
MS Word Plug-in Installation Guide

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Overview

SugarCRM Plug-in for Microsoft Word enables you to merge data, such as names and address in Sugar to perform mail merges. One of the most common uses of the Sugar Plug-in for Word is mailing letters to your clients and/or creating License Agreements that need to be printed and signed. The plug-in is available for all supported versions of Sugar and must be installed on each computer running Word where the plug-in is desired.

For a complete list of platform requirements and supported environments, please refer to the [Plug-ins Supported Platforms](#) page.

Steps to Complete

If you are installing the Word Plug-in for a user, you will need to be logged in as the user on their computer. The user also needs to have full administrator privileges to write to the necessary files and directories. Please note that attempting to install the Word Plug-in for a non-administrator user on the computer may not be successful. The steps below will go through how to access and install the zip file required to download and install Sugar Plug-in for Word.

Check Microsoft Word Version

You must download and install the correct version of the Sugar Plug-in for Word to match your software's version. In order to verify the installed version and bit version of Word, check under "About Word" or via File > Help depending on the version of Word that you have. Please note that a 64-bit computer may be running a 32-bit Word application, so it is best to check prior to running the installation.

Product Activated

Microsoft Office Standard 2010

This product contains Microsoft Excel, Microsoft
Microsoft PowerPoint, Microsoft Publisher, Micr

[Change Product Key](#)

About Microsoft Word

Version: 14.0.4760.1000 (64-bit)

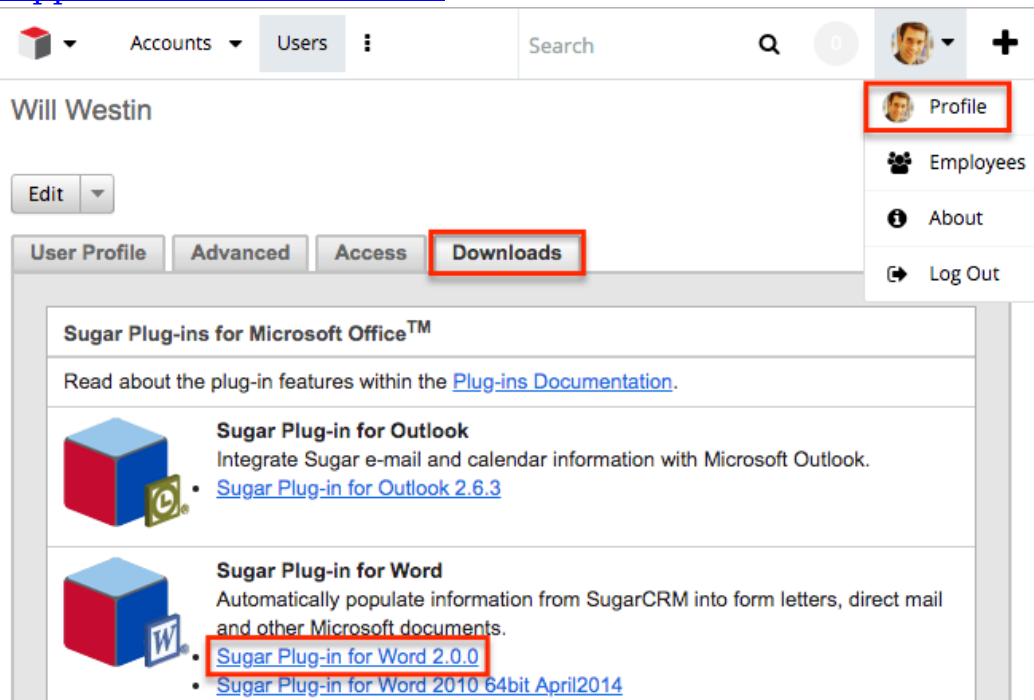
[Additional Version and Copyright Information](#)

Part of Microsoft Office Standard 2010

Downloading Sugar Plug-in for Word

You can download the appropriate Sugar Plug-in for Word file by logging into your Sugar instance and clicking the Downloads tab in your user profile. The

installation file will save to a location on your computer and will work with all [supported versions of Word](#).



