

**Part**

**1**

FULL EDITION

GrinMark SugarCRM – Office 2003-2013 Integration

V 4.2.0

# Getting Started Guide

GRINMARK LIMITED

# Getting Started Guide

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@ GrinMark Limited  
2007-2015

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## Getting Started Guide

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## Terminology

***SugarCRM Item*** – any object in SugarCRM. It can be an Account, an Opportunity or any other entry that has “History” subpanel in its Detail view.

***To Archive to SugarCRM item*** – put (upload) Email or document to “History” subpanel for a given SugarCRM item.

***SugarCRM*** – Commercial Open Source CRM. See [www.sugarcrm.com](http://www.sugarcrm.com)

## What's new in Version 4.2

- Improved support for Sugar v7
- Switch to .NET 4 runtime
- Feature to related Meetings to Projects/Opportunities

## What's new in Version 4

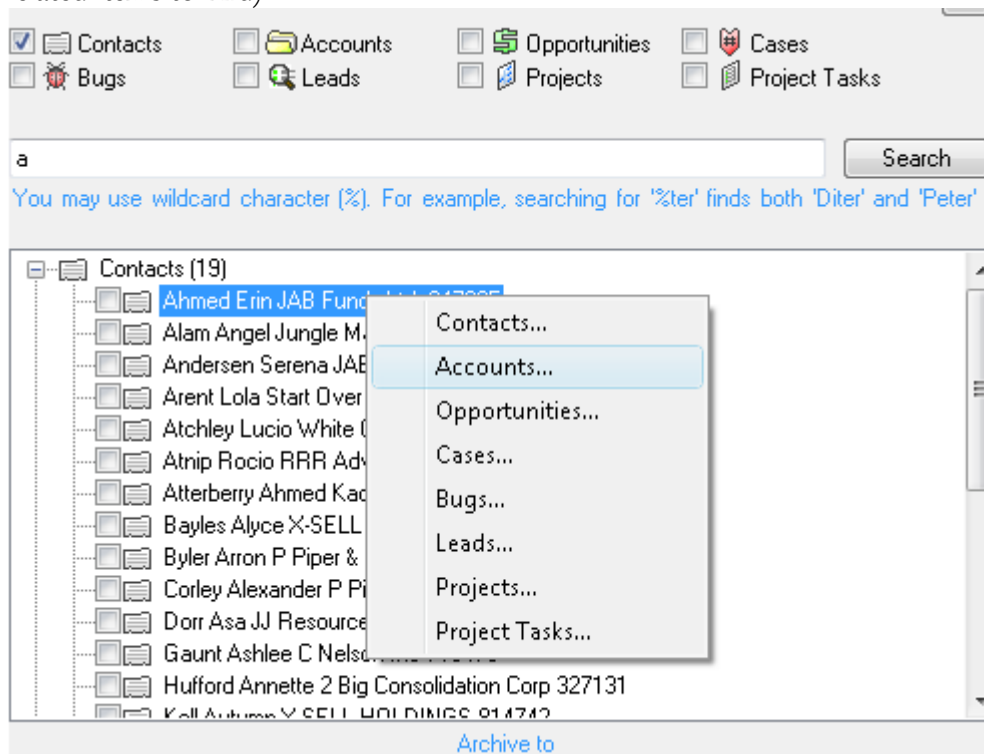
- Support for custom sync folders
- Support for Office 365
- Custom configurator tool

## What's new in Version 3.2

- Support for 64 bit versions of Outlook
- Relate Tasks, Contacts and Appointments to SugarCRM
- Option to archive an Email without attachments

## What's new in Version 2.4.14

- Search for related modules (right-click on item, from the context menu select the type of related items to find)



- GrinMarkContactSynchronizer.exe now has command line interface.
- Added: \*.xml files with customized archiving and synchronization settings can now be stored on server.
- Documentation updated: "Customizing GrinMark AddIn.pdf"

## What's new in Version 2.4

- Advanced Customization options. A custom solution may be created with AddIn. Archive Emails to your custom module, create custom items, change synchronizer rules and so on.
- Document template processor now can fill templates for anything: Contacts, Accounts, Leads, Cases and so on.
- Purchase Assistant to help purchasing licenses.
- X509 certificate support.
- More language packs.

## What's new in Version 2.2

- Online tutorials: <http://www.grinmark.com/en/tutorials>
- Support for SugarCRM v.5
- Synchronize Tasks

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<http://www.grinmark.com/english>

sugarcrm@grinmark.com

- Synchronize Meetings
- Synchronize Calls
- Improved Outlook integration
- Bug fixes and improvements

## What's new in Version 2.0

- New installer allows selecting separate features for installation
- Support for Outlook 2007
- Synchronize Contacts
- Create new Contacts
- Create new Accounts
- Create new Leads
- Create new Opportunities
- “Send To” Windows Desktop Menu integration
- Custom fields support
- Custom modules support
- Bug fixes and improvements

## Introduction

This document describes available features and usage scenarios. In general GrinMark SugarCRM – Microsoft Office Integration is shipped as a freely downloadable product. Some features

### **GrinMark SugarCRM – MS Office 2003/2007/2010/365 Addin**

Free version provides the following features:

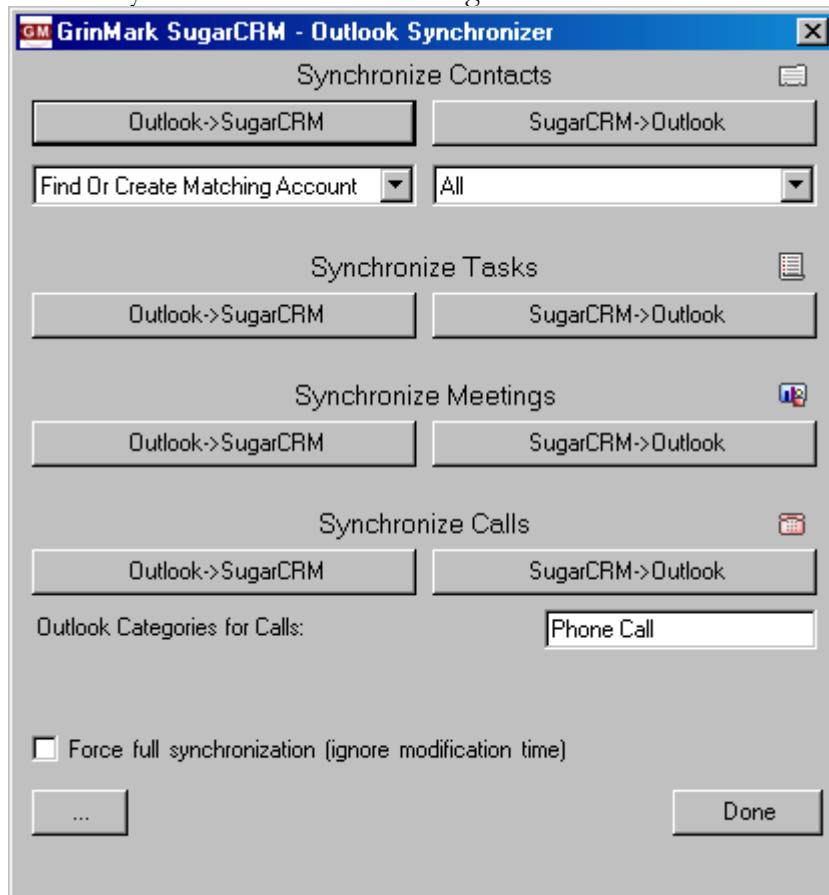
1. Outlook Add-In.
  - a. Allows archiving (uploading) Emails to SugarCRM and attaching to available items: Contacts, Accounts, Opportunities, Bugs, Cases, Projects. Each Email can be archived to a multiple items at once (for example, to a Contact and to an Opportunity at the same time).
  - b. Allows archiving of Email attachments separately from the Email itself.
2. Automatically attach “RE:” and “FW:” emails to the same SugarCRM item.
3. Support for all SugarCRM flavours: Open Source, Professional, Enterprise.
4. Word/Excel Integration Add-in allows archiving documents and spreadsheets to available SugarCRM items directly from Word and Excel. Useful for quick archiving of orders and invoices produced by other applications.
5. Document Repository. Allows filling of Word templates available in “Documents” tab with data from SugarCRM. Filled document may be sent to a specified recipient by means of Outlook with a copy archived to a SugarCRM.

### **“Pro” Features**

Contact GrinMark or one of our reseller partners for more information about the purchase. Once product license is installed, many new sophisticated features appear:



1. Contact Synchronization between SugarCRM and Outlook:



2. Support for other Microsoft Office Applications:



- PowerPoint
- MSProject
- Visio

3. An ability to create Leads, Contacts, Accounts, Opportunities and Cases directly from Outlook

**GM Archiving E-Mail: Your WindJack Solutions, Inc. Download Request (Incoming)**

Archive to Existing Item | Create Contact/Account/Opportunity/Lead

Account | Contact | Lead | Opportunity

☒ Create New

☐ All

Name:	WindJack Solutions, Inc. Download
Assigned to:	Grinevich Alexey
Rating:	
Type:	
Industry:	Construction
Annual Revenue:	
Website:	www.windjack..com
Ownership:	
Employees:	10
SIC Code:	
Ticker Symbol:	WJ
Member of:	
Description:	good account
Modified by	
Created by	

☐ Contact Information

Email: support@windjack.com

**Description:**  
description  
good account...

Thank you for requesting a download of AcroButtons 2.0 Demo (exe) from WindJack Solutions, Inc.

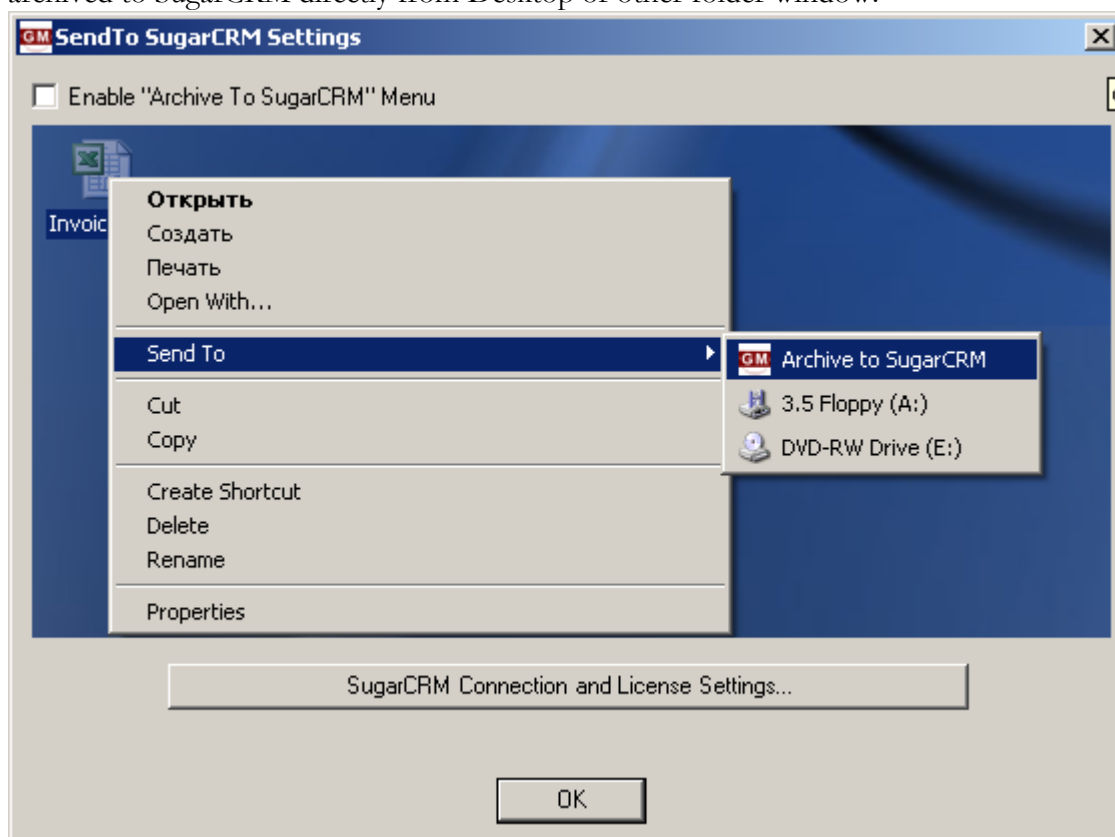
Please click this link  
<http://x.windjack.com/down1.php?vericode=731144416afc7d72494f2fdf35b220d6&sid=3> to complete your download process. If you cannot click this link please copy and paste the following URL into your web browser:  
<http://x.windjack.com/down1.php?vericode=731144416afc7d72494f2fdf35b220d6&sid=3>

☒ Archive E-mail to Newly Created Items

Cancel Create

4. Advanced GrinMark Activity Monitor Functionality
5. Custom fields support. All the tools could be reconfigured to support additional modules and additional fields in all searches.

6. Integration with Explorer "Send To" menu. PDF documents, images and other files can be archived to SugarCRM directly from Desktop or other folder window.



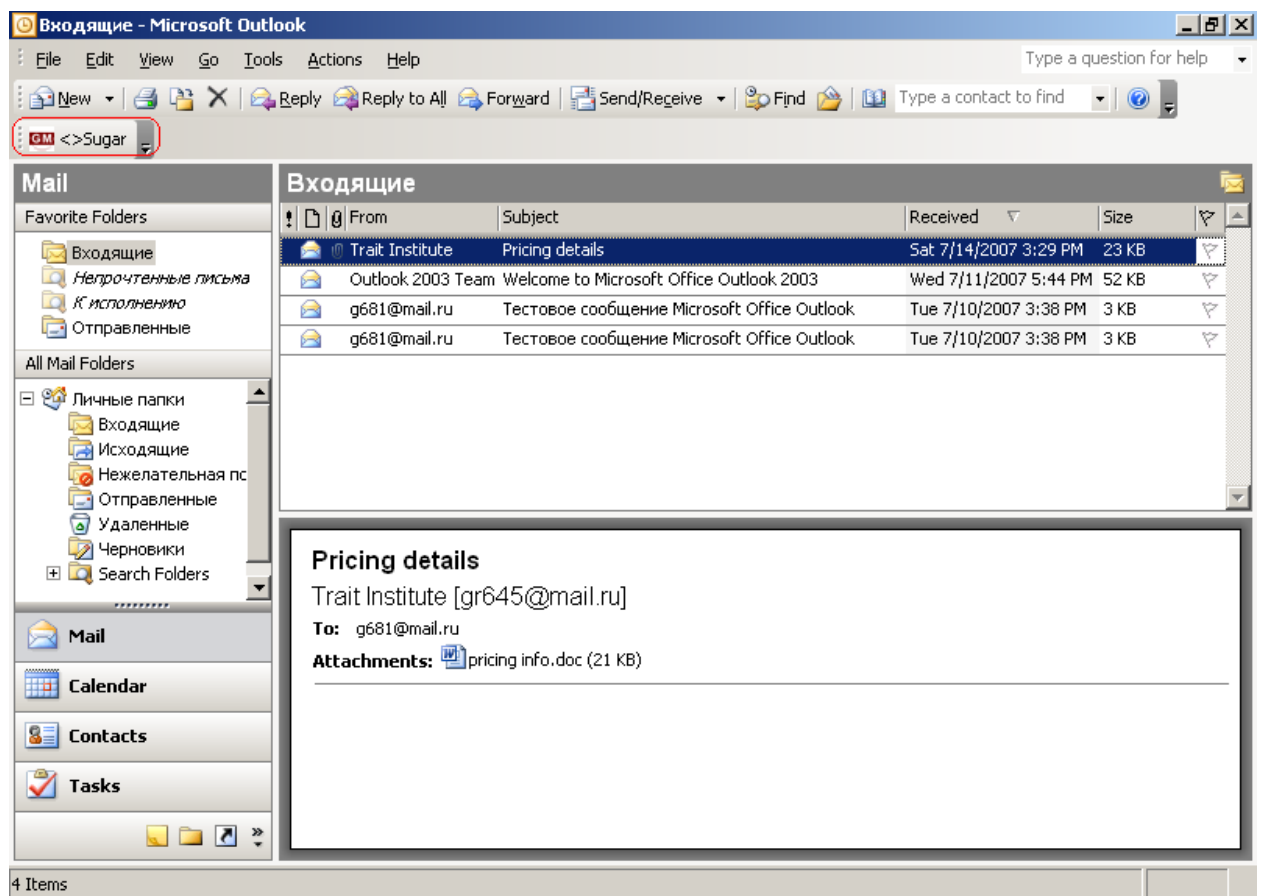
7. Official support.

## Installation

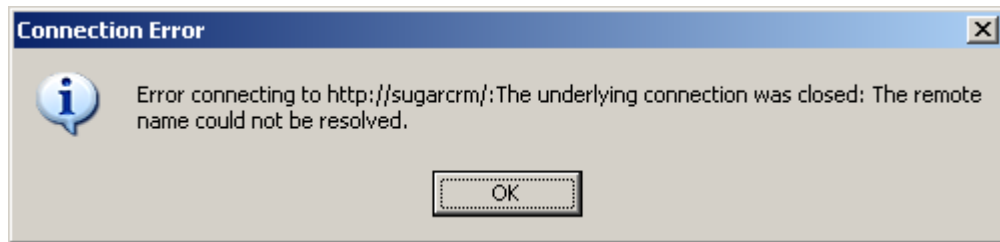
Download the setup package and run “setup.exe” and finish installation. Add-in requires:

1. Office 2003 Service Pack 2 or Office 2007
2. .NET 1.1 installed. The product is shipped in 2 packages: setup\_full\_xx.yy.zip and GrinMarkOffice.msi. The .zip file contains correct version of .NET 1.1 framework and should be used for first install. An .msi package takes should be used for updates only.

