Outlander User Guide

Outlander is an Outlook Add-In that integrates your contacts, tasks, calendar events, and emails with your SugarCRM system.

Installation

Outlander is distributed as a Microsoft® Installation (.msi) file. To install on a client system, double click on the .msi and follow the installation wizard instructions.
If you have a previous version of Outlander installed, you must un-install that version before installing the new version. Use the "Add/Remove Programs" in the Windows Control Panel to remove the existing version before installing the new version.
If you do not have the .NET Framework installed on your system, you will get an error message during the installation process indication that you need to install it first. The .NET Frame work can be obtained from Microsoft's web site. One way to obtain the download Url is to use Google with ".net framework download" as the search term.

Client requirements:

- Windows 2000, XP, or Vista
- Outlook 2000, XP, 2003, or 2007
- .NET Framework 1.0+

Server requirements:

- SugarCRM 4.5.0 through 5.0.0b

Configuration

The Outlander Configuration screen allows you to set up your connection, adjust the sync and archive email options, and retrieve the Outlander version information.
You can access the Outlander Configuration screen a couple of ways:

- Launch Outlook. Then select “Outlander -> Options” from the Outlander toolbar.
- Or: “Start -> Programs -> Outlander -> Configurator”

Login

The Login tab allows you to set and test your connection.

1. Enter the Url to your SugarCRM service.
2. Enter your user name.
3. If your server uses LDAP authentication, select the “Server Uses LDAP” checkbox and fill in the LDAP key with the value your SugarCRM administrator gives you.
4. Enter your password.
5. Click on the “Test Connection” button.
6. You should see a message like “The connection and login are valid”.
7. Click on “Ok” to save and close your connection settings.

Advanced Authentication

Clicking on the “Advanced” button in the “Advanced Authentication” section brings up dialog that allows you to configure Outlander to use Basic Authentication and to allow it to allow Self Signed SSL Certificates.
To configure Basic Auth:

1. Check the “Enable HTTP Basic Authentication” checkbox.
2. Enter your Basic Auth username.
3. Enter your Basic Auth password.

To allow any Self Signed SSL Certificate, select the checkbox in the “Relax SSL Certificate Security” section. Please be aware that if you have this checkbox checked, Outlander will accept any SSL certificate as authentic.

Synchronization

The Synchronization tab allows you to make changes to the way the Sync process behaves when a conflict occurs during the synchronization process. A conflict is when a previously synced record has been changed on both the Outlook side and the SugarCRM side.
Since the CRM is a shared and central resource that represents your 'official company records', we have written the Synchronization processes to consider the CRM system to be the final authority during most sync operations. This means that for a synced record, information in the

CRM system will overwrite the information in Outlook during the next sync. Because of this, if you need to make a change to a synced record, we recommend that you make the change in your CRM system before performing a sync.
Please see the Calendar Sync, Contact Sync, and Task Sync sections of this document for a full explanation of how records are synced between Outlook and SugarCRM.

Archive

The Archive tab allows you configure the behavior of the Archive Email process. Currently the only setting you can control is whether or not to automatically start a search when you launch the Archive Email process.

About

The About tab displays the version and copyright information of Outlander as well as your activation status. You may be requested to provide this information to support personnel when they are assisting you with an issue.
Information you will see on this page:

- The current version of Outlander
- Whether or not you are in the trial period and how many days remain.
- The Outlander activation status.
- The Outlander copyright information.

Activation

Outlander works in 'trial mode' for 15 days after it is first installed without requiring an activation key. After that time, you will need to activate Outlander by purchasing an activation key from the Outlander Plugin site.
Once you have purchased and obtained your activation key, follow these steps to activate Outlander:

1. Launch “Start -> Programs -> Outlander -> Outlander Activation”
2. Enter the activation key you obtained during the purchase process.
3. Click “Activate”. You should receive a message like “Outlander was successfully activated”.

Take care when using your activation key since it is only good for the number of activations that you purchased. For example, if you purchased an activation key for 3 copies of Outlander, you can only use the activation key three times.

Calendar Sync

Calendar Sync provides a way for you to:

- Create a new Meeting or Call from an Outlook calendar event.
- Updated your Outlook calendar with the Meetings and Calls in the CRM that are either assigned to you, or where you are an invitee.
- Add changes from your Outlook calendar event to an already synced CRM Meeting or Call.

To create and sync a new Meeting or Call from Outlook to your CRM:

1. Open Outlook and create or edit a calendar event. Note: the calendar event must be in the Default Calendar Folder for it to be synced.
2. While on the edit screen, click on “Mark to Sync”. This will add a category called “CRM” to the calendar event. If you wish to add the calendar event to the CRM as a Call, be sure to add the “Phone Call” category.
3. Save the calendar event.
4. Click on “Sync with CRM -> Sync Calendar” to perform the sync.