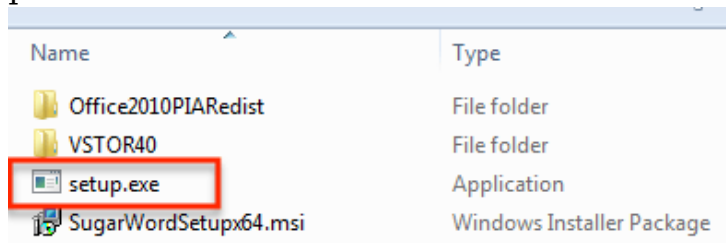
Installing Sugar Plug-in for Word

Installing via Setup Wizard

Once you have [downloaded](#) the installation file, you can install the Sugar Plug-in for Word via the Setup Wizard using the following steps:

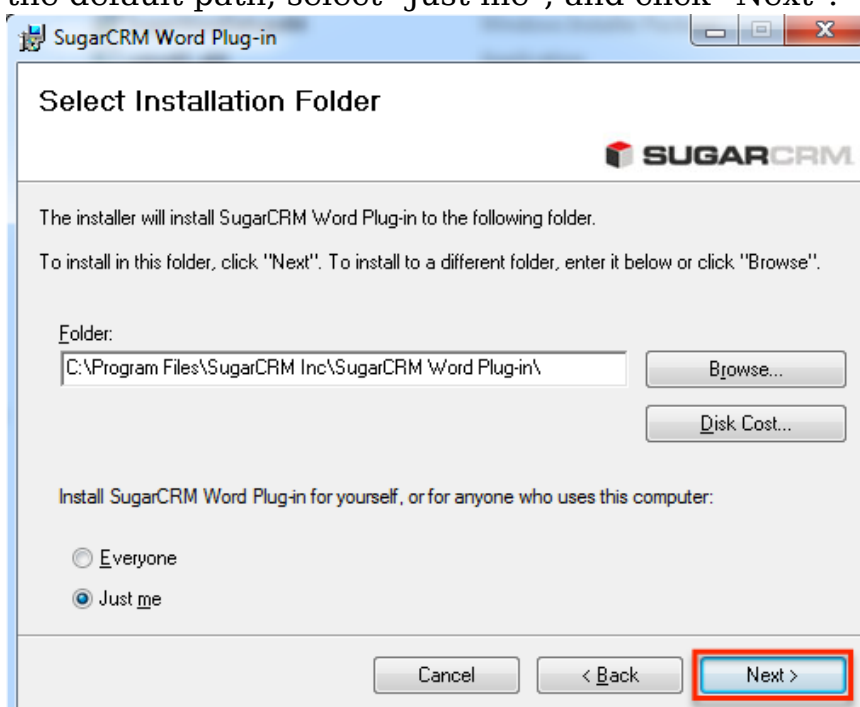
1. Navigate to the folder where you saved the downloaded file and extract the contents of the zip file.
2. In the new window, click on the x64 (for 64-bit Word application) or x86 (for 32-bit Word application) folder depending on your bit version of Word.
3. Click the setup.exe file to run the installation.

Note: A security warning pop-up window may appear. Click "Run" to proceed with the installation.



4. On the Welcome step of the setup wizard, click "Next" to proceed with the installation process.
5. On the License Agreement step, select "I Agree" and then click "Next".
6. On the Select Installation Folder step, leave the installation directory set to

the default path, select "Just me", and click "Next".



7. On the Confirm Installation step, click "Next" to start the installation on your computer.
8. Once the installation has completed successfully, click "Close" to exit.
9. Now, open up your Word application to [connect](#) the Word Plug-in to your Sugar instance.

Installing via Silent Install

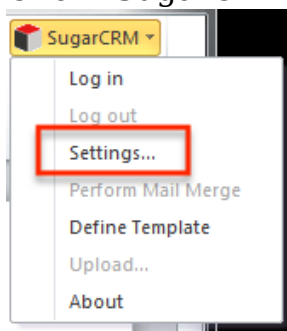
Use the following steps to run a silent install for Sugar Plug-in for Word:

1. [Download](#) the appropriate installation file to your desktop.
2. Launch the DOS command window and navigate to the unzipped installation directory.
3. Run the following command from the command line:
 - For x64 (64-bit) platform : `msiexec /i data.package.msi /quiet OFFICE_BITNESS=x64 ALLUSERS=1`
 - For x86 (32-bit) platform : `msiexec /i data.package.msi /quiet OFFICE_BITNESS=x86 ALLUSERS=1`
4. Enter exit to close the command window.