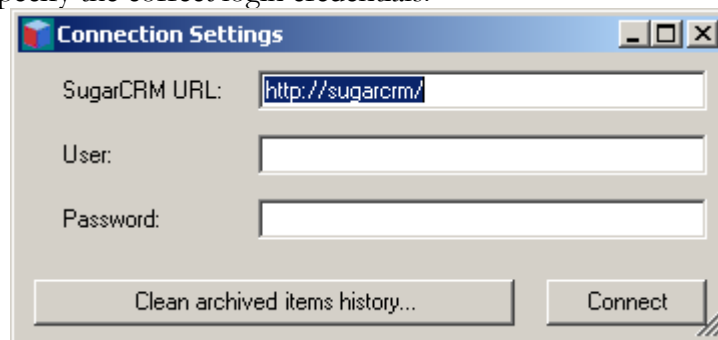
After installer finished its job, run Outlook. The presence of the Add-in is reflected by a button:



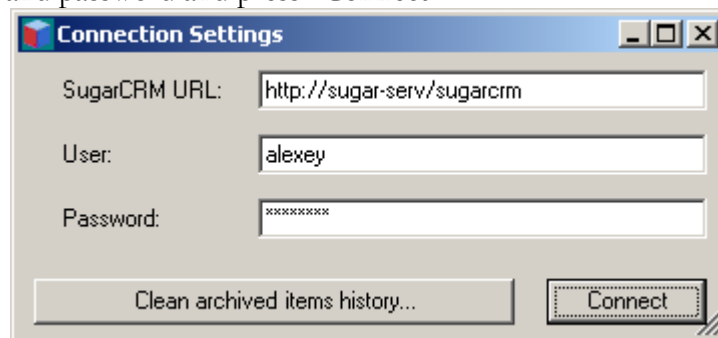
Select any Email message and press the button **GM <>Sugar** on the toolbar. The first thing it tries to do is establishing connection to a SugarCRM instance. We did not specify credentials during installation so it is high time to do it. Right after the connection is failed the “Connection Error” message is displayed:



Add-in suggests to specify the correct login credentials:



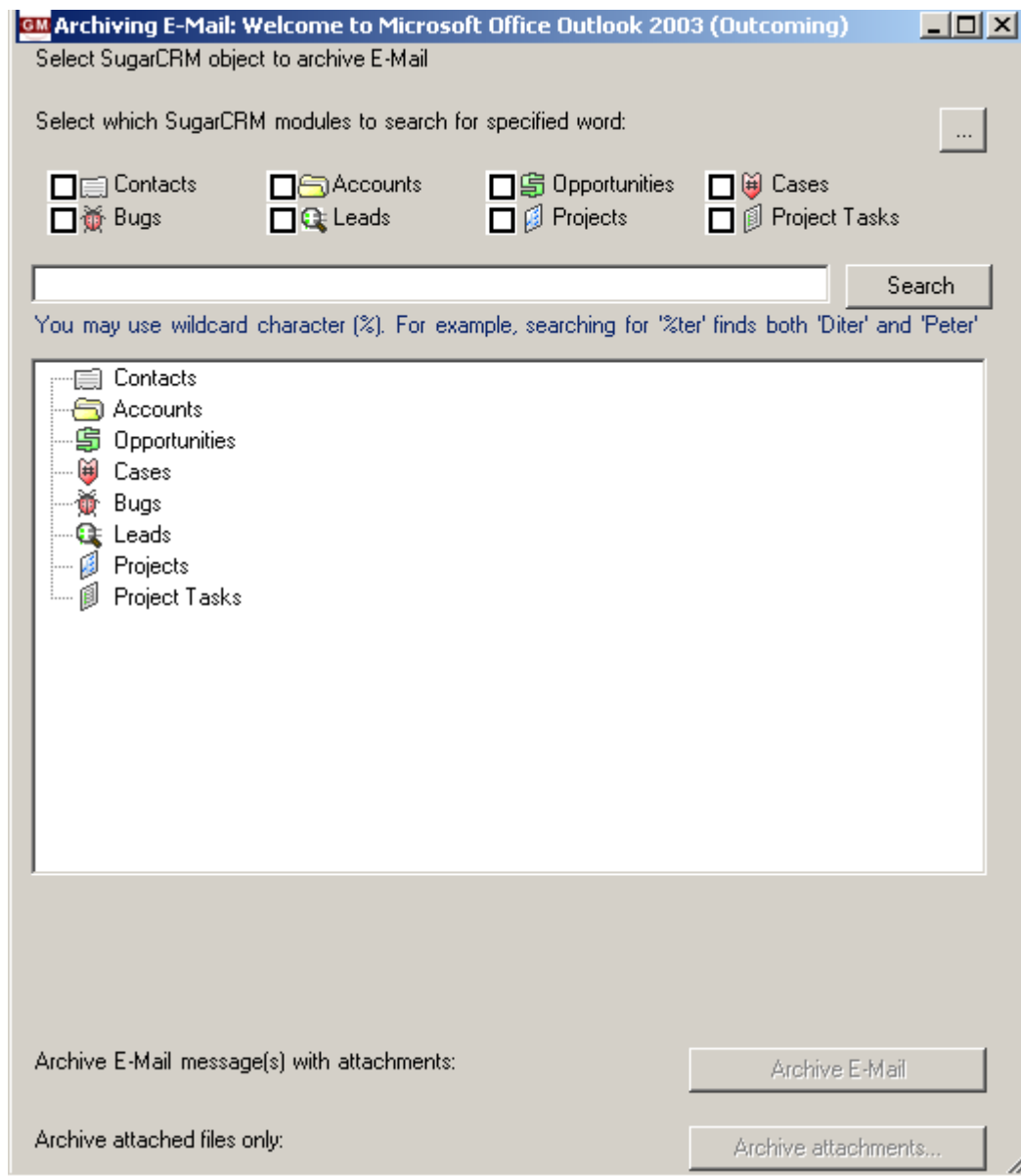
Fill URL, user name and password and press "Connect".



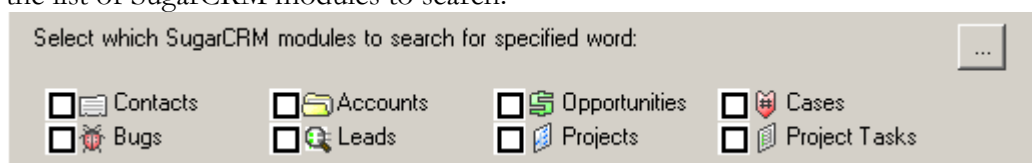
Now you should see "Archive Email" dialog, that will be described in the next section.

## Working with Archiving Dialog

All actions related to archiving share common dialog called “Archiving Dialog”.



Selected Email(s) can be archived (uploaded) to one or more SugarCRM items. To select an appropriate item it has to be found throughout available ones. Upper part of the Archiving Dialog displays the list of SugarCRM modules to search:



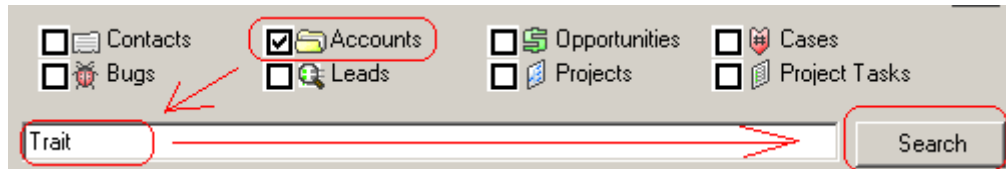
Select appropriate checkboxes to search for data in some specific modules. For example, we want to archive some incoming Email to “Account” named “Trait Institute Inc 144819” and to an Opportunity named “Trait Institute Inc 144819 – 1000 units”.

We need to:

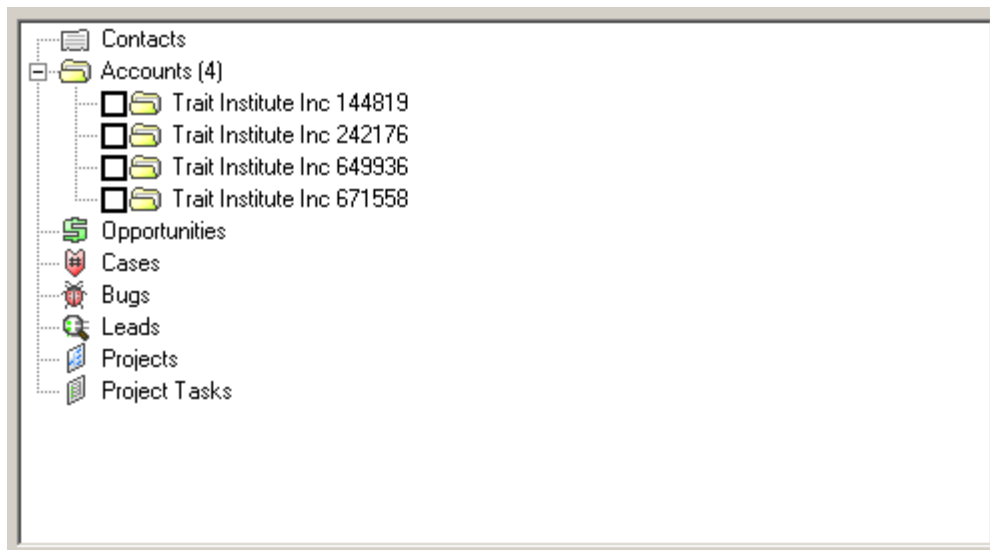
<http://www.grinmark.com/english>

sugarcrm@grinmark.com

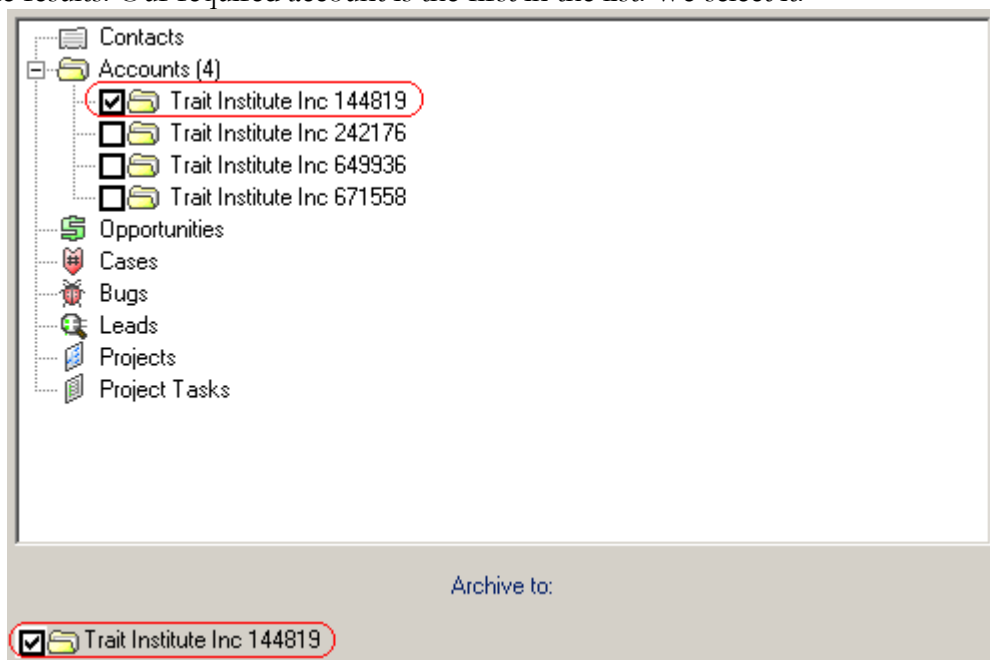
1. Select the “Accounts” module to search
2. Type a part of account name (“Berufs”)
3. Press “Search”



After the search is finished we see the results. In this case we have 12 accounts found:

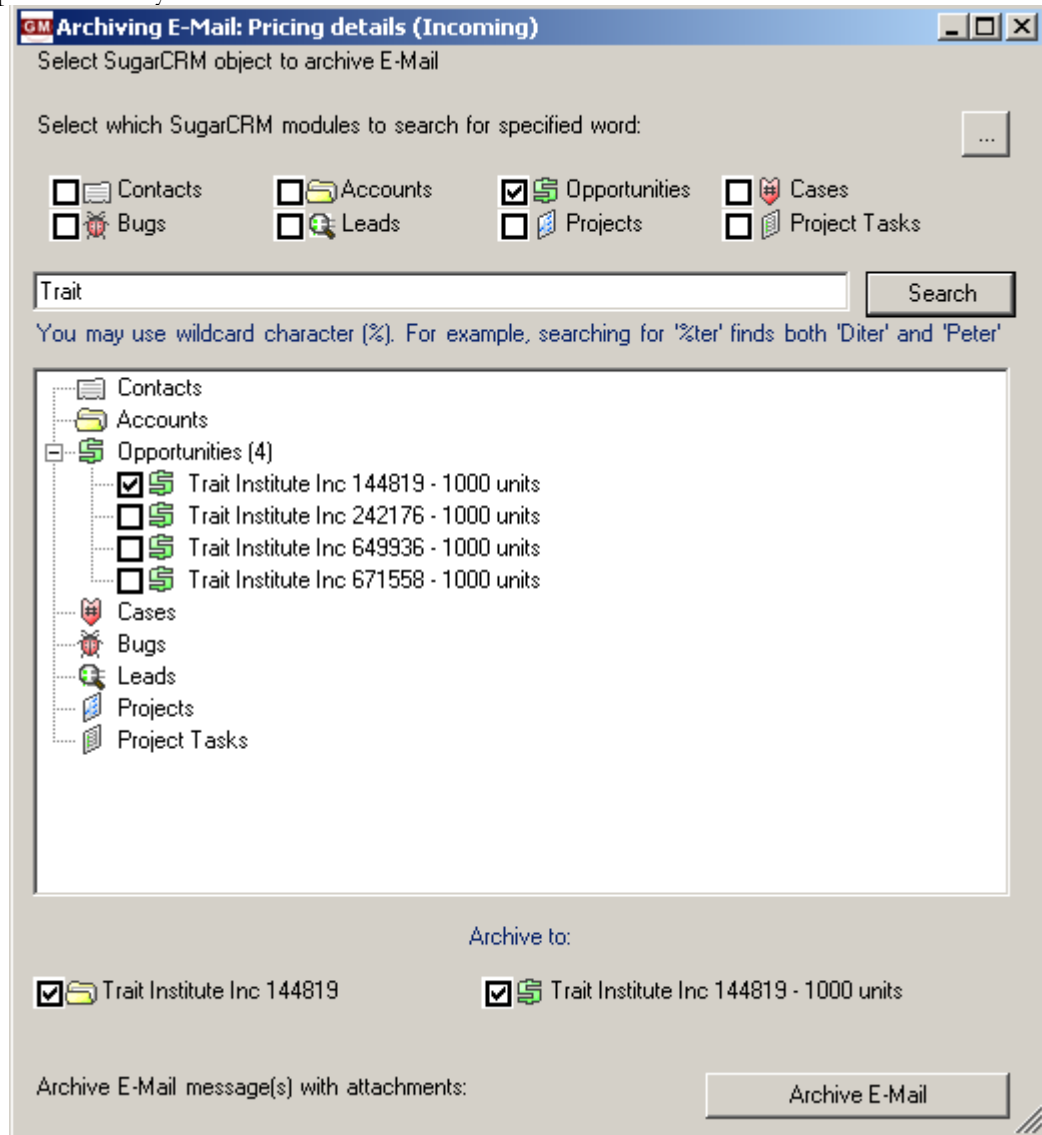


Now we can either select appropriate Account from the list of found items or repeat the search to narrow the results. Our required account is the first in the list. We select it:





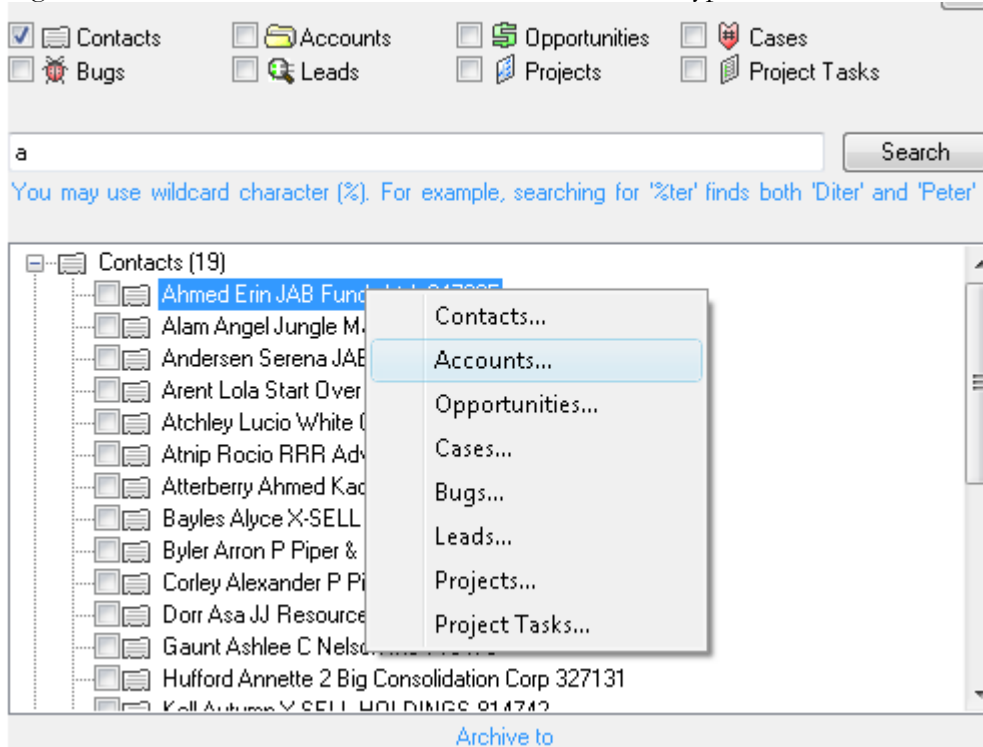
In the bottom section of the dialog we can see that the selected item appears in “Archive to:” section. Now we are going to add another SugarCRM item to archive to. Select “Opportunities”, find opportunities by the start of the name “Trait Institute Inc 144819 – 1000 units” from the list:



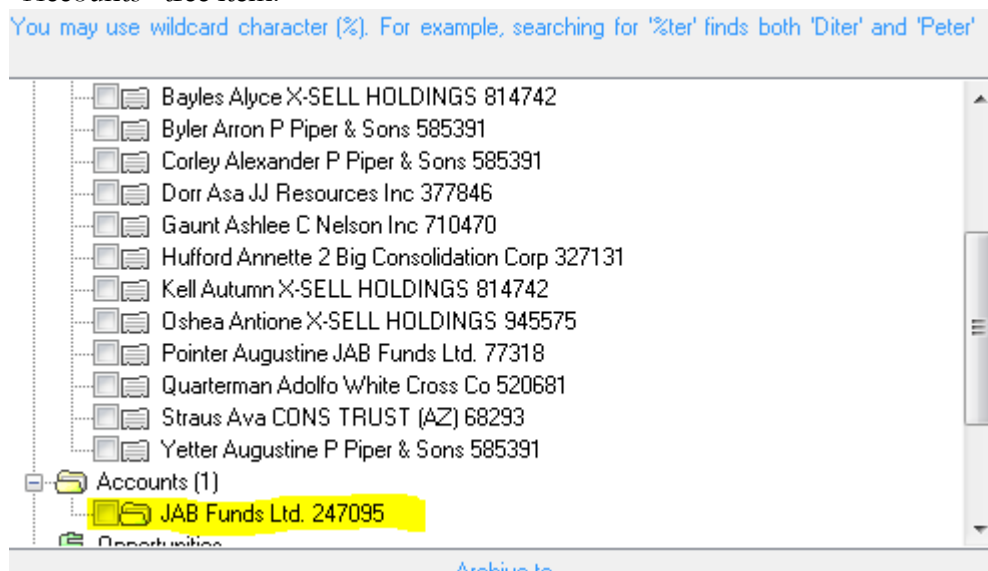
Now we have two SugarCRM items selected. Pressing “Archive E-Mail” archives the selected Email message to the “Account” named “Trait Institute Inc 144819” and to the “Opportunity” named “Trait Institute Inc 144819 – 1000 units”.

## Searching for Related Entries

Right-click on item. From the context menu select the type of related item to find:



This will find all “Accounts” related to selected contact (“Black Jack”) and place them under “Accounts” tree item.

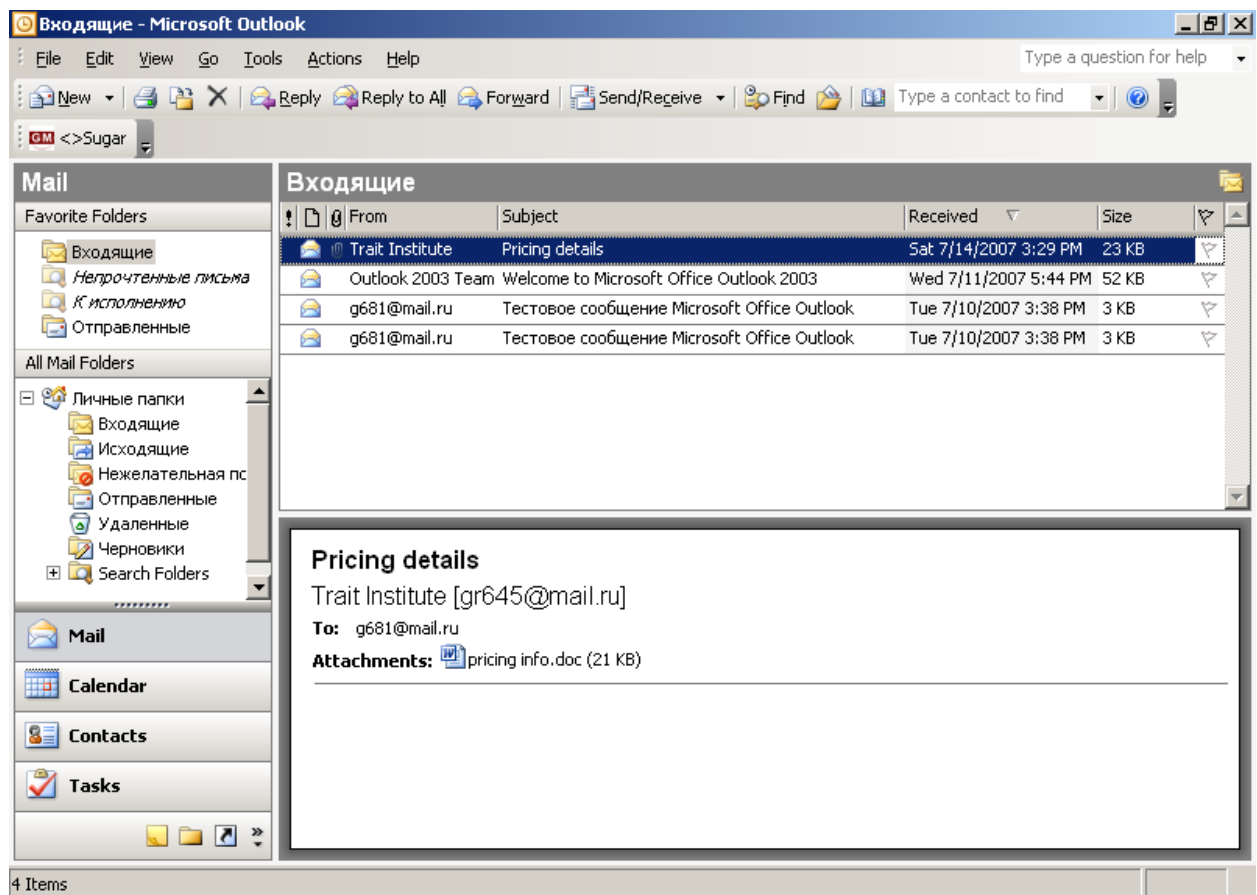


## Archiving E-Mails from Outlook 2003

### Archiving Incoming Email (Inbox)

Previous chapter describes the process of selecting Emails, selecting SugarCRM items and preparing for archiving. Last step to perform archiving is pressing “Archive E-mail” button.

