FULL EDITION

### GrinMark SugarCRM – Office 2003-2013 Integration

V 4.2.0

# Getting Started Guide

GRINMARK LIMITED

### **Getting Started Guide**

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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 <u>www.sugarcrm.com</u>

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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

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#### 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)

🔽 🚍 Contacts 🔲 👾 Bugs	🔲 🔄 Accounts 🔲 🔍 Leads	🔲 🗳 Opportunities 🔲 🕖 Projects	<ul> <li>Gases</li> <li>Project Tasks</li> </ul>
a You may use wildo	ard character (%). For	example, searching for '%	Search
⊡	19)		A
	ned Erin JAB Func m Anael Junale M.	Contacts	
- And	dersen Serena JAE	Accounts	
	nt Lola Start Over	Opportunities	=
Atr	ip Rocio RRR Adv	Cases	
Atte	erberry Ahmed Kac	Bugs	
Bay	rles Alyce X-SELL er Arron P Piner &	Leads	
	ley Alexander P Pi	Projects	
	r Asa JJ Resource unt Ashlee C Nelsc	Project Tasks	
Huf	ford Annette 2 Big Con	solidation Corp 327131	
		Archive to	

- 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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- 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



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### 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:

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1. Contact Synchronization between SugarCRM and Outlook:

🏧 GrinMark SugarCRM - Outlook S	ynchronizer 🗙
Synchronia	ze Contacts 🗔
Outlook->SugarCRM	SugarCRM->Outlook
Find Or Create Matching Account 💌	All
Synchron	ize Tasks 📃
Outlook->SugarCRM	SugarCRM->Outlook
Synchroniz	e Meetings 🙀
Outlook->SugarCRM	SugarCRM->Outlook
Synchro	nize Calls 🗂
Outlook->SugarCRM	SugarCRM->Outlook
Outlook Categories for Calls:	Phone Call
Force full synchronization (ignore ma	odification time) Done

2. Support for other Microsoft Office Applications:



- PowerPoint
- MSProject
- Visio

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

💷 Archiving E-Mail: Your WindJack Solutions, Inc. Download Request (Incoming)				
Archive to Existing Item Create Contact/Account/Opportunity/Lead				
<b>A</b>				
A	Account Contact Lead Upportunity			
☑	Create New		6	
	2 <b>2 .</b>			
	All			
	Name:	WindJack Solutions, Inc. Download		
	Assigned to:	Grinevich Alexey		
	Rating:			
	Туре:			
	Industry:	Construction		
	Annual Revenue:			
	Website:	www.windjackcom		
	Ownership:			
	Employees:	10		
	SIC Code:			
	Ticker Symbol:	WJ		
	Member of:			
	Description:	good account		
	Modified by			
	Created by			
Ξ	Contact Information			
	Fmail:	support@windiack.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				
	Lancel	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.

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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.

GM Send	To SugarCRM Settings	×
🗖 Ena	ble "Archive To SugarCRM" Menu	٥
Invoic	Открыть Создать	
	Open With	
	Send To	M Archive to SugarCRM
	Cut Copy	🛃 3.5 Floppy (A:) 2 DVD-RW Drive (E:)
	Create Shortcut Delete Rename	
	Properties	
	SugarCRM Connection and License S	ettings
	OK	

7. Official support.



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#### 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 end 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:

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Connecti	on Error
(į)	Error connecting to http://sugarcrm/:The underlying connection was closed: The remote name could not be resolved.
	()

Add-in suggests to specify the correct login credentials:

Connection Settings		
SugarCRM URL:	http://sugarcrm/	
User:	[	
Password:		
Clean archit	ind items history	Connact
Clean archived items history Connect		Connect

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

Connection Settings		
SugarCRM URL:	http://sugar-serv/sugarcrm	
User:	alexey	
Password:	******	
Clean archive	ed items history	Connect

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



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### **Working with Archiving Dialog**

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

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Archiving E-Mail: Welcome to Microsoft Office O     Select SugarCRM object to archive E-Mail	utlook 2003 (Outcoming)
Select which SugarCRM modules to search for specified	word:
□	oportunities  ☐
	Search
You may use wildcard character (%). For example, search Contacts	ming for "%ter" finds both "Diter" and "Peter"
Archive E-Mail message(s) with attachments:	Archive E-Mail
Archive attached files only:	Archive attachments
(1, 1) $(1, 1)$ $(1, 1)$ $(1, 1)$	

