



# Sugar Plug-in for Microsoft Outlook Version 6.0.0

*Sugar Plug-in for Microsoft Outlook*  
Version 6.0.0, 2010

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This guide describes the installation and use of the Sugar Plug-in for Microsoft Outlook, version 6.0.0.

Topics include:

- **Installation Prerequisites**
- **Installing the Sugar Plug-in for Microsoft Outlook**
- **Configuring the Sugar Plug-in for Microsoft Outlook**
- **Using the Sugar Plug-in for Microsoft Outlook**
- **Using the Sugar Plug-in for Microsoft Outlook**
- **Archiving Emails**

The Sugar Plug-in for Microsoft Outlook provides the ability to perform the following actions to users of Sugar Enterprise, Sugar Professional, and Sugar Express:

- Synchronize contacts, appointments, and tasks between Outlook and Sugar.
- Archive email items from Outlook with Sugar accounts, bugs, cases, contacts, leads, opportunities, and projects.
- View Sugar records from within Outlook.
- Create Sugar accounts, bugs, cases, contacts, leads, and opportunities.

Each user can run only one installation of the plug-in.

## Installation Prerequisites

The 6.0.0 version of the Sugar Outlook Plug-in requires Sugar version 6.0.0.

It is recommended that you uninstall any previous versions of Sugar Plug-in for Microsoft Outlook before you install the latest version.

### To uninstall previous version of Outlook Plug-in for Microsoft Outlook

1. Close the Outlook client and any Outlook-related windows and programs.
2. In the Windows Control Panel, click Add/Remove Programs.
3. From the Add or Remove Programs window select the Sugar Plug-in for Microsoft Outlook item, and then select the **Change/Remove** button.
4. Follow the instructions that the Uninstall Wizard provides to remove the previous version.

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**Note:** If the free trial version of Outlook Plug-in is already installed on your machine, you can upgrade to the full version of Outlook Plug-in instead of performing a fresh install.

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## Installing the Sugar Plug-in for Microsoft Outlook

1. Download the appropriate Outlook installer file for the Outlook version that you use to your local machine. For Outlook 2007, download *Sugar\_Plugin\_for\_Outlook\_2007-6.0.0-*

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*Full.zip*; for Outlook 2003, download *Sugar\_Plugin\_for\_Outlook\_2003-6.0.0-Full.exe*.

2. For Outlook Plugin 2003, run the *.exe* file; for Outlook Plugin 2007, open the zip file and run the *setup.exe* file.

The **Setup Wizard** dialog box displays on the screen.

3. Click **Next**.

If you are upgrading from a previous version of the plug-in, select **Upgrade** and click **Next**.

The **Select Installation Folder** window displays on the screen. This window identifies the location where the Sugar Plug-in will be installed on your PC. You can leave the default location, or browse to select an alternate location.

4. Click **Next**.

The **Confirm Installation** dialog box displays on the screen.

5. Click **Next**.

The installation process begins. When the installation completes, the Installer displays a message stating that the plug-in has been successfully installed.

6. Click **Close** to close Setup Wizard.

## Configuring the Sugar Plug-in for Microsoft Outlook

You now need to configure Sugar Plug-in for Microsoft Outlook to point to your Sugar server and to establish login credentials.

1. Launch Microsoft Outlook.

The Sugar toolbar displays directly beneath the standard toolbar.

2. Navigate to **Tools > Sugar Options** to access the Sugar Plug-in for Microsoft Outlook configuration settings.
3. In the **Connection** section, enter your Sugar username and password. This is the username and password of the Sugar user whose Contact and Calendar synchronization, and Outlook email item archival will take place. Enter the values you use to log into Sugar.
4. In the **URL** field, specify the URL of your Sugar Server instance, for example, `localhost/sugarcrm`.
5. Use the **Test Connections** button to verify your settings.

If the settings are correct, the **Test Results** dialog box displays a message confirming that the test was successful.

6. If your administrator has sent you an encryption key for LDAP authentication, select the **Advanced** tab, select the **Use LDAP** option under **LDAP Settings**, and enter the encryption key in the **Authentication Key** field. Outlook uses this key to encrypt your passwords.

