%20False']]`. The page header includes the OpenERP logo, the text "Welcome Administrator", and navigation links: "Home", "Preferences", "About", and "Logout". Below the header, there are tabs for "MAIN MENU", "SHORTCUTS", and "Modules". The "Menu" section is expanded, showing a list of options: "Get Email Folder", "Open URL", "Configuration" (expanded to show "Email Account", "Email Folder", "Email Rule", "Contact Synchronisation", and "Group Contact"), and "Emails". A sidebar on the left contains a "Toolbar" with icons for "Partners", "Email Management", "CRM & SRM", and "Administration".

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 The web client is developed by Axelor (<http://axelor.com>) and Tiny (<http://tiny.be>)
 Running Server: socket://localhost:8090 - database: test_webmail



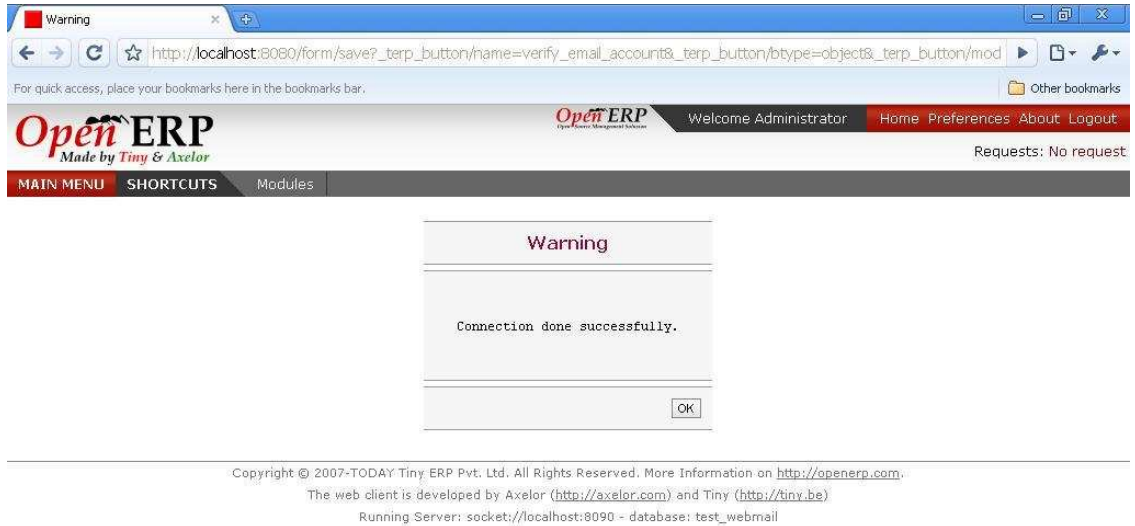
The screenshot shows the "Email Account" configuration page in the OpenERP web client. The page header is identical to the previous screenshot. The main content area has a title "Email Account" and a toolbar with "Search", "Form", "Calendar", "Gantt", "Graph", "Process", and other icons. Below the toolbar are "Save", "Save & Edit", and "Cancel" buttons. The configuration is organized into several sections:

- Login Information:** Fields for "Name" (demo), "User Name" (demo2), "Email Address" (demo2@tinyerp.com), and "Password" (masked with dots).
- Incoming Server Information:** Fields for "Server Type" (IMAP), "Pop/Imap Port" (993), "Pop/Imap Account" (imap.tinyerp.com), and "SSL" (checked).
- Outgoing Server Information:** Fields for "Smtp Account" (smtp.tinyerp.com), "Smtp Port" (2525), and "SSL" (checked).
- Other Information:** Fields for "New Email Arrival Time" (15), "Remove from Server" (After), and "The Following Number Of Days" (0). There is also a "Verify Email Account" button and a "State" dropdown set to "Draft".

 At the bottom of the form, there are checkboxes for "Make Email Account Active" and buttons for "Hide Folder" and "Hide Email". A "[CUSTOMISE]" link is also present.