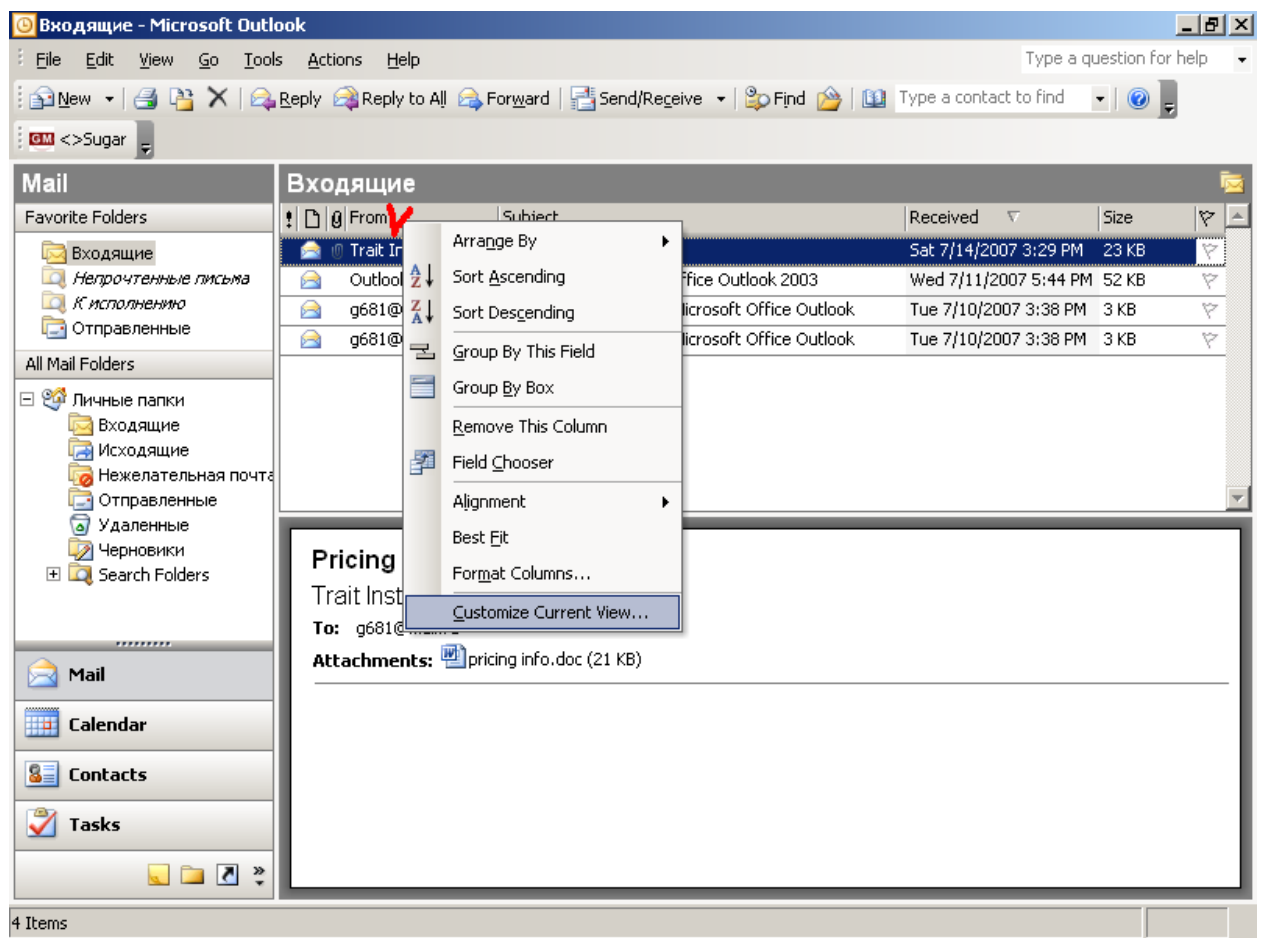
After a while archiving is completed, dialog is closed and we’re back to the main Outlook window.



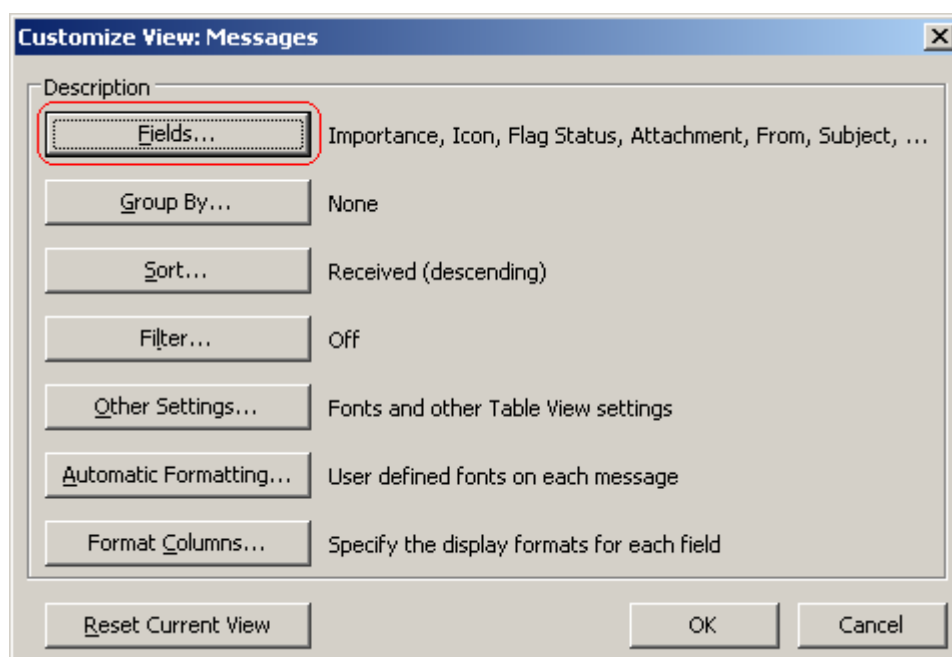
How to find out where this Email was archived?

**Please note, the rest of this chapter is only applicable to cases when “Avoid winmail.dat problem in outlook” is switched off.**

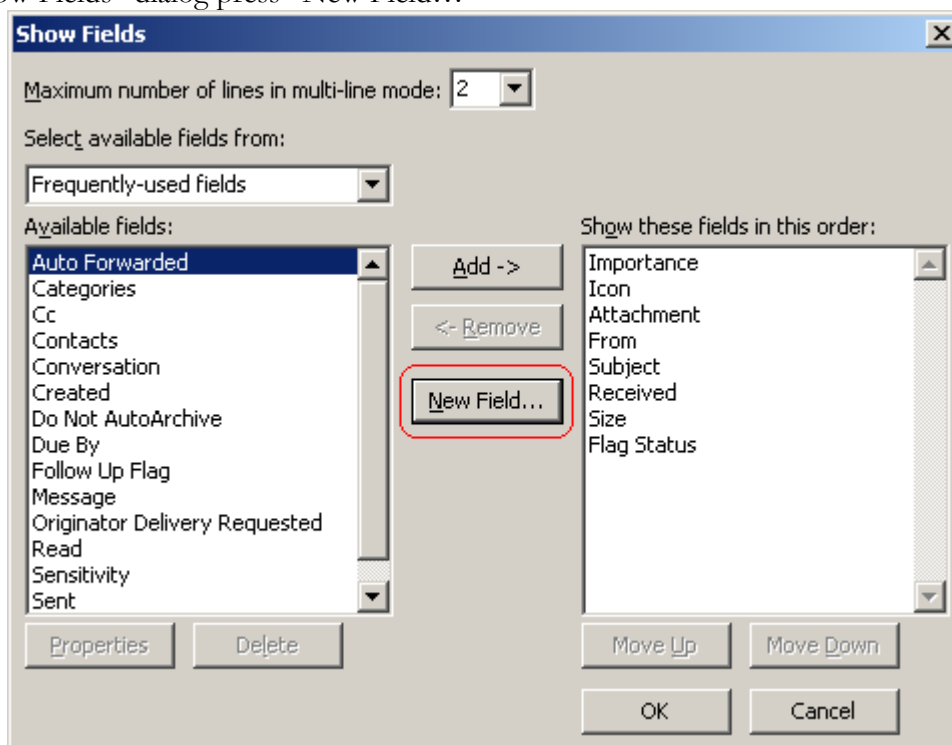
GrinMark SugarCRM – Microsoft Office 2003/2007 integration Add-In leaves a signature of archiving destination in each of the archived Emails. Displaying the signature is simple. Right-click on the column header of the Outlook folder and select “Customize Current View...” popup menu item:



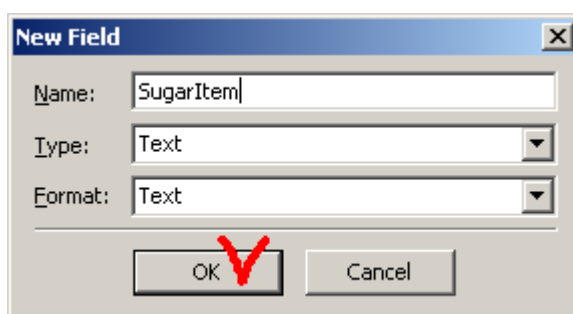
“Customize View” dialog appears. Press “Fields...” button:



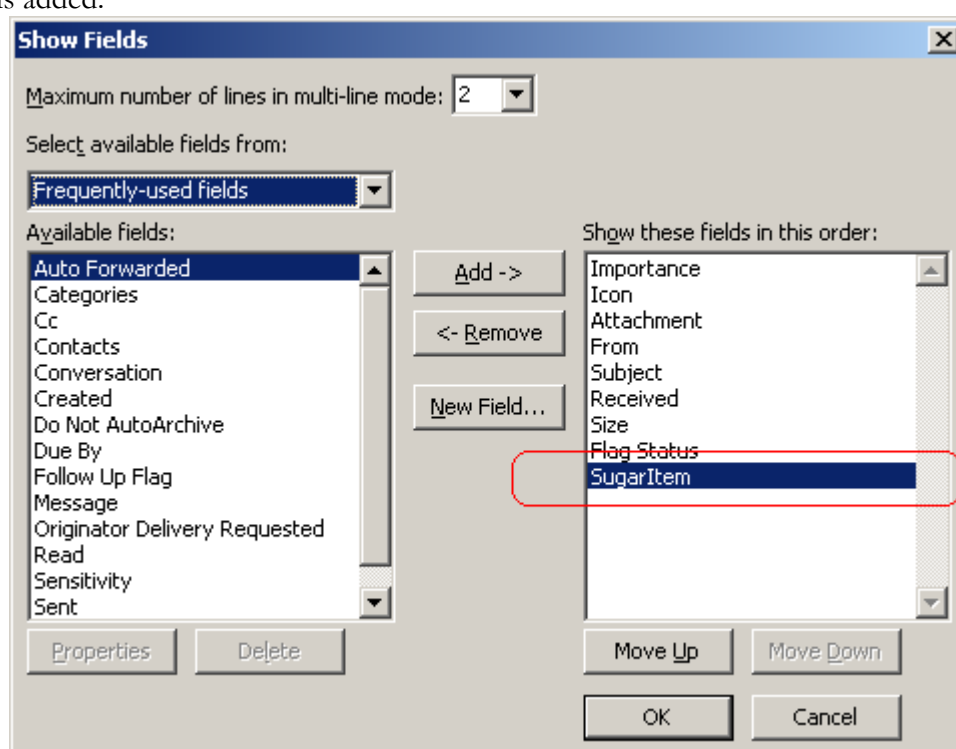
In the “Show Fields” dialog press “New Field...”



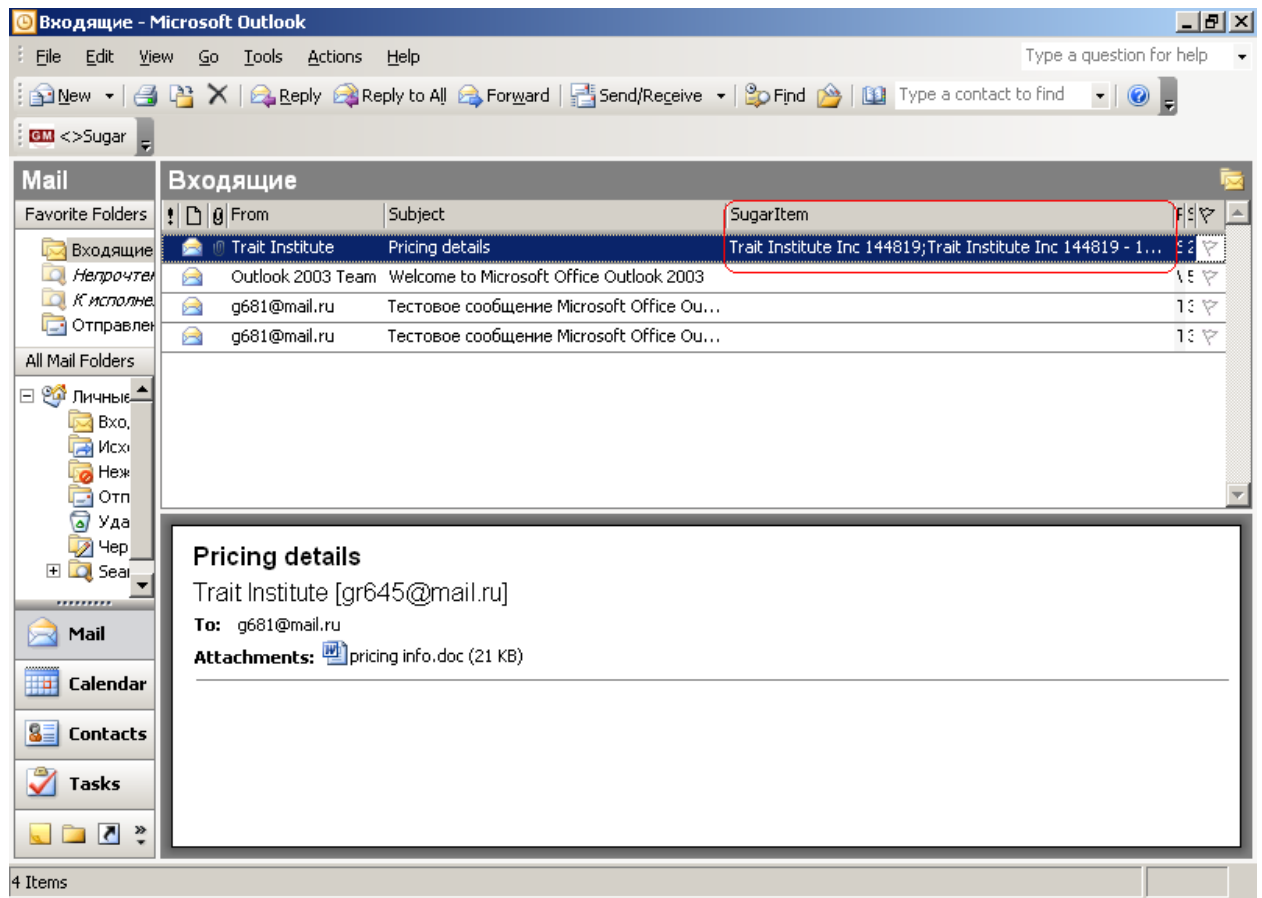
And add the field named “SugarItem”:



New field is added:

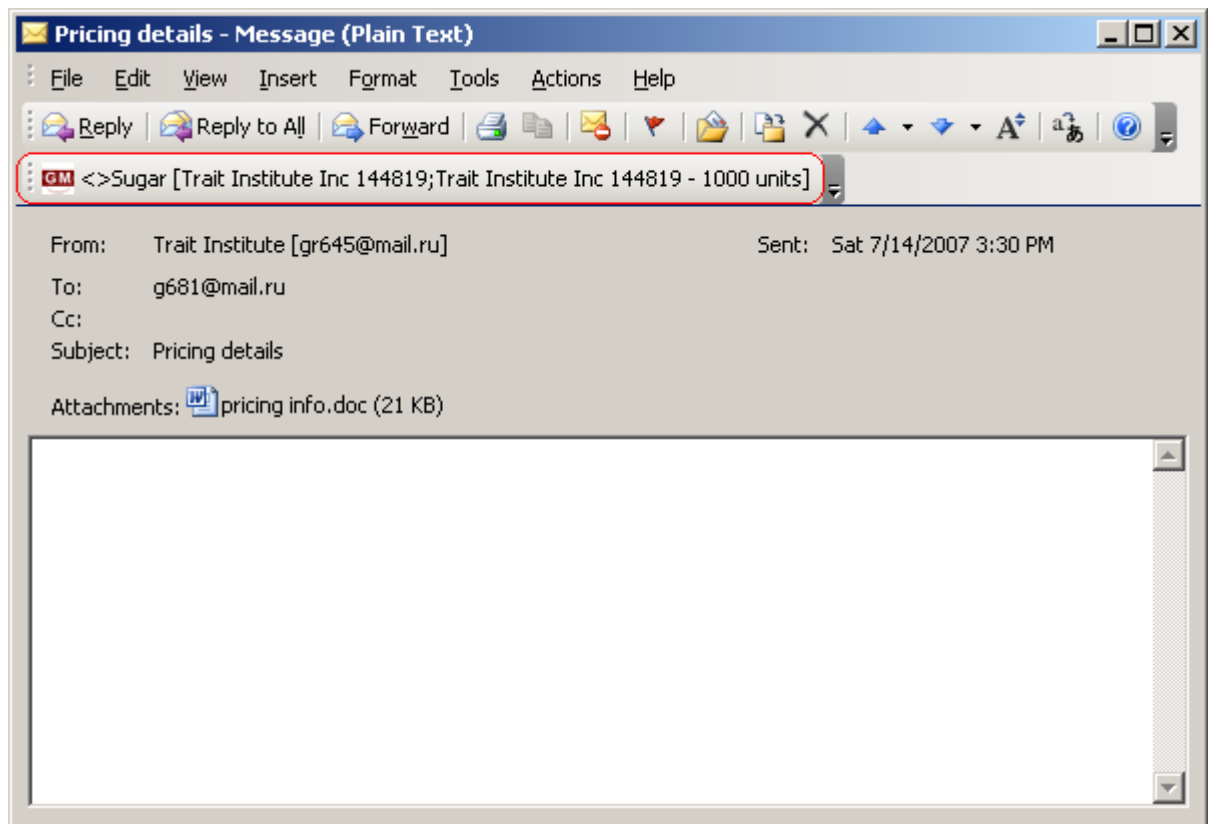


Press Ok and see what has changed in Outlook folder:



One can see the list of SugarCRM items that this Email message was archived to.

