

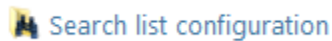
Outlook Plugin for Blackbaud CRM (Version 1.4)

Blackbaud CRM Configuration Requirements

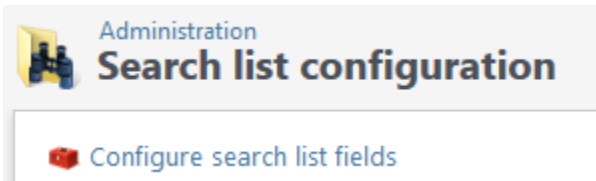
System Configuration Requirements

- **Search List Configuration**

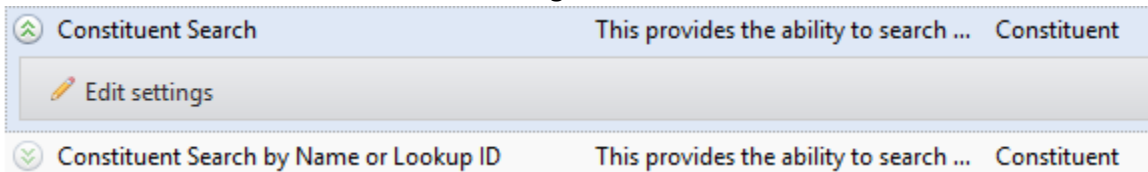
1. In the **Administration** functional area, select **Search list configuration**



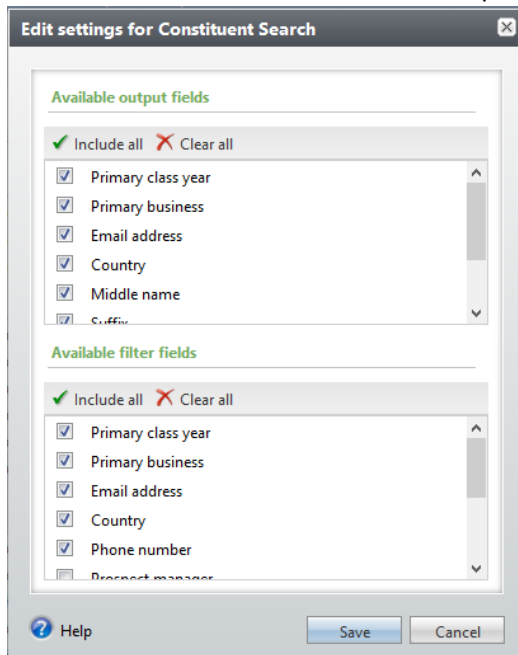
2. Select **Configure search list fields**



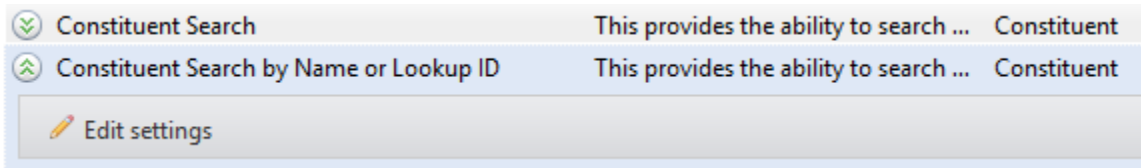
3. Select **Constituent search** and click **Edit settings**



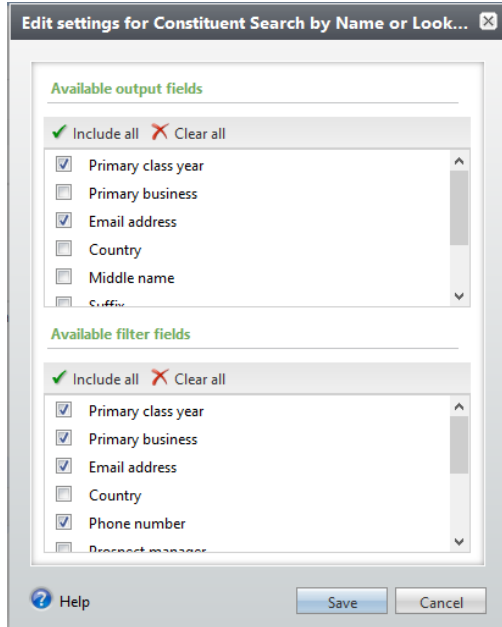
4. Ensure Email Address is checked for output and filter fields. Click Save when finished



5. Select **Constituent Search by Name or Lookup ID** and click **Edit settings**



6. Ensure Email Address is checked for output and filter fields. Click Save when finished

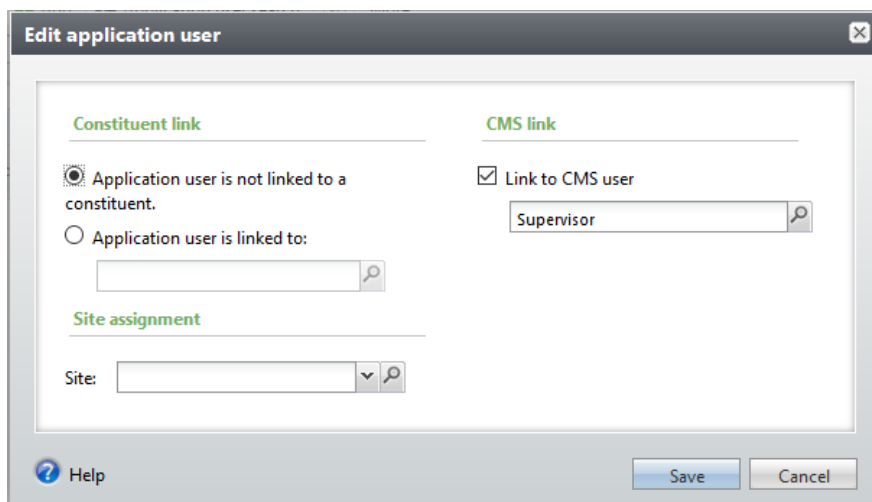


- **User Security Rights**

1. Certain Security Rights are required for the Plugin to work correctly. We have provided a System Role .XML document that you may download, import, and assign to your users, available for download: <http://www.siliconharsolutions.com/downloads/BlackbaudCRMOutlookPluginUser.xml>

- **Application User Constituent Record Assignment**

1. Users must have a constituent record within Blackbaud CRM. To assign constituent records to application users, navigate to Administration, Security, Application Users. Find the corresponding application user you want to edit, click Edit. Check the **Application User is linked to:** radio button and assign a constituent record.



- **Code Table Population**

1. In order to properly create and/or save records in Blackbaud CRM using the Outlook Plugin the following code tables should have values populated:
 - a. Stewardship Attachment Type
 - b. Interaction Attachment Type (Found under Major Giving)
 - c. Interaction Type (Contact Method)
 - d. Stewardship Note Type (Stewardship Contact Report Workaround)