MS Outlook Plug-in User Guide

MS Outlook Plug-in User Guide

MS Outlook Plug-in will reach end of support on June 28, 2024. For more details, please refer to the Outlook & Word Plug-ins Will Reach End of Support June 2024 **SugarClub post.**

Overview

Sugar's Plug-in for Outlook allows you to archive emails to Sugar®, synchronize contacts, meetings, calls, and tasks, as well as create new Sugar records. The plug-in is available with all supported versions of Sugar and must be installed on each computer running Outlook where the plug-in is desired. This documentation describes how to use the Sugar Plug-in for Microsoft Outlook to sync and create records between Outlook and Sugar, as well as archive emails to Sugar.

Prerequisites

- Each user can only run one installation of the Sugar Plug-in for Microsoft Outlook.
- For a complete list of Sugar version compatibility, platform requirements, and supported environments, refer to the Plug-ins Supported Platforms page.
- To use the plug-in's sync and archive functions, the logged-in user must have Import, Export, Mass Update, and Delete role permissions enabled for the module that they want to sync or archive. For more information on role permissions, please refer to the Role Management documentation.
- It is recommended that you uninstall any previous versions of Sugar Plug-in for Microsoft Outlook before you upgrade to the latest version. For more information on uninstalling previous versions of the Sugar plug-in, refer to the Sugar Plug-in for Outlook Installation Guide.

For additional information about working with and troubleshooting the Sugar Plug-in for Microsoft Outlook, check out the articles in our Knowledge Base.

Terminology

The Sugar Plug-in for Outlook allows users to archive, sync, and relate records from Outlook to Sugar. The following table explains the difference between these activities:

Term	Pertains to	Description
Archive	Emails	Archiving an email from Outlook will create a copy of the message as an

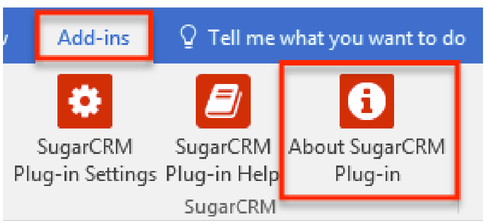
		email record in Sugar's Emails module.
Sync	Contacts, Calendar items, Tasks	The sync process shares data between Outlook and Sugar by first creating a corresponding record in the opposite system and then pushing changes back and forth from one or both sides, depending on how you have configured the sync in your plug-in's settings.
Mark to Sync	Contacts, Calendar items, Tasks	Marking a record to sync is the method used to tell the plug-in that an Outlook record should be included in future syncs with Sugar.
Relate	Contacts, Calendar items, Tasks, Emails	Relating creates a relationship between an Outlook record and a non-activity record in Sugar.

Menus

The following sections explain the Sugar options in Outlook's Add-Ins tab as well as the context-relevant menu options you will see in the ribbon's main tab when working with emails and contacts and events in Outlook.

Add-ins Tab Menu

After installing the Sugar plug-in, you can access the following options by clicking the Add-ins tab on the Outlook ribbon:



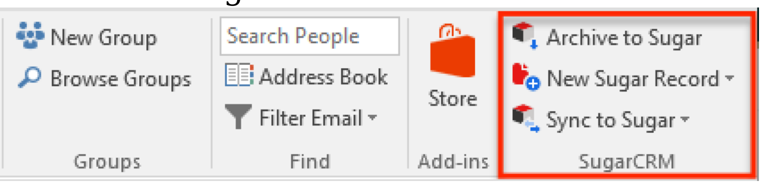
Menu Item	Description

SugarCRM Plug-in Settings	Connect to Sugar and configure various plug-in settings as described in [Configuring the Sugar Plug-in for Outlook]().
SugarCRM Plug-in Help	Navigate from Outlook to this User Guide in your default web browser (Internet access required).
About SugarCRM Plug-in	View details (e.g. version and build) about your installed version of the Sugar Plug-in for Outlook.

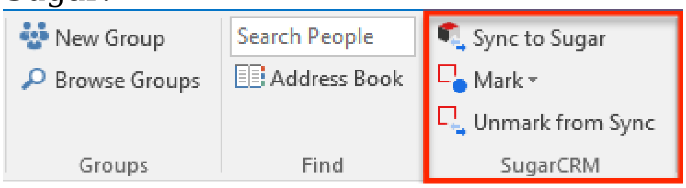
SugarCRM Actions Menu

The SugarCRM Actions menu is always present in the toolbar of your Outlook user interface. It is shown as a series of options next to variations of the familiar Sugar cube icon. The options available will automatically pertain to what you are doing in Outlook.

For example, the menu options shown when working with mail items in Outlook are related to archiving emails, creating records, and syncing contacts from Outlook to Sugar:



As another example, the menu options shown when working with non-mail items in Outlook are related to syncing and marking records for sync from Outlook to Sugar:



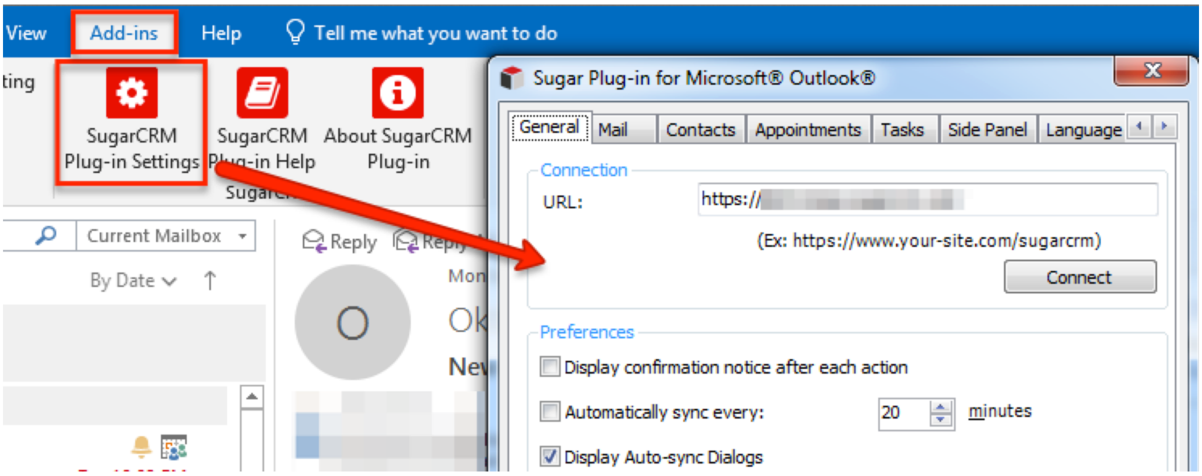
The following table summarizes the context-relevant menu options and their availability when working with emails, calendar items, tasks, and contacts in Outlook. Click on a menu item's name for more information.

Menu Item	**Visibility**				
	Email Inbox	**Compose Mail**	**Calendar**	**Tasks**	**People**

Archive to Sugar	□				
New Sugar Record	□				
Send and Archive		□			
Lookup Sugar Address		□	□		
Sync to Sugar	□		□	□	□
Mark to Sync (Save and Mark to Sync)			□	□	□
Mark to Sync and Relate (Save, Mark to Sync and Relate)			□	□	□
Unmark from Sync			□	□	□
View in Sugar			□	□	□
Set Company to Sugar Account					□

Configuring the Sugar Plug-in for Outlook

You can connect to Sugar as well as configure various plug-in settings via the SugarCRM Plug-in Settings window. To access these settings, click on the Add-ins tab in Outlook's ribbon and select "SugarCRM Plug-in Settings". The settings window will open where you can configure options in the various tabs as described in the sections below.

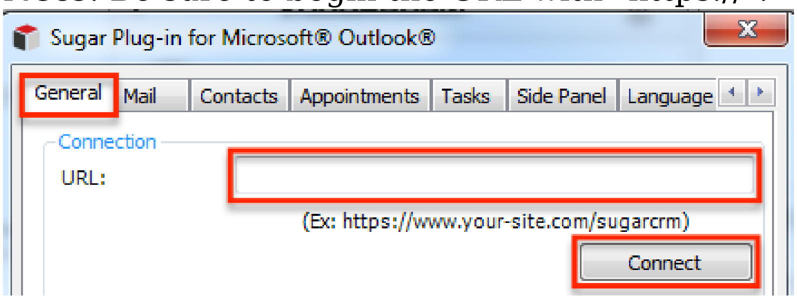


General Settings

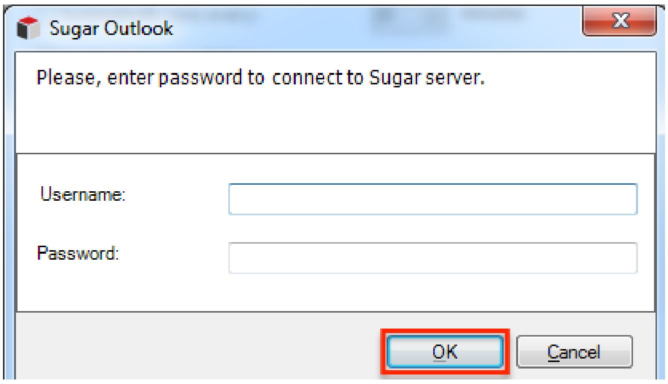
The General tab allows you to connect your Sugar Plug-in for Outlook to Sugar as well as configure your basic preferences. The steps to connect the Outlook Plug-in to a Sugar instance varies depending on whether your instance uses SugarIdenitity or not. For more information, refer to the Logging in WIthout SugarIdentity or Logging in With SugarIdentity section below depending on your situation. For more information on setting up the connection between the plug-in and your Sugar instance after installing the plug-in, refer to the Sugar Plug-in for Outlook Installation Guide.

Logging in Without SugarIdentity

The following steps cover connecting the plug-in to a Sugar instance that does not use SugarIdentity:

1. In the Connection section, enter your Sugar instance URL then click "Connect".
   Note: Be sure to begin the URL with "https://".
   

2. If the connection is successfully made to your Sugar server, a login dialog box will appear. Enter your Sugar username and password then click "OK".



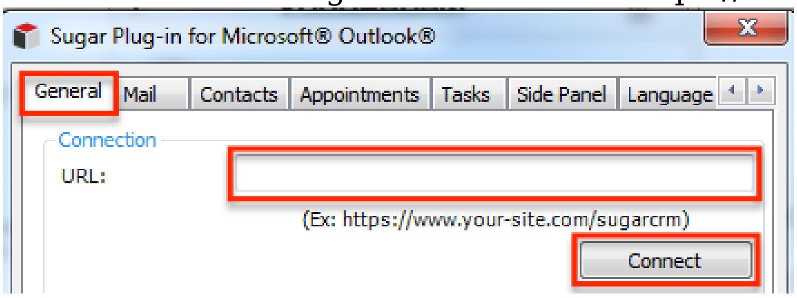
Note: The Sugar Plug-in for Outlook is not supported for Sugar instances using single sign-on (SSO) unless the instance uses SugarIdentity.

Logging in With SugarIdentity

The Sugar Plug-in for Outlook can connect to a Sugar instance that uses SugarIdentity via standard login and single sign-on. Please note that the plug-in supports single sign-on for instances that are SugarIdentity-enabled and use SAML or OIDC.

Logging in With SugarIdentity Using Standard Login

The following steps cover connecting the plug-in to a SugarIdentity-enabled instance that does not use SAML or OIDC:

1. In the Connection section, enter your Sugar instance URL then click "Connect".
   Note: Be sure to begin the URL with "https://".
   

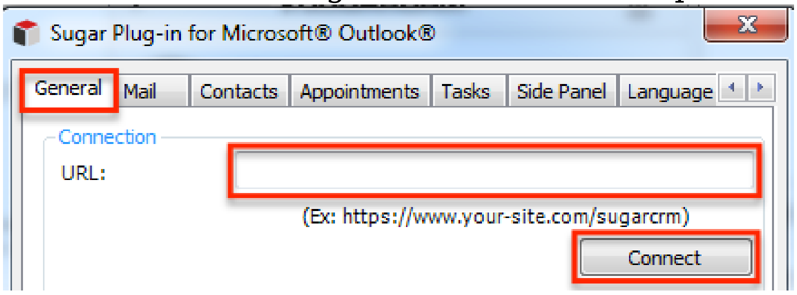
2. In the login window that appears, enter your Sugar username and password, then click "Log In".
3. A user consent window will appear requesting access to your Sugar account. Click "Allow access" to grant access for the connection to occur.

If the connection is successful, you will see a success message.

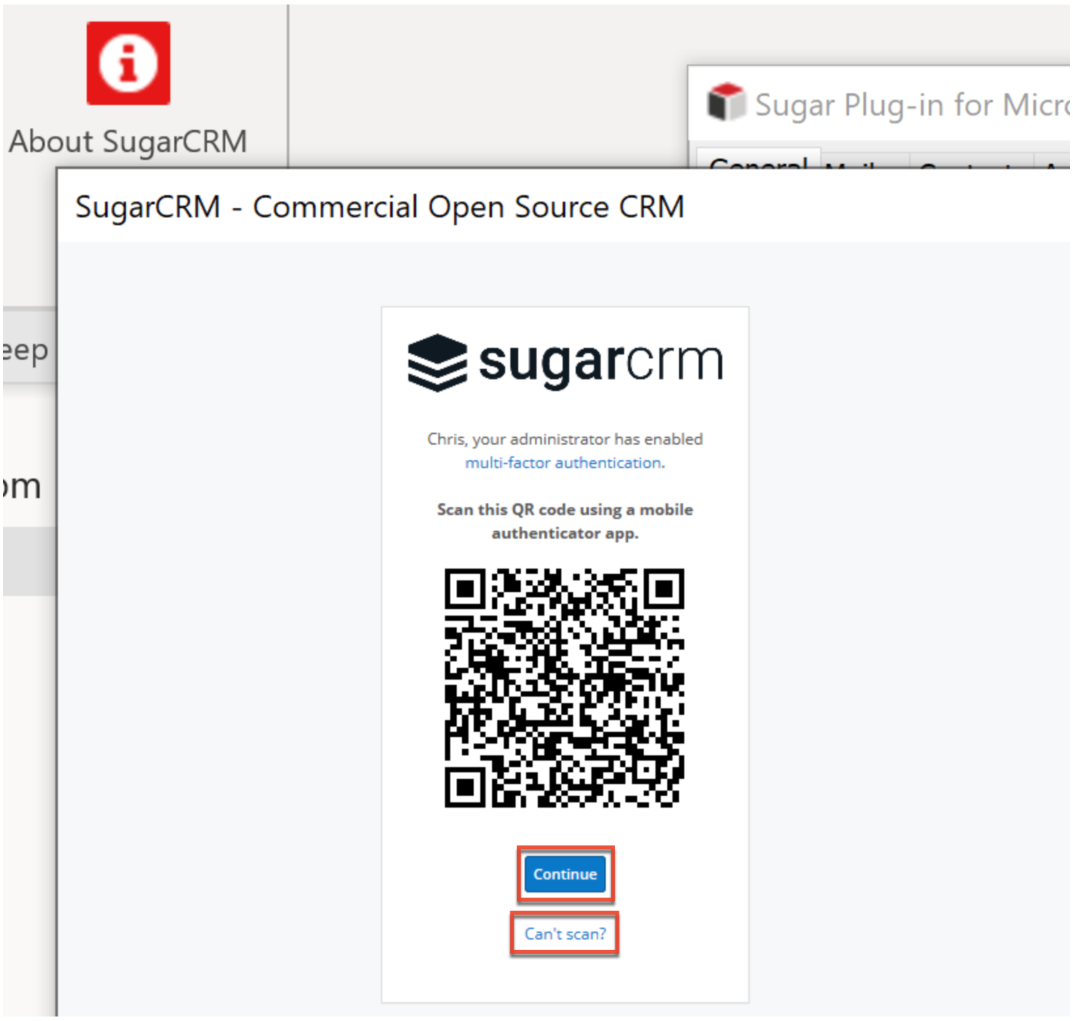
Logging in With SugarIdentity Using Multi-Factor Authentication

SugarIdentity supports multi-factor authentication, which provides an added layer of security for Sugar to prevent unauthorized users from gaining access to your account. When multi-factor authentication is enabled for your Sugar instance, you will need to use a mobile authenticator app (e.g., Authy, Google Authenticator, Microsoft Authenticator) when logging in to Sugar, as covered in the steps below.