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**Note:** When you log into Sugar Outlook plug-in again, your encrypted password will display on the screen for security reasons. If you want to test the connections again, you will need to reenter your original password.

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7. Press **OK** to close the dialog box and return to Outlook.

## Using the Sugar Plug-in for Microsoft Outlook

This section describes the toolbar options and the tasks that you can perform using the Sugar Plug-in for Microsoft Outlook.

### Toolbar Options

The Outlook Inbox window, which is the Mail window, displays the following Sugar options.

**Archive to Sugar.** Use this option to archive one or more Outlook email items to one or more Sugar records.

**New Sugar Record.** Use this the creation of new Sugar accounts, bugs, cases, contacts, leads, and opportunity records.

**Sync to Sugar.** Use this option to synchronize Outlook appointments, contacts, and tasks with corresponding Sugar meetings, calls, contacts, and tasks.

The Calendar, Contacts, and Task windows displays the following Sugar toolbar:

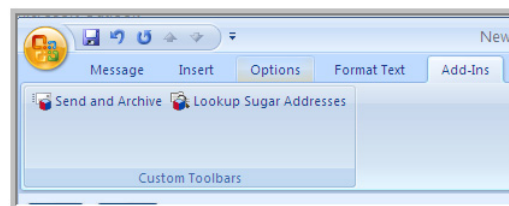


**Sync to Sugar.** Use this option to perform a synchronization of the current Outlook item type with the corresponding Sugar module.

**Mark to Sync.** Use this option to designate items that will be included in the next synchronization.

**Unmark from Sync.** Use this option to discontinue the synchronization of selected items. The items remain in both Sugar and Outlook.

When you compose a new email in Outlook you can make use of the following Sugar toolbar that displays in the Add-Ins tab:



**Send and Archive.** Use this option to send emails and archive them in one easy step.

**Lookup Sugar Addresses.** Use this option to select email addresses for Sugar contacts for inclusion in the To, CC, and BCC address fields.

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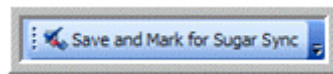
Creating a new Outlook Contact provides the following toolbar options in the Add-Ins tab:



**Save and Mark for Sugar Sync.** Use this option to save the contact and include the record in the next contact synchronization operation.

**Set Company to Sugar Account.** Use this option to pre-populate an Outlook Contact's Company field with a Sugar Account name. Also, in the event the Outlook Contact is synchronized, this option ensures a direct linkage between the resulting Sugar Contact and the corresponding Sugar Account.

Creating a new appointment or task also displays the following toolbar option in the Add-Ins tab:



**Save and Mark for Sugar Sync.** Use this option to provides a convenient way to save the appointment or task and include the record in the next synchronization.

## Synchronizing Contacts

The Sugar Plug-in for Microsoft Outlook allows you to synchronize Outlook and Sugar contacts. Changes made to contacts in one system are reflected in the other system after synchronization.

### To begin synchronizing contacts:

1. In Outlook, navigate to Go > Contacts and in the Contacts window, select the contacts that you want to synchronize.
2. Click **Mark to Sync**.
3. Click **Sync to Sugar**.

During the synchronization process a dialog box displays a count of records processed. At the end of the process the dialog box closes and the synchronization is complete. While the synchronization is processing you can use Outlook normally. In Outlook, Sugar contacts who are visible to the user are eligible for synchronization but only contacts for whom the **Sync to Outlook** option has been enabled in Sugar are synchronized.

Similarly, only Outlook contacts that you have marked for synchronization through the **Mark for Sync** command will be synchronized with Sugar. When you mark an Outlook contact to synchronization, Sugar Plug-in for Microsoft Outlook will add "SugarCRM" to the category of the item.

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**Note:** The "SugarCRM" category value is only a visual aid; Sugar Plug-in for Microsoft Outlook maintains an internal database of items marked for sync.

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You can view an item's categories by right-clicking on the item and choosing the *Categories* menu item.