Another way to see where this item was archived is double-clicking on a message. Note the caption of the “<>Sugar” button. It shows where this Email was archived.

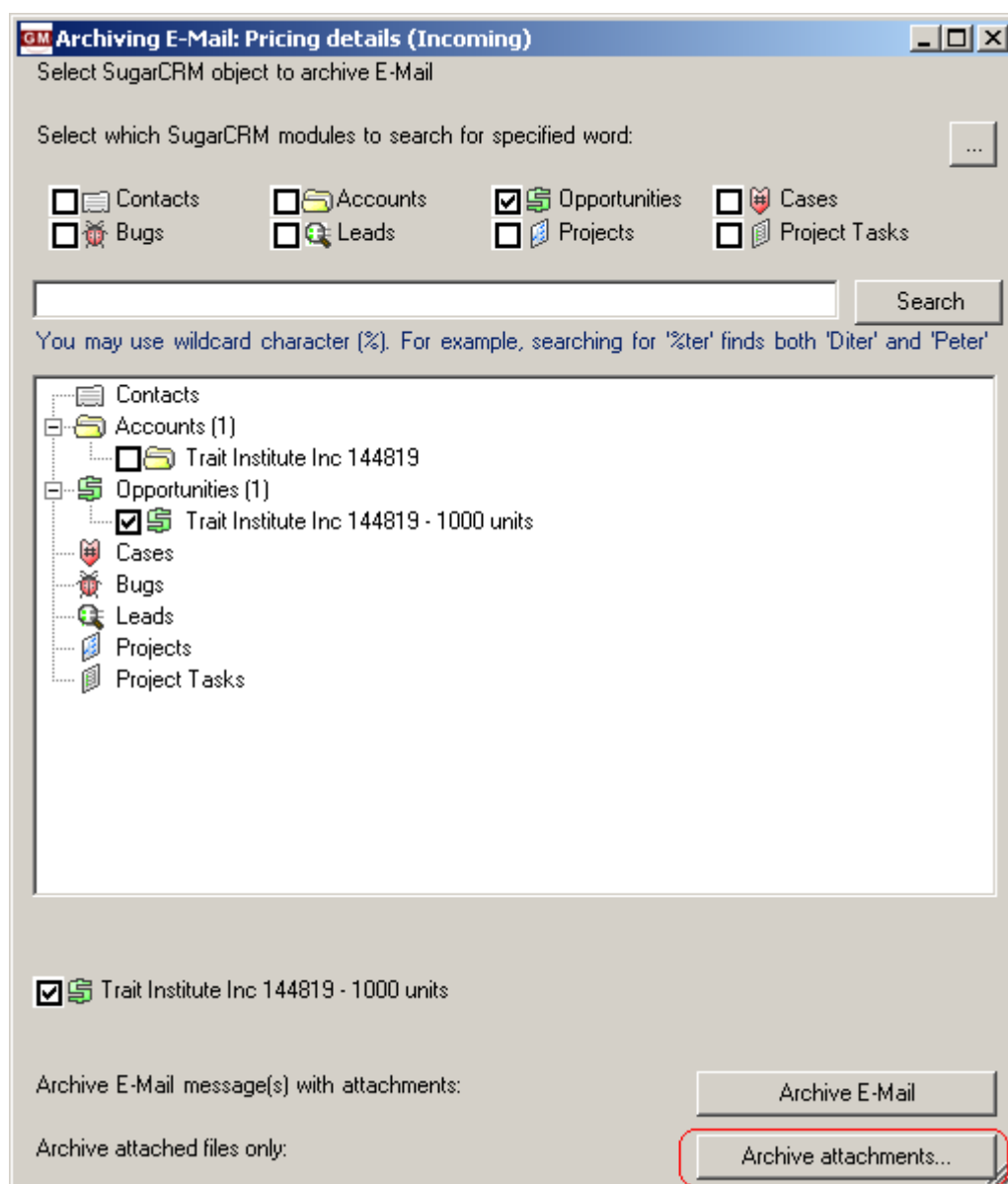


## Archiving Attachments

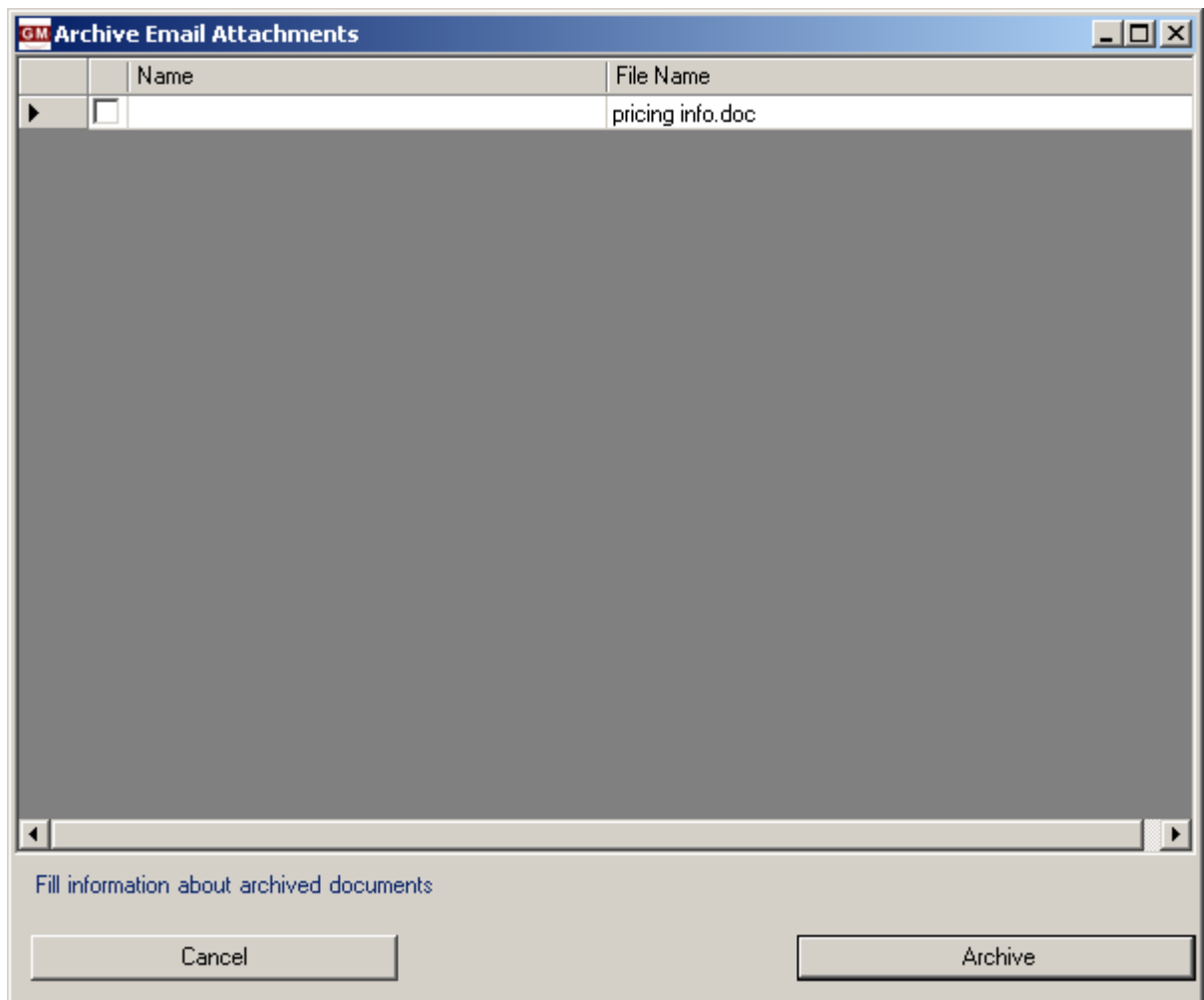
Sometimes Email message itself does not contain any useful information and is not needed for the future.

For example, two employees of the same organization may pass some documents between each other. Or Email is sent to self from some other place. In this case the text of the Email is redundant and not needed (useless). Other example is an Email message containing many documents while only some of them are needed for archiving.

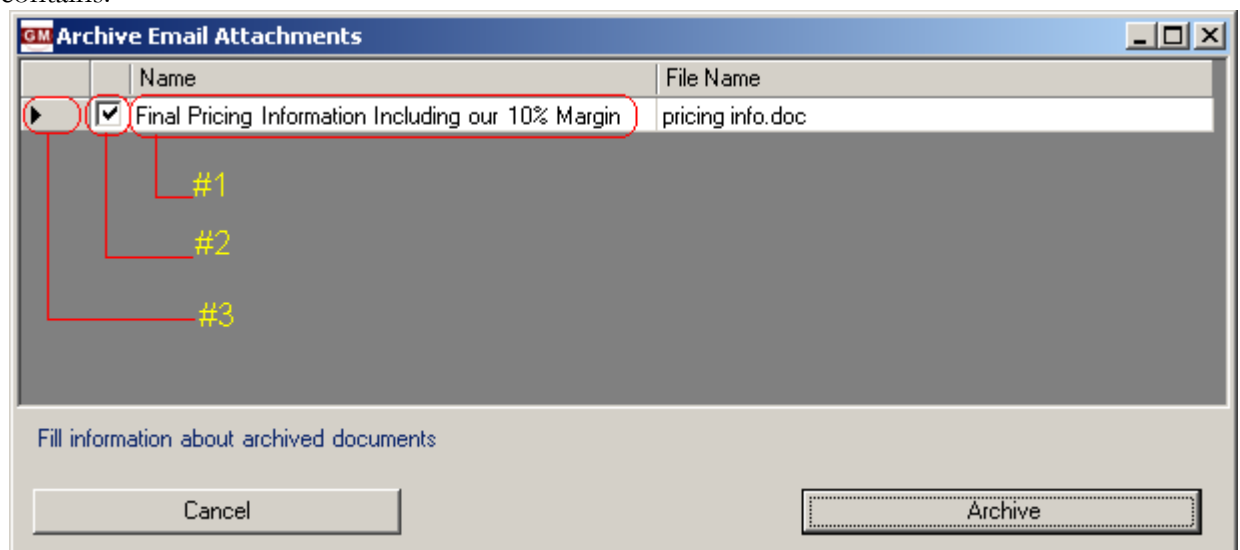




Archive Email dialog helps to archive attachments separately. Press the “Archive attachments...” button. The “Archive Email Attachments” dialog appears:



The checkbox to the left of each attachment selects it for archiving. “Name” is the required column. It is a note name for a given attachment. In many cases a file has shorter name than a document it contains.

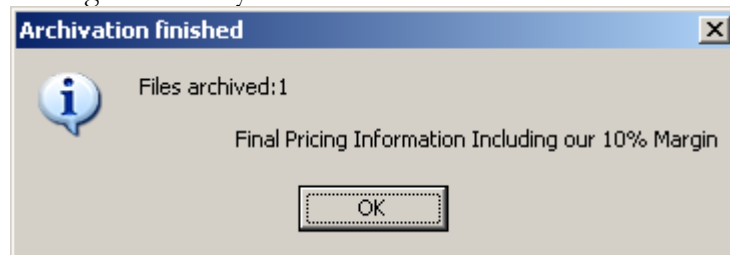


<http://www.grinmark.com/english>

sugarcrm@grinmark.com

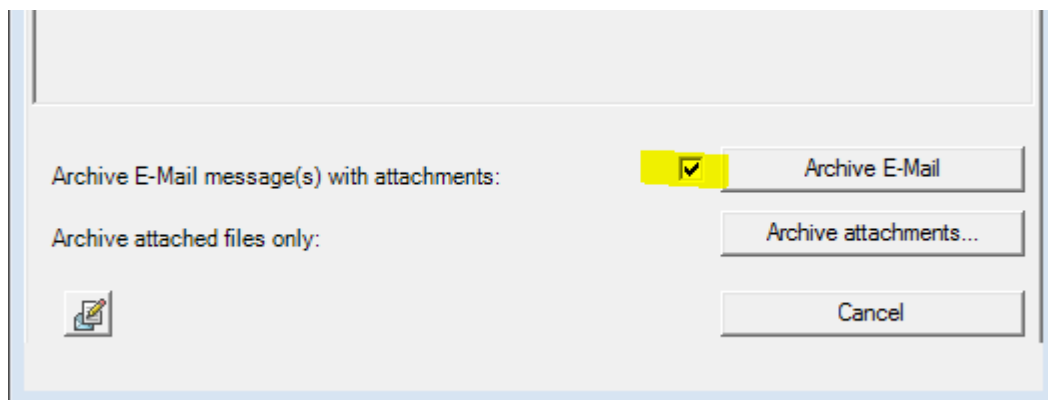
- #1 – Filled full document name (Note Name).
- #2 – Checked – archive this file.
- #3 – Double click this area to open this attachment.

After filling the information about documents to be created, press the “Archive” button. When archiving is completed a message box describing all archived documents is displayed. Check it to ensure that you did not forget to set any checkboxes:




## Archiving Email without Attachments

Sometimes only email subject and text are needed. Attached document may be stored elsewhere and there is no need to waste free space by saving it into the SugarCRM. In this case one may uncheck the checkbox next to “Archive Email...” button. While it is unchecked the Email is archived without attachments.



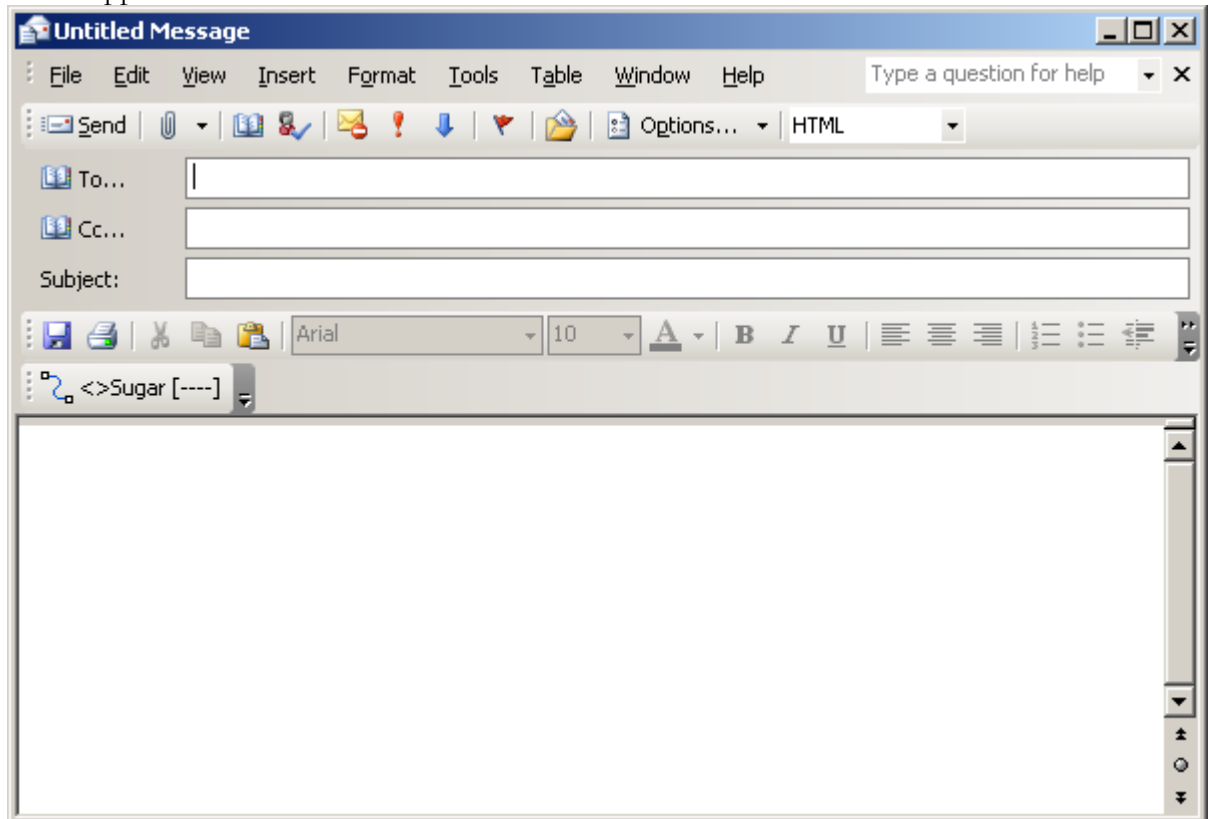
## Archiving Sent Email


Archiving Sent Email is very similar to archiving an incoming one. Just select it in the “Sent” folder and press the  <>Sugar button. The rest is similar for Incoming and Sent Emails.

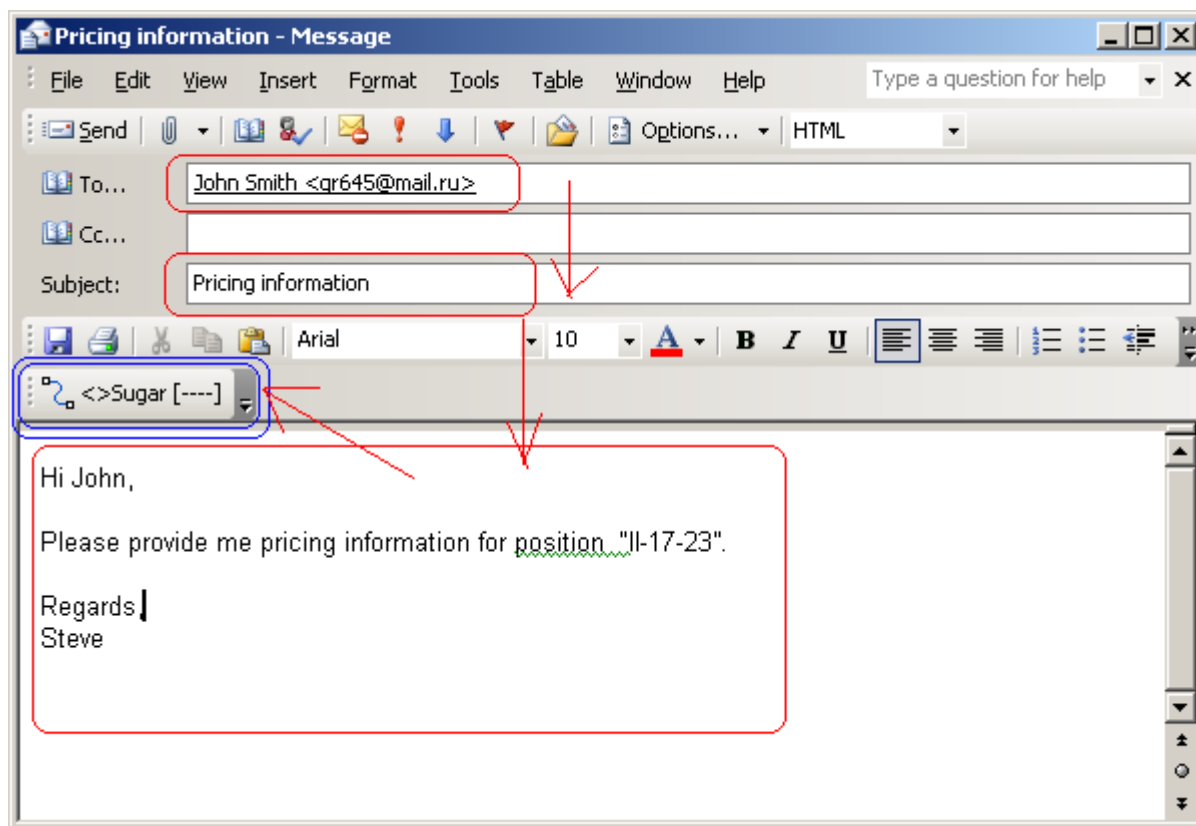
To learn how to archive an Email that is not yet sent but is just being composed see the next chapter.