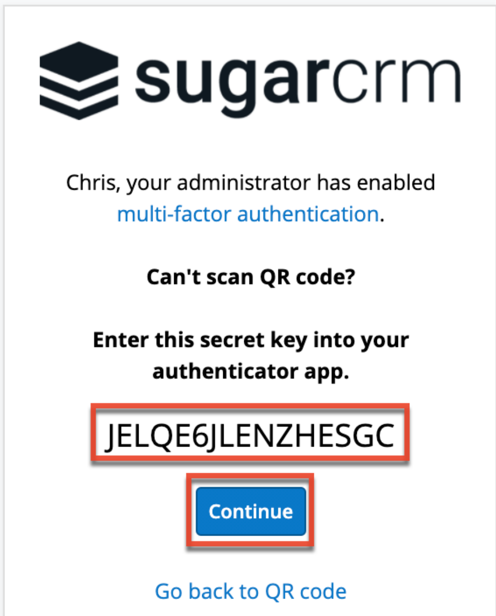
The following steps cover connecting the plug-in to a SugarIdentity-enabled instance that uses multi-factor authentication:

1. In the Connection section, enter your Sugar instance URL, then click "Connect".
   Note: Be sure to begin the URL with "https://".
   

2. In the login window that appears, enter your Sugar username and password, then click "Log In".
3. If this is your first time logging in after multi-factor authentication has been enabled for Sugar, a QR code will appear in the window. Scan the QR code using your authenticator app (e.g., Authy, Google Authenticator), then click "Continue". If you cannot scan the QR code using your mobile device, skip to step 4.
   Note: If you have already paired an authenticator app with Sugar, then skip to step 5.

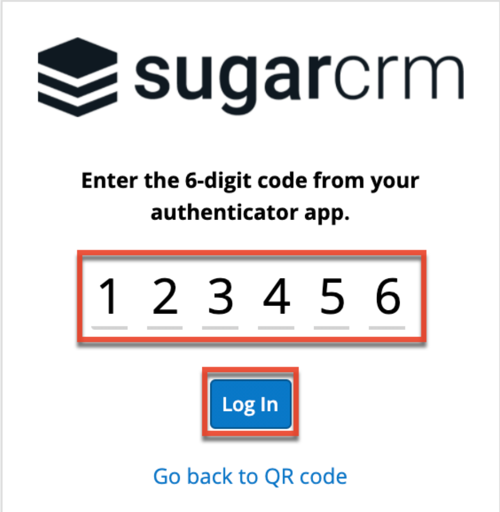


4. If you cannot scan the QR code on step 3 using your mobile device, click the "Can't scan?" link and enter the secret key that appears in the window into your authenticator app. Click "Continue".



5. In the next step, enter the 6-digit code generated from your authenticator

app, then click "Log In".
Note: Once your authenticator app is paired with Sugar, for future logins, you will just be required to enter a new 6-digit code in this step after entering your Sugar login credentials in step 2.



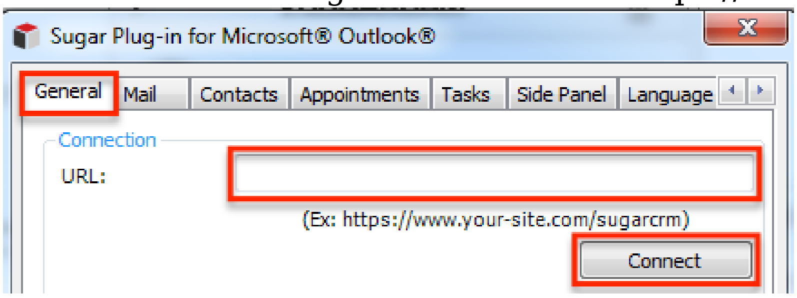
6. A user consent window will appear requesting access to your Sugar account. Click "Allow access" to grant access for the connection to occur.

If the connection is successful, you will see a success message.

Logging in With SugarIdentity Using Single Sign-On Authentication

The following steps cover connecting the plug-in to a SugarIdentity-enabled instance that uses SAML or OIDC:

1. In the Connection section, enter your Sugar instance URL then click "Connect".
   Note: Be sure to begin the URL with "https://".



2. In the login window that appears, enter your LDAP or identity provider (e.g. Okta) login credentials then click "Log In" or "Sign In".
3. A user consent window will appear requesting access to your Sugar account. Click "Allow access" to grant access for the connection to occur.

If the connection is successful, you will see a success message.

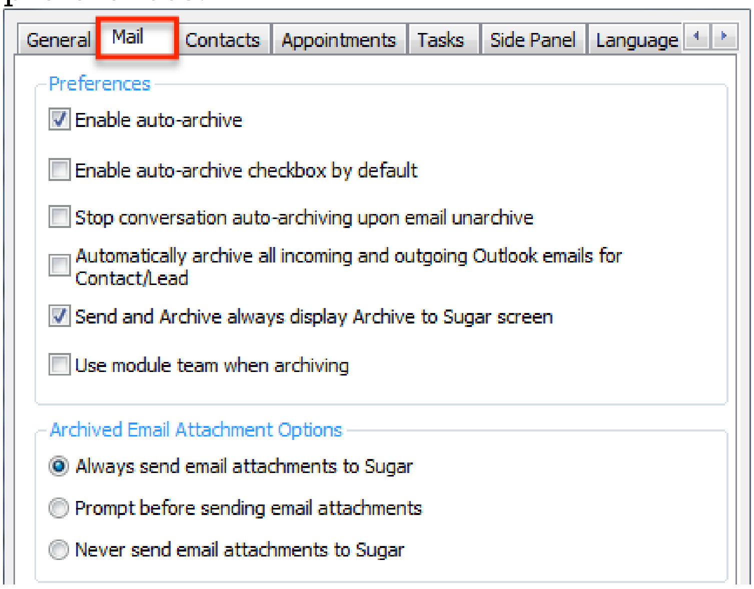
General Preferences

The following preference options are available to configure under the General tab:

- **Display confirmation notice after each action**: Select if you want to receive a confirmation notice each time an action (e.g. sync, archive, etc.) completes.
- **Automatically sync every**: This option must be enabled and configured if you have enabled auto-sync for any record type in Outlook to automatically sync Outlook data to Sugar and vice versa. You can specify the time frame (e.g. 5 minutes, 20 minutes) for the sync as well.
- **Display Auto-sync Dialogs**: Select if you want to view dialog boxes when auto-sync occurs.
  Note: Be sure to enable this option if you wish to view detailed information via the dialog box regarding records that fail to sync.
- **Parse Last Name first**: Select if you want to display the contact's last name first (e.g. Smith John) for synced Sugar contacts.
- **Ignore private flag when syncing**: Select if you want to have the plug-in disregard the private flag setting for calls, meetings, tasks, and contacts, and sync the records to Sugar.
- **Ignore Sugar modules visibility settings**: Enable this option if you want to have modules which are hidden in Sugar displayed in the Sugar plug-in.
- **Automatically populate Sugar lookup lists**: When archiving via the Archiving Email window, the search is performed automatically based on the pre-populated search criteria. If disabled, you will need to click the Search button in order to perform the record search in Sugar.
- **Display right-click menus**: If enabled, the Sugar plug-in options (e.g. Mark to Sync, Archive to Sugar, etc.) appear in the right-click menu.

Mail Settings

The Mail tab has options for you to set your email archiving and attachment preferences.



The following options are available to configure email archiving under the Mail tab:

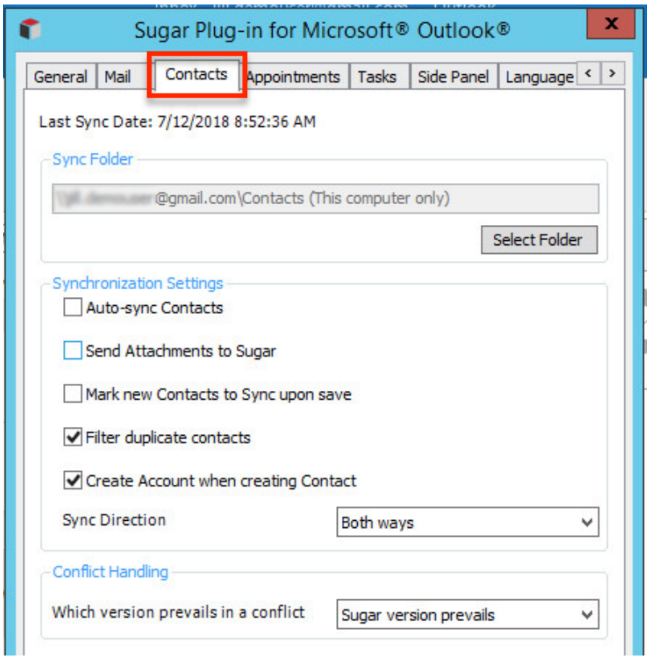
- **Enable auto-archive**: Select this checkbox to enable auto-archiving for emails. Enabling auto-archive makes the following additional options available:
    - **Enable auto-archive checkbox by default**: Select if you want to have the "Automatically archive future emails in this conversation" option checked by default.
    - **Stop conversation auto-archiving upon email unarchive**: Disable this option if you want to preserve the auto-archiving feature when an email gets unarchived from Sugar and allow future emails in the conversation to continue archiving to Sugar.
    - **Automatically archive all incoming and outgoing Outlook emails for Contact/Lead**: Enable auto-archiving for all incoming and outgoing emails if the email is received from a contact or lead or if the email has a Sugar lead or contact in its recipient list ((i.e. To:, CC:, BCC:).
- **Send and Archive always displays Archive to Sugar screen**: Select if you want to have the Archiving Email window always appear when sending and archiving email to Sugar. For more information, refer to the Quick Archive section.
- **Use module team when archiving**: Select if you want to assign the archived email to the related record's team instead of your default team in Sugar.

The following options pertain to email attachments for archived emails:

- **Always send email attachments to Sugar**: Select this option to always send email attachments to Sugar.
- **Prompt before sending email attachments**: Select this option to have Outlook ask you before sending email attachments to Sugar.
- **Never send email attachments to Sugar**: Select this option to never send email attachments to Sugar.

Contact Settings

The Contacts tab contains options specific to syncing contacts between Sugar and Outlook. At the top of the Contacts tab, you can see the date and time of the plug-in's most recent lead or contact sync next to the "Last Sync Date" label.



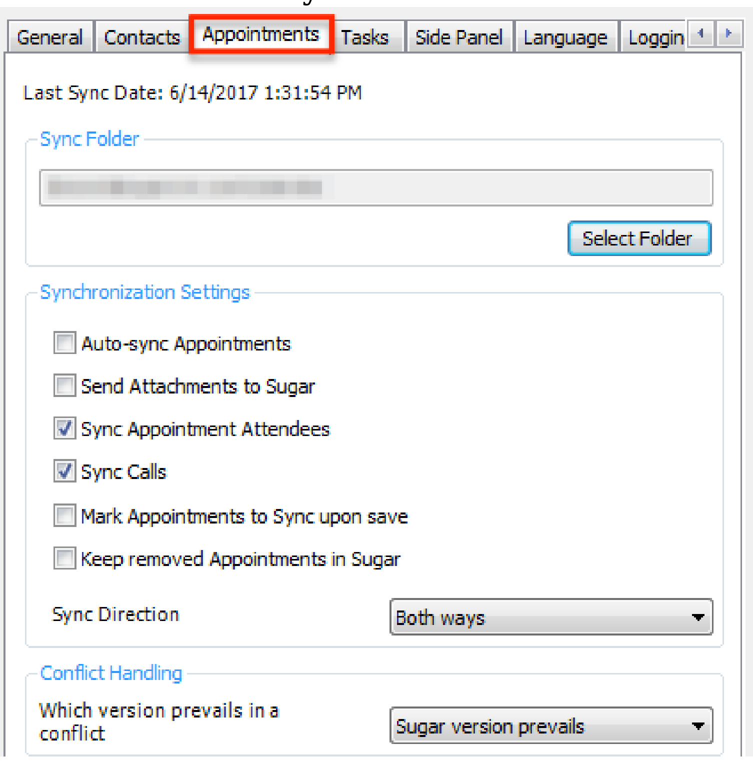
The following options are available to configure the sync settings for contacts:

- **Sync Folder**: Designate a folder in your Outlook mail server to have the Sugar plug-in sync contacts to and from. A contacts folder is automatically selected by default on the backend even if you do not designate a folder in this section.
  - **Note**: It is not recommended that you change the designated synced folder after utilizing the Sugar plug-in. Changing the sync folder will cause any contacts marked to sync before changing your sync folder to no longer sync between Outlook and Sugar.
- **Auto-sync Contacts**: Select if you want to automatically sync both your Outlook contacts to Sugar, as well as your Sugar contacts to Outlook. In both directions, only the contacts marked for sync will be pushed.
  - **Note**: The "Automatically sync every" option must be enabled under the General tab if you want to use the auto-sync feature for contacts.
- **Send Attachments to Sugar**: Select if you want to sync files attached to the Outlook contact to Sugar.
- **Mark Contacts to Sync upon save**: Select if you want to automatically mark new contacts for sync upon save in Outlook.
- **Filter duplicate contacts**: Select if you want to have duplicate contacts detected during synchronization from Outlook to Sugar and Sugar to Outlook. Once enabled, if a duplicate contact is found, the data will be synced to the matching record.
- **Create Account when creating Contact**: When auto-sync is enabled, select this option if you want the plug-in to automatically create a new account in Sugar when an account record with the contact's account name

is not found. Deselect this option if you never want the plug-in to create a new account when auto-syncing contacts.
- **Sync Direction**: Select the direction of the data synchronization for contacts between Outlook and Sugar.
  - **Both ways**: Sync data both ways between Outlook and Sugar.
  - **One way (Sugar to Outlook)**: Sync data only from Sugar to Outlook.
  - **One way (Outlook to Sugar)**: Sync data only from Outlook to Sugar.
- **Conflict Handling**: Specify how you want to handle conflicts between Outlook and Sugar when syncing. For more information, refer to the Conflict Handling section of this page.