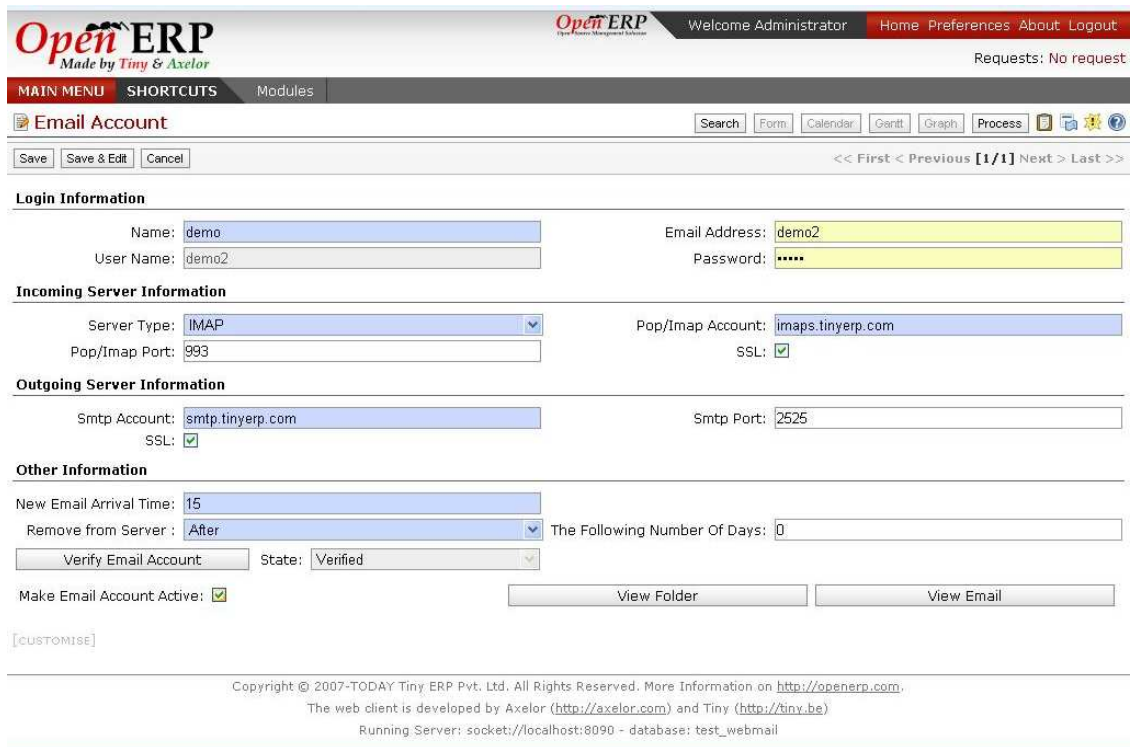
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 Running Server: socket://localhost:8090 - database: test_webmail

- On successfully verifying the account the draft state will change to verified state.



The screenshot shows a web browser window with the OpenERP interface. A modal dialog box titled "Warning" is displayed in the center, containing the text "Connection done successfully." and an "OK" button at the bottom right. The background interface includes the OpenERP logo, navigation menus, and a footer with copyright information.

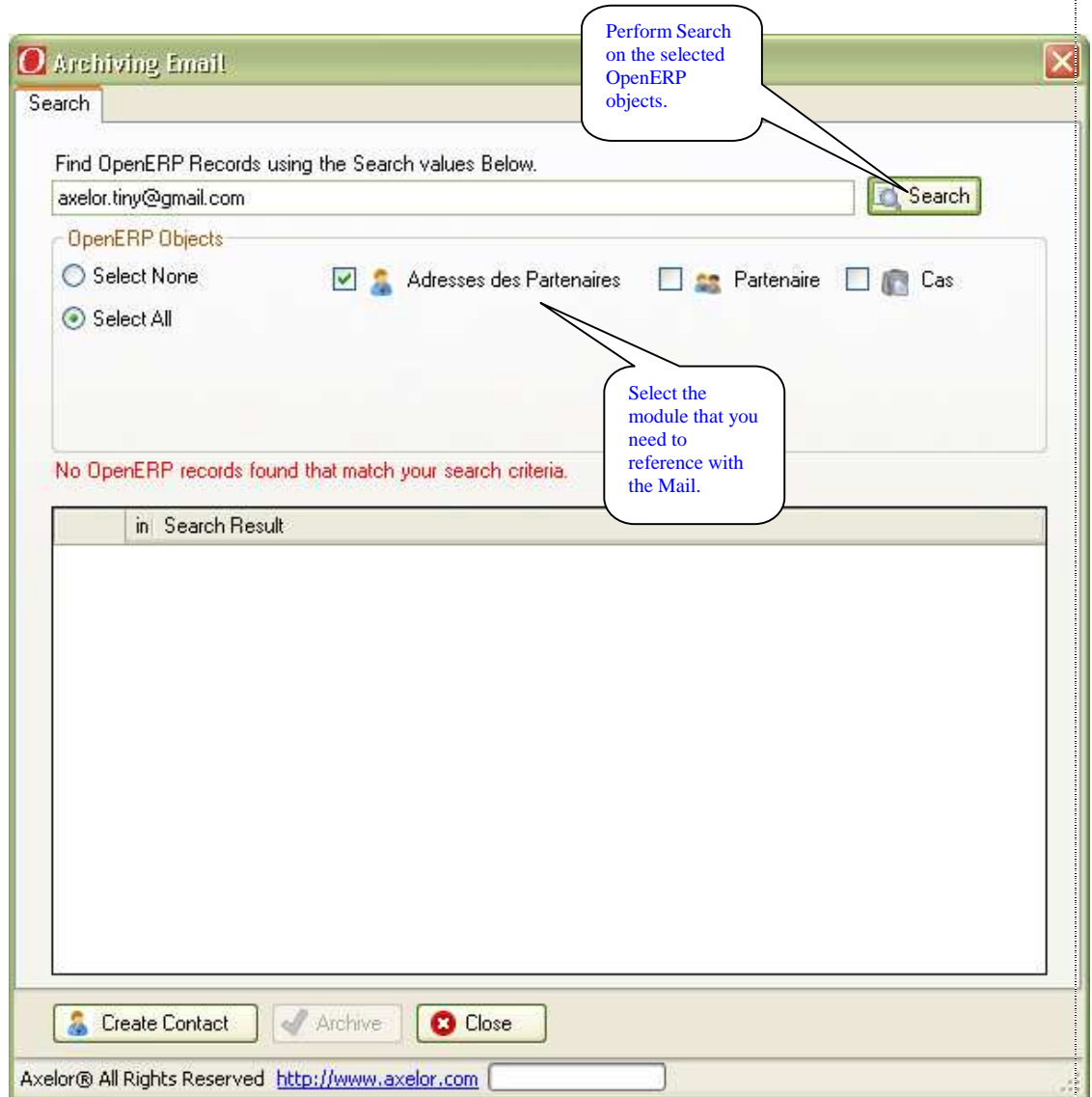
- Make Email account active in order to fetch and receive mail from that email.