## Archiving Composed Email

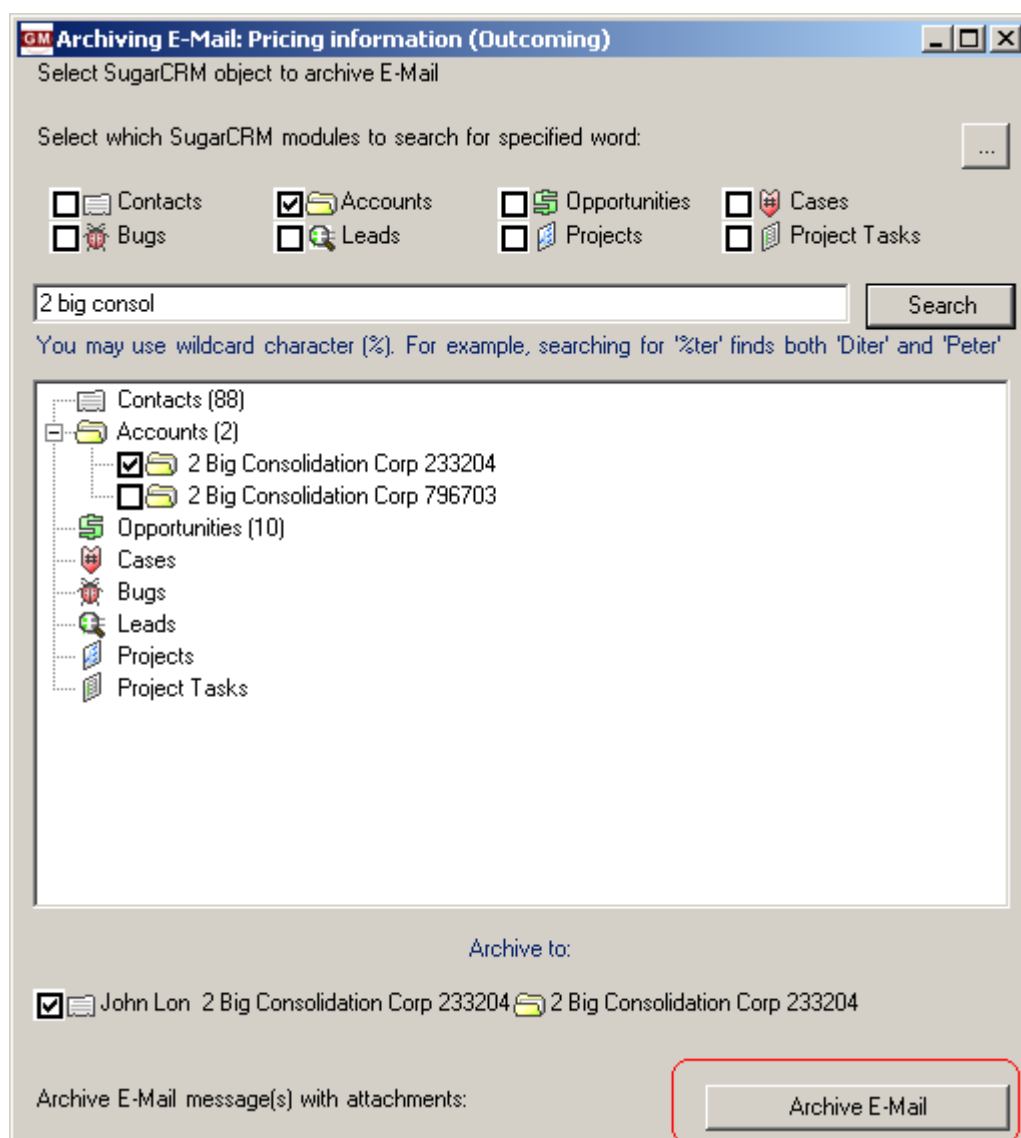
Suppose that the “New” button is pressed and a new Email is being composed. Composition window appears:



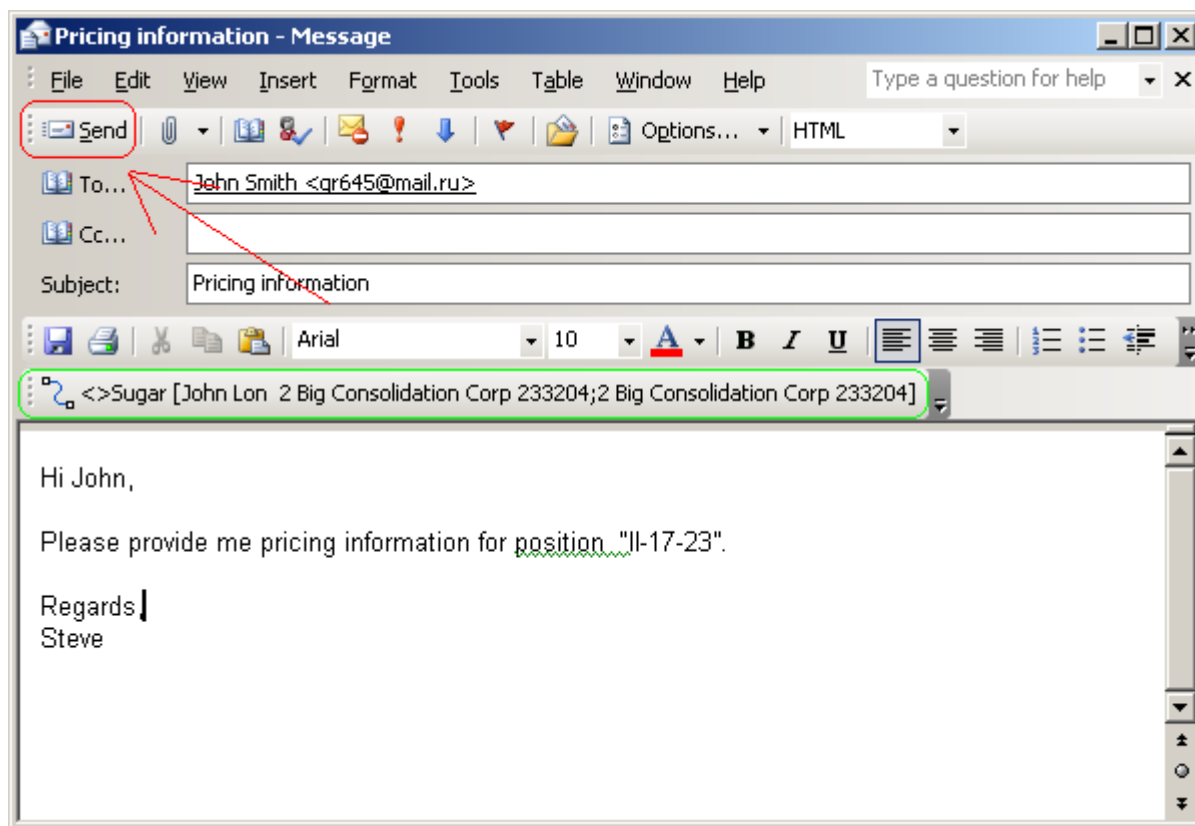
Compose this Email as usual. One additional feature is available for you:  '<>Sugar [----]'. This button schedules this Email to be archived to selected SugarCRM items when “Send” button is pressed. In this case we fill all standard Email fields, and press this button:



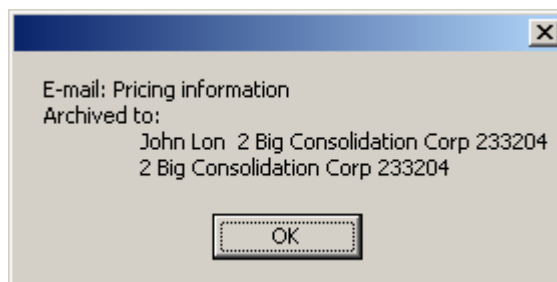
After pressing it, we see the standard Archiving Dialog. Select the required SugarCRM items and press “Archive E-Mail”:



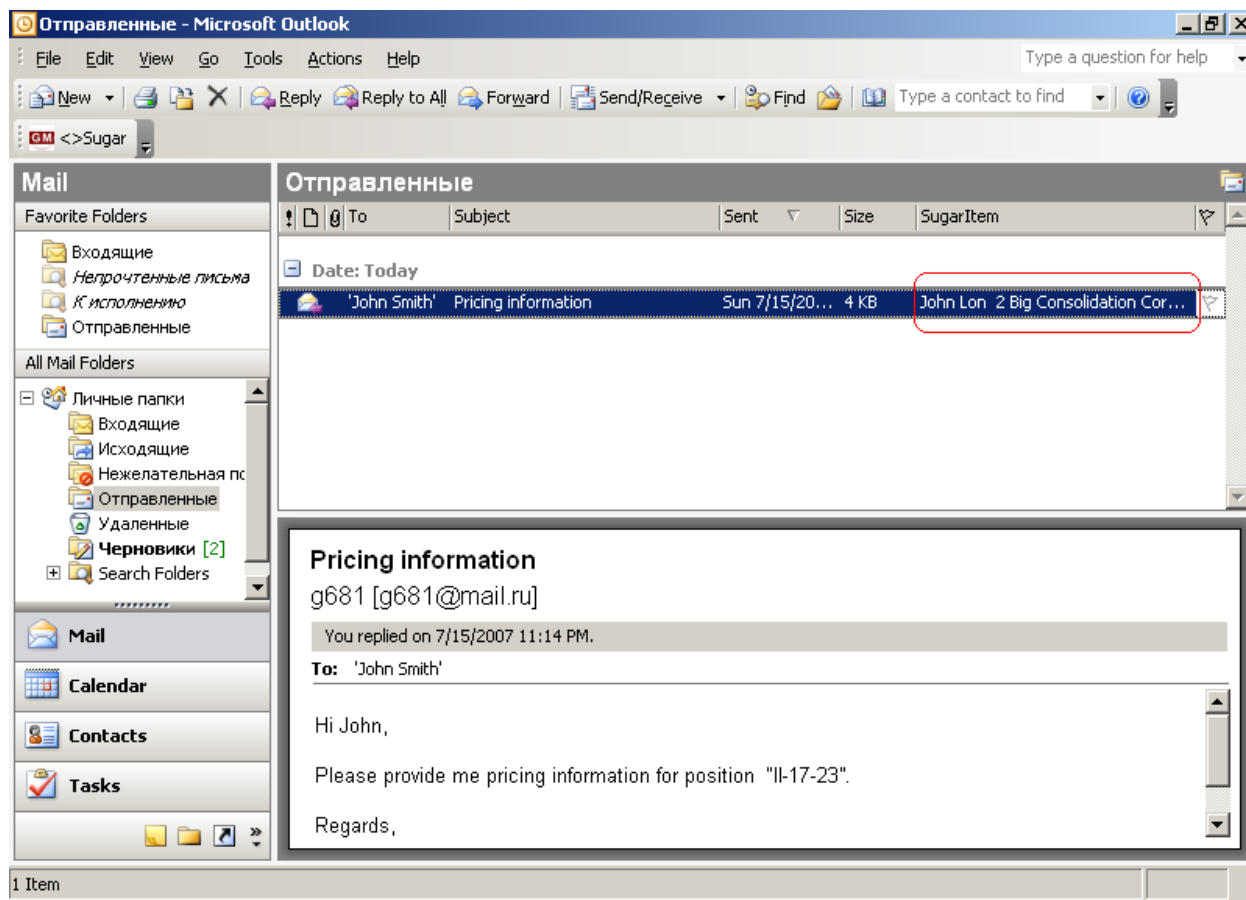
Now you can see that Email is scheduled for Archiving to “John Lon” from “2 Big Consolidation Corp 233204”:



Pressing “Send” for the composed Email forces archiving of the message right after sending it:



The message just sent is also marked in the “Sent” folder:



## Archiving RE and FW Email

Since version 3.0 there is a setting to control automatic archiving of Sent and Forwarded email messages. This behavior is optional. To enable it the registry value should be set:


HKEY\_CURRENT\_USER\Software\GrinMark\SugarOutlook\autoArchivingEnabled=1

Default value is 0.

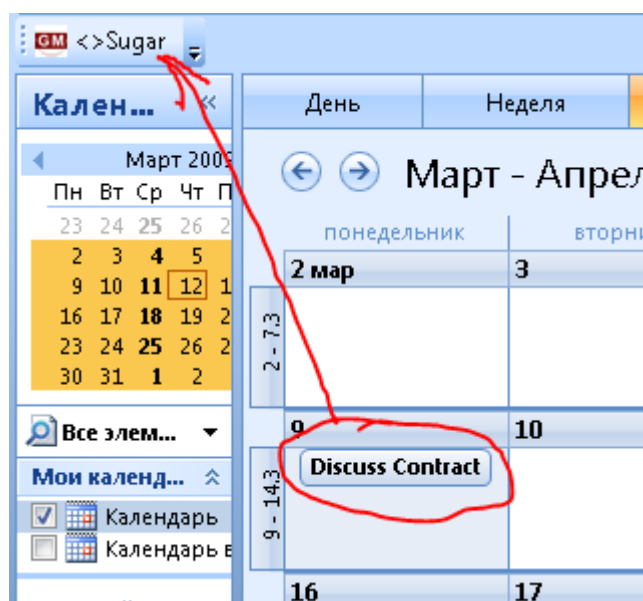
When enabled archiving “RE” and “FW” Emails becomes very similar to archiving composed Emails. GrinMark Addin automatically schedules the message for archiving to SugarCRM items of the Parent Email (i.e. Email being replied or forwarded).

This way the whole Email thread will be automatically archived.

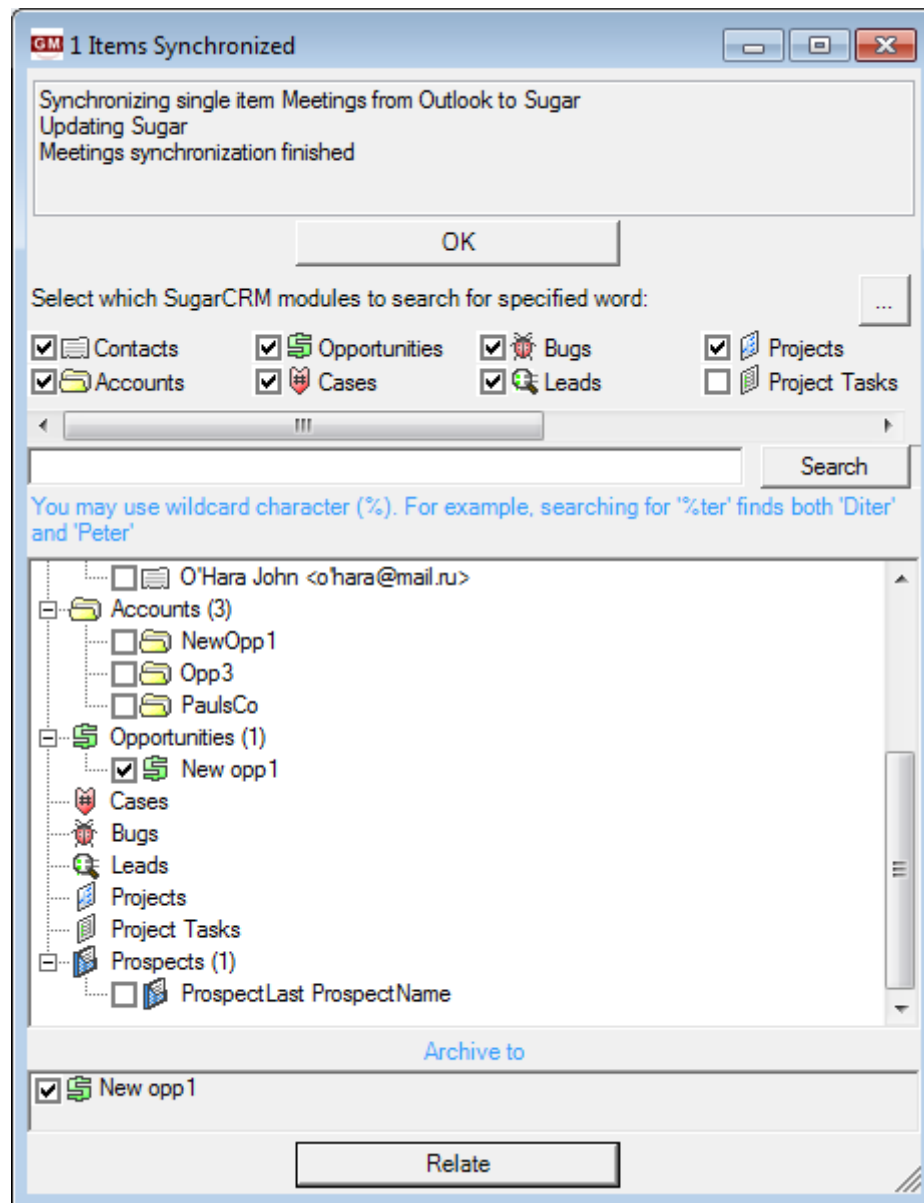
## Archiving Contacts, Tasks and Appointments

Whenever you have any entry, such as Contact or Meeting selected in Outlook you can press the  <>Sugar button to archive selected entry to Sugar immediately:





When archiving is done the confirmation dialog appears:



This means that the meeting has just been synchronized. Press “OK” to finish without any further steps. Or press “Relate” to assign newly archived items to something in SugarCRM.

## Where to Find Attached Items

### How to Find Archived Email?

Suppose that we archived the Email with subject “Pricing details” to the Account “Trait Institute Inc 144819”. Let’s look on the details of this item in the database:

The screenshot shows the GrinMark application interface. At the top, there is a toolbar with various icons. Below the toolbar, the account details for 'Trait Institute Inc 144819' are displayed in a table-like format. The details include:

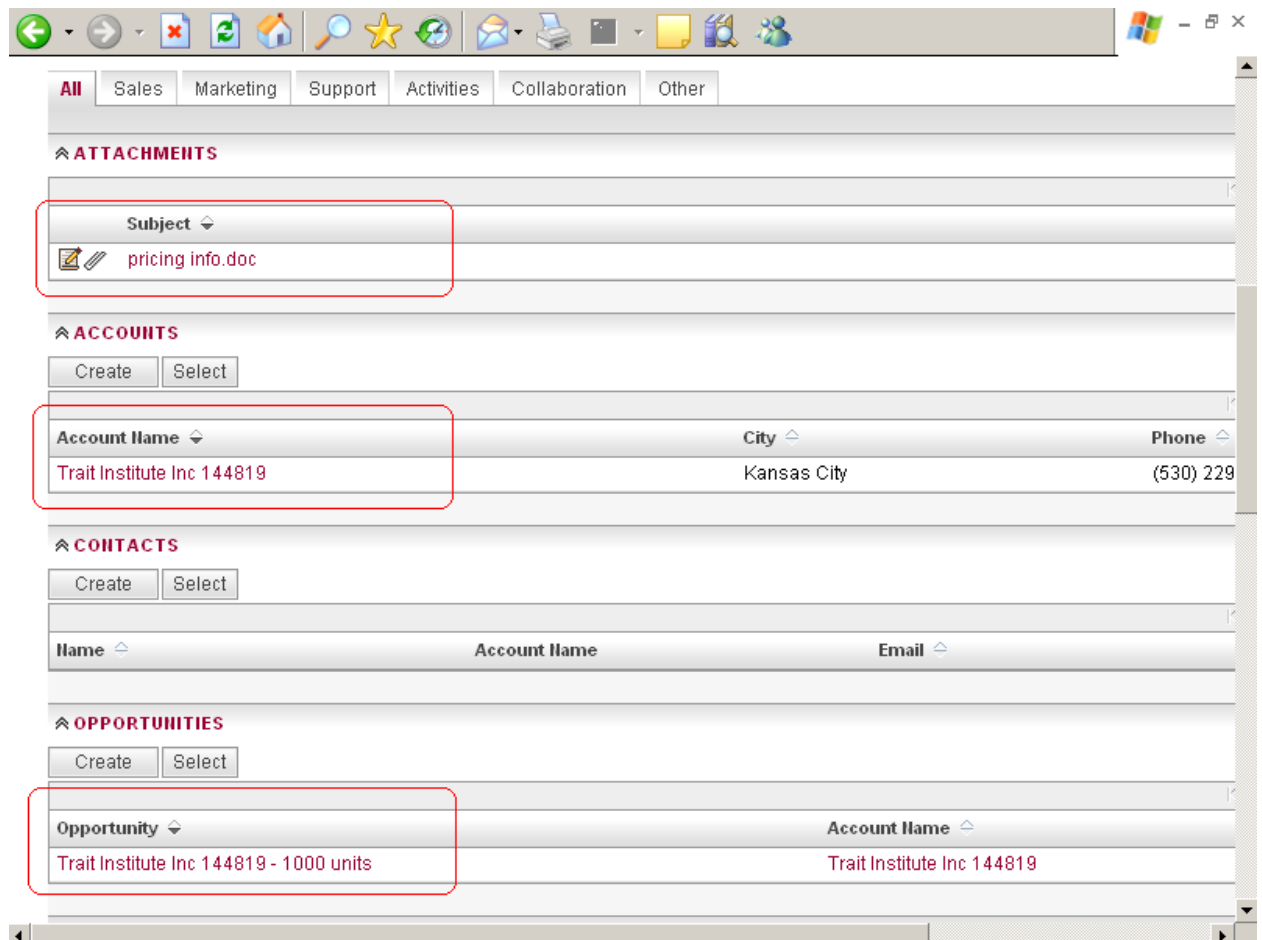
- Account Name: Trait Institute Inc 144819
- Website: [www.hrga.org](http://www.hrga.org)
- Ticker Symbol:
- Member of:
- Employees:
- Ownership:
- Industry: Biotechnology
- Type: Customer
- Assigned to: chris
- Billing Address: 321 University Ave. Kansas City, NY 23201 USA
- Description:
- Phone: (530) 229-6422
- Fax:
- Other Phone:
- Email: [dev64@example.bi](mailto:dev64@example.bi)
- Other Email:
- Rating:
- SIC Code:
- Annual Revenue:
- Last Modified: 2007-07-14 15:02 b
- Date Created: 2007-07-14 15:02 b
- Shipping Address: 321 University Ave. Kansas City, NY 23201 USA

Below the account details, there is a section for 'ACTIVITIES' and 'HISTORY'. The 'HISTORY' subpanel is active, showing a list of activities. The first activity is highlighted with a red box:

Subject	Status	Contact	Date Modified	Assigned User
Pricing details	Read		2007-07-14 16:46	admin
Review needs	Not Held	Wendi Vanderburn	2007-07-14 15:03	chris

The attached Email is available in the History subpanel.