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:



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- 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:

Contacts
🚊 🔄 Accounts (4)
🗌 🔤 🗖 Trait Institute Inc 144819
🚽 🔤 🗂 Trait Institute Inc 242176
🚽 🔤 🗂 Trait Institute Inc 649936
🗌 🔤 🔤 Trait Institute Inc 671558
Gpportunities
🛛 😝 Cases
🖌
🛛
Projects
Project Tasks

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:

Contacts Accounts (4) Trait Institute Inc 144819 Trait Institute Inc 242176 Trait Institute Inc 649936 Trait Institute Inc 671558 Opportunities Cases Bugs Leads Projects Project Tasks	
(Carait Institute Inc 144819)	Archive to:



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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:

GM Archiving E-Mail: Pricing details (Incoming)				
Select SugarCRM object to archive E-Mail				
Select which SugarCRM modules to search for specified word:         Image: Contacts       Image: Contacts         Image: Bugs       Image: Contacts         Image: Bugs       Image: Contacts         Image: Bugs       Image: Contacts         Image: Contacts       Image: Contacts				
Trait	earch			
You may use wildcard character (%). For example, searching for '%ter' finds both 'Diter' and	l 'Peter'			
Contacts Accounts Opportunities (4) S Trait Institute Inc 144819 - 1000 units S Trait Institute Inc 242176 - 1000 units S Trait Institute Inc 649936 - 1000 units S Trait Institute Inc 671558 - 1000 units Cases Bugs Leads Projects Project Tasks				
Archive to:				
Image: Second state of the second				
Archive E-Mail message(s) with attachments: Archive E-Mai				

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".

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#### **Searching for Related Entries**

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

🗹 🚍 Contacts 👘 🚍 🔲 🍎 Bugs 👘 🔍	Accounts Leads	🔲 🖨 Opportunities 🔲 🕖 Projects	🔲 🍑 C 🔲 🕖 P	ases roject Tasks
a You may use wildcard charac	ter (%). For eva	mple searching for '?	(ter' finds	Search
Contacts (19)		imple, searching for «		
Ahmed Erin JA Alam Angel Jur Andersen Sere Arent Lola Star Atchley Lucio V Atnip Rocio Rf Atterberry Ahm Bayles Alyce X Byler Arron P F Corley Alexand Dorr Asa JJ Re	Biruno ngle M. Ci ana JAE A. t Over O White ( RR Adv Ci ed Kac Bi SELL SELL Piper & Le Piper Pi Pi Ssource Pi	ontacts ccounts pportunities ases ugs eads rojects roject Tasks		E
	e 2 Big Consolid cerr unining	ation Corp 327131		-

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

You may use wildcard character (%). For example, searching for '%ter' fin	ds both 'Diter' and 'Peter'
Bayles Alyce X-SELL HOLDINGS 814742	
	=
🖃 🕣 Accounts (1)	
Consertunities	*
Archive to	



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### **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.

🖲 Входящие - Microsoft Outlo	ok			_ 8 ×		
Eile Edit View Go Tools	Actions Help		Type a qu	uestion for help 🛛 👻		
🗄 🕪 🖌 🎒 🎦 🗙	keply 🙈 Reply to All 🙈 Forward	d   📑 Send/Receive 🔹   🏠 Find 🍅   🛄 T	ype a contact to find	•   💿 📮		
GM <>Sugar <sub>╤</sub>						
Mail	Входящие			2		
Favorite Folders	🖞 🗋 🕼 From Subje	ect	Received 🗸	Size 🔯 📥		
🖂 Входящие	📄 🖉 Trait Institute 🛛 Pricino	ng details	Sat 7/14/2007 3:29 PM	23 КВ 😤		
🔯 Непрочтенные письма	📄 Outlook 2003 Team Welco	ome to Microsoft Office Outlook 2003	Wed 7/11/2007 5:44 PM	52 KB 💎		
🔯 К исполнению	📄 g681@mail.ru Тестс	овое сообщение Microsoft Office Outlook	Tue 7/10/2007 3:38 PM	3 КВ 🖗		
🗔 Отправленные	📄 g681@mail.ru Тестс	овое сообщение Microsoft Office Outlook	Tue 7/10/2007 3:38 PM	3 КВ 🖗		
All Mail Folders						
Пичные папки           Входящие           Исходящие						
🤯 Нежелательная пс						
Отправленные				<u> </u>		
У Черновики	<b></b>					
🗄 🗖 Search Folders 🔤	Expression Pricing details					
<b>_</b>	Trait Institute [gr645@mail.ru]					
🚔 Mail	To: g681@mail.ru					
	Attachments: Pricing info.doc (21 KB)					
Calendar						
Sector Contacts						
🝸 Tasks						
🔍 🗀 🗷 뽖	L					
4 Items						

How to find out where this Email was archived?