Exposing the **Categories** field in Outlook contact views is a convenient way to identify contacts who are included in synchronization. Initially, after installing Sugar Plug-in for Microsoft Outlook, no contacts are designated for synchronization.

You cannot synchronize Outlook contacts for whom the “Private” flag is set.

### Handling Conflicts

A conflict occurs when a contact is modified in both Sugar and Outlook some time after the last synchronization. Settings in **Tools > Sugar Options** govern conflict handling behavior. You can elect to have the Sugar version prevail, the Outlook version, or prompt the user to choose.

### Deleting Contacts

In Sugar Plug-in for Microsoft Outlook, the Sugar version of a contact record supersedes in importance an equivalent contact in Outlook. This is because the contact has a greater role in the organization through Sugar than with any given individual using Outlook. Therefore, if you delete a contact record in Outlook after it has been synchronized with Sugar, the contact will remain in Sugar and its “Sync to Outlook” checkbox will be cleared. However, when you delete a contact in Sugar, the contact is also deleted in Outlook.

Setting a synchronized contact to **Unmark for Sync** (in Outlook) or clearing the “Sync to Outlook” checkbox in Sugar has the effect of suspending further synchronizations – both Outlook and Sugar will retain their respective contact records and the flags will be set equivalently via the sync operation. Changes to the contact in either system will not be reflected by the other system. If you later re-enable the **Mark for Sync** or **Sync to Outlook** flags then synchronization will resume.

### Resolving Duplicate Contacts

To prevent inadvertent contact duplication, Sugar Plug-in for Microsoft Outlook performs a lookup during synchronization and then binds the resulting contacts, or creates new contacts if not found.

For example, you create a contact in Outlook that is already accessible to you in Sugar with the name “Betty Boop” and an email address of [betty@boop.com](mailto:betty@boop.com). When you set this contact’s **Mark for Sync** flag in Outlook, Sugar Plug-in for Microsoft Outlook detects that this is a new contact from a synchronization perspective. In this case the plug-in will attempt to bind the Outlook contact with a Sugar contact. The combination of the contact’s email address and first and last name is used. If no matches are found a new contact is created on the Sugar side; otherwise, the **Sync to Outlook** flag is set on the Sugar side for the contact matching the search.

The same process is used when a Sugar contact is changed to **Sync to Outlook** and the contact already exists in Outlook.

### Contacts and Sugar Accounts

When a contact is synchronized with Sugar, the plug-in will perform a lookup of Sugar accounts using the value stored in the Outlook’s **Company Name** field. If there is an exact match, the Sugar contact will directly reference the account that was found.

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Sugar Plug-in for Microsoft Outlook provides a convenient way to ensure that synchronized contacts maintain their relationship with Sugar accounts. When in the Outlook Contact form, click **Set Company to Sugar Account** to perform a lookup of Sugar account names.

A similar mechanism is used for Sugar contacts you create using the **New Sugar Record** button to link to a new Sugar record.

## Synchronizing Your Calendar

Sugar calls and meetings that are visible to the Outlook user are eligible for synchronization. From these, only calls and meetings that the user has organized or has been invited to are synchronized to Outlook as appointment items.

Only Outlook calendar items for which the Mark for Sync option has been selected will be synchronized. Records for which the Private flag has been set will not be synchronized.

During synchronization, you can use Outlook normally.

### To begin synchronizing the calendar:

1. Click Sync to Sugar in the Outlook Calendar window
2. Select **Appointments** from the Sync to Sugar option in the main toolbar.

During the synchronization process a dialog box displays a count of records processed. After the process ends, the dialog box closes and the synchronization is complete. While the synchronization is processing you can use Outlook normally.

## Synchronizing Tasks

Tasks in Sugar that are visible to the Outlook user are eligible for synchronization. From these, only tasks that are assigned to the user are synchronized to Outlook. Only Outlook task items for which the Mark for Sync option has been selected will be synchronized. Records for which the Private flag has been set will not be synchronized.

During synchronization, you can use Outlook normally.