Let’s look at the DetailView for this Email in SugarCRM:



SugarCRM now knows that this Email:

- a) Has an attachment “pricing details.doc”
- b) Is Attached to an Account “Trait Institute Inc 144819”
- c) Is Attached to an Opportunity “Trait Institute Inc 144819 – 1000 Units”

## Where to Find Archived Files

Suppose that we archived an Email with an attachment (or file) “pricing details.doc” named as “Final Pricing Information Including our 10% Margin”, to an Opportunity “Trait Institute Inc 144819 – 1000 Units”. We can find it in the history panel of this Opportunity:

OFF CHANCE! THAT INCLUDES THE 10% MARGIN

Edit Duplicate Delete

**View Change Log**

Opportunity Name:	Trait Institute Inc 144819 - 1000 units	Amount:(USD \$)	50,000.00
Account Name:	<u>Trait Institute Inc 144819</u>	Expected Close Date:	2008-04-0
Type:	New Business	Next Step:	
Lead Source:	Partner	Sales Stage:	Id. Decisio
Campaign:			
		Probability (%):	40
Assigned to:	chris	Last Modified:	2007-07-1
		Date Created:	2007-07-1
Description:			

All Sales Marketing Support Activities Collaboration

▼ **ACTIVITIES**

▲ **HISTORY**

Create Note or Attachment Archive Email View Summary

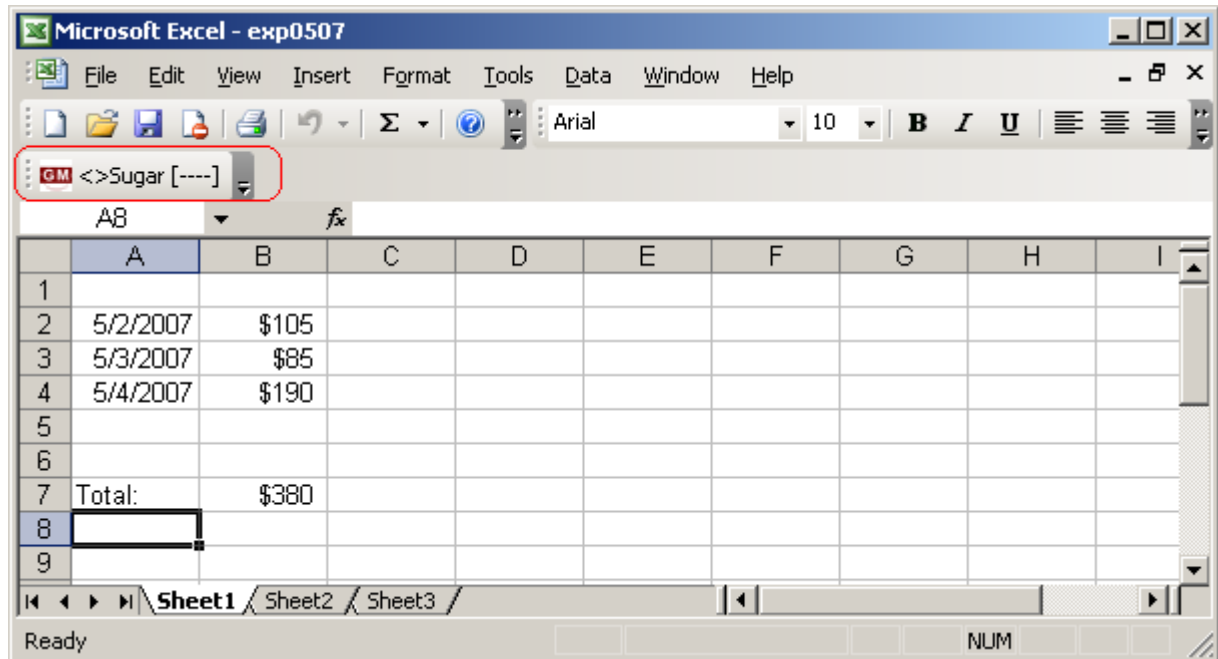
Subject	Status	Contact	Date Modified	Assigned User
Final Pricing Information Including our 10% Margin	Note		2007-07-14	
Pricing details	Read		2007-07-14 16:46	admin

▲ **LEADS**

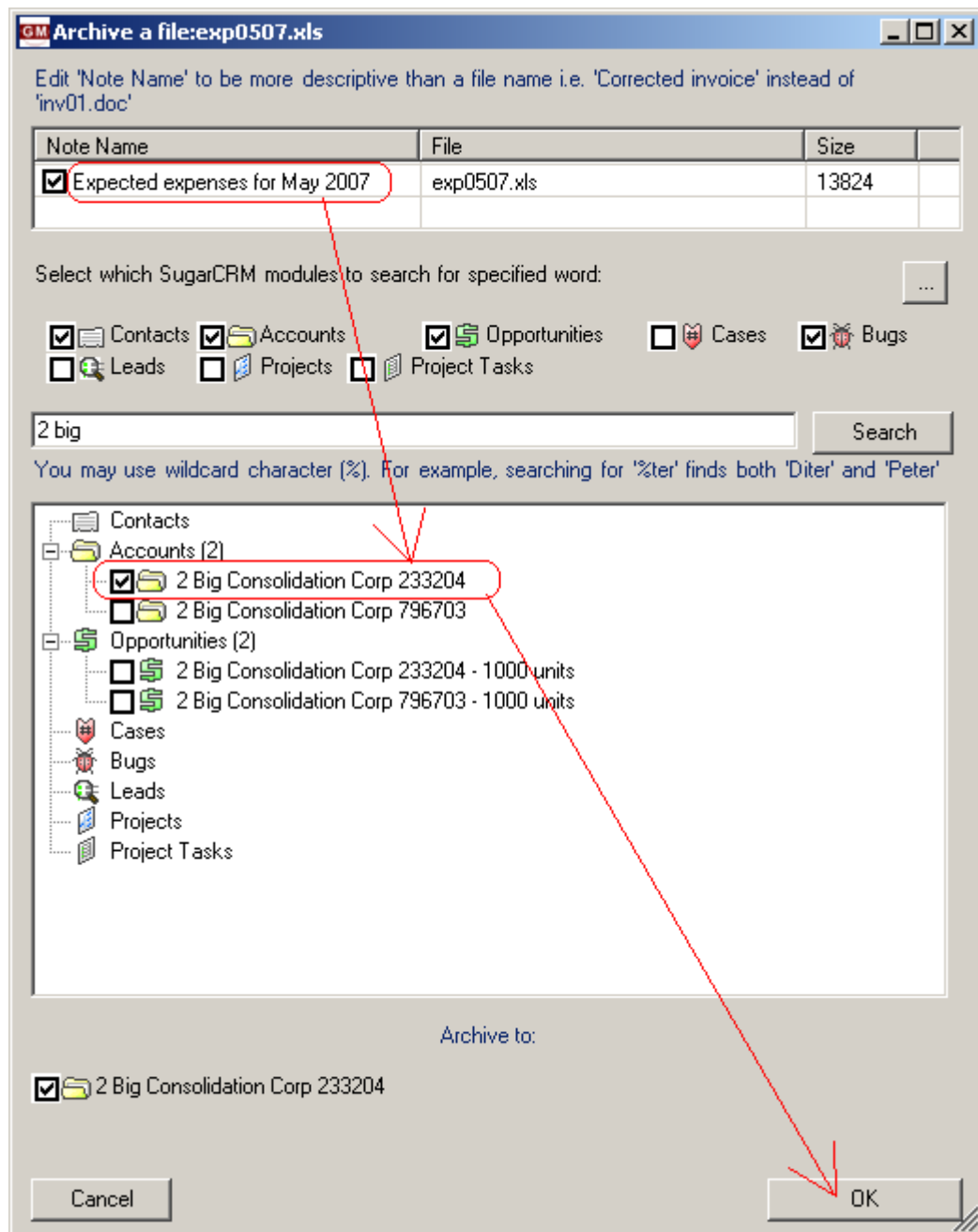
Create Select

## Archiving Documents from Word and Excel

Working with Addin from Word and Excel is simple. GrinMark Addin is on the toolbar:

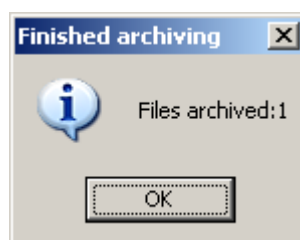


Use **GM <>Sugar** button to archive the current version of the document. Archive document dialog appears:



Specify “Note Name” to clarify document contents, select the archiving target and press “OK”.

Finally, the status message is displayed:



## Working with Document Templates

### How to Add a Document Template?

Each company has a set of standard documents used in everyday operations. Some kinds of documents are produced by certain software systems (Orders, Invoices, Payroll). Some kinds of documents are semantically much closer to CRM software: Marketing, Whitepapers, EULA and so on.

SugarCRM has a dedicated module for storing standard documents and templates. Module “Documents” that is used to maintain the list of standardized documents:



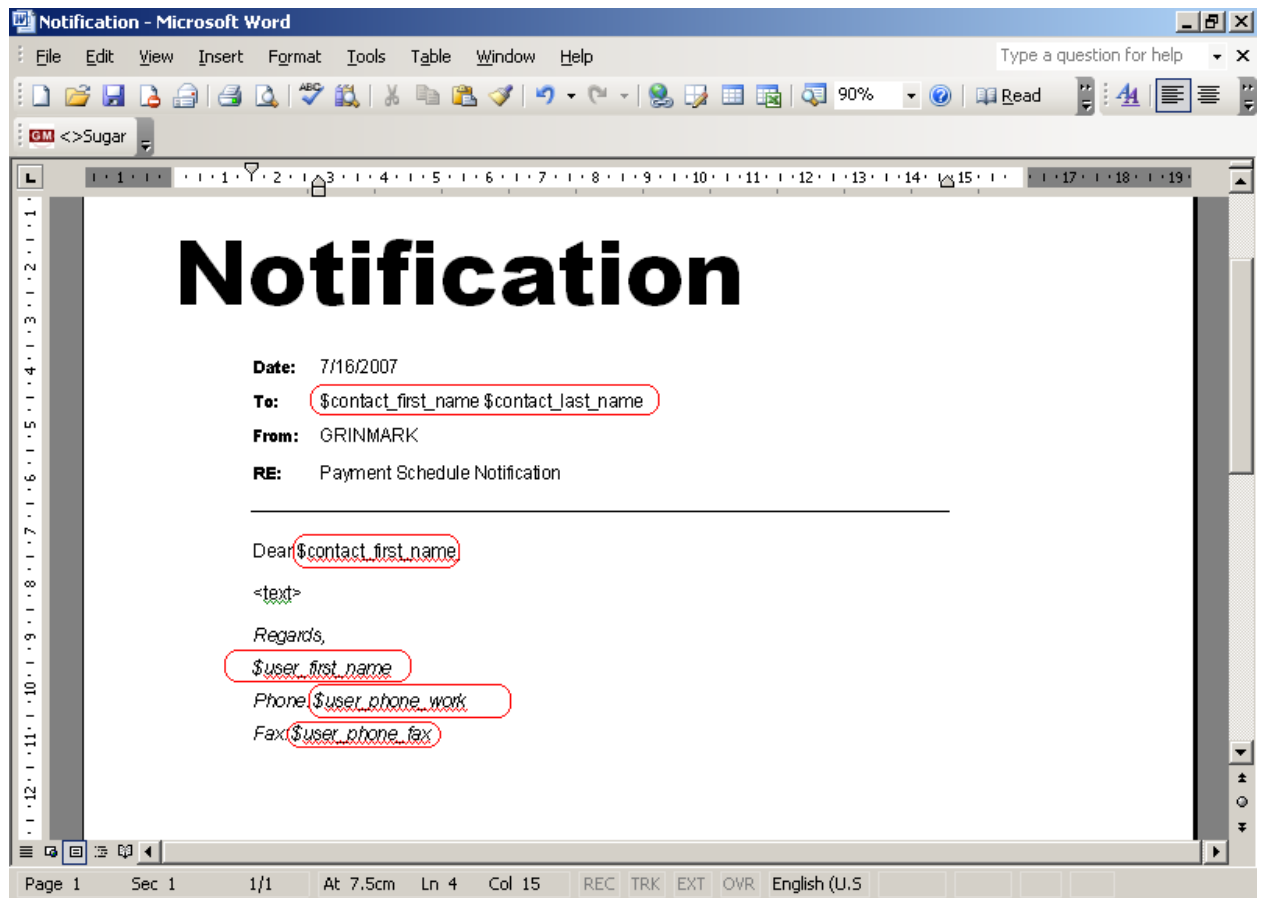
<http://www.grinmark.com/english>

sugarcrm@grinmark.com

The screenshot displays the SugarCRM user interface. At the top, the SugarCRM logo is on the left, and a navigation bar contains links: Welcome Steven, My Account, Training, Employees, Admin, Logout, and About. Below this is a secondary navigation bar with links: Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, and Documents (which is highlighted with a red box). A 'Last Viewed' section shows recent items like Notification, EULA, NDA, Form I-12, Trait Institute, Steven Sothenberg, Pricing details, and another Trait Institute. The main content area is titled 'DOCUMENTS: HOME' and includes tabs for Basic Search, Advanced Search, and Saved Search & Layout. A search form is present with fields for Document Name, Category (set to --None--), and Sub Category (set to --None--), along with Search and Clear buttons. Below the search form is a 'DOCUMENT LIST' section with an 'Export' button and 'Selected: 0'. The list contains four items: Notification (Sales, 1.0, admin, 2007-07-16 11:09), Form I-12 (Marketing, Marketing Collateral, 1.3, admin, 2007-07-16 11:31), NDA (Marketing, 1.6, admin, 2007-07-16 11:32), and EULA (Marketing, 2.3, admin, 2007-07-16 11:33). Each item has a checkbox and a document icon. At the bottom of the list is another 'Export' button and 'Selected: 0'. A 'Clear All' link is also present. The section ends with a 'MASS UPDATE' button.

<input type="checkbox"/>	Document Name	Category	Sub Category	Latest Revision	Published By	Revision Date
<input type="checkbox"/>	Notification	Sales		1.0	admin	2007-07-16 11:09
<input type="checkbox"/>	Form I-12	Marketing	Marketing Collateral	1.3	admin	2007-07-16 11:31
<input type="checkbox"/>	NDA			1.6	admin	2007-07-16 11:32
<input type="checkbox"/>	EULA			2.3	admin	2007-07-16 11:33

Suppose that we prepared some document that is frequently used in the communication with customers:



Parts of the document starting with the “\$” sign are subjects for template processing. For example,

\$contact\_first\_name

An alternative way to specify the field is to enclose it into {{...}}. I.e.:

{{contact\_first\_name}}

Represents first name of the notification recipient. At any time one may review the list of available template fields for selected Contact by pressing the “?” button next to the “Fill” button:



This brings the template list filled with actual values.

It is possible to format date and time fields by means of template prefixes. For example,

\$contact\_birthdate -> 1975-10-10 03:00.00

I.e. it is resolved to date in full format. It is possible control how the date field is replaced using one of the prefixes: "D." for "Date", "DT." for Date & Time and "T." for "Time". System-default date and time formats are used. For example:

<http://www.grinmark.com/english>

sugarcrm@grinmark.com

```
$D.contact_birthdate    -> 10/10/1975
$DT.contact_birthdate    -> 10/10/1975 03:00
$T.contact_birthdate     -> 03.00
```

Next we publish a new template to be available to all employees:

COMMERCIAL OPEN SOURCE™

Home My Portal Calendar Activities Contacts Accounts Leads Opportunities Cases Bug Tracker Documents

Last Viewed: Notification EULA NDA Form I-12 Trait Institute Steven Sothenberg Pricing details Trait Institute

**DOCUMENTS: NOTIFICATION**

Save Cancel

Document Name: \* Notification

File Name: \* Notification.doc

Revision: \* 1.0

Template? : ☒

Document Type: Mail

Category: Sales

Sub Category: --Nor

Status: Active

Publish Date: \* 2007-07-16 yyyy-mm-dd

Expiration Date:

Related Document: Select

Related Document's Revision:

Description:

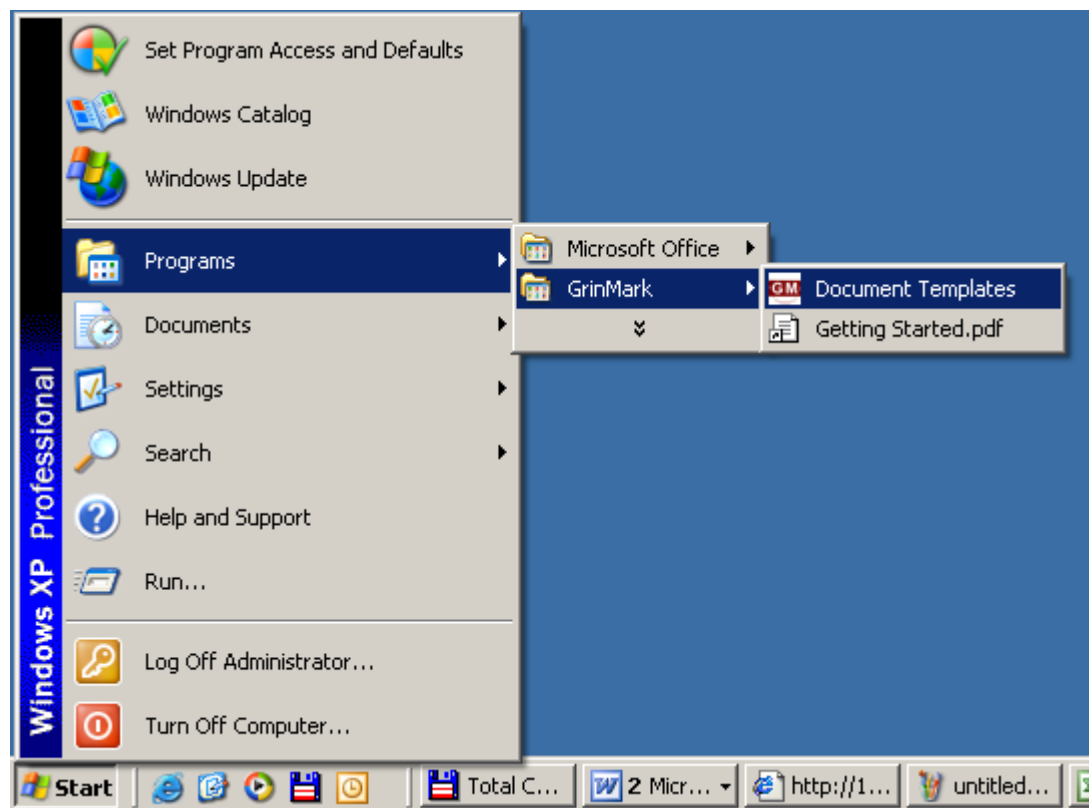
Save Cancel

Please note that we set the “Template?” checkbox to mark this document as a template.