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### **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:

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Customize View: Messages	x
Description	Importance, Icon, Flag Status, Attachment, From, Subject,
Group By	None
<u>S</u> ort	Received (descending)
Filter	Off
Other Settings	Fonts and other Table View settings
Automatic Formatting	User defined fonts on each message
Format <u>C</u> olumns	Specify the display formats for each field
Reset Current View	OK Cancel

In the "Show Fields" dialog press "New Field..."

Show Fields			×
Maximum number of lines in multi-line n Select available fields from: Frequently-used fields Available fields: Auto Forwarded Categories Cc Contacts Conversation Created Do Not AutoArchive Due By Follow Up Flag Message Originator Delivery Requested Read Sensitivity Sent	node: 2  Add -> <- Remove New Field	Sh <u>o</u> w these field Importance Icon Attachment From Subject Received Size Flag Status	ds in this order:
Properties Delete		Move <u>U</u> p	Move <u>D</u> own
		ОК	Cancel

And add the field named "SugarItem":

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New Field		×
<u>N</u> ame:	SugarItem	
<u>T</u> ype:	Text	•
<u>F</u> ormat:	Text	•
	OK Cancel	

#### New field is added:

s added.				
Show Fields				X
Maximum number of lines in multi-line n Select available fields from: Frequently-used fields Available fields: Auto Forwarded Categories Cc Contacts Conversation Created Do Not AutoArchive Due By Follow Up Flag Message Originator Delivery Requested Read Sensitivity Sent Properties Delete	node: 2 💌 <u>A</u> dd -> <- <u>R</u> emove <u>N</u> ew Field	Show these field Importance Icon Attachment From Subject Received Size Flag Status SugarItem	ds in this order: Move <u>D</u> own	
		ОК	Cancel	

Press Ok and see what has changed in Outlook folder:

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🙆 Входящие – №	1icrosoft Outlool	¢					
Eile Edit Vie	w <u>G</u> o <u>T</u> ools	<u>A</u> ctions	Help			Туре а	question for help $-$
🗄 🔂 <u>N</u> ew 👻 🎒	📔 🗙   🙈 <u>R</u> e	ply 🙈 Rep	oly to All 🙈 For <u>w</u> ard   📑 Se	nd/Re <u>c</u> eive 👻	🏠 Find 🍅   💷	Type a contact to find	- 🕜 📜
i 💷 <>Sugar 📘							2
Mail	Входящие						
Favorite Folders	! 🕒 🛛 From		Subject	(	SugarItem		F 5 17 -
🖂 Входящие	📄 🕕 Trait Inst	itute	Pricing details	1	Trait Institute Inc 14	4819;Trait Institute Inc 1	44819 - 1 52 🕅
🔯 Непрочтел	📄 Outlook 2	2003 Team	Welcome to Microsoft Office O	utlook 2003 🔨			157
🔍 К исполне.	🖂 g681@ma	ail.ru	Тестовое сообщение Microsof	t Office Ou			15 🕅
СП Отправлен	📄 g681@ma	ail.ru	Тестовое сообщение Microsof	t Office Ou			13 🕅
All Mail Folders							
🖃 🧐 Личныє 📥							
Bxo,							
Отп							-
词 Уда							
Чер	Pricing d	etails					
🛨 🞑 Sear	Trait Institu	ute [ar64	15@mail.ru]				
	To: d681@m	ail ru	lo@mainiaj				
🖂 Mail	Attachment	e. 🕅 pricip	a info doc (21 KB)				
Calendar		s. Ephon	g ##0.000 (21 Kb)				
Sector Contacts							
🏹 Tasks							
<u> </u>							
🔍 🗀 🚺 🐥							
4 Items							

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.