To update your Outlook calendar with your Meetings and Calls in the CRM:

1. Open Outlook.
2. Click on “Sync with CRM -> Sync Calendar”.

To update an already synced CRM Meeting or Call with the Outlook event information:

1. Open Outlook and edit a calendar event that has already been synced.
2. When you are finished making your changes, click on “Save and Update CRM”. This will add a category called “CRM Update” to the calendar event.
3. Click on “Sync with CRM -> Sync Calendar” to perform the sync. All calendar events with the “CRM Update” category will have the Outlook changes added to the CRM before the main sync logic is performed. This means that the changes in Outlook take precedence over the changes in the CRM for that calendar event.

What gets synced:

Only the non-recurring Outlook calendar events in the Default Calendar Folder marked with the “CRM” category will be considered during the Calendar Sync.
Since the CRM is a shared and central resource that represents your 'official company records', we have written the Calendar Sync to consider the CRM system to be the final authority during the sync operation. This means that for a synced Meeting or Call, the data in the CRM version of

the record takes precedence and will overwrite the data in the mapped Outlook calendar event during the next sync. Because of this, if you need to make a change to a synced meeting or call, we recommend that you make the change in your CRM system before performing a sync.
You can use the “Save and Update CRM” feature to add changes from your Outlook event to the corresponding CRM Meeting or Call.
The following matrix should help clarify how records are synced during the Calendar Sync process:
Calendar Sync Matrix

Current Sync Value	Outlook Change	CRM Change	Outlook Value After Sync	CRM Value After Sync
No record	New record A	No change	A	A
No record	No change	New record B	B	B
C	Hard delete C	No change	C	C
D	Soft delete D	No change	D (in deleted folder)	D
E	Unmark E	No change	E (unmarked)	E
F	No change	Delete F	F (in deleted folder)	No record
G	No change	Re-assign G	G	G (assigned to another user)
H	Hout	No change	H	H
I	No change	Icrm	Icrm	Icrm
J	Jout	Jcrm	Jcrm	Jcrm
K	No change	No change	K	K

Contact Sync

Contact Sync provides a way for you to:

- Create a new Contact from an Outlook contact.
- Updated your Outlook contacts with the Contacts in the CRM that you have marked to sync to Outlook.

To create and sync a new Contact from Outlook to your CRM:

1. Open Outlook and create or edit a contact record. Note: the contact must be in the Default Contact Folder for it to be synced.
2. While on the edit screen, click on “Mark to Sync”. This will add a category called “CRM” to the contact.
3. Save the contact.
4. Click on “Sync with CRM -> Sync Contacts” to perform the sync.

To update Outlook with Contacts in the CRM:

1. Log into the CRM system and select the “Contacts” tab.
2. Select the contact records that you wish to sync by clicking on their check box on the list view.
3. Scroll to the bottom of the list view, select “Yes” from the “Sync to Outlook” drop down.
4. Click the “Update” button.
5. Launch Outlook.
6. In Outlook, click on “Sync with CRM -> Sync Contacts”.

To update an already synced CRM Contact with the Outlook Contact information:

1. Open Outlook and edit a contact record that has already been synced.
2. When you are finished making your changes, click on “Save and Update CRM”. This will add a category called “CRM Update” to the contact.
3. Click on “Sync with CRM -> Sync Contacts” to perform the sync. All contacts with the “CRM Update” category will have the Outlook changes added to the CRM before the main sync logic is performed. This means that the changes in Outlook take precedence over the changes in the CRM for that contact.

What gets synced:

For Outlook contacts: only the contacts in the Default Contact Folder marked with the “CRM” category will be considered during the Contact Sync.

For CRM contacts: only contacts marked “Sync to Outlook” will be considered during the Contact Sync.
Since the CRM is a shared and central resource that represents your 'official company records', we have written the Contact Sync to consider the CRM system to be the final authority during the sync operation. This means that for a synced contact, the data in the CRM version of the record takes precedence and will overwrite the data in the mapped Outlook contact record during the next sync. Because of this, if you need to make a change to a synced contact, we recommend that you make the change in your CRM system before performing a sync.
You can use the “Save and Update CRM” feature to add changes from your Outlook Contact to the corresponding CRM Contact.
The following matrix should help clarify how records are synced during the Contact Sync process:
Contact Sync Matrix

Current Sync Value	Outlook Change	CRM Change	Outlook Value After Sync	CRM Value After Sync
No record	New record A	No change	A	A
No record	No change	New record B	B	B
C	Hard delete C	No change	No record	C (unmarked for sync)
D	Soft delete D	No change	D (unmarked, deleted folder)	D (unmarked for sync)
E	Unmark E	No change	E (unmarked)	E (unmarked for sync)
F	No change	Delete F	F (unmarked, deleted folder)	No record
G	No change	Unmark G	G (unmarked, deleted folder)	G (unmarked for sync)
H	Hout	No change	H	H
I	No change	Icrm	Icrm	Icrm
J	Jout	Jcrm	Jcrm	Jcrm
K	No change	No change	K	K

Task Sync

Task Sync provides a way for you to:

- Create a new Task from an Outlook task.
- Updated your Outlook tasks with the tasks in the CRM that are assigned to you.

To create and sync a new Task from Outlook to your CRM:

1. Open Outlook and create or edit a task record. Note: the task must be in the Default Task Folder for it to be synced.
2. While on the edit screen, click on “Mark to Sync”. This will add a category called “CRM” to the task.
3. Save the task.
4. Click on “Sync with CRM -> Sync Tasks” to perform the sync.