### To begin synchronizing tasks:

1. Select one or more tasks in the Outlook Tasks window.
2. Click **Mark to Sync** in the Tasks window.
3. Click **Sync to Sugar** in the Tasks window.

During the synchronization process, a dialog box displays a count of records processed. When the process ends, the dialog box closes and synchronization is complete.

You can now view the task in the Tasks List View in Sugar. Alternatively, you can right-click the task in Outlook and select View in Sugar.

## Archiving Emails

The Sugar Plug-in for Microsoft Outlook provides a convenient way to archive Outlook emails and associate them with any of the following Sugar modules:

- Accounts
- Bugs
- Cases
- Contacts
- Leads
- Opportunities
- Projects

Any Outlook email item can be archived to Sugar records, providing a powerful means of recording important customer interactions.

There are two ways an email can be archived:

1. When composing the email
2. By selecting it from the list of existing emails

### Composing and Archiving Emails

Sugar Plug-in for Microsoft Outlook enables you to send and archive emails in one step.

When you have finished composing an email, click **Send and Archive** to begin the process. You can enable the Send and Archive always displays Archive to Sugar screen option in Tools > Sugar Options. When this flag is set, the plug-in will unconditionally display the Archive Email to Sugar screen after the email is sent, allowing you to find the appropriate Sugar records to which the new email is archived.

To allow for quick archival of emails to a single recipient, clear the Send and Archive always displays Archive to Sugar screen setting in Tools > Options. Then, if a new email is sent to a single recipient, the plug-in will attempt to find the Sugar contact or lead (in that order) that matches that email address. If a single Sugar contact or lead is found, then the email is archived immediately with no further interaction.

However, if a single match cannot be found or if the email is addressed to multiple recipients, Sugar Plug-in for Microsoft Outlook will display the Archive Email to Sugar screen.

This behavior is summarized below:

Send and Archive display Archive to Sugar screen <i>flag</i>	A single recipient	Recipient found in Sugar	Action Performed after email sent
Checked	Yes or no	Yes or no	Display Archive Emails screen
Not checked	Yes	Yes	Archive immediately

Not checked	No	Yes or no	Display Archive Emails screen
Not checked	Yes	No	Display Archive Emails screen

## Archiving Existing Emails

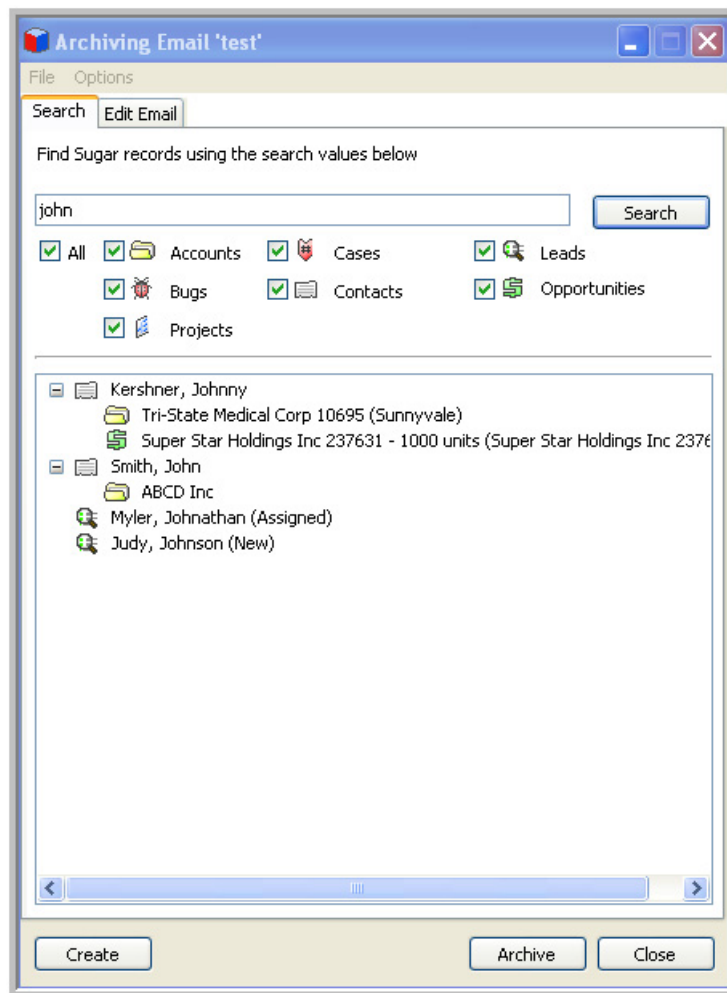
Sugar Plug-in for Microsoft Outlook provides for the convenient archival of existing email items. You can archive a single email or multiple emails, including items from different modules, in one archive step.