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🗹 Pricing details - Message (Plain Text)	
<u>File Edit View Insert Format Tools Actions H</u> elp	
🙈 Reply   🙈 Reply to All   🙈 Forward   🎒 🐚   😼   🔻   🍅	📑 🗙   🔺 • 🗇 • A <sup>‡</sup>   a͡ <sub>b</sub>   @
🚥 <>Sugar [Trait Institute Inc 144819;Trait Institute Inc 144819 - 100	00 units] 👳
From: Trait Institute [gr645@mail.ru]	Sent: Sat 7/14/2007 3:30 PM
To: g681@mail.ru	
Cc	
Subject: Pricing details	
Attachmentar Dipricipalinfo doc (21 KB)	
Accachments: Pricing inito.doc (21 KB)	

### **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.

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



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Marchive Email Attachments	
Name	File Name
	pricing info.doc
Fill information about archived documents	
Cancel	Archive

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.

GM Ar	chive Email Attachments		1
	Name	File Name	1
$\bigcirc$	Final Pricing Information Including our 10% Margin	pricing info.doc	
	#1 #2 #3		
Fill in	formation about archived documents		
	Cancel	Archive	

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- #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 check box next to "Archive Email..." button. While it is unchecked the Email is archived without attachments.

Archive E-Mail message(s) with attachments:	Archive E-Mail
Archive attached files only:	Archive attachments
	Cancel

### **Archiving Sent Email**

Archiving Sent Email is very similar to archiving an incoming one. Just select it in the "Sent" folder and press the end of the 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.



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### **Archiving Composed Email**

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

😭 Untitled M	essage						<u>- 0 ×</u>
Eile Edit	<u>V</u> iew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ools	T <u>a</u> ble <u>W</u> in	idow <u>H</u> elp	Тур	e a question for help	• ×
: 🖃 <u>S</u> end   🌘	) - 🔟 🍫	😼 📍 🌲 🛛 🛛	r   🖄   🗈 🤇	Options 👻	HTML	•	
🛄 То							
🔛 Cc							
Subject:							
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Compose this Email as usual. One additional feature is available for you: Compose 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:

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Pricing information - Message	
Eile Edit View Insert Format Tools Table Window Help Type a question for help	• ×
🕴 🖃 Send   🔘 👻   🔛 🎭   😼 🕴 💘   🍅   😫 Options 👻   HTML 🔹	
Io John Smith <qr645@mail.ru></qr645@mail.ru>	
🛄 Cc	
Subject: Pricing information	
🔢 🛃 🔏 🐘 🌊   Arial 🔹 10 🔹 🗛 •   B 🖌 🖳 🚍 🚝   🚝 🗄 1	ŧ.
[ <sup>®</sup> ℃ <>Sugar []	
Hi John,	
Please provide me pricing information for position"II-17-23".	
Regards	
Steve	
	-
	±
	⊙ ∓

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

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M Archiving E-Mail: Pricing information (Outcoming)	<u> </u>
Select SugarCRM object to archive E-Mail	
Select which SugarCRM modules to search for specified word:	
<ul> <li>□ ☐ Contacts</li> <li>□ ☐ Accounts</li> <li>□ ☐ Opportunities</li> <li>□ ☐ Cases</li> <li>□ ☐ Bugs</li> <li>□ Q Leads</li> <li>□ ☐ Projects</li> <li>□ ☐ Project Tasks</li> </ul>	
2 big consol Si	earch
You may use wildcard character (%). For example, searching for '%ter' finds both 'Diter' and	l 'Peter'
Contacts (88) Accounts (2) 2 Big Consolidation Corp 233204 2 Big Consolidation Corp 796703 Cases Cases Bugs Leads Projects Project Tasks	
Archive to:	
🗹 🚍 John Lon 2 Big Consolidation Corp 233204 🗂 2 Big Consolidation Corp 233204	
Archive E-Mail message(s) with attachments:	

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

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Pricing information - Message	<u> </u>
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💷 <u>S</u> end) 🕕 👻 🍢 🗏 🕴 🤻 🏠 👔 Options 👻 HTML 🔹	
To	
🛄 Cc	
Subject: Pricing information	
🗄 🛃 🖂 🖄 🐚 🌊 🗛 Arial 🔹 🔹 10 🔹 📥 🖌 🖪 🖌 🖳 🗮 🚍 🏣 🚍	· 🛊 🔋
🕞 🏷 <>Sugar [John Lon 2 Big Consolidation Corp 233204;2 Big Consolidation Corp 233204]	
Hi John,	1
Please provide me pricing information for <u>position</u> _"II-17-23".	
Regards, Steve	
	•
	*
	Ŧ