Appointment Settings

The Appointments tab allows you to designate a calendar folder for sync of your calls and meetings, configure the sync settings, and designate how conflicts should be handled between Sugar and Outlook. At the top of the Appointments tab, you can see the date and time of the plug-in's most recent sync for calls and meetings next to the "Last Sync Date" label.



The following options are available to configure the sync settings for appointments:

- **Sync Folder**: Designate a folder in your Outlook mail server to have the Sugar plug-in sync calls and meetings to and from. A calendar folder is automatically selected by default on the backend even if you do not designate a folder in this section.

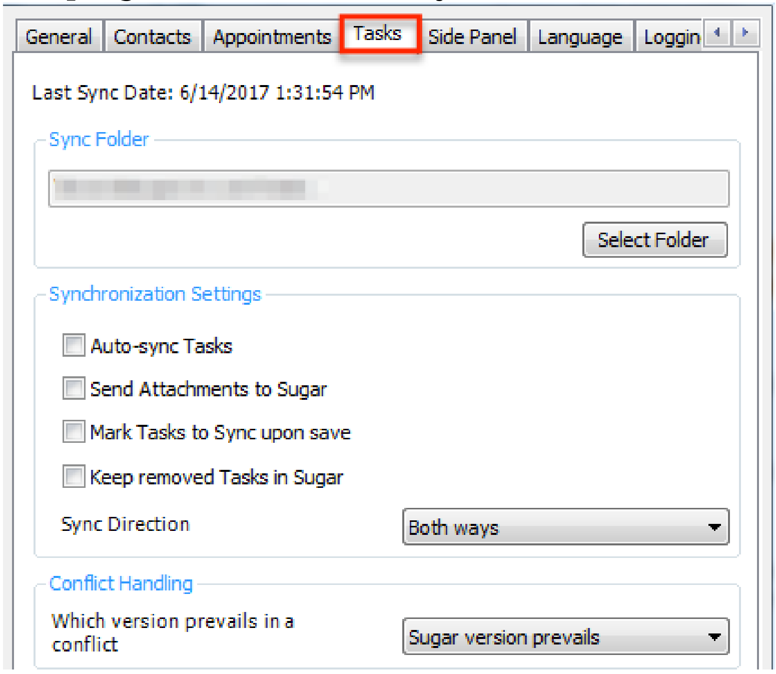
  - **Note**: It is not recommended that you change the designated synced folder after utilizing the Sugar plug-in. Changing the sync folder will cause any meetings and calls that are marked to sync before changing your sync folder to no longer sync between Outlook and Sugar.

- **Auto-sync Appointments**: Select if you want to automatically sync both your Outlook meetings and calls to Sugar, as well as your Sugar meetings and calls to Outlook. In Outlook, only the calls and meetings marked for sync will sync; in Sugar, only the calls and meetings assigned to the authenticated user will sync.
  - **Note**: The "Automatically sync every" option must be enabled under the General tab if you want to use the auto-sync feature for appointments.
- **Send Attachments to Sugar**: Select if you want to sync files attached to the Outlook meeting or call to Sugar. The synced attachments will appear in the Notes subpanel of the "Meeting" or "Call" record in Sugar.
  - **Note**: The Sugar plug-in will sync attachments for meetings and calls that are synced to Sugar after this option has been enabled. The sync with Sugar will not retroactively pick up any previously synced calls or meetings with attachments unless a change (e.g. change start date) has been made to the record to be included in the synchronization process.
- **Download Appointment Attendees**: Select if you want to have the invitee's information (name and email address) appear in the attendees list when Sugar meetings are synced to Outlook.
- **Sync Calls**: Select if you want to sync calls between Outlook and Sugar. The calls must be marked for sync in Outlook in order to be pushed to Sugar.
- **Mark Appointments to Sync upon save**: Select if you want to automatically mark new calls and meetings for sync upon save in Outlook.
- **Keep removed Appointments in Sugar**: Select if you want to preserve synced meeting and call records in Sugar when the activity is deleted or archived in Outlook.
  - **Note**: The Sugar call and meeting records will be unlinked and will no longer be included in future syncs going forward.
- **Sync Direction**: Select the direction of the data synchronization for meetings and calls between Outlook and Sugar.
  - **Both ways**: Sync data both ways between Outlook and Sugar.
  - **One way (Sugar to Outlook)**: Sync data only from Sugar to Outlook.
  - **One way (Outlook to Sugar)**: Sync data only from Outlook to Sugar.
- **Conflict Handling**: Specify how you want to handle conflicts between Outlook and Sugar when syncing. For more information, refer to

the [Handling Conflicts](#) section of this page.

Task Settings

The Tasks tab allows you to designate a task folder for sync, configure the synchronization settings, and designate how conflicts should be handled between Sugar and Outlook. At the top of the Tasks tab, you can see the date and time of the plug-in's most recent sync for tasks next to the "Last Sync Date" label.



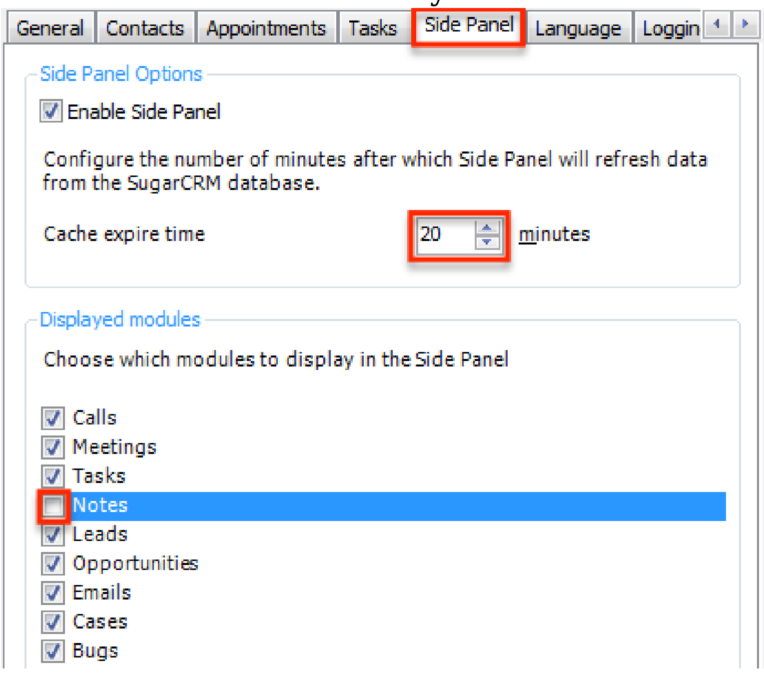
The following options are available to configure the sync settings for tasks:

- **Sync Folder**: Designate a folder in your Outlook mail server to have the Sugar plug-in sync tasks to and from. A tasks folder is automatically selected by default on the backend even if you do not designate a folder in this section.
    - **Note**: It is not recommended that you change the designated synced folder after utilizing the Sugar plug-in. Changing the sync folder will cause any tasks that are marked to sync before changing your sync folder to no longer sync between Outlook and Sugar.
- **Auto-sync Tasks**: Select if you want to automatically sync both your Outlook tasks to Sugar, as well as your Sugar tasks to Outlook. In Outlook, only the tasks marked for sync will sync; in Sugar, only the tasks assigned to the authenticated user will sync.
    - **Note**: The "Automatically sync every" option must be enabled under the General tab if you want to use the auto-sync feature for tasks.
- **Send Attachments to Sugar**: Select if you want to sync any files attached to the Outlook task to Sugar. The synced attachments will appear in the Notes subpanel of the Task record in Sugar.

- ◦ **Note**: The Sugar plug-in will sync attachments for tasks that are synced to Sugar after this option has been enabled. The sync with Sugar will not retroactively pick up any previously synced tasks with attachments unless a change (e.g. change due date) has been made to the record to be included in the synchronization process.
- **Mark Tasks to Sync upon save**: Select if you want to automatically mark new tasks for sync upon save in Outlook.
- **Keep removed Tasks in Sugar**: Select if you want to preserve synced task records in Sugar when the task is deleted in Outlook.
    - **Note**: The Sugar task records will be unlinked and will no longer be included in future syncs going forward.
- **Sync Direction**: Select the direction of the data synchronization for tasks between Outlook and Sugar.
    - **Both ways**: Sync data both ways between Outlook and Sugar.
    - **One way (Sugar to Outlook)**: Sync data only from Sugar to Outlook.
    - **One way (Outlook to Sugar)**: Sync data only from Outlook to Sugar.
- **Conflict Handling**: Specify how you want to handle conflicts between Outlook and Sugar when syncing. For more information, refer to the Handling Conflicts section of this page.

Side Panel Settings

The Side Panel tab allows you to enable and configure the side panel.



The following options are available to configure the side panel:

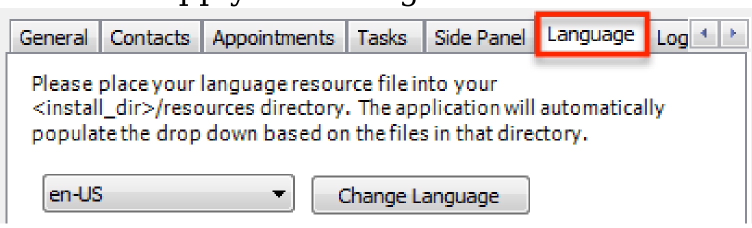
- **Enable Side Panel**: Enable or disable the Side Panel in the Mail, People, Calendar, and Task views to view Sugar record (e.g. contact) details.
- **Cache expire time**: Choose how many minutes to locally store information accessed in the side panel. The plug-in will only retrieve a record's details from Sugar periodically to prevent unnecessary performance degradation on the instance. Once the cache expire time has elapsed, accessing the Sugar record (e.g. contact) again will refresh the information from Sugar.
- **Displayed Modules**: Select which related-module subpanels (e.g. Calls, Meetings, Tasks) to display in the side panel when viewing emails in the mail view. All modules are selected by default To hide a module's subpanel, uncheck the box to the left of the module name (e.g. Notes). Select the checkbox again to enable the module's subpanel for display in the side panel.

Language Settings

The Language tab allows you to select the default language localization to be used for all plug-in related labels (e.g. Sugar Options window, confirmation notices, etc.).

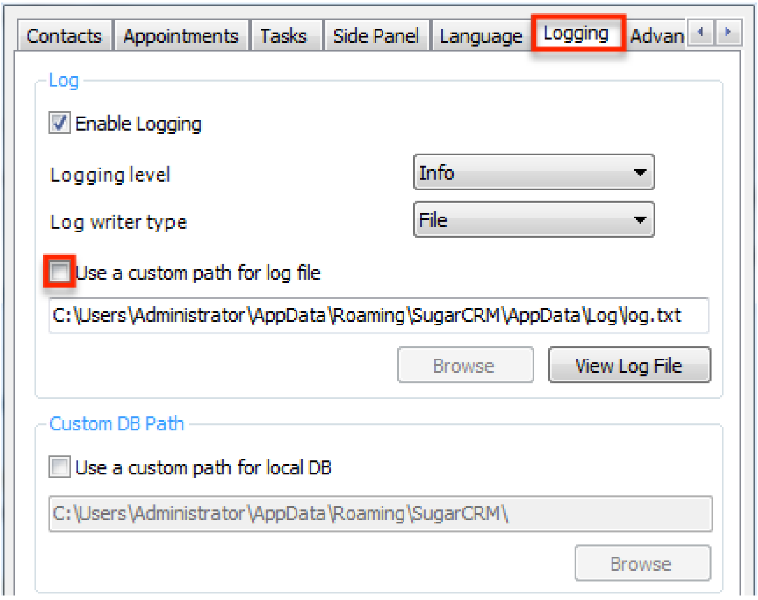
Note: The available language options are encoded according to ISO standards.

Once you have selected your preferred language, click the Change Language button to apply the change.



Logging Settings

The Logging tab allows you to enable and configure error logging.

