
Understanding Field Mappings for Sugar Plug-ins

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Overview

The Sugar® Plug-ins for Microsoft Office allow you to archive your emails into Sugar, make offline updates to data for later sync, and merge Sugar customer data into documents like letters and invoices. The following article will help you understand how the data in these software systems communicate with Sugar and what you can expect when a synchronization occurs.

Features and Restrictions

When using plug-ins to communicate between Sugar and external software products, there will be times that the names of Sugar fields do not exactly coincide with the fields in the other products. Use this article to better understand field mappings between Sugar and Plug-ins for Microsoft. The complete installation and application guides for the following plug-ins can be found in the [Sugar Plug-ins documentation](#).

Microsoft Outlook Plug-in

The Sugar Plug-in for Outlook synchronizes data between your Sugar instance and Outlook. You can utilize the Description field in either product to share non-standardized data. The Sugar Plug-in for Outlook does not recognize custom fields in Sugar, therefore any custom Sugar fields will be ignored by the Outlook Plug-in as the ability to synchronize custom Sugar fields is an existing [enhancement request](#). The fields in the Contacts, Meetings, Calls, and Tasks modules that can be synchronized with Outlook are listed below.

Contacts Field Mappings

When the Outlook Plug-in synchronizes contacts, the following field mappings are applied:

Outlook Contact Field	Sugar Contact Field Name	Sugar Contact Database Name
Full Name	First Name	first_name
Full Name	Last Name	last_name
Company	Account Name	account_name
Job Title	Title	title
Email	Email Address	email
Business Phone	Office Phone	phone_work
Business Fax	Fax	phone_fax
Mobile Phone	Mobile	phone_mobile

Business Address	Primary Address	primary_address_street, primary_address_city, primary_address_state, primary_address_postalcode, primary_address_country
Other Address	Alternate Address	alt_address_street, alt_address_city, alt_address_state, alt_address_postalcode, alt_address_country
Notes	Description	description

Meetings Field Mappings

Sugar calls and meetings will both synchronize to Outlook as appointments. When the Outlook Plug-in syncs meetings, the following field mappings are applied:

Outlook Appointment Field	Sugar Meeting Field Name	Sugar Meeting Database Name
Subject	Subject	subject
Start Time	Start Date	date_start
End Time	End Date	date_end
Location	Location	location
[Description Block]	Description	description

Calls

Sugar calls and meetings will both synchronize to Outlook as appointments. When the Outlook Plug-in syncs calls, the following field mappings are applied:

Outlook Appointment Field	Sugar Call Field Name	Sugar Call Database Name
Subject	Subject	subject
Start Time	Start Date & Time	date_start
End Time	[Start Date & Time + Duration]	date_end
[Description Block]	Description	description

Tasks Field Mappings

When the Outlook Plug-in synchronizes tasks, the following field mappings are applied:

Outlook Appointment Field	Sugar Task Name	Sugar Task Database Name

Subject	Subject	subject
Start Time	Start Date	date_start
End Time	Due Date	date_due
Priority	Priority	priority
Status	Status	status
[Description Block]	Description	description

Microsoft Word and Excel Plug-Ins

The Sugar Plug-in for Microsoft Word enables users to merge Sugar data with Word templates, while the Sugar Plug-in for Microsoft Excel allows users to edit and delete the contents of existing Sugar fields in Excel and transfer the updated information to the Sugar database. Both of these plug-ins recognize custom Sugar fields created in Studio and can successfully sync data to and from these fields.

For more information about using Sugar plug-ins for Microsoft products, please refer to the [Sugar Plug-ins documentation](#).