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

×
E-mail: Pricing information Archived to: John Lon 2 Big Consolidation Corp 233204 2 Big Consolidation Corp 233204
OK

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

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🕒 Отправленные - Microsoft	: Outlook					_ 8 ×
Eile Edit View Go Tool	ls <u>A</u> ctions <u>H</u> elp				Туре а	a question for help 🛛 🗸
🗄 🛐 <u>N</u> ew 👻 🎒 🎽 🗙 🛛 🙈	<u>R</u> eply 🙈 Reply to Al	🙈 For <u>w</u> ard   📑 Send/R	e <u>c</u> eive 👻 🗎 🏠 Fi	ind 🔌   🔟	Type a contact to find	-   🕜 📮
💷 <>Sugar 🖕						
Mail	Отправленн	sie				5
Favorite Folders	1 D 0 To	Subject	Sent	∇ Size	SugarItem	P -
🖂 Входящие 🖸 <i>Непрочтенные письма</i>	🖃 Date: Today					
🔯 К исполнению	🙈 'John Smith'	Pricing information	Sun 7/15	5/20 4 KB	John Lon 2 Big Cons	olidation Cor 🛜
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🖂 Mail	You replied on 7	/15/2007 11/14 PM				
	Te: 'John Smith'	13/2007 11/14 PM				
🛄 Calendar						
Sector Contacts	Hi John,					
🗳 Tasks	Please provide	me pricing information	for position "II-	-17-23".		
s 🛯 📄 🖉	Regards,					•
1 Item						

### **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 selected entry to Sugar immediately:

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When archiving is done the confirmation dialog appears:

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💷 1 Items Synchronized				-			
Synchronizing single item M Updating Sugar Meetings synchronization fir	Synchronizing single item Meetings from Outlook to Sugar Updating Sugar Meetings synchronization finished						
	0	к					
Select which SugarCRM m	odules to search	for specified wo	rd:				
Contacts	うOpportunities (Cases	🗹 💓 Bugs 🗹 🔍 Leads	Projects	s			
•			+	•			
You may use wildcard char and 'Peter'	racter (%). For ex	ample, searchin	ng for '%ter' finds both 'Diter	-			
O'Hara John     Accounts (3)     Accounts (3)     Opp3     Opp3     Opportunities (1)     Oportunities (1)	t <oʻhara@mail.ru)< td=""><th>&gt;</th><td></td><td>+ III</td></oʻhara@mail.ru)<>	>		+ III			
	Arcl	hive to		_			
▼島 New opp1							
	Rela	ate		//			

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.



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### 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:

G	) - 🕞	) - 💌 😰 🎸	ነ 🔎 났	3	3- 🍓 🔳	-	🛍 🔏			ali	8×
		Account Name:	Trait Institute	Inc 144819	}				Phone:	(530) 229-6422	<b></b>
		Website:	www.hrga.org	L					Fax:		
		Ticker Symbol:							Other Phone:		
		Member of:							Email:	dev64@exampl	e.bi:
		Employees:							Other Email:		
		Ownership:							Rating:		
		Industry:	Biotechnology	/					SIC Code:		
		Type:	Customer						Annual Revenue:		
									Last Modified:	2007-07-14 15:	02 b
		Assigned to:	chris						Date Created:	2007-07-14 15:	02 b
		Billing Address:	321 University Kansas City, I USA	/ Ave. NY 23201	I		Сору	S	hipping Address:	321 University A Kansas City, NY USA	we. 1 2
		Description:									
	All	Sales Marketing	Support	Activities	Collaboration	I					
	∀ACT	IVITIES									
	≈HIST	ORY									
		Create Note or Attac	chment	Archi	ve Email	View 9	Summary				
											K
(		Subject 🔿			Status 🔷		Contact	D	ate Modified 🇢	Assigned User	÷
		Pricing details			Read	,		2	2007-07-14 16:46	admin	
•		Review needs			Not Held		Wendi Vande	erhura 🤉	0007-07-14 15:03	chris	•

The attached Email is available in the History subpanel.