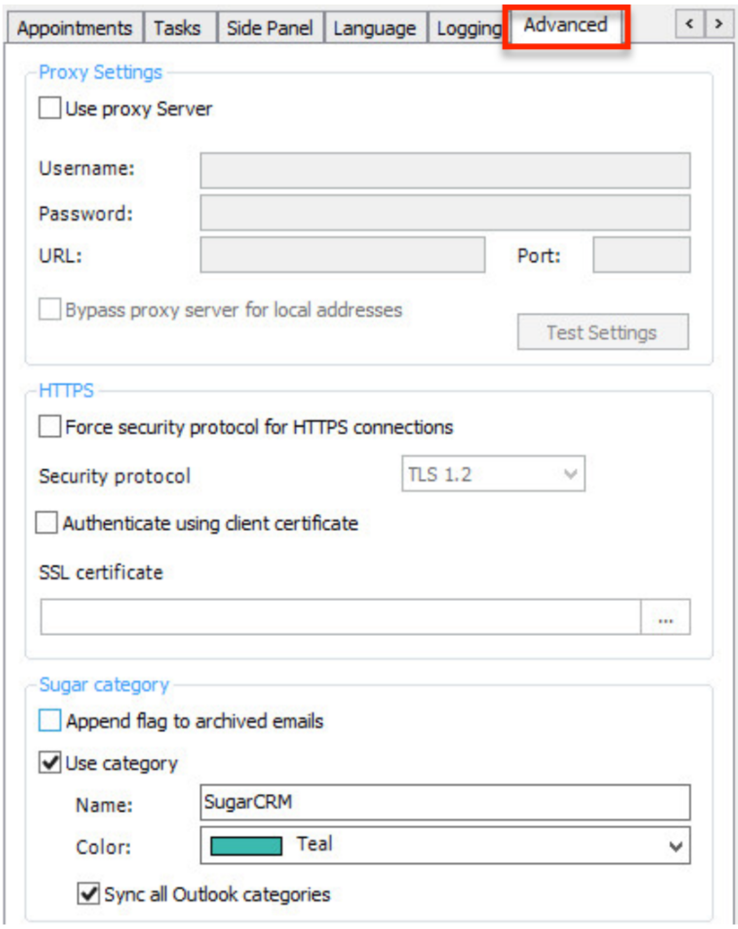


The following options are available to configure the log:

- **Enable Logging**: Enable logging to capture any errors in the Sugar plug-in.
- **Logging level**: Specify the logging level (e.g. Fatal, Error) you want to capture in the log.
- **Log writer type**: Select the log writer type (e.g. File, Windows event log) to capture the errors.
- **Use a customer path for log file**: There is a default path specified where the log file will be created and stored. If you want to specify a custom path for the log file, enable this option and select a valid path.
- **View Log File**: Once logging is enabled, you can click the View Log File button at any time to generate and access the log file.
- **Use a custom path for the DB**: The plug-in uses a database to store local information about records that have been updated and which version of a synced record is the most recent. By default, the sugar.db file is in the c:\Users\[home directory]\AppData\Roaming\SugarCRM\[the instance's host name] directory. Enable this option and select a custom path if you would like to store the database file elsewhere.
    - **Note**: The instance's name will not be controlled by this setting. The Sugar Plug-in for Microsoft Outlook will use the path provided to open a directory using the instance's hostname and then store the sugar.db file there.

Advanced Settings

The Advanced tab contains performance and protocol settings and allows you to configure the Outlook category and flag color for synced and archived records.



- **Proxy Settings**: If you are using a proxy to connect to the Internet (not common), enable the "Use proxy server" option and complete the fields in this section. Contact your network administrator if you need assistance completing these fields.
- **Force security protocol for HTTPS connections**: If you want to force Sugar Plug-in for Outlook to connect to your instance using a particular security protocol for HTTPS connection, enable the "Force security protocol for HTTPS connections" checkbox and select your security protocol type (e.g. TLS 1.2, TLS 1.1, etc.).
- **Authenticate using client certificate**: Have the Sugar Plug-in for Outlook connect to your Sugar instance with your own SSL certificate. Once enabled, click the "..." button in the SSL certificate field to select the certificate file.
- **Append flag to archived emails**: Enable this option to mark archived emails with a flag in Outlook. Changing the flag setting will not affect previously archived Outlook records.
- **Use category**: By default, the Sugar plug-in tags record(s) with the "SugarCRM" category to help you identify Outlook records that have been archived or marked for sync. When Outlook records (e.g. contacts, meetings) are synced with Sugar for the first time, the SugarCRM category is added to the Sugar record's Tags field. For more information on how tags

are used in Sugar, refer to the Tags documentation.

- **Name**: If you want to change the category's label to something other than "SugarCRM", enter the custom text for the category's label. Changing the Outlook category's name will not affect emails already archived to Sugar, but you may want to re-archive a previously archived email to Sugar to append the new category on top of the existing category.
- **Color**: Choose your preferred color for the category's label in Outlook. Going forward, the archived, marked for sync, and synced records will be classified with the new color in Outlook's record view, list view, and calendar view.
- **Sync all Outlook categories**: Enable this option if you want all categories assigned to an email in Outlook to sync to Sugar as tags on the email record. When disabled, only the SugarCRM category (e.g. "SugarCRM" or the label set in the category's Name field) will sync to Sugar as a tag on the email record.

Note: The SugarCRM Plug-in for Outlook relies on the SugarCRM email category to identify that a message has been archived.

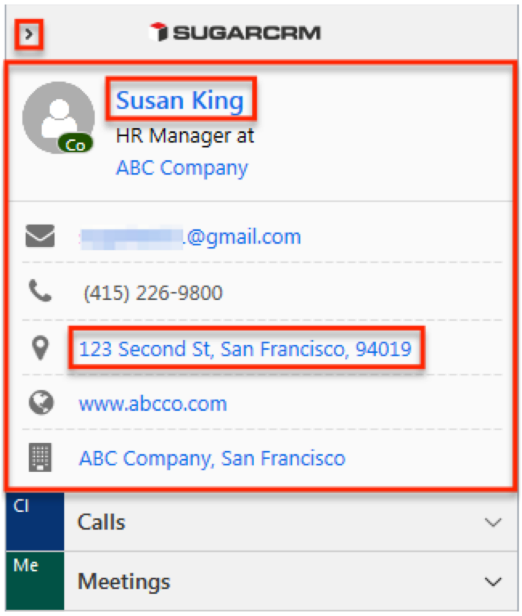
The SugarCRM Side Panel

When accessing the Mail, People, Tasks, or Calendar views in Outlook, the SugarCRM side panel appears on the far right of the screen. If you do not see the SugarCRM side panel, confirm that it is enabled in the Side Panel Settings.

The side panel for the People, Tasks, and Calendar views will display details from Sugar for Outlook records that have already been synced. When accessing a record (e.g. contact) in Outlook, the plug-in will look for the synced record in Sugar and display key information such as address, and phone number from the record's business card panel. The Sugar data that displays in the side panel will vary depending on the module record you are viewing.

Side Panel Behavior

The following list describes some of the basic functions of the SugarCRM side panel in Outlook:



- You can expand and collapse the side panel by clicking the arrow on the upper left of the side panel. The collapsed or expanded state of the side panel will apply to all Outlook views and will be preserved upon subsequent visits to Outlook.
- The side panel for the People, Tasks, and Calendar views will display details from Sugar for any Outlook records that have already been synced.
- You cannot edit Sugar records via the side panel Outlook.
- Click the record's hyperlinked name to open and, if your role permits, edit the Sugar record (e.g. contact, meeting) in your browser.
- Click on an email address to start composing a new email to that recipient.
- Click on a hyperlinked postal address to open the location via Google maps in your browser.
- When viewing the side panel from an Outlook appointment or meeting, you can see invitee details from Sugar appear in the Guests panel.
- Double-click anywhere in the side panel's header to reload the data and force a refresh in real-time.
- Some side panel options can be configured via the plug-in's Side Panel Settings.
- Some side panel features are specific to the Mail view. For more information, refer to the Side Panel for Mail View section below.

Users can only view record details in the Outlook side panel as allowed by their Sugar team membership and assigned roles in Sugar. If any changes are made to the user's assigned role in Sugar, the user must restart Outlook to reflect the permission changes in the side panel. For more information on teams and roles, refer to the Team Management and Role Management documentation.

To prevent performance strain on the instance, the plug-in will only periodically retrieve a record's details from Sugar. The "Cache expire time" option in your

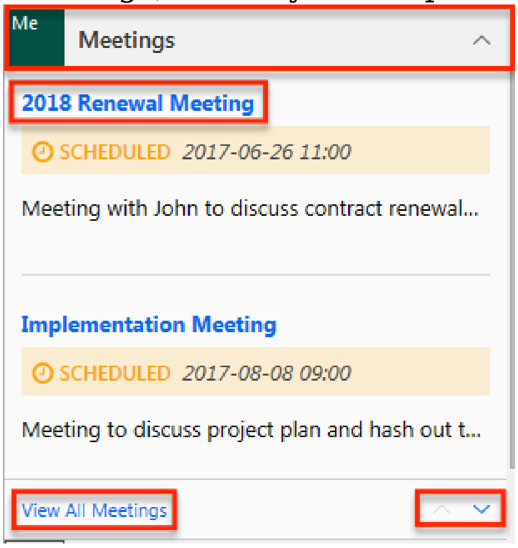
[SugarCRM Plug-in Settings](#) allows you to choose how many minutes to locally store information accessed in the side panel. Once this time period has elapsed, accessing the record again in Outlook will cause a refresh of the side-panel information from Sugar. To force a refresh in real-time, you can double-click anywhere in the side panel's header to reload the data.

Side Panel Subpanels

Beneath the record's key details in the SugarCRM side panel, there are subpanels that contain related records from other Sugar modules (e.g. Meetings, Calls, Emails). You can control which related modules' subpanels are displayed by enabling and disabling modules in the plug-in's Side Panel Settings.

Note: Users who are assigned to a role in Sugar that restricts access or view permission for a module (e.g. Bugs) will also be restricted from viewing the module's subpanel in the side panel.

Each subpanel will display up to two most recently updated related records. If there are more than two related records for the module, the "View All {Module Name}" link will appear at the bottom of the subpanel in addition to the Down (expand) and Up (collapse) arrows. Click the Down arrow to load the next set of related records in groups of five. Click the Up arrow to collapse the subpanel back to the default view. To view all related records, click the "View All {Module Name}" link and you will be directed to the specific module's list view (e.g. Meetings) where you can perform a search to retrieve the related records.



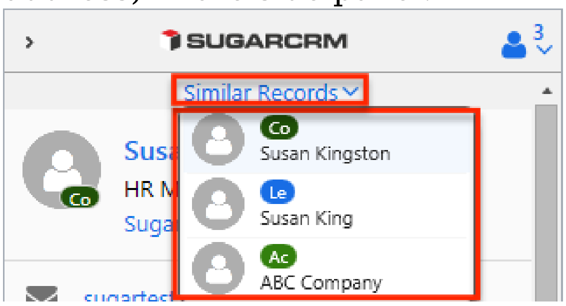
Each related record in the subpanel will display summary information such as the record's name, status, and description. To view the record's complete details, simply click the record's name (e.g. 2018 Renewal Meeting) to access the record view in Sugar. You can also collapse or expand the subpanel by clicking anywhere in the subpanel's header.

Side Panel for Mail View

As you access each email message from the mail view in Outlook, the plug-in will perform a search to locate any matching Sugar contact, lead, or account records based on the current email's From, To, and CC fields. The logged-in user's email address will be disregarded in the plug-in search. So if you are the sender of the email, then the plug-in will search for the recipients in the To field. Any contact, lead, or account record in Sugar with a matching email address (e.g. primary, secondary, etc.) to the sender or recipient(s) of the email will be considered a match. If a matching record (e.g. contact) is found, the Sugar record's information will display in the Side Panel to the right of the reading pane. If there is no matching record found in Sugar, then the side panel will indicate that no record was found and allow you to create a new record. For more information on creating a new Sugar record via the side panel, refer to the Creating Contacts and Leads via Side Panel section below.

Viewing Similar Records via Side Panel

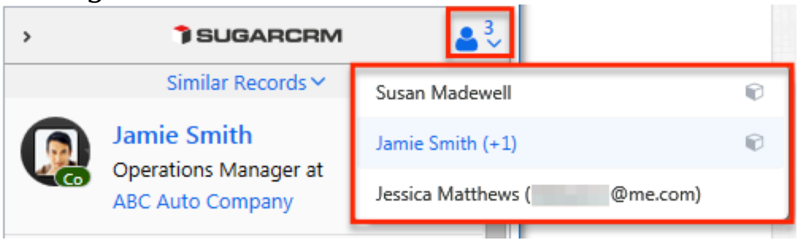
During the plug-in search, Sugar may find multiple records (e.g. contacts, leads, accounts) with email addresses that match the email's recipients. If there are multiple Sugar records detected as a match for a particular email contact (e.g. Susan Kingston), the Similar Records dropdown menu will appear at the top of the side panel. Click the link to view the list of all matching Sugar records, then select a record's name from the list to view the record's details (e.g. name, email address) in the side panel.



If the current email contains more than one recipient, a number will appear on the upper right of the side panel to represent the total count of email contacts detected based on email addresses (not including the user's) in the From, To, and CC fields. Simply click the down arrow to view the list of all detected contacts.

If a matching Sugar record exists, a Sugar cube icon will display to the right of the individual's name. If there are no matching records in Sugar, the Sugar cube icon will not be displayed for the email contact (e.g. Jessica Matthews), but you will be able to create a new Sugar contact or lead via the Side Panel. For more information on creating new records, refer to the Creating Contact or Lead via Side Panel section.

If there are multiple Sugar records detected as a match for a particular email sender or recipient (e.g. Jamie Smith), a number (+1) will appear in parentheses to the right of the name to indicate this, and the [Similar Records](#) dropdown menu will appear at the top of the side panel when viewing the record's details. You can select the email recipient (e.g. Jamie Smith) that you want to view from the Email Contacts dropdown and the matching Sugar record (if applicable) will display in the side panel. To view more information about the contact, click the record's name (e.g. Jamie Smith) in the side panel and the corresponding record will open in Sugar.

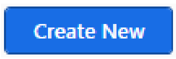
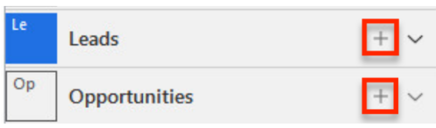
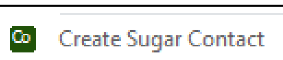


Once you have reviewed and created (as necessary) the records in the side panel, you can archive the current email to Sugar via the Archive to Sugar option. For more information on archiving emails to Sugar, refer to the Archiving Emails to Sugar section of this page.

Creating Sugar Records From Outlook

Users have the ability to create new Sugar records from various locations in Outlook. When you select the create option, the module-specific create form will open allowing you to enter the information for the record. Once you have completed the create form, click "OK". A duplicate check is automatically performed to ensure that no duplicate records are created in Sugar. If no duplicate records are detected, the new record is instantly created in Sugar.