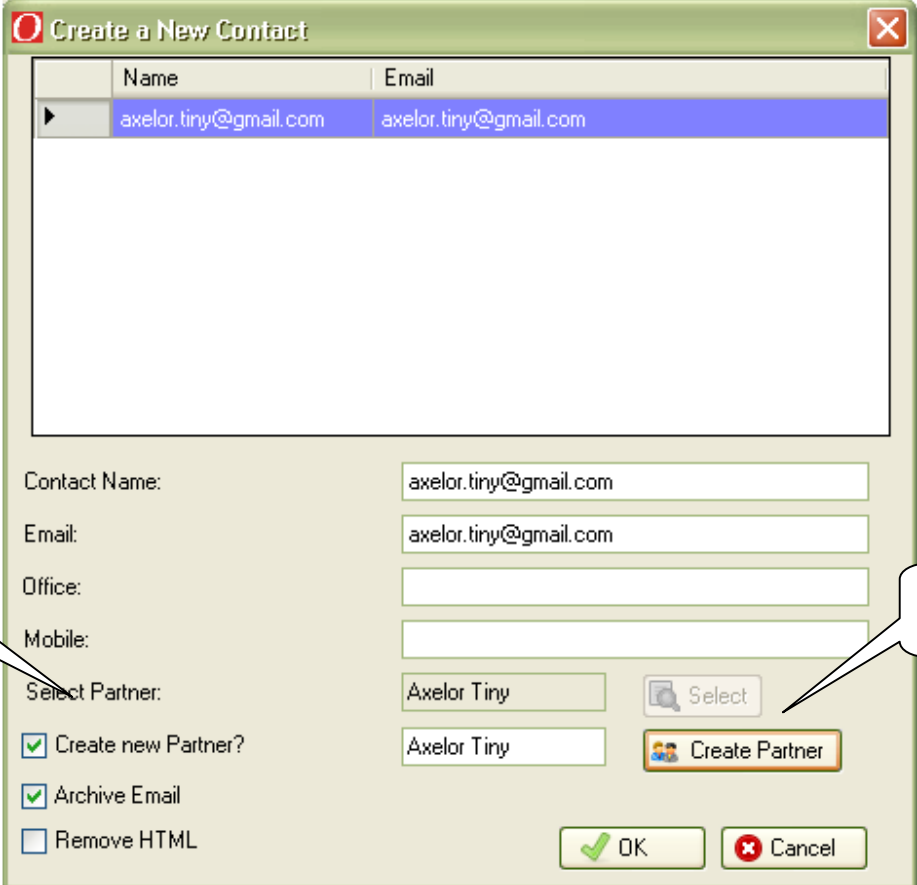
The screenshot displays the "Email Account" configuration page in the OpenERP web client. The page includes sections for "Login Information", "Incoming Server Information", "Outgoing Server Information", and "Other Information". In the "Other Information" section, the "Make Email Account Active" checkbox is checked, and the "State" dropdown menu is set to "Verified". There are also "View Folder" and "View Email" buttons at the bottom of the configuration area.