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

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G • 🕞 - 💌 🖻 🏠 🔎 📩 🥴	🖉 • 🌺 🔟 • 📙 🛍	1 🚳	🥂 – 🗗 ×
All Sales Marketing Support Activit	ies Collaboration Other		
ATTACHMENTS			
			R
Subject 🗘			
🖉 🥢 pricing info.doc			
* ACCOUNTS			
Create Select			
Account Name 🗘		City 🕀	Phone 👄
Trait Institute Inc 144819		Kansas City	(530) 229
Create Select			
Name $\hat{-}$	Account Name	Email 🔶	K
Create Select			
			K
Opportunity 🔶		Account Name 🔶	
Trait Institute Inc 144819 - 1000 units		Trait Institute Inc 144819	
4			

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:

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Edit Duplicate Delete			-
View Change Log			
Opportunity Name:	Trait Institute Inc 144819 - 1000 units Amo	unt:(USD \$)	50,000.00
Account Name:	Trait Institute Inc 144819 Expected 0	Close Date:	2008-04-0
Type:	New Business	Next Step:	
Lead Source:	Partner S	ales Stage:	ld. Decisio
Campaign:			
	Pro	bability (%):	40
Assigned to:	chris La	ist Modified:	2007-07-1
	Da	ate Created:	2007-07-1
Description:			
All Sales Marketing Suppo	ort Activities Collaboration		
<b>∀ACTIVITIES</b>			
♠ HISTORY			
Create Note or Attachment	Archive Email View Summary		k
Subject 🔶	Status 🔶 Contact Date Modified 🇢	Assigned	User 🔶
🖉 🥢 Final Pricing Information Ind	cluding our 10% Margin Note 2007-07-14		
Pricing details	Read 2007-07-14 16:48	6 admin	
Create    Select   			•

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sugarcrm@grinmark.com

### **Archiving Documents from Word and Excel**

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

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:2	<u>F</u> ile <u>E</u> dit	<u>V</u> iew <u>I</u> nse	ert F <u>o</u> rmat	<u>T</u> ools <u>D</u> a	ata <u>W</u> indov	v <u>H</u> elp			_ 8 ×
1	📂 🛃 🕻	3 3 9	- <b>Σ</b> -	🕜 🕎 i Aria	al	<b>v</b> 10	- B /	Ū∣≣	≣ ≣ []
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I4 4	→ → \She	et1 / Sheet2	2 / Sheet3 /	/		•			
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Use **Example 1** button to archive the current version of the document. Archive document dialog appears:

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💷 Archive a file:exp0507.xls		<u>_ 0 ×</u>					
Edit 'Note Name' to be more descriptive than a file name i.e. 'Corrected invoice' instead of 'inv01.doc'							
Note Name	File	Size					
Expected expenses for May 2007	exp0507.xls	13824					
Select which SugarCRM modules to searc	h for specified word:						
Contacts 🖉 🕤 Accounts	☑ 🛱 Opportunities 🛛 🔲 😝 Cases Project Tasks	🗹 斄 Bugs					
2 big		Search					
You may use wildcard character (%). For	example, searching for '%ter' finds both '[	Diter' and 'Peter'					
Contacts Accounts (2) Accounts (2) 2 Big Consolidation Corp 23 Deportunities (2) 2 Big Consolidation Corp 23 2 Big Consolidation Corp 23 Cases Bugs Leads Projects Project Tasks	33204 36703 33204 - 1000 units 36703 - 1000 units						
Archive to:							
☑ ि 2 Big Consolidation Corp 233204		N i					
Cancel	Ľ	ОК					

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

Finally, the status message is displayed:





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### **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:

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<u>ht</u>	tp:	/ / x	www.grinmarł	com/engli	<u>sh</u>	sugarcr	m@grint	mark.com
		<b>SU</b>	GARCRM.	Welcome Steven	My Account Training Emplo	oyees Admin Lo	ogout About	• • • • • •
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La	st Vie	wed:	Notification 🛛 🚺 EULA	NDA 🛛 🚺 Form I-12	2   🗂 Trait Institute   🝰 Steve	en Sothenberg 🛛 🖂	Pricing details	🛱 Trait Institute
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			Document Name 🚊	Category $\ominus$	Sub Category 🔶	Latest Revision	Published By	Revision Date
		<b>D</b>	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			1.6	admin	2007-07-16 11:32
		1	EULA			2.3	admin	2007-07-16 11:33
	e≯ Ex	port	Selected: 0					P
	Clear /	41						
4	MAS	S UP	DATE					•

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

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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:

Fill ?