The following table summarizes the various options to create new Sugar records in Outlook along with where you can expect to find these options:

Location(s)	**Option Name**	**Option Appearance**
Mail View ribbon	New Sugar Record	
Mail View side panel	Create New	
Side panel	Plus icon	
Archiving Email window	Create	
Email right-click menu	Create Sugar Contact	

[Email right-click menu](#)	Create Sugar Lead	
The ["Set Company to Sugar Account"](#) option when creating a new Outlook contact. The Account field's Select option on the [create form](#) (e.g. Create a Contact)	Create New Account	

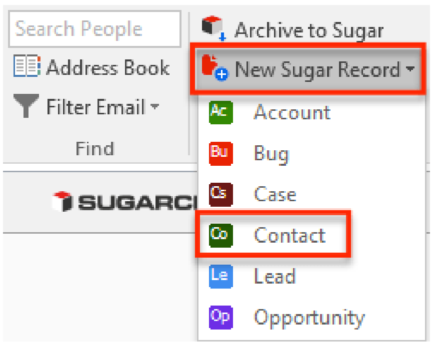
Note: Users assigned to a role in Sugar that restricts access or edit permission for a module (e.g. Accounts) will not be able to create a new record for that module.

Note: When creating a case or bug, the subject and description in the create form will be auto-populated based on the selected email you are archiving to the record. You can update the fields accordingly before creating the record in Sugar.

One example of creating new Sugar records is via the New Sugar Record option in the Mail view ribbon. Simply select the module (e.g. Contact) you want to create a new record for then complete the create form accordingly. You can also archive emails to the new record by selecting the email(s) before clicking the New Sugar Record option.

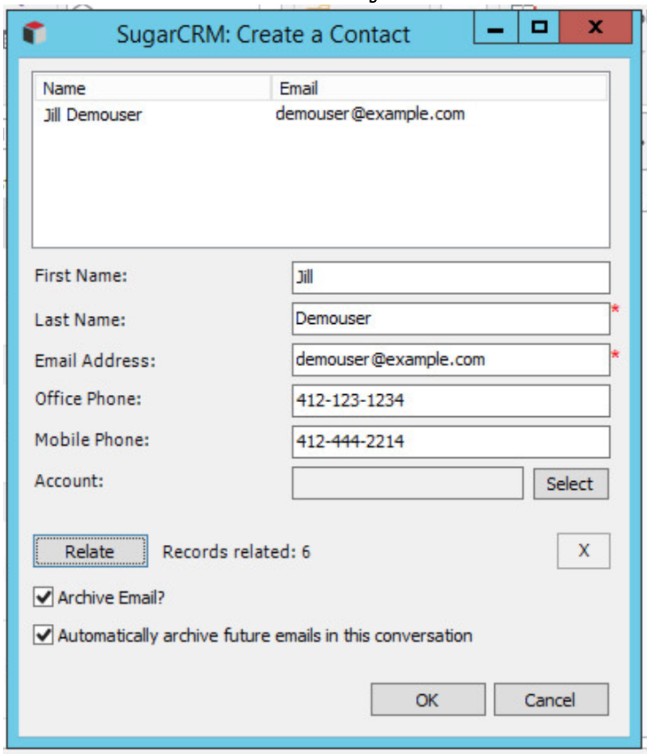
The following steps cover creating a new contact via the New Sugar Record option as an example:

1. Navigate to the Mail view in Outlook, click "New Sugar Record" in the ribbon, then select "Contact".
    - **Note**: If a module is hidden in Sugar, you will not be able to select the module for creation via the New Sugar Record option.

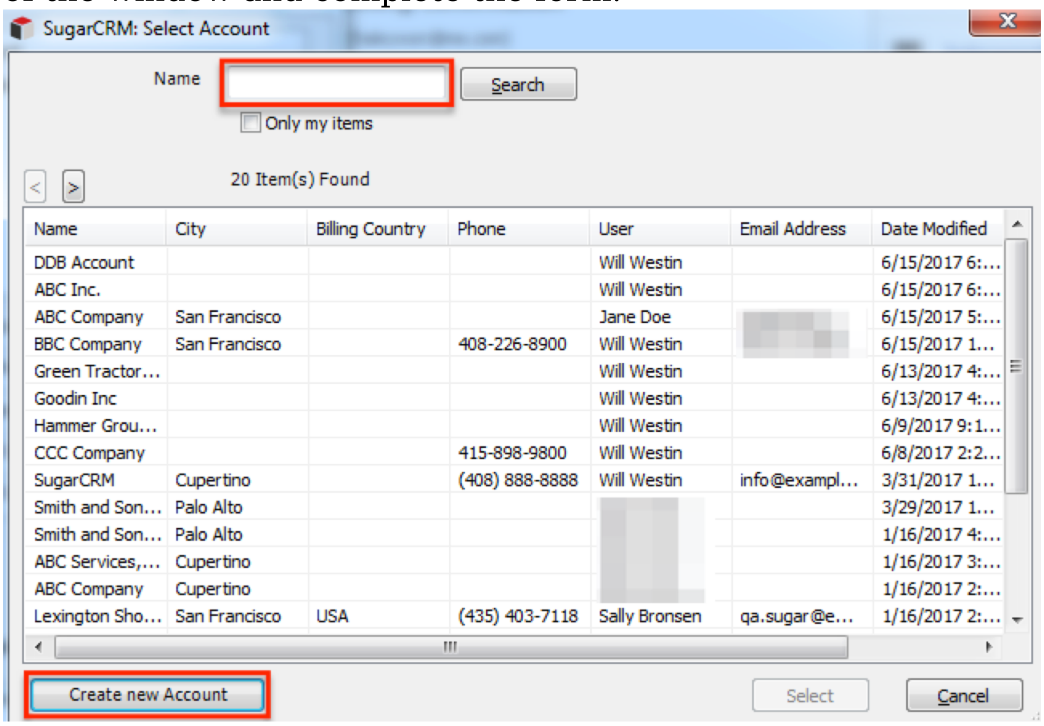
      

2. Enter the contact information in the Create a Contact form. All required fields will be marked with a red asterisk and must be completed prior to clicking "OK".
    - **Note**: The "Archive Email?" checkbox will be selected if you have your inbox open and have chosen "Enable auto-archive checkbox by default" in your Mail preferences. Simply uncheck the box if you do

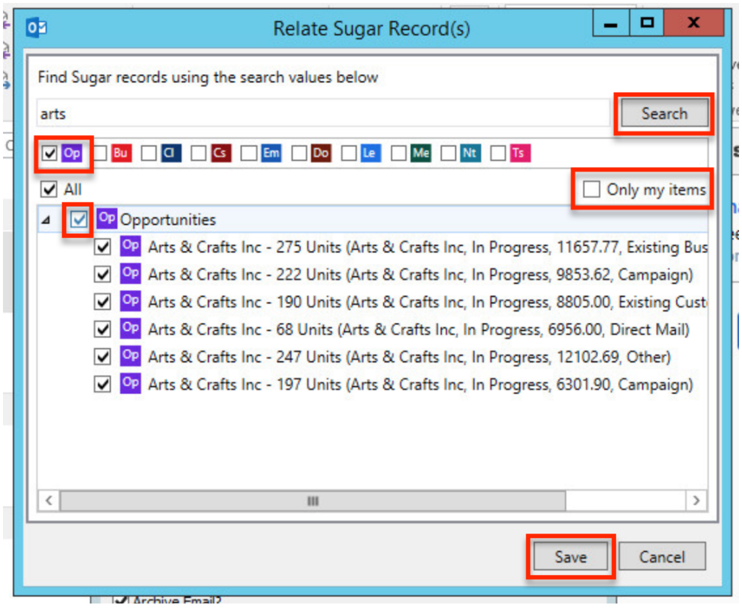
not want to archive any emails to the new Sugar record.



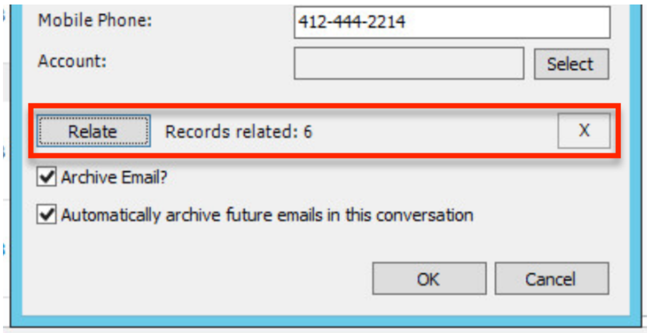
3. To relate the new contact to a new or existing account, click "Select" to the right of the Account field. Use the search box to search for an existing Sugar account or click the "Create New Account" button on the bottom left of the window and complete the form.



4. To relate the new contact to additional records in Sugar (optional), click the "Relate" button.
    - As an example, you may want to create a new contact and relate it to all existing opportunities for an account:



- Click "Save" after selecting the records and the Create a Contact form will now show the number of selected related records:



- To select additional records to relate, simply click "Relate" again and search for and select the additional records. They will be added to the count of related records.
- To un-relate the selected records before saving the new contact, click the "X" button adjacent to the Relate options.
- The number of related records shown is exclusive of the account record you may have chosen in the Account field.

5. Once you have completed the required fields and the desired options, click "OK".

The new contact record will be instantly created in Sugar assigned to your default team.

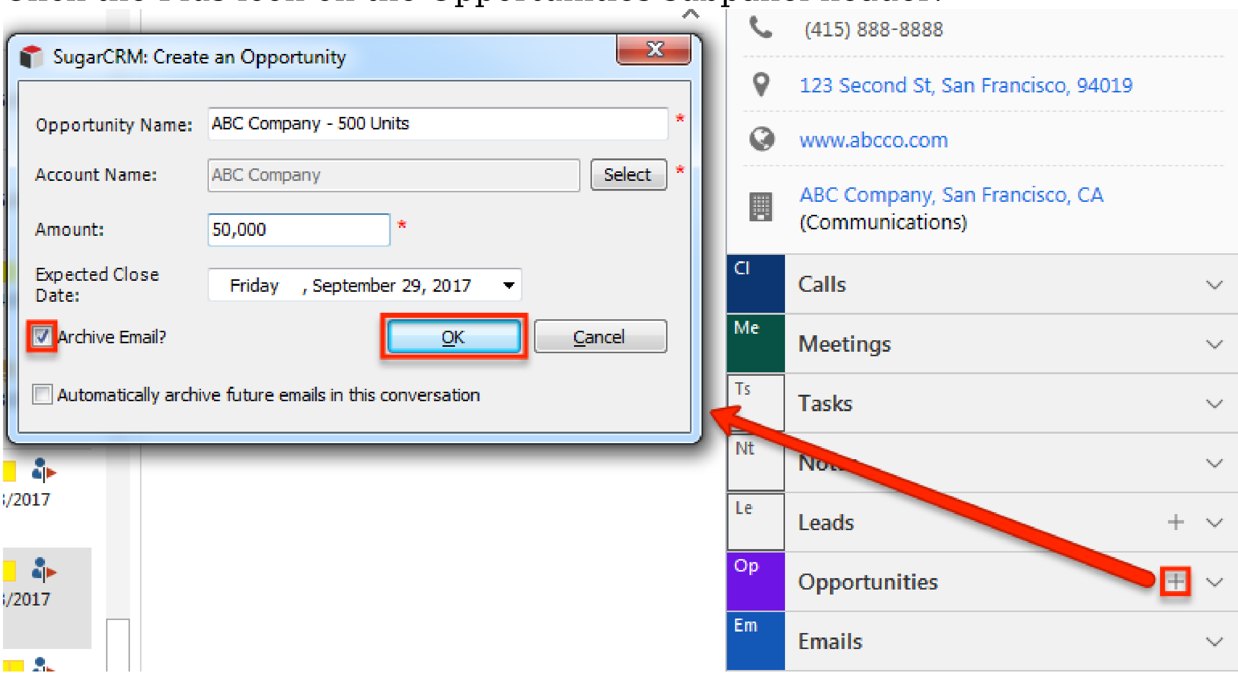
Creating Sugar Records via Subpanels

You can create related records directly from subpanels by clicking the Plus icon on the subpanel header. The create option is only available for certain subpanels in the side panel: Accounts, Bugs, Cases, Contacts, Leads, and Opportunities. For more information on creating new Sugar records, refer to the Creating New Sugar Records section of this page

Note: Users assigned a role in Sugar restricting access or edit permission for a module (e.g. Bugs) will not be able to create a new record for that module.

The following steps cover creating an opportunity via the Opportunities subpanel as an example:

1. Click the Plus icon on the Opportunities subpanel header.



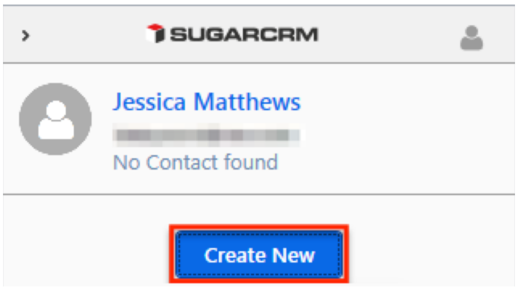
2. Enter appropriate values in the fields. The "Archive Email?" checkbox will be selected if any emails are selected in the Mail view. Simply uncheck the box if you do not want to archive any emails to the new Sugar record.
3. Click "OK" to complete the action.

The Sugar plug-in will instantly create the new opportunity record in Sugar assigned to your default team. To view the opportunity record, simply navigate to the related module's (e.g. Contacts) record view in Sugar then scroll down to the Opportunities subpanel.

Creating Contacts and Leads via Side Panel

When there is no matching record found in Sugar for an email sender or recipient, the side panel will display a "No Contact found" message and allow you to create a new record by clicking the Create New button.

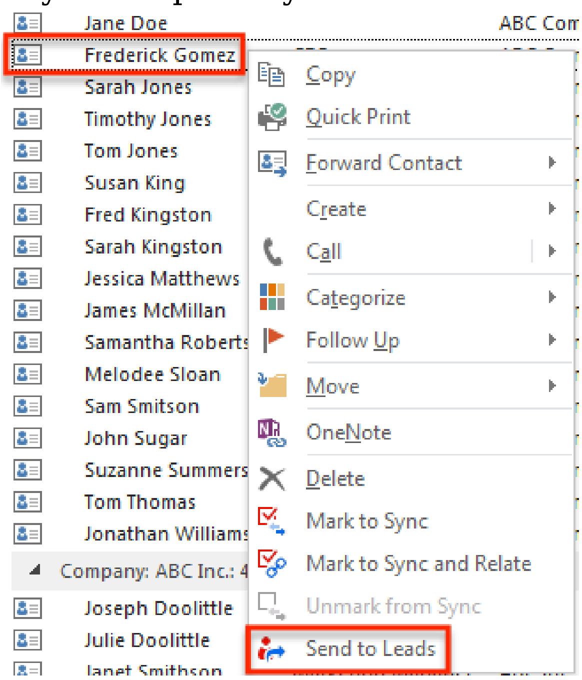
Note: Users assigned to a role in Sugar that restricts access or edit permission for a module (e.g. Leads) will not be able to create a new record for that module.