Archive Email to OpenERP

- Press the **Archive to OpenERP** Command bar button from OpenERP Bar.
- Search for the email id in OpenERP through search button.
- If that email id doesn't exist then a error message will be shown in red color below OpenERP Object Frame.



- New contact can be created through create button also a partner can be selected under which this contact will be saved.
- A new partner can also be created.

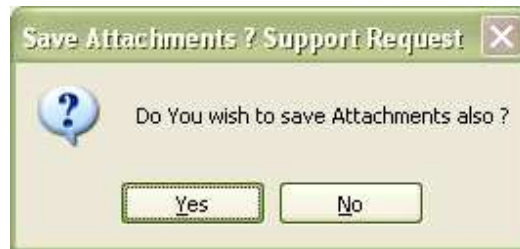


Check To create new partner.

Click To create new partner.

i Note: If no partner selected then contact will be created in default **outlook partner**

- Press archive button below form to send this mail to partner in OpenERP.
- If mail contains attachment it will ask permission to save on server as attachment, depends on your Open ERP settings under tools Menu..



- Plug-in will give you confirmation message once desired mail achieved.



- The archived mail in OpenERP can be seen from the email interface in contacts or under which the mail is achieve.

Partner Address

Open ERP
Made by Tiny & Axelor

Search Form Calendar Gantt Graph Process

LINKS
Email Interface

Partner: Axelor
Name: Demo
Function:
Street:
Zip:
Country:
Phone:
Mobile:

Title:
Address Type:
Street2:
City:
Fed. State:
Fax:
E-Mail: demo1@tinyerp.com

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The web client is developed by Axelor (<http://axelor.com>) and Tiny (<http://tiny.be>)
Running Server: socket://localhost:8090 - database: test_webmail

i Note: If you are not able to see the link “Email Interface”, restart your Open ERP web client (eTiny), or clear the cache of your web browser.

- Archived Email can be viewed through Email Interface Link shown on the right side of form of the referenced object you have selected while Archiving.

Open ERP
Made by Tiny & Axelor

BIENVENUE ADMINISTRATOR Accueil Préférences A propos Déconnexion

Requêtes: Pas de requête

Recherche normale Recherche avancée

Rechercher

Requêtes: Pas de requête

RAPPORTS
Opportunités d'affaire
ACTIONS
Convertir en opportunité
Planifier un rendez-vous
Créer un partenaire

ID	Date	Deadline	Description	Partenaire	Responsable	Priorité	Revenus prévus	Coûts prévus	État
1	03/09/2009 10:20:03	10/09/2009 00:00:00	Follow-up on proposal	Maxtor	Administrator	Normal	0,00	0,00	Ouvert
2	05/09/2009 12:01:01	12/09/2009 00:00:00	Initial discussion	Tecscas	Administrator	Normal	0,00	0,00	Brouillon
3	12/09/2009 15:55:05	20/09/2009 00:00:00	Discuss pricing	China Export	Administrator	Haute	0,00	0,00	Clôturer
4	20/09/2009 10:02:02	25/09/2009 00:00:00	Review needs	Lederc	Demo User	Normal	0,00	0,00	Brouillon
5	22/09/2009 11:05:05	28/09/2009 00:00:00	Changes in Designing	OpenRoad	Demo User	Normal	0,00	0,00	En attente
6	18/09/2009 13:12:49	28/09/2009 00:00:00	Update the data	Distrib PC	Administrator	Normal	0,00	0,00	Clôturer
18	06/08/2009 15:17:55		Fwd: Ask ur Manager for this office...If u get it ur so lucky	Axelor	Administrator	Normal	0,00	0,00	Brouillon
19	25/08/2009 11:07:34		Invitation for Bad time		Administrator	Normal	0,00	0,00	Brouillon
20	17/08/2009 14:29:49		Lead OOCRM		Administrator	Normal	0,00	0,00	Brouillon
21	17/08/2009 18:13:44		Invitation for Bad time	Axelor Tiny	Administrator	Normal	0,00	0,00	Brouillon

Importer | Exporter

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Le client web est développé par Axelor (<http://axelor.com>) et Tiny (<http://tiny.be>).
Serveur courant: socket://localhost:8070 - database: outlook_free

- Clicking on the record editable view of record will open.