You can immediately archive an email to a Sugar contact or lead identified by the To email address. Simply right-click the email item and choose the Archive to Sugar option.

Sometimes, you may need to archive to multiple Sugar modules at one time or edit the email before it is archived in Sugar. For these reasons, you should use the Archive to Sugar option.

With the cursor positioned on an Outlook email item, click the **Archive to Sugar** button on the toolbar to initiate the archive process.

The following page displays on the screen:



Several actions occur prior to the page displaying on the screen. First, the Search field is populated for reference with the email address or addresses found in the current email To and CC fields.

Secondly, the Sugar modules identified by the checkboxes below the search field are scanned for matches. In the screenshot above, a single Sugar contact is matched using the email address of the selected email. The contact item has been expanded to reveal other Sugar modules associated with the contact.

### **Archiving Outlook Email with Existing Contacts and Leads**

You can click **Archive** to immediately associate the email with the highlighted item. This action immediately creates a History record in Sugar that stores the email correspondence for the selected item. You can choose multiple Sugar items and the email will be archived to each in turn.

Selecting the Edit tab prior to clicking Archive gives you the opportunity to alter the contents of the email prior to storing the email correspondence as a History item in Sugar. This allows you to augment the current email with comments. Any changes that you make here will not alter the Outlook email.

Alternatively, you can select one or multiple Outlook emails and drag-drop them onto a Sugar item listed in the Archive Email to Sugar screen.

To provide for repeated archival steps involving multiple combinations of emails and Sugar items, like catching up with emails at the end of the day, the Archive Email to Sugar screen dialog box is always in the forefront. You can change this by modifying the setting in the Options menu.

### **Archiving Outlook Email with Existing Sugar Records**

To associate an email with Sugar records, you must first identify the appropriate records.

For example, to associate the current email with an account named 'SugarCRM', you will need to clear the Search field and enter the leading characters of the account name. Ensure that the Accounts checkbox is set.

Records matching the search criteria, including account records, are displayed in the list. Select the appropriate record and click **Archive**. The email is immediately archived to the account you choose.

You may search for records from multiple Sugar modules and archive emails to any combination of Sugar items.

### **Archiving Outlook Email with New Sugar Records**

Sugar Plug-in for Microsoft Outlook provides a convenient method to create new Sugar records. This is helpful when you wish to begin collecting important correspondence for records which may not currently exist in Sugar.

For example, to create an account in which to associate the current email, do the following:

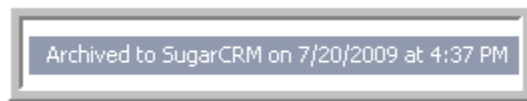
- a. Click **Create** and a dialog appears allowing you to specify account field values.

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- b. Click **Create and Close** to save the account record. A Sugar account record is immediately created.
  - c. Then, use the methods described previously to associate the current email with the new account record, which now appears among the Sugar items.

### **Determining Which Email Items have been Archived**

Sugar Plug-in for Microsoft Outlook makes it easy to tell that an Outlook email item has been archived to Sugar.

First, the item's Category field value is set to "SugarCRM". You can view an email item's category by right-clicking the item and choosing Options. Additionally, the item displays the date and time of the archival in the message status area.



Finally, the flag status of the item is updated if there is no flag already placed on the item.