Once you click the Create New button, you can select either "Contact" or "Lead" to create the new Sugar record. So, for example, selecting the Contact option will open the "Create a Contact" form, allowing you to enter the contact's details. For more information on completing the form and creating the Sugar record, refer to the Creating New Sugar Records section of this page.

Creating Sugar Leads from Outlook Contacts

You can push Outlook contacts to the Leads module in Sugar by right-clicking on the contact's row and selecting "Send to Leads". This option can only be used if the Outlook contact is not already marked for sync with Sugar. A duplicate check will be performed when pushing the lead to Sugar, and if a duplicate lead is found with a matching name and email address, the lead record will not be created in Sugar. The Send to Leads option is a one-time push to Sugar and there will not be any subsequent syncs to the Lead record after the initial sync.

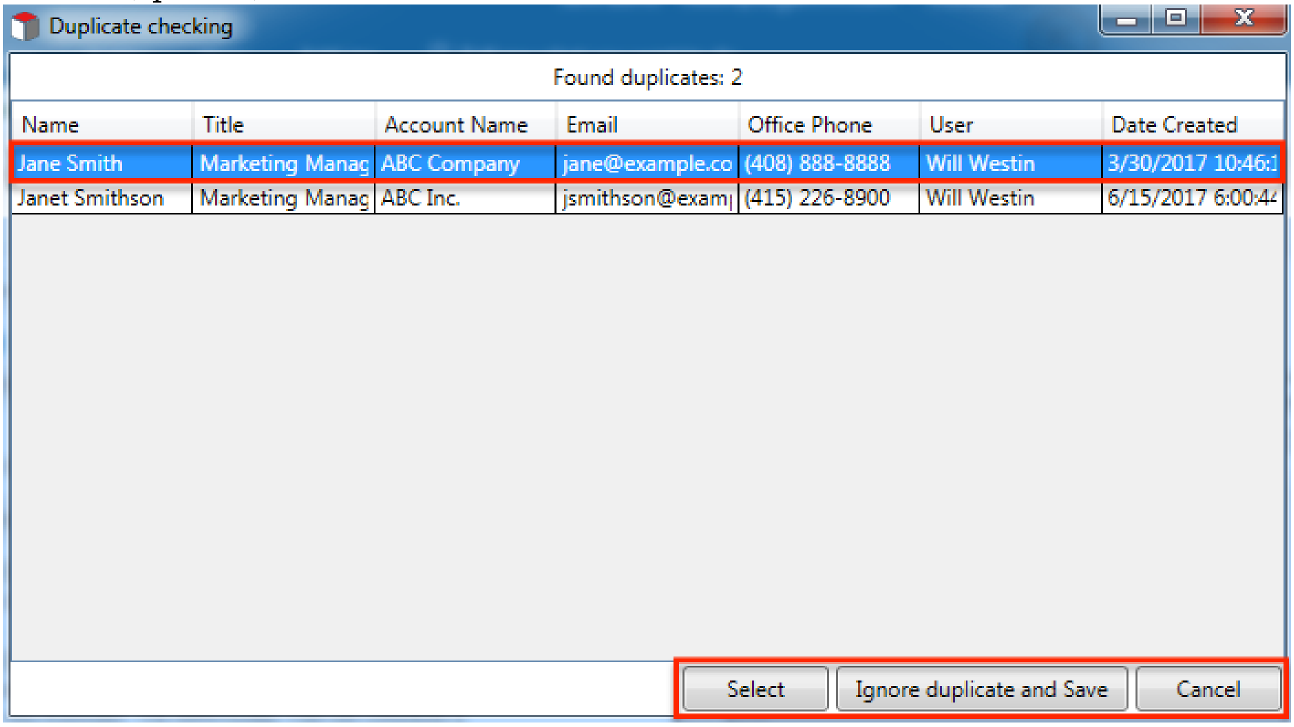


You can also create new leads in Sugar by clicking the New Sugar Record option in the ribbon on the Mail view, then selecting "Lead". For more information on creating new records via the New Sugar Record option, refer to the Creating New

Sugar Records section of this page.

Detecting Duplicates When Creating Sugar Records

When creating new Sugar records via Outlook, a duplicate check is automatically performed to help ensure that no duplicate records are created in Sugar. The duplicate-check process initiates once you complete the create form and click "OK". If the record you are creating is detected as a duplicate of an existing Sugar record, the Duplicate checking window will appear displaying the list of duplicate records along with key details such as name, subject, email address, related account, phone, etc.



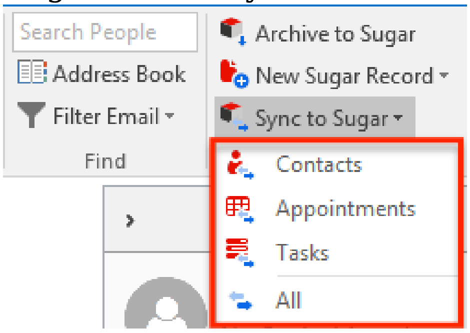
Note: For contacts, you have the option to enable or disable duplicate check during sync via the "Filter duplicate contacts" option in the SugarCRM Plug-in Settings.

If one of the displayed Sugar records is a true match, click the specific record then click the Select button. This action will overwrite any data you have entered on the form with the selected Sugar record's values. You can change the create form's fields then click "OK" to push any desired updates to the existing Sugar record.

If you want to proceed with creating a new record, simply click the "Ignore Duplicate and Save" button and the new Sugar record will be created instantly. If you do not want to select or create a record, simply click the "Cancel" button and you will return to the previous create form.

Syncing Sugar and Outlook Data

To sync records that have been marked for sync bidirectionally between Outlook and Sugar, click the Sync to Sugar option in the ribbon and select the Outlook entity that you want to sync. For example, if you only want to sync contacts, then select "Contacts" from the Sync to Sugar menu. To sync all marked contacts, appointments, and tasks at the same time, then select "All" from the menu. Any new and updated marked-for-sync records since the last sync between Outlook and Sugar will be synced each time the sync is initiated.



When an Outlook record syncs with Sugar, it will create a new record in Sugar on the first sync and, in future automatic and manual syncs, replicate any updates made to the synced records in Sugar or in Outlook between the two systems. During the sync process, a dialog box will appear indicating that records are being synced between Outlook and Sugar, and the box will close once the sync completes. You can continue to use Outlook and the Sugar plug-in's features during the synchronization process.

If any records fail to sync during the sync process, you will be provided with detailed information (sync date, record type, record name, the cause of fail) via a dialog box regarding the affected records. Please note that you can also access the log file via the SugarCRM Plug-in Settings window to view information regarding the records that failed to sync. If you wish to be notified of records that fail to sync during the auto-sync process, please make sure that the Display Auto-sync Dialogs option is enabled in the SugarCRM Plug-in Settings window. Records that fail to sync will be unmarked from sync and excluded from future sync actions. If the issue causing the record(s) to fail sync is corrected and the record is marked for sync, it will be included in the next subsequent sync.

Some situations and record types require special consideration for sync activities. For more information, refer to the following sections, which outline the rules of synchronization.

- Sync Features and Limitations
- Sync Rules for Contacts
- Sync Rules for Calls and Meetings

- [Sync Rules for Recurring Calls and Meetings]
- [Sync Rules for Data Conflicts]

Sync Features and Limitations

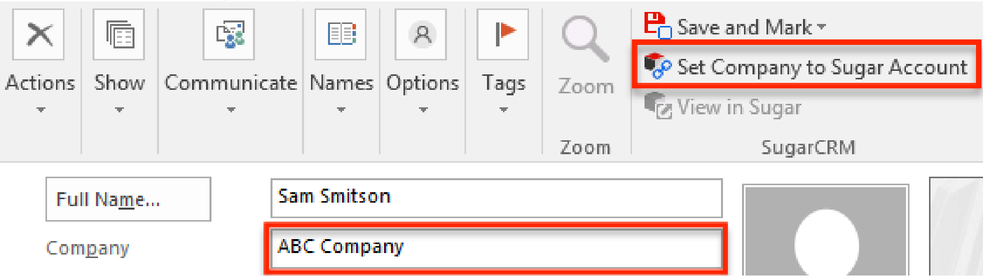
Keep in mind the following general rules of sync behavior between Sugar and Outlook:

- **Syncing to Sugar**: Only records in Outlook that have the Mark to Sync option enabled will be synced to Sugar. Outlook records that are marked for sync will automatically be marked with the SugarCRM category if "Use category" is enabled in the plug-in's Advanced settings.
- **Syncing to Outlook**: Only Sugar records (e.g. contacts, meetings, calls, tasks) that meet specific requirements will be synced to Outlook. Sugar records that are synced to Outlook will automatically be marked with the SugarCRM category if "Use category" is enabled in the plug-in's Advanced settings.
    - **Syncing calls to Outlook**: When Sugar calls are synced to Outlook, the subject line will automatically include "[Call]" by default.
- **Role restrictions**: If you are assigned to a role that restricts access to the Contacts, Calls, Meetings, or Tasks module, the sync between Outlook and Sugar will not work for the particular module (e.g. Contacts). In addition, certain Sugar options (e.g. Sync to Sugar, Mark to Sync, etc.) in the ribbon and in the right-click menu will be disabled. For calls and meetings, the Sugar options (e.g. Sync to Sugar, Mark to Sync, etc.) in the ribbon and in the right-click menu will still be enabled as long as the user has access to one of the modules (e.g. Meetings). If any changes are made to a user's role settings in Sugar, Outlook must be restarted to reflect the changes.
- **Private flag**: Unless "Ignore private flag when syncing" has been enabled, Outlook records that have the Private flag set will demonstrate the following sync behavior:
    - **Private Contacts and Tasks**: If a private contact or task is marked for sync in Outlook, it will not be synced to Sugar.
    - **Private Calls and Meetings**: If a private call or meeting is marked for sync in Outlook, it will sync to Sugar unidirectionally; changes made to the record in Sugar will not sync back to Outlook, allowing the user to overwrite personal call or meeting names in Sugar for privacy without losing data in Outlook. Any subsequent changes to a private call or meeting made on the Outlook side will, on sync, overwrite changes that may have been made in Sugar.

Note: The Sugar Plug-in for Microsoft Outlook maintains an internal database of items marked for sync.

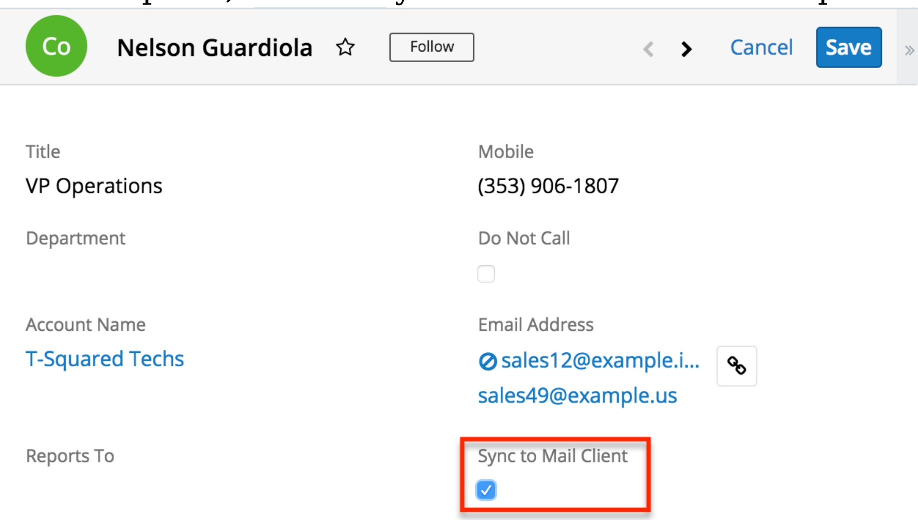
Sync Rules for Contacts

Outlook contacts sync with the Sugar Contacts module. When creating or editing an Outlook contact for sync with Sugar, you also have the option to search for and select an account to relate to the contact or create a new account via the "Set Company to Sugar Account" option. Once you have selected or created an account record, the account's name will be populated in the Company field of the contact form. This allows a direct link to be created between the Sugar contact and the corresponding Sugar account.



As an alternative to selecting or creating an account, you can manually enter the company's name in the Company field. On sync, the plug-in will perform a lookup for matching Sugar accounts. If there is an exact-spelling account match found, that account will be related to the synced contact record. If an account with the same spelling does not exist in Sugar, then a new account will be created and related to the synced contact record.

For the reverse scenario, to sync a Sugar contact to Outlook after enabling sync for contacts, select the "Sync to Mail Client" checkbox on the contact's record view. To stop syncing a Sugar contact to Outlook, simply uncheck the "Sync to Mail Client" option, and the synchronization will be suspended going forward.



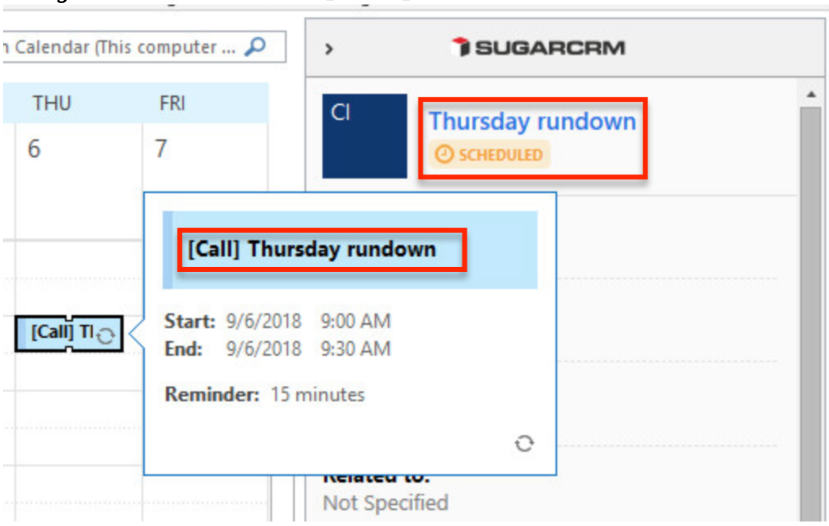
Sync Rules for Tasks

After enabling sync for tasks, only task records that are assigned to the user will be synced to Outlook. When the sync is initiated in Outlook, the plug-in will process any new and updated Sugar records since the last sync between Outlook and Sugar.