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:

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http://www.grin	mark.com/english	sugarcrm@grinmark.co	m
\$D.contact \$DT.contac \$T.contact	_birthdate -> 10/10/ t_birthdate -> 10/10/ _birthdate -> 03.00	1975 1975 03:00	
Next we publish a new employees:	template to be available to all		-
Home My Portal Calenda	r Activities Contacts Accounts Leads C	Opportunities Cases Bug Tracker Documents	E
Last Viewed:   💕 Notification	🕼 EULA 🛛 💋 NDA 🕸 Form I-12 🛛 🗂 Trait Institute 🛛 {	🍰 Steven Sothenberg 🛛 🖂 Pricing details 🗍 🞒 Trait Institu	te
DOCUMENTS: NOTIFIC Save Cancel Document Name: * File Name: * Template? :	Notification Notification.doc	Revision: * 1. Document Type:	.0 1 Iii
Category: Status:	Sales  Active	Sub Category:	Nor
Publish Date: * Related Document:	2007-07-16 yyyy-mm-dd	Expiration Date:	<b>-</b>
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":

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The list of documents from the template repository is displayed:

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SugarCRM Documents and Templa	ites					
Name	Category	Subcategory	Template?			
🞇 Notification	Sales		+			
EULA						
Form I-12	Marketing	Marketing Collatera				
Preview		F	'roceed>>			

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:

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sugarcrm@grinmark.com

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### SugarCRM Documents and Templates Category Subcategory Template? Name 🖳 Notification Sales 💾 EULA 🛃 NDA 📳 Form I-12 Marketing Marketing Collateral Proceed>> Preview... Select Document or Template from the SugarCRM

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

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### http://www.grinmark.com/english sugarcrm@grinmark.com 🎟 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 Send E-Mail Save Fill

After a while a pre-filled template appears:

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http://www.	<u>grinmark</u>	.com/e	nglis	<u>h</u>		5	sugarc	rm@grin	ımark.o	com
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айл Правка	<u>В</u> ид Вст <u>а</u> вка	Фор <u>м</u> ат	С <u>е</u> рвис	<u>т</u> аблица	<u>О</u> кно	⊆правка	E	ведите вопр	oc	- ×
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💷 <>Sugar 💂										
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7.1.6.1.5.1.4.1.3.1.2.1.1.1.	Date: 7/16/2 To: From: RE Payme	<b>fic</b> 007 MARK ent Schedule N	otification	tio	n					
- 1 - 13 - 1 - 12 - 1 - 11 - 1 - 12 - 1 - 8 - 1 - 8 - 1 - 9 - 1 - 8 - 1 - 1	Dear Lon, <text> Regards, Steven Phone : +7-916 Fax: +7-916-19</text>	-153-19-87 33-19-00								*
■ @ ■ 5 ₩ ◀										
Рисование 🔹 🔓 🛛	Автофи <u>г</u> уры т			4 🕄 🙎		🆄 + 🚄	• <u>A</u> • :	= = ₽		
Стр. 1 Разд 1	1/1	На 7,5см	Ст 4	Кол 15	ЗАП	ИСПР ВД	Л ЗАМ	английский	Ŀ	

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:

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http://www.grinmark.com/english sugarcrm@grinmark.com 🕎 Notification.doc - Microsoft Word Введите вопро x Файл Правка Вид Вставка Формат Сервис Таблица Окно <u>С</u>правка • ж<u>ч</u> ह ह ह ह ह ह ह थे • <u>А</u> • х √а 🐴 Основной текст 👻 Arial **-** 10 🔻 0,5 🔹 🏒 📲 📲 🔹 🦄 🔹 🛄 👻 🥅 📰 🔚 📰 🔛 🔛 🔛 <>Sugar 1 і́ 🗋 🧀 🔚 🔚 🕒 🖤 📖 🐰 🐚 🖺 🟈 🤊 – 🔍 – 😣 🞲 💷 🖓 III 📢 👖 🕰 I 🕮 Цтение 1 • 1 • 1 • 1 • 1 • 1 • 2 • 1 • 3 • 1 • 4 • 1 • 5 • 1 • 6 • 1 • 7 • 1 • 8 • 1 • 9 • 1 • 10 • 1 • 11 • 12 • 1 • 13 • 1 • 14 • 15 • 1 • 10 • 1 • 17 • 1 • 18 • 1 • 19 • L 12-1-16-1-15-1-14-1-13-1-12-1-11-1-10-1-9-1-8-1-7-1-6-1-5-1-4-1-3-1-2-1-1 Notification Date: 7/16/2007 To: Lon John GRINMARK From: Payment Schedule Notification RE DearLon, Your payment deadline expires in 3 days Regards, Steven Phone: +7-916-153-19-87 Fax: +7-916-153-19-00 • ± ۹ Ŧ E G E 3 Q 4 Рисование т 😓 | Автофигуры т 🔨 🔪 🗔 🔿 🔛 🐗 🎲 💁 🔏 | 🦄 т 🚄 т 📥 т 🚍 🚃 🛱 💷 🇊 💂 1/1На 10,5см Ст 7 Кол 42 ЗАП ИСПР ВДЛ ЗАМ английский Ľ٧ Стр. 1 Разд 1