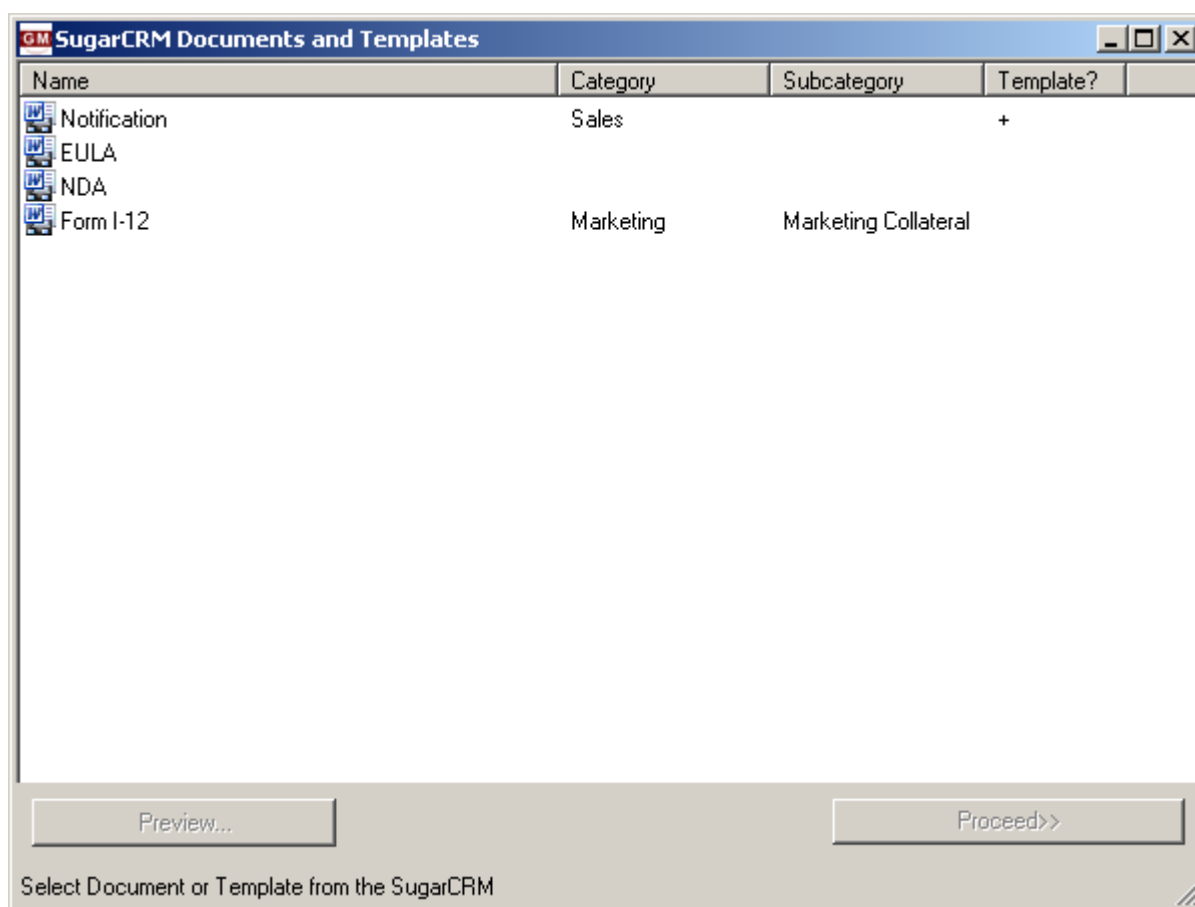
## Viewing Documents Repository

Start the template repository:

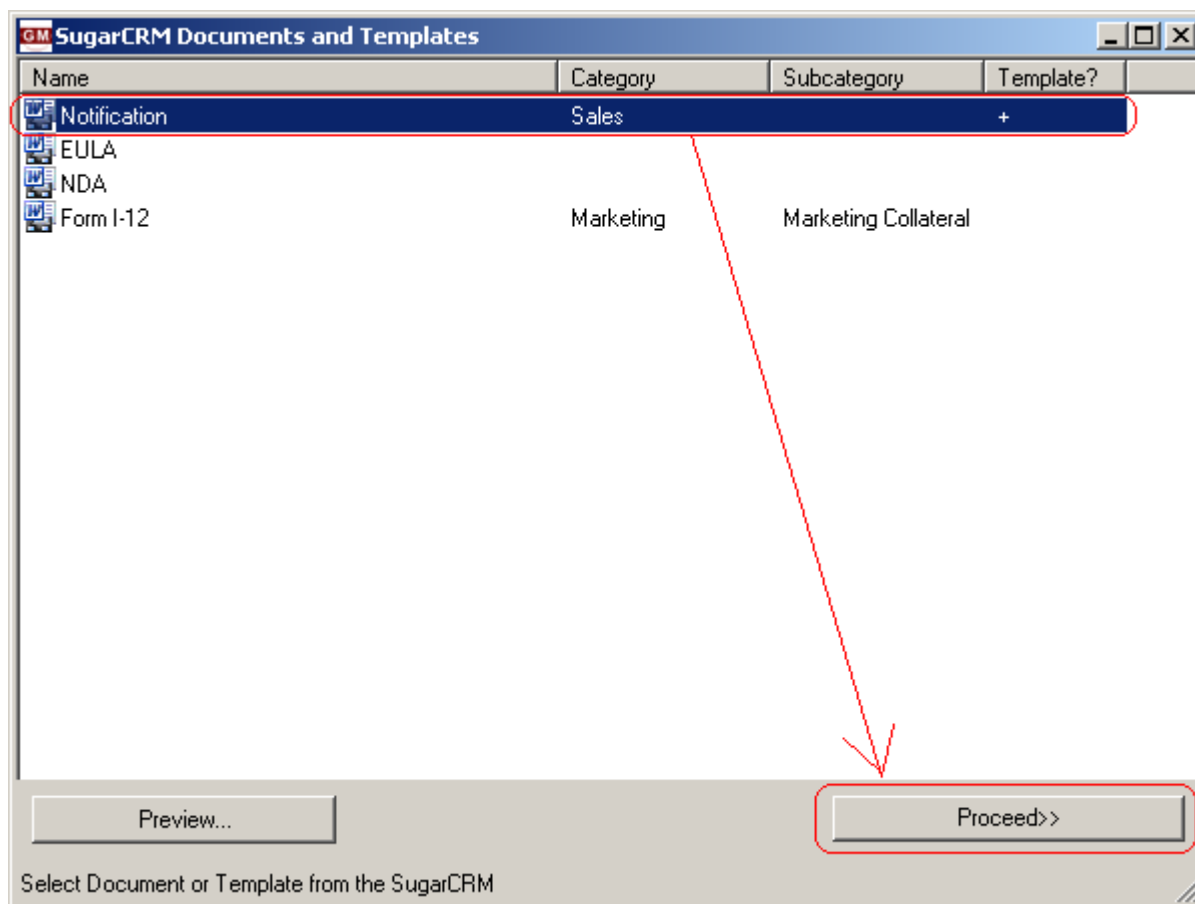
“Start”->”Programs”->”GrinMark”->”Document Templates”:



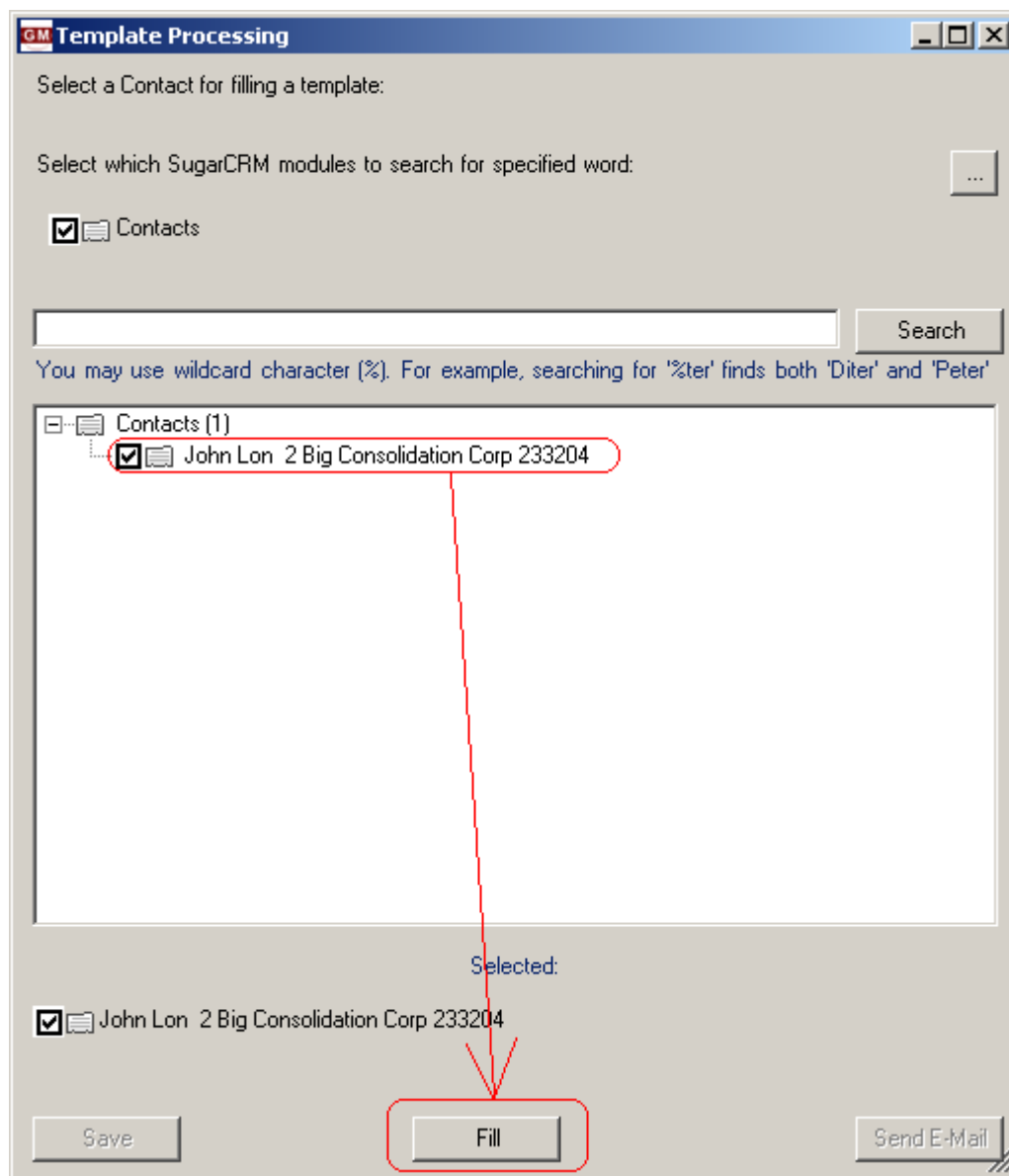
The list of documents from the template repository is displayed:



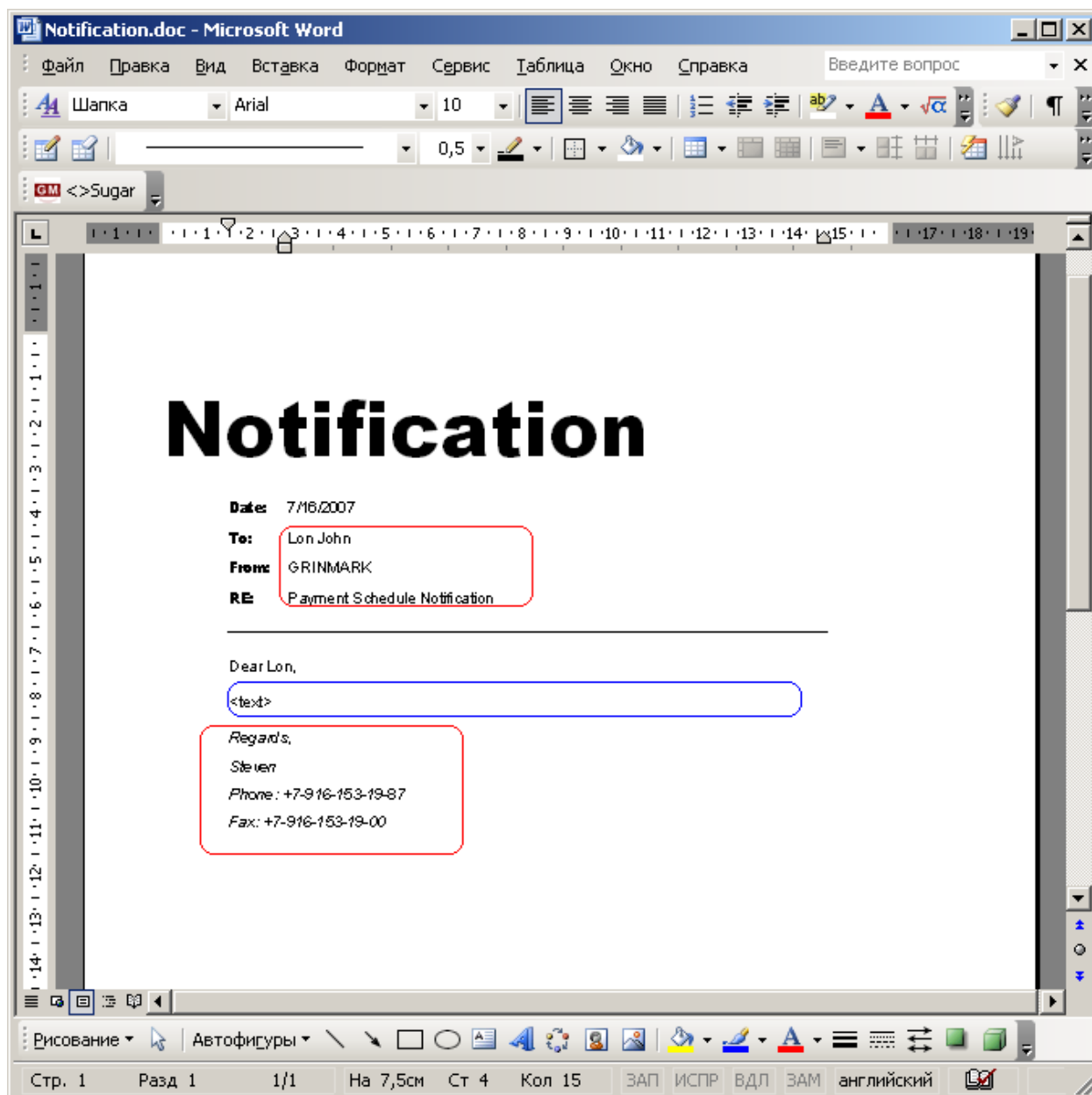
In this example we are going to prepare the notification for “John Lon” and send it to him via Email. We select the “Notification” template and press the “Proceed>>” button:



Next we see the Archive Dialog that allows search and select contacts. We select “John Lon” and press the “Fill” button:

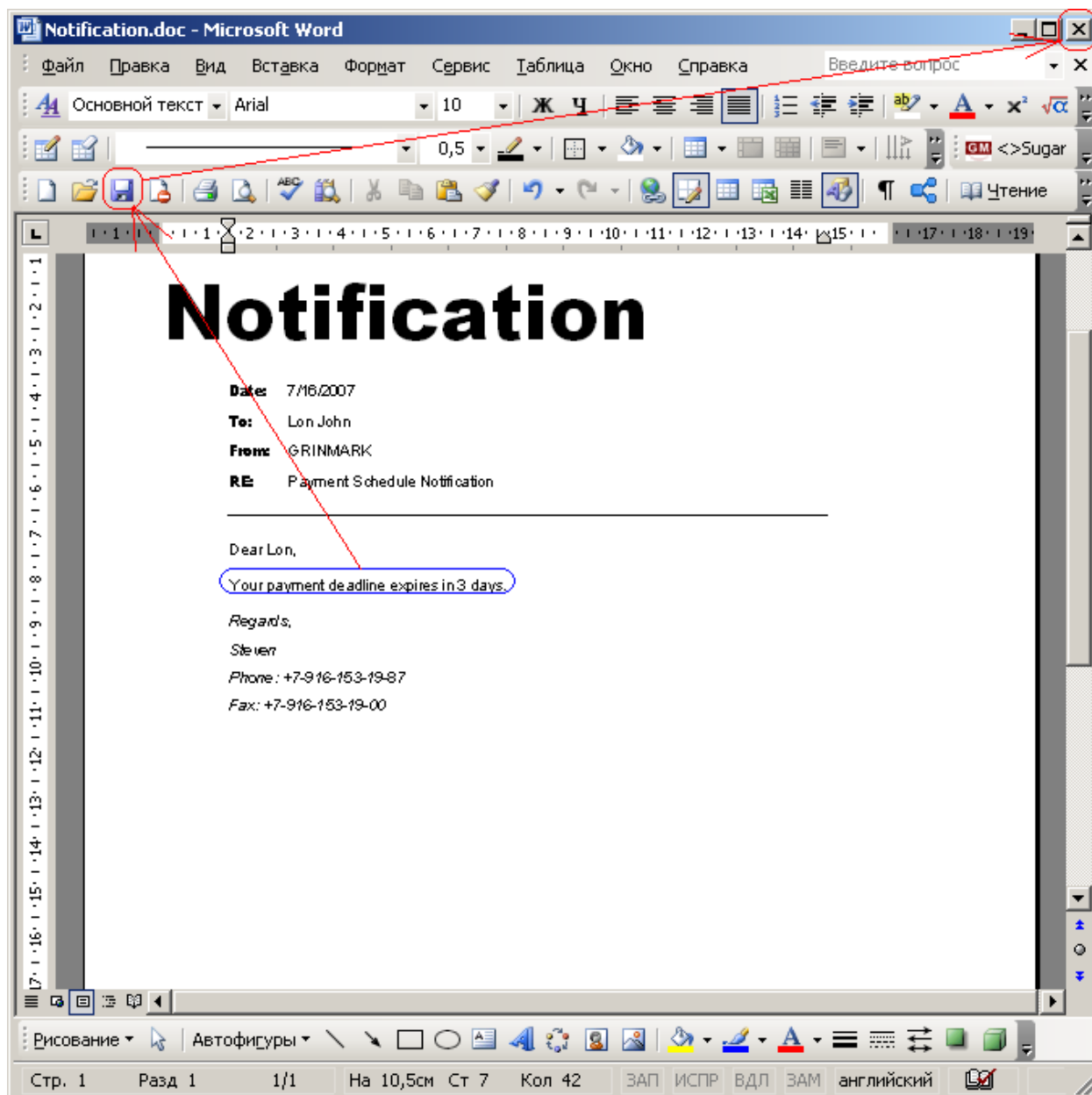


After a while a pre-filled template appears:



Automatically filled parts are disclosed in RED rectangle. The last thing to do is to fill the Notification text (BLUE rectangle). After it is done we can save and close the document:





Now we have two options: either to save filled document somewhere on the local drive or to send it via Email:

GM Template Processing

Select a Contact for filling a template:

Select which SugarCRM modules to search for specified word:

☒ Contacts

Search

You may use wildcard character (%). For example, searching for '%ter' finds both 'Diter' and 'Peter'

Contacts (1)