Sync Rules for Calls and Meetings

In addition to the general sync behavior rules, the following rules apply to syncing calls and meetings in Sugar with appointments and meetings in Outlook:

- **Syncing to Outlook**: Only future calls and meetings that are assigned to the authenticated user in Sugar will be synced to Outlook.
- **Syncing calls to Sugar**: Outlook does not differentiate between calls and meetings the same way that Sugar does. If you would like to sync an appointment or meeting from Outlook to Sugar as a call record in the Calls module, you must prepend the text "[Call]" (no quotes) to the front of the subject line in the Outlook record. The Sugar call record will adopt the subject line minus "[Call]" as its name.



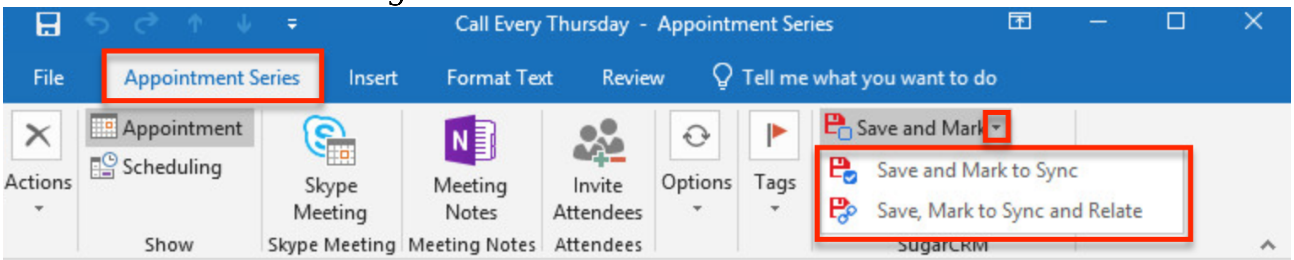
- **Invitees**: For Outlook events, the invitees are included in the sync and get pushed to Sugar. If a contact already exists in Sugar, it will be automatically related to the call or meeting record. The synced invitees will appear in the Guests panel of the call or meeting record. For more information on the Guests panel in Sugar, refer to the Calls or Meetings documentation.
- **Invitee responses**: When invitee responses are received in Outlook, the responses will be synced to Sugar on the next subsequent sync. So, for example, if the invitee accepts and responds to the meeting invitation, the invitee's status will change from "No Reply" to "Attending" in the Guests panel once Outlook is synced to Sugar.
- **Private events**: If a private call or meeting is marked for sync in Outlook, it will be synced to Sugar as read-only with the subject line "Busy" and only the Start Date and End Date fields will appear in the record view. Any

changes to a private call or meeting must be made in Outlook.
- **Sync window**: The Sugar plug-in will not sync calls, meetings, or tasks that are more than 3 months old or more than 1 year in the future. In addition, it will not sync inline images from Outlook appointments to Sugar.

Note: As a best practice, you should sync your Outlook calendar with Sugar before creating any new meetings or calls in Sugar to avoid potential scheduling conflicts.

Sync Rules for Recurring Calls and Meetings

Future recurring events can also be synced between Sugar and Outlook. When creating or editing a recurring series of meetings or appointments in Outlook, expand the "Save and Mark" option on the Appointment Series tab and then select "Save and Mark to Sync" or "Save, Mark to Sync and Relate" if you want to relate the recurrences to a Sugar record.



Upon syncing the recurring event(s) to Sugar, each occurrence will save to Sugar as a separate record in the Meetings module or, if the phrase "[Call]" is in the subject line, as records in the Calls module in Sugar. For example, an appointment that is set to recur in Outlook on every Monday for one year will sync to Sugar as approximately 52 separate meeting records.

- **Recurrence limit**: There is a sync limit of 1000 occurrences for each recurring series.
- **Statuses**: By default, the synced records' statuses will be set to "Scheduled" in Sugar. Users will need to manually update the status in Sugar if needed. You can make additional changes to synced meeting and call records in the recurring series as necessary, and the changes will get pushed to Outlook on the next subsequent sync.
- **Attachments**: For recurring events that contain an attachment in Outlook, only the first synced Sugar record in the series will include the related attachment once synced to Sugar.
- **Syncing from Sugar to Outlook**
    - Outlook only supports a single start date for monthly recurring meetings and calls. So if you have a recurring meeting or call in Sugar that is set to repeat on multiple days of the month (e.g. 1, 5, 10), the records will not get synced to Outlook.

- Sugar monthly or yearly meetings/calls that are scheduled for the fifth day, weekday, or weekend day will get synced to Outlook as being scheduled on the fourth day, weekday, or weekend day as Outlook does not support the fifth-day variable for appointment recurrence rules. However, the start time in Outlook will match the actual start date of the call or meeting record in Sugar.

Sync Rules for Data Conflicts

The following sections explain what to expect in the case that there is a conflict during sync between Outlook and Sugar or the plug-in encounters a deleted record or erased field due to data privacy.

Conflict Handling

When both the Sugar and Outlook versions of a synced record have been changed since the last sync, one of the records' changes will overwrite the other record's data. The system that should win in the face of a conflict can be configured independently for contacts, appointments, and tasks in their corresponding tabs in the SugarCRM Plug-in Settings. The available options for each record type are:

- **Allow user to specify**: The plug-in will prompt the user to decide which record prevails every time a conflict arises.
- **Sugar version prevails**: Changes made on the Sugar side of a synced record will overwrite any changes made on the Outlook side.
- **Outlook version prevails**: Changes made to an Outlook record will overwrite any changes made on the Sugar side.

Duplicate Records

During the sync process, the Sugar plug-in will perform a lookup to help prevent duplicate records from being created in Sugar. If a matching record is found, it will sync the data to the matching Sugar record. If no matching record is found, it will create a new Sugar record. For example, if a new contact is created in Outlook named "John Smith" with email address "john@example.com" and you sync this contact to Sugar, the plug-in will first check to see if the record already exists in Sugar based on the name and email address. If a matching contact record is found, the data will be synced and the "Sync to Mail Client" option will be automatically marked in Sugar. However, if no match is found in Sugar, then a new contact record (John Smith) will be created and the "Sync to Mail Client" option will be marked as well. The Sugar plug-in also performs a duplicate check when synchronizing Sugar records to Outlook.

Deleted Records

The following rules apply if a synced record is deleted from Sugar or Outlook:

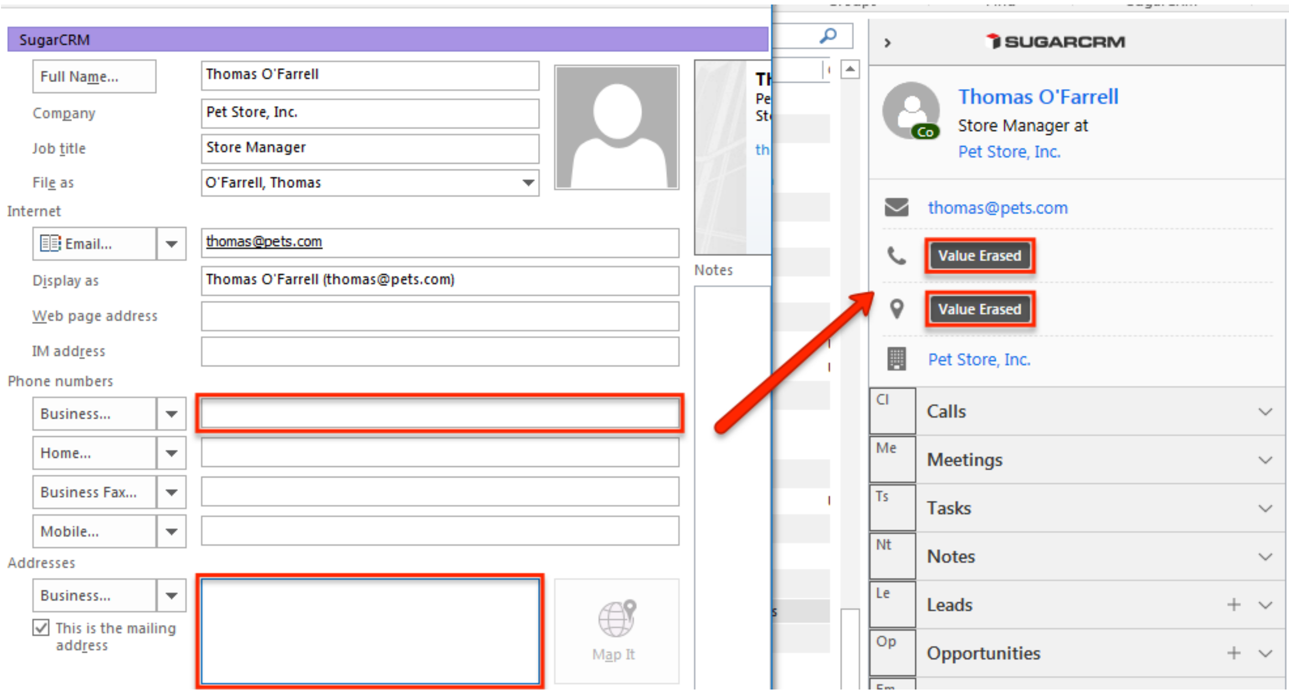
- **Deleted contacts**: When a synced Outlook contact is deleted, the "Sync to Mail Client" option will be disabled for the associated contact record in Sugar during the next sync. Similarly, if a synced contact record is deleted in Sugar, the "Mark to Sync" option will be disabled for the corresponding Outlook contact during the next sync. In either case, the sync option must be re-enabled on the Sugar or Outlook record to initiate syncing again.
- **Deleted or archived calls and meetings**: When a synced call or meeting is deleted or archived in Outlook, the corresponding meeting or call record will be deleted from Sugar on the next sync unless the "Keep removed Appointments in Sugar" option has been enabled in the SugarCRM Plug-in Settings. The preserved records in Sugar will not be included in future syncs to Outlook. If a synced call or meeting record is deleted from the Sugar side, then it will be deleted from Outlook on the next sync.
- **Deleted tasks**: When a synced task is deleted from Outlook, the corresponding task record will be deleted from Sugar on the next sync unless the "Keep removed Tasks in Sugar" option has been enabled in the SugarCRM Plug-in Settings. The preserved records in Sugar will not be included in future syncs to Outlook. If a synced task record is deleted from the Sugar side, then it will be deleted from Outlook on the next sync.

Erased Fields (Data Privacy)

The following rules apply to instances leveraging Sugar's Data Privacy module for data erasure. For more information about data erasure in Sugar, refer to the Data Privacy Guide.

If the Last Name and Email Address fields for a contact or lead have been erased via Data Privacy in Sugar, the plug-in will permanently disable sync for the corresponding Outlook record and prevent the record from being marked for sync. As an additional precaution, the Sugar Plug-in for Outlook will apply a "Data Privacy" category to the Outlook contact record. The fields in the Outlook contact record will continue to display data but the side panel will no longer display details from Sugar since the record is no longer synced. So, depending on your organization's data privacy policies, it may be necessary to manually erase the field values in Outlook as well. If the individual later provides consent for your organization to use their information, you will need to create a new record in Outlook and then sync it to Sugar.

If the erased Sugar fields do not include the Last Name and Email Address, then the erased field values will be removed from the related Outlook record on the next sync and the side panel will display the Value Erased pill to indicate which fields have been erased in Sugar. You can enter new values for the erased fields in Outlook, but the values of those fields will not sync back to Sugar. For any fields (e.g. Title, Account Name) that have not been permanently erased in Sugar, you can continue to update the data for sync between Sugar and Outlook.



Syncing From Sugar to Outlook

The Sugar plug-in can sync your contacts, tasks, and calls and meetings from Sugar to Outlook. Each module must be enabled for sync in its respective settings tab in the plug-in's preferences with "Both ways" or "One way (Sugar to Outlook)" chosen for the Sync Direction option. For more information on enabling sync from Sugar, please refer to the sections under Configuring the Sugar Plug-in for Outlook . For important details about sync behavior, be sure to read the sections under Syncing Sugar and Outlook Data on this page.

Syncing From Outlook to Sugar

Contact, appointment, meeting, and task records that are marked for sync in Outlook will be pushed to Sugar during the sync process. Each module must be enabled for sync in its respective settings tab in the plug-in's preferences with "Both ways" or "One way (Outlook to Sugar)" chosen for the Sync Direction option. For more information on enabling sync from Sugar, please refer to the sections under Configuring the Sugar Plug-in for Outlook. For important details about sync behavior, be sure to read the sections under Syncing Sugar and Outlook Data on this page.

Once sync has been enabled, you can mark an Outlook record for sync via the following methods:

- **Creating new records**: When creating a record in Outlook, click "Save and Mark" in the ribbon and select one of the Mark to Sync options. For

more information, refer to the [Syncing New Outlook Records to Sugar](#) section.
- **Syncing existing records**: To mark existing Outlook records for sync, open the record and then choose one of the Mark to Sync options from either the ribbon or right-click menu. For more information, refer to the [Syncing Existing Outlook Records to Sugar](#) section.