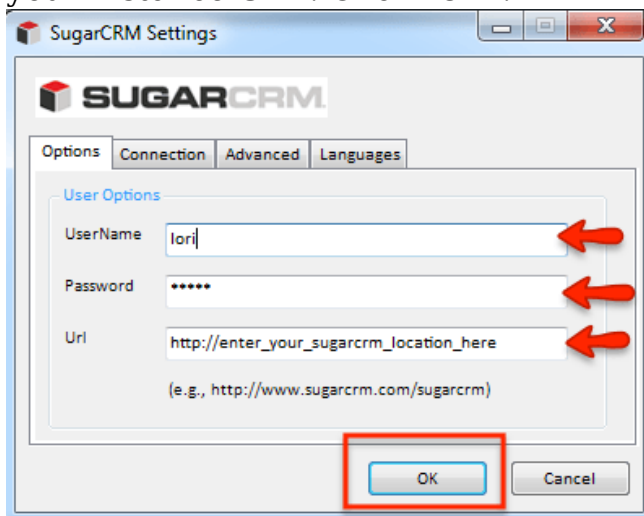
Connecting Sugar Plug-in for Word

Once the installation is completed successfully, you will need to configure the Word Plug-in to connect to your Sugar instance so that they can communicate to each other. You can confirm that the Sugar Plug-in for Word was installed successfully as you will see SugarCRM displayed in the Add-ins ribbon.

1. Click "SugarCRM" on the Add-ins ribbon and select "Settings".



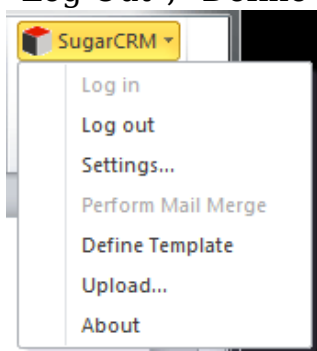
2. Enter in the login credentials used to access your Sugar instance as well as your instance URL. Click "OK".



URL must begin with 'https://'.

3. If the connection is successful, the SugarCRM Settings window should disappear.

Now when you click "SugarCRM" on the top right of Word, you should see that you are logged in. You will also be given more options in the SugarCRM menu such as "Log Out", "Define a Template", and "Upload".



Necessary Libraries

The Sugar Plug-in for Word requires several libraries to function. The Setup.exe file will install two of the necessary libraries if needed. Please note that running

"SugarWordSetup.msi" only installs the Sugar Plug-in for Word and may not result in a functioning plug-in if these other components have not been installed previously.

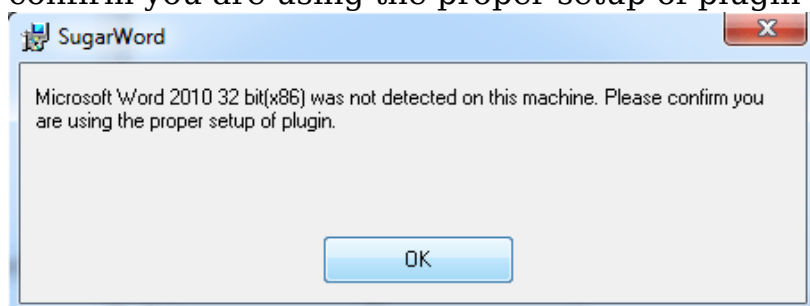
The necessary libraries are as follows:

- Microsoft Office 2010 Primary Interop Assemblies (included in setup.exe installer).
- Microsoft Visual Studio 2010 Tools for Office SE Runtime (included in setup.exe installer).
- Microsoft .NET 4.0 Framework (must be [installed separately](#) if not already present on your computer).

Troubleshooting Installation

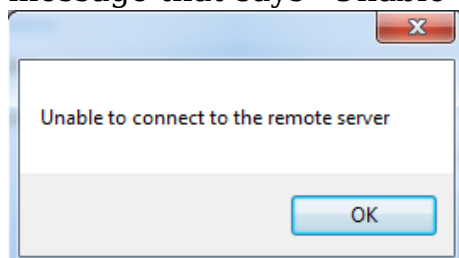
There may be times when you run into issues installing the Sugar Plug-in for Word. We will provide some helpful solutions to common issues that may occur.

1. During the installation process, you are prompted with a message that says "Microsoft Word 2010 32bit(x86) was not detected on this machine. Please confirm you are using the proper setup of plugin".



You may be using the incorrect Sugar Plug-in download file, so you will need to download the Sugar Plug-in for Word 2010 x64 and re-install. Please review the [Install Sugar Plug-in for Word](#) section in this article for installation steps.

2. After entering in your login credentials and Sugar instance URL, you see a message that says "Unable to connect to the remote server".



Click "Ok" to close out the error message and confirm that you entered in

the correct URL for your Sugar instance. Make sure that the instance URL begins with 'https://'. Also check to see if the Sugar URL that is listed redirects you to another destination address. If this is the case, please enter in the destination address in the SugarCRM Word Plug-in settings.