To update Outlook with Tasks in the CRM:

1. Launch Outlook.
2. In Outlook, click on “Sync with CRM -> Sync Tasks”.

To update an already synced CRM Task with the Outlook Task information:

4. Open Outlook and edit a task record that has already been synced.
5. When you are finished making your changes, click on “Save and Update CRM”. This will add a category called “CRM Update” to the task.
6. Click on “Sync with CRM -> Sync Tasks” to perform the sync. All tasks with the “CRM Update” category will have the Outlook changes added to the CRM before the main sync logic is performed. This means that the changes in Outlook take precedence over the changes in the CRM for that task.

What gets synced:

For Outlook tasks: only the tasks in the Default Task Folder marked with the “CRM” category will be considered during the Task Sync.
For CRM contacts: only tasks assigned to you will considered during the Task Sync.
Since the CRM is a shared and central resource that represents your 'official company records', we have written the Task Sync to consider the CRM system to be the final authority during the sync operation. This means that for a synced task, the data in the CRM version of the record takes precedence and will overwrite the data in the mapped Outlook task record during the next sync. Because of this, if you need to make a change to a synced task, we recommend that you make the change in your CRM system before performing a sync.

You can use the “Save and Update CRM” feature to add changes from your Outlook Contact to the corresponding CRM Contact.

The following matrix should help clarify how records are synced during the Task Sync process:

Task Sync Matrix

Current Sync Value	Outlook Change	CRM Change	Outlook Value After Sync	CRM Value After Sync
No record	New record A	No change	A	A
No record	No change	New record B	B	B
C	Hard delete C	No change	No record	No record
D	Soft delete D	No change	D (unmarked, deleted folder)	No record
E	Unmark E	No change	E (unmarked)	No record
F	No change	Delete F	F (unmarked, deleted folder)	No record
G	No change	Re-assign G	G (status becomes completed)	G (re-assigned)
H	Hout	No change	H	H
I	No change	Icrm	Icrm	Icrm
J	Jout	Jcrm	Jcrm	Jcrm
K	No change	No change	K	K

Archive Email

Archive Email allows you to store the emails you receive in Outlook with their associated records in your CRM system.
Archive Email gives you the following features:

- **Built in Search.** Search for Accounts, Contacts, Leads, Opportunities, Projects, Project Tasks, Cases, and Bugs to associate your email to.
- **Email editor.** Modify the email to include only the information that is most relevant.
- *Attachment Selector.* Include only the attachments you need, not someone's "neato" image signature.
- *Quick Create.* Create Accounts, Contacts, Leads, Opportunities, and Tasks while working with the email.

To Archive an Email:

The Search form allows you to look up the Accounts, Contacts, Leads, Opportunities, Projects, Project Tasks, Cases, and Bugs you want to associate your email to.
To Archive an Email:

1. Launch Outlook and select an email from the list of emails.
2. Click the "Archive to CRM" button.
3. Enter your search terms into the Search field. Search fields are separated by the semi-colon character. For example, if you enter "Bubba; Hotep" into the search field, you will get results that contain the word "Bubba" as well as results with the word "Hotep".
4. Click on the Search button.
5. Select the items you want to associate the email to from the search results.
6. Edit the email (optional)
7. Select the attachments (by default no attachments are selected)
8. Click on "Archive This Email"

Edit Email

The Archive Email screen also allows you to edit the email before you archive it. Any change you make here will be what is added to the CRM system.
Please be aware that there are two tabs for editing the message body: "Text Body" and "HTML Body". Changes to the "Text Body" are not reflected in the "HTML Body". This is because an HTML email can have a different text-only version intended for email clients that do not support HTML.

Attachment Selector

By default attachments are not selected for archive. This is because most of the attachments these days are a signature graphic which is not something that you need to archive every time. Only attachments with a check in their check box will be archived with the email.

Quick Create

The Quick Create feature allows you to create Accounts, Contacts, Leads, Opportunities, and Tasks without having to switch to your CRM system.
To Quick Create an item:

1. Select the type of item you would like to create from the drop down.
2. Click on Quick Create.
3. Fill in the form. Fields marked with an asterisk are required fields. Drop downs are pre-populated with values from your CRM system, so there may be a delay while it retrieves those values.
4. Click on the “Submit” button.

When you quick create an item, a search term for that item is added to the Archive Email search field and a search is performed (if you have auto search enabled). Also, when you submit an item, some duplicate record checking is performed. You will be given the option to create the new record anyway or to continue editing your quick create form to make changes.
This table describes what field is used for the search term and for duplicate item checking for each type of Quick Create item:

Quick Create Item	Search Term Field	Duplicate Record Field
Account	Account Name	Account Name
Contact	Last Name	Email Address
Lead	Last Name	Email Address
Opportunity	Name	Name
Task	Subject	Subject

Support Information

Online support can be found by accessing the Outlander Forums.
http://www.outlanderplugin.com/forums
Please post any questions, comments, or feature requests to the appropriate topic.