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

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### http://www.grinmark.com/english sugarcrm@grinmark.com 🎟 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 Send E-Mail Save Fill

Pressing "Send" opens the Outlook composer window:

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### http://www.grinmark.com/english

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😰 Untitled - Message (HTML)	<u>- 🗆 ×</u>
Eile Edit View Insert Format Tools Actions Help	
i ⊡ <u>S</u> end   🛃   λ 📮 i Arial →   10 →   <u>A</u>   B Ι <u>U</u>   🚍 i	
Sugar [John Lon 2 Big Consolidation Corp 233204] = #1	
To	
<u></u>	
Subject:	
Attach Motification.doc (27 KB) #3 Attachment Op	tions
	<u> </u>
	<b>v</b>

#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



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### **GrinMark Contact Synchronizer**

### **Basic Functions**

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

🏧 GrinMark SugarCRM - Outlook Synchronizer 🛛 🛛 🔜					
Synchronize Contacts					
Outlook->SugarCRM	SugarCRM->Outlook				
Ignore Account Name 3	My Contacts marked 'Sync to Outlo				
_ Synchroniz	e Tasks 🛛 🝃 📃				
Outlook->SugarCRM	SugarCRM->Outlook				
Synchronize	Meetings 👜				
7 Outlook->SugarCRM	SugarCRM->Outlook 🞖				
Synchroni	ze Calls 1 🗂				
Outlook->SugarCRM	SugarCRM->Outlook				
Outlook Categories for Calls:	Phone Call				
	Call;Phone				
Force full synchronization (ignore modification time) <b>12</b>					
<b>13</b> Scheduler <b>14</b> Ad	dvanced <b>15</b> Done <b>16</b>				

- 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.

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- 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:

Ignore Account Name 🗾 💌
Ignore Account Name
Find Matching Account
Find Or Create Matching Account



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- 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:

My Contacts marked 'Sync to Outlo
Only My Contacts
My Contacts marked 'Sync to Outlook'
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:

Sync to Outlook®: 🛛 📝

*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:

Uutlook Categories for Calls:	IPhone:Call
2	

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.



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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:

GM Advanced Settings	
Assign these categories to newly created items <mark>1</mark> in Outlook:	CRM;CRM1 CRM,Work
Only synchronize Outlook items belonging to 2 one of these categories (leave empty to synchronize all):	Work Work
Never synchronize Outlook items belonging to <b>3</b> any of these categories:	Private Private,Personal,Hidden
	OK Cancel

- 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).

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- During the next synchronization the synchronizer looks for corresponding entries in SyncHistory.db. If such entry is found, the Modification'Time is compared. If the actual Modification'Time is more than the Modification'Time 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.

🚥 Scheduler			- • ×
Synchronization Direction	Module	Scheduled At	Nou 2
🔹 Outlook -> SugarCRM	Contacts 🗧	Every 15 minutes	
🞏 SugarCRM -> Outlook	Contacts 🗖	Every 15 minutes	🐨 Delete 3
			🗢 Up 🐴
			≙ Down 5
Task Options			1
Synchronization Direction: 6	SugarCBM -> Outlook		
• •	Jougarer IM -> Outlook		
Module: 7	Contacts	•	
	,		ОК У
Schedule At: 8	Every 15 minutes	<b>•</b>	Cancel

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

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- 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:

	 2	
Outlook Startup		•
Outlook Startup		
Every 15 minutes		
Every 30 minutes		
Every hour		

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  $1^{st}$  task is always performed just before the the  $2^{nd}$ .



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### **GrinMark SugarCRM Activities Monitor**

### **Appendix A**

The following template values are available for the selected Contact:

Currently Selected Contact		
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	

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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:

Account o	f the Currently Selected Contact
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):

Current User (Employee)		
user_user_name		
user_user_hash		
user_first_name		
user_last_name		
user_description		
user_title		

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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

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