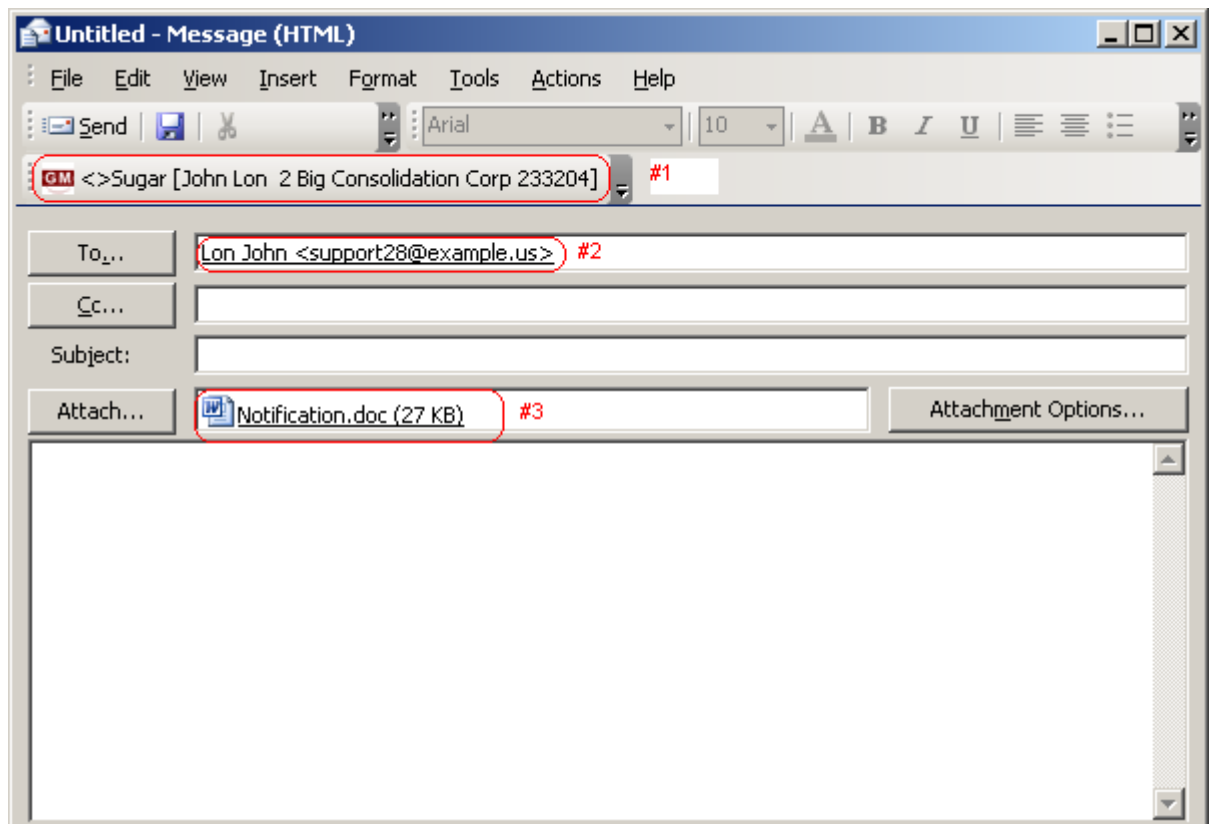
- ☒ John Lon 2 Big Consolidation Corp 233204

Selected:

☒ John Lon 2 Big Consolidation Corp 233204

Save Fill Send E-Mail

Pressing “Send” opens the Outlook composer window:



#1: The composed message is already scheduled for archiving to selected account in SugarCRM

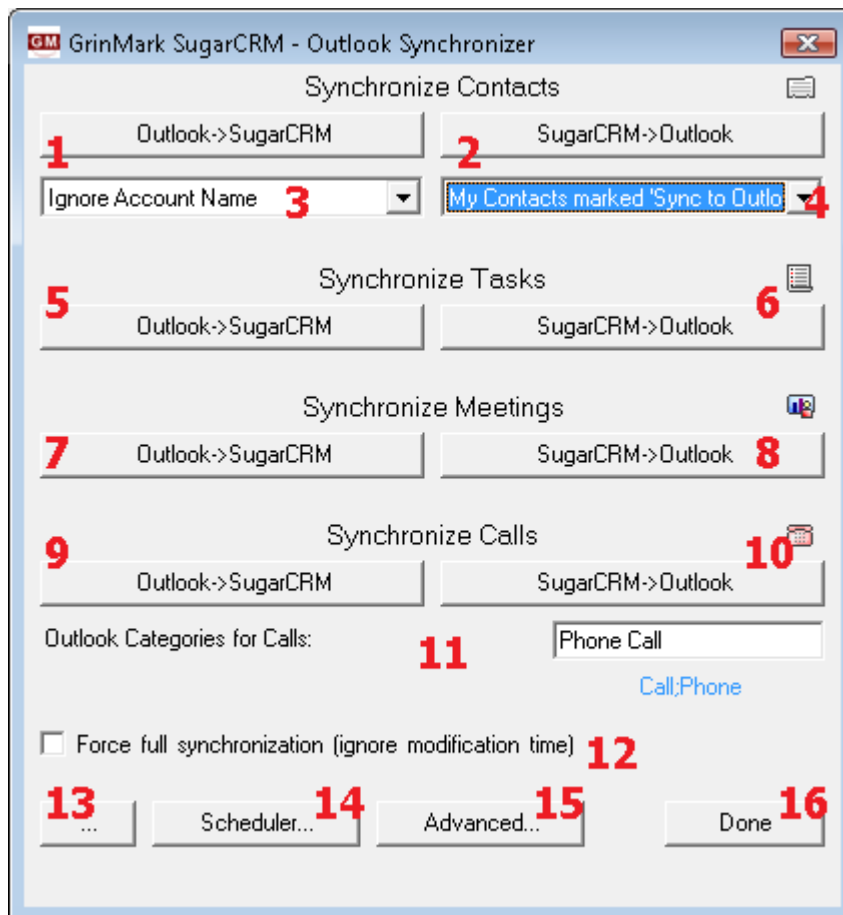
#2: The composed message already has the required “To” address

#3: The composed message has filled the template attached to it

## GrinMark Contact Synchronizer

### Basic Functions

Contact Synchronizer can be executed via “Start->Programs->Grinmark->Contact Synchronizer”:



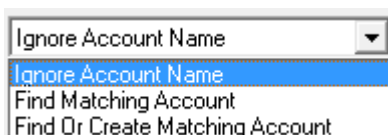
1. Synchronize Contacts from Outlook to SugarCRM
2. Synchronize Contacts from SugarCRM to Outlook
3. Options to be used when synchronizing from Outlook to SugarCRM. See the chapter “Contact Synchronization Options” below for more information.

4. Options to be used when synchronizing from SugarCRM to Outlook. See the chapter “Contact Synchronization Options” below for more information.
5. Synchronize Tasks from Outlook to SugarCRM
6. Synchronize Tasks from SugarCRM to Outlook
7. Synchronize Meetings from Outlook to SugarCRM
8. Synchronize Meetings from SugarCRM to Outlook
9. Synchronize Calls from Outlook to SugarCRM. “Outlook Categories for Calls” option is used to help to distinguish Calls from Meetings in Outlook. See “Synchronizing Phone Calls” for more information.
10. Synchronize Calls from SugarCRM to Outlook. “Outlook Categories for Calls” option is used to help to distinguish Calls from Meetings in Outlook. See “Synchronizing Phone Calls” for more information.
11. “Outlook Categories for Calls” option is used to help distinguishing Calls from Meetings in Outlook. See “Synchronizing Phone Calls” for more information.
12. “Force full Synchronization (ignore modification time)”. Should be used if you change any other synchronization options to force full synchronization. See the “Full Synchronization” chapter below for more explanations about this option.
13. Open “Connection Settings” dialog.
14. Open synchronization scheduler settings dialog. See “Automatic Synchronization” for more information.
15. The “Advanced...” option allows you to configure Outlook categories involved in the synchronization process.
16. “Done” saves settings and closes synchronizer dialog window.

**Important note:** All synchronization settings are remembered and used in other types of synchronization (Automatic, Archive of Selected Items).

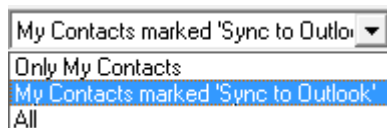
## Contact Synchronization Options

When Synchronizing from Outlook to SugarCRM the following options may be applied:



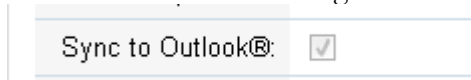
1. “Ignore Account Name” – Just archive Contacts to Outlook ignoring Company Name field. This means that in SugarCRM the Contact will not be associated with any Account.
2. “Find Matching Account” – Search for SugarCRM Account with the name equal to “CompanyName” field in Outlook Contact. If such Account is found, then newly created contact in SugarCRM is associated with it.
3. “Find Or Create Matching Account” – Search for SugarCRM Account with the name equal to “CompanyName” field in Outlook Contact. If such Account is found, then newly created contact in SugarCRM is associated with it. If no such Account is found, then a new Account is created and its name is set to “CompanyName”. The Contact is then Associated with this new Account.

When Synchronizing from SugarCRM to Outlook the following options may be applied:



A screenshot of a web interface showing a dropdown menu. The menu is titled "My Contacts marked 'Sync to Outlook'" and has three options: "Only My Contacts", "My Contacts marked 'Sync to Outlook'" (which is highlighted in blue), and "All".

1. “Only My Contacts” – synchronize only contacts “Assigned To:” this user.
2. “My Contacts marked “Sync to Outlook”” – Synchronize only contacts having the ‘Sync to Outlook’ checkbox set in SugarCRM:



A screenshot of a checkbox labeled "Sync to Outlook@:". The checkbox is checked, indicated by a small square icon.

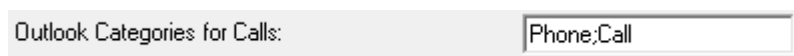
**Important Note:** If this option is set then all contacts synchronized from Outlook to SugarCRM do automatically get this option set to “On” too.

3. “All” – Synchronize all Contacts

## Synchronizing Phone Calls

SugarCRM has two types of items: Calls and Meetings. In the same time Outlook has the “Appointment” item that reflects both Calls and Meetings.

That is why we have the following option:



A screenshot of a web interface showing a text input field. The label is "Outlook Categories for Calls:" and the input field contains the text "Phone;Call".

This option should contain semicolon-separated list of categories that are used to distinguish Contacts from Accounts.

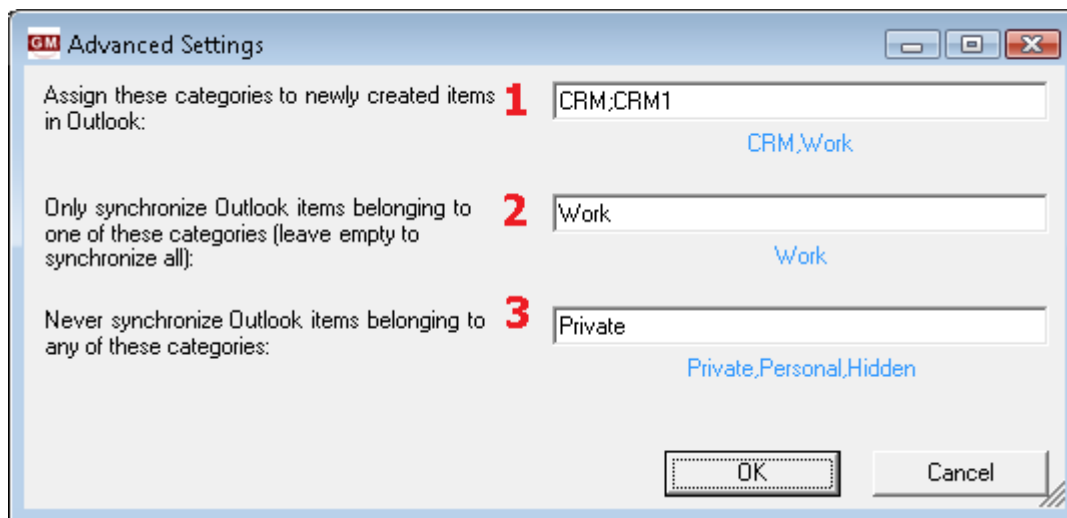
For example, if this option is set to “Phone;Call” then:

1. During SugarCRM->Outlook synchronization of Calls every created Appointment gets both “Phone” and “Call” categories.

2. During Outlook->SugarCRM synchronization only Appointments having "Phone" OR "Call" category are synchronized to calls.

## Categories

"Advanced Settings" dialog allows you to configure Outlook categories involved in synchronization process:



1. Whenever a new Outlook item is created it automatically gets categories mentioned in this field.
2. If the option 2 is set, then only items belonging to the mentioned categories are synchronized.
3. If the option 3 is set, then all items will be synchronized except ones having specified categories.

**Important:** Options 2 and 3 are mutually exclusive. If the option 2 is set, the option 3 is **IGNORED**.

## Full Synchronization

The logic of the synchronizer is the following:

- After item is synchronized we have two entries "ItemO" – the item in Outlook and "ItemS" – the item in Sugar. Synchronizer remembers these items by storing information:

ItemO\_id, ItemO\_ModificationTime, ItemS\_id, ItemS\_ModificationTime

in the internal database (

"c:\Users\<User Name>\AppData\Roaming\GrinMark\SyncHistory.db" on Vista

"c:\Documents and Settings\<User>\Application Data\GrinMark\SyncHistory.db" on XP).

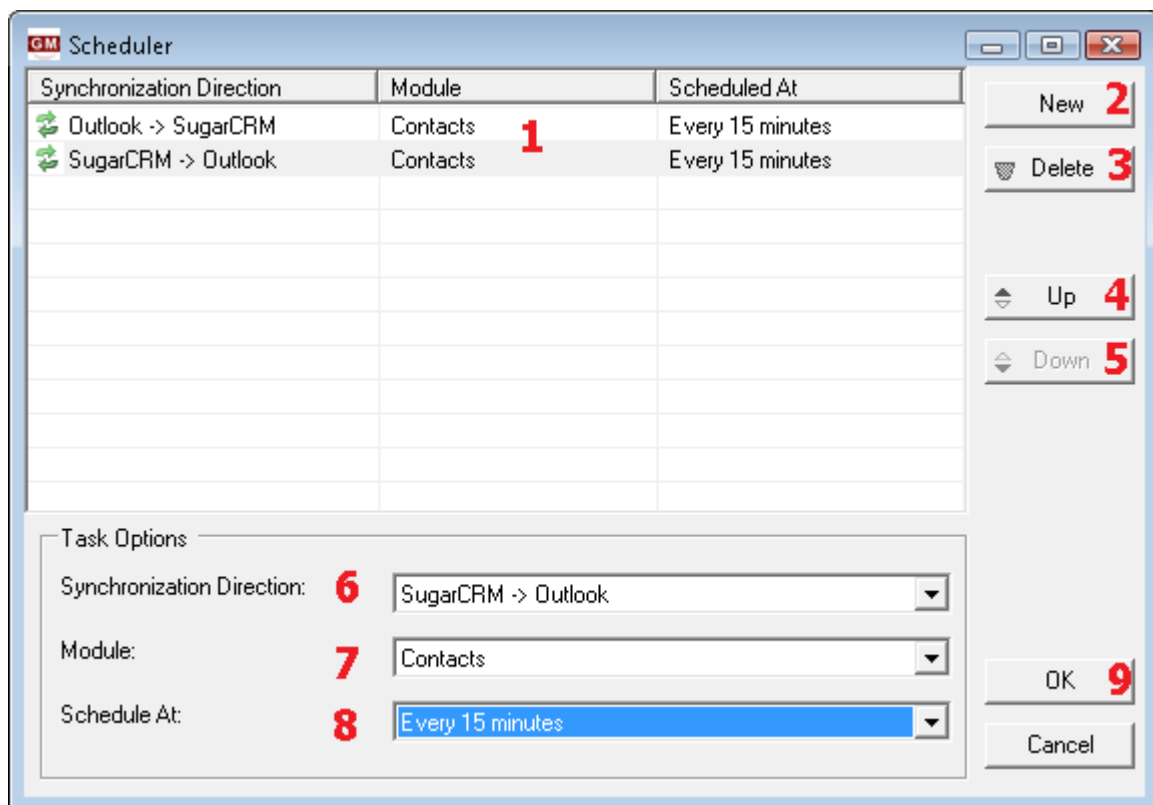
This is a SQLite database that you can open with any SQLite database viewer (for example, with Firefox with the SQLite addin).

- During the next synchronization the synchronizer looks for corresponding entries in SyncHistory.db. If such entry is found, the ModificationTime is compared. If the actual ModificationTime is more than the ModificationTime stored in the DB then the item was modified and should be re-synchronized.
- The check box "Force Full Synchronization" allows to ignore ModificationTime and to force the synchronization to be performed again.

☒ Force full synchronization (ignore modification time)

## Automatic Synchronization

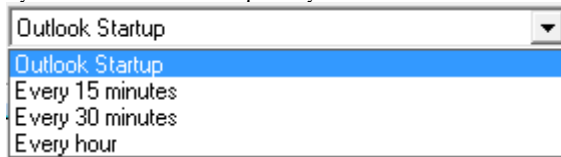
Synchronization Scheduler is available to help working with the Contact Synchronizer. The synchronizer works inside the Outlook process.



1. List of available scheduler tasks.
2. Create a new scheduled task
3. Delete the selected scheduled task



4. Move the selected task one step Up to the list
5. Move the selected task one step Down to the list
6. Synchronization direction for the selected task.
7. Module to be synchronized (Contacts, Accounts, Meetings, Calls).
8. Synchronization frequency:



9. OK saves synchronization settings. The settings are applied *on the next Outlook startup*.

The order of tasks is important. For example, the screenshot below contains 2 tasks:

1<sup>ST</sup>: “Outlook->SugarCRM, Contacts, Every 15 minutes” and

2<sup>ND</sup>: “SugarCRM->Outlook, Contacts, Every 15 minutes”

Both tasks are executed every 15 minutes since Outlook has started. But the 1<sup>st</sup> task is always performed just before the 2<sup>nd</sup>.

## GrinMark SugarCRM Activities Monitor

### Appendix A

The following template values are available for the selected Contact:

<i><b>Currently Selected Contact</b></i>
contact_report_to_name
contact_birthdate
contact_do_not_call
contact_phone_home
contact_phone_mobile
contact_phone_work
contact_phone_other
contact_phone_fax
contact_email1
contact_email2
contact_assistant
contact_assistant_phone
contact_email_opt_out
contact_primary_address_street
contact_primary_address_city
contact_primary_address_state
contact_primary_address_postalcode
contact_primary_address_country
contact_alt_address_street
contact_alt_address_city
contact_alt_address_state
contact_alt_address_postalcode
contact_alt_address_country
contact_description

<http://www.grinmark.com/english>

sugarcrm@grinmark.com

contact_portal_name
contact_portal_active
contact_portal_app

Each contact may belong to an account. So that then the contact is selected template macros for corresponding account automatically become available:

<b><i>Account of the Currently Selected Contact</i></b>
account_assigned_user_name
account_name
account_parent_id
account_account_type
account_industry
account_annual_revenue
account_phone_fax
account_billing_address_street
account_billing_address_city
account_billing_address_state
account_billing_address_postalcode
account_billing_address_country
account_description
account_rating
account_phone_office
account_phone_alternate
account_email1
account_email2
account_website
account_ownership
account_employees
account_sic_code
account_ticker_symbol
account_shipping_address_street
account_shipping_address_city
account_shipping_address_state
account_shipping_address_postalcode
account_shipping_address_country
account_account_name

Template macros representing You (i.e. user that is filling the template):

<b><i>Current User (Employee)</i></b>
user_user_name
user_user_hash
user_first_name
user_last_name
user_description
user_title

<http://www.grinmark.com/english>

sugarcrm@grinmark.com

user_department
user_phone_home
user_phone_mobile
user_phone_work
user_phone_other
user_phone_fax
user_email1
user_email2
user_status
user_address_street
user_address_city
user_address_state
user_address_country
user_address_postalcode
user_messenger_id
user_messenger_type