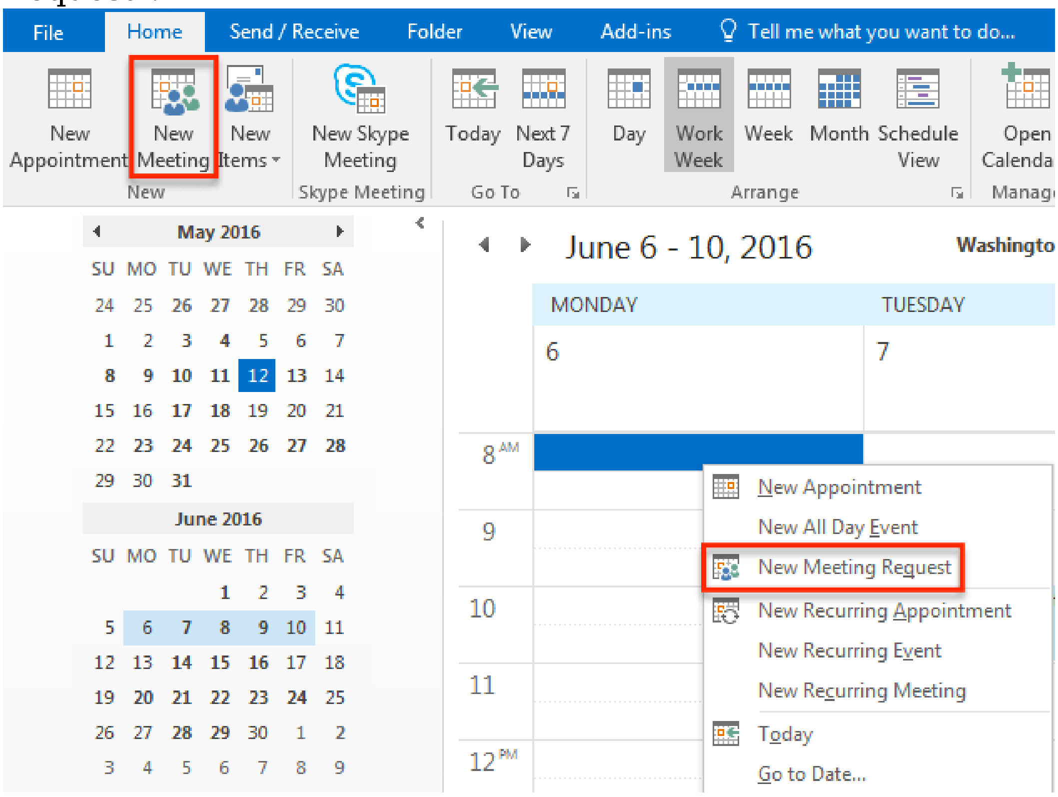
Syncing New Outlook Records to Sugar

The Sugar Plug-in for Microsoft Outlook allows you to easily synchronize new Outlook records to Sugar. When creating the new Outlook record, you must make sure that the record is [marked for sync](#) in order for it to be included in the sync process. For important details about sync behavior, be sure to review the sections under [Syncing Sugar and Outlook Data](#) on this page.

Note: New records created in Sugar via the Sugar plug-in will automatically be assigned to your primary default team.

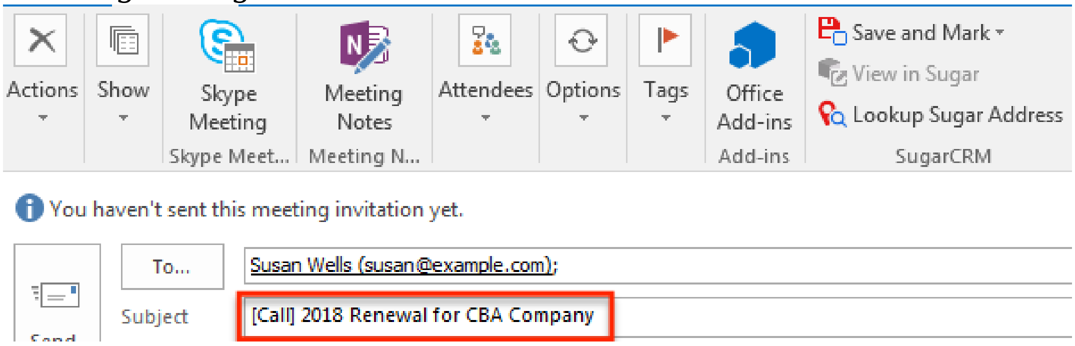
The following steps cover synchronizing a new Outlook record to Sugar's Calls module as an example:

1. Click the Calendar icon in the navigation pane of your Outlook window.
2. Click "New Meeting" in the ribbon or click the cell corresponding to the date and time you want to schedule the call, then select "New Meeting Request".

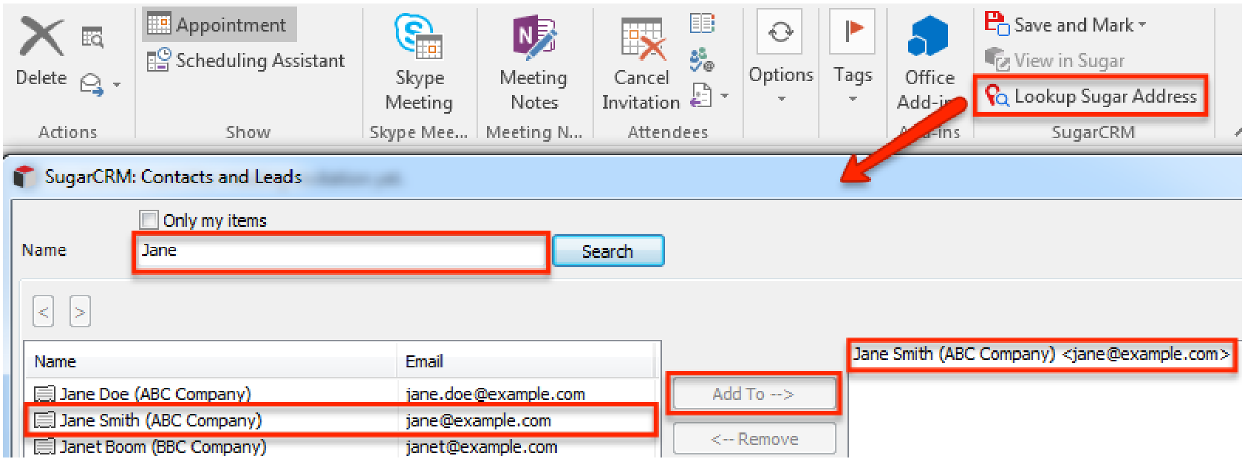


3. Complete the appropriate fields (e.g. To, Subject, Start time).

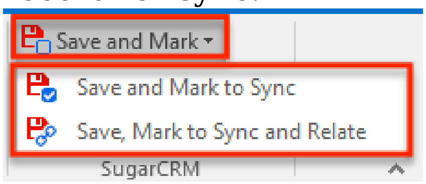
- **Note**: You must include "[Call]" in the subject line in order to have the calendar item synced properly to the Calls module in Sugar. Do not include "[Call]" in the subject line if you want to sync a new meeting to Sugar.



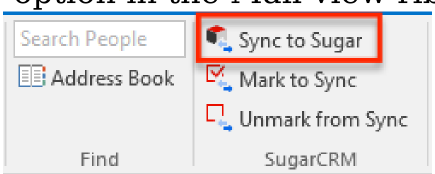
4. If you want to add Sugar contacts and/or leads as invitees to the call, simply click the Lookup Sugar Address option in the ribbon. Search for and select the record(s) then click the "Add To" button. Click "OK" to add the contact and/or lead as invitees.



5. If you want to relate the call to other Sugar records, click the "Save and Mark" option then select "[Save, Mark to Sync and Relate]()".
   - **Note**: If you do not want to link the call to other Sugar records, simply select "Save and Mark to Sync" to save and mark the call record for sync.



6. Finally, click "Sync to Sugar" in the Calendar view ribbon to synchronize the newly created call to Sugar.
   - **Note**: You can also initiate the sync by clicking the [Sync to Sugar]() option in the Mail view ribbon and selecting "Appointments".

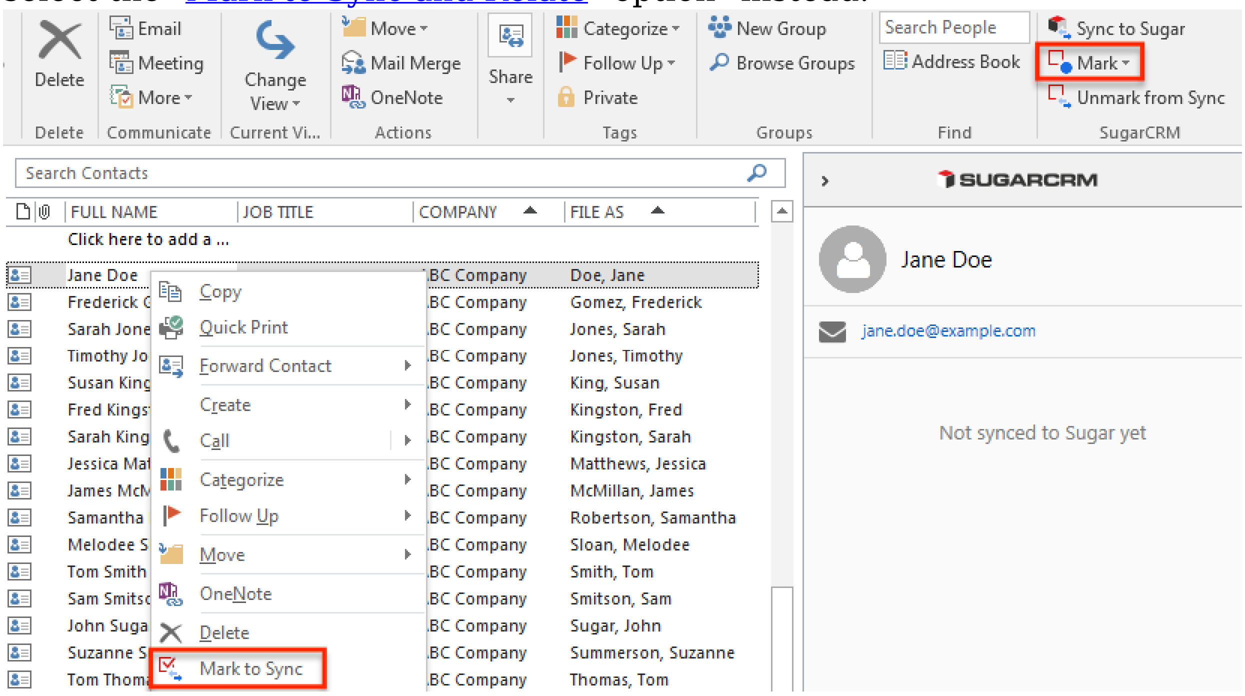


The sync will process records that are marked for sync and have been created or updated since the last sync between Outlook and Sugar.

Syncing Existing Outlook Records to Sugar

The Sugar Plug-in for Microsoft Outlook also allows you to sync existing Outlook records to Sugar. Only records that have the Mark to Sync option enabled will be pushed to Sugar during the sync process. For example, if a meeting is already marked for sync, the corresponding meeting cell will be color-coded with the SugarCRM category. This helps users easily identify records which have already been marked for sync with Sugar. During the sync, the plug-in will process any new and updated records since the last sync between Outlook and Sugar. For important details about sync behavior, be sure to review the sections under Syncing Sugar and Outlook Data on this page.

The following steps cover synchronizing an existing Outlook contact to Sugar as an example:

1. Click the People icon in the navigation pane of Outlook.
2. Locate and select the specific contact, then either click the Mark option in the ribbon and select "Mark to Sync" or right-click on the contact's row and select "Mark to Sync".
   Note: If you want to relate the Outlook record to other Sugar records, select the "Mark to Sync and Relate" option" instead.
   

3. Once the necessary contact has been marked for sync, click "Sync to Sugar" in the ribbon to synchronize the contact to Sugar.
   Note: You can also initiate the sync by clicking the Sync to Sugar option in the Mail View ribbon.

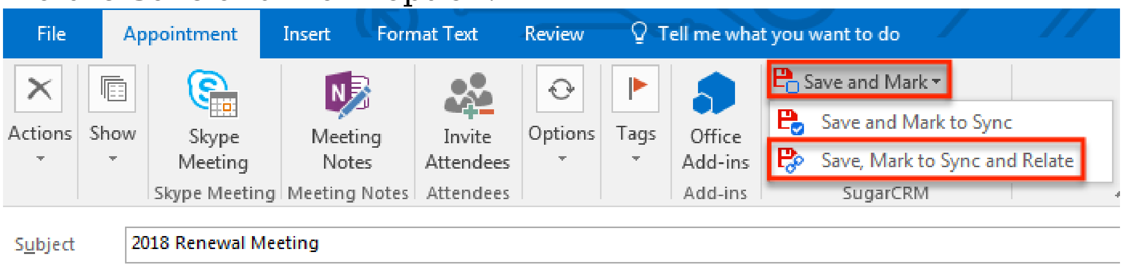
Stopping Sync

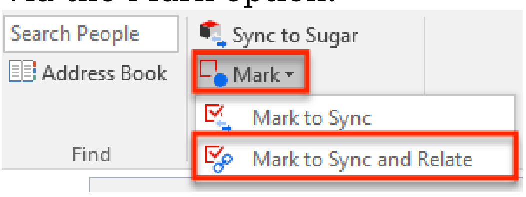
If you no longer want to sync a certain Outlook record with Sugar, you can either click the "Unmark from Sync" option in the ribbon or right-click on the record's row or Calendar cell and select "Unmark from Sync". This option will exclude the record from future automatic and manual sync actions.

Creating Relationships During Sync

When creating or updating a contact, meeting, call, or task in Outlook, you have the option to relate the record to other Sugar records via the "Save, Mark to Sync and Relate" (from the create form) and "Mark to Sync and Relate" (from the Outlook view) options in the ribbon. The Relate Sugar Record(s) window will open allowing you to search for and select records to populate the module's Related To field in Sugar as well as select records you want to link via the module's related record subpanels.

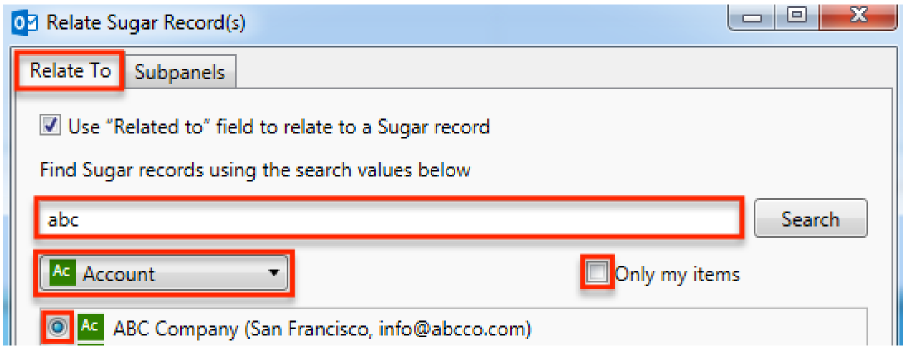
The following steps cover relating a new Outlook meeting to Sugar records as an example:

1. Create a new meeting record and complete the appropriate fields.
2. Click the "Save and Mark" option in the ribbon then select "Save, Mark to Sync and Relate". The Relate Sugar Record(s) window will open containing two tabs (Relate To, Subpanels).
    - **Note**: For existing Outlook records, you can select the record in the Outlook view (e.g. Tasks) then click "Mark" in the ribbon and select "Mark to Sync and Relate".
    Via the Save and Mark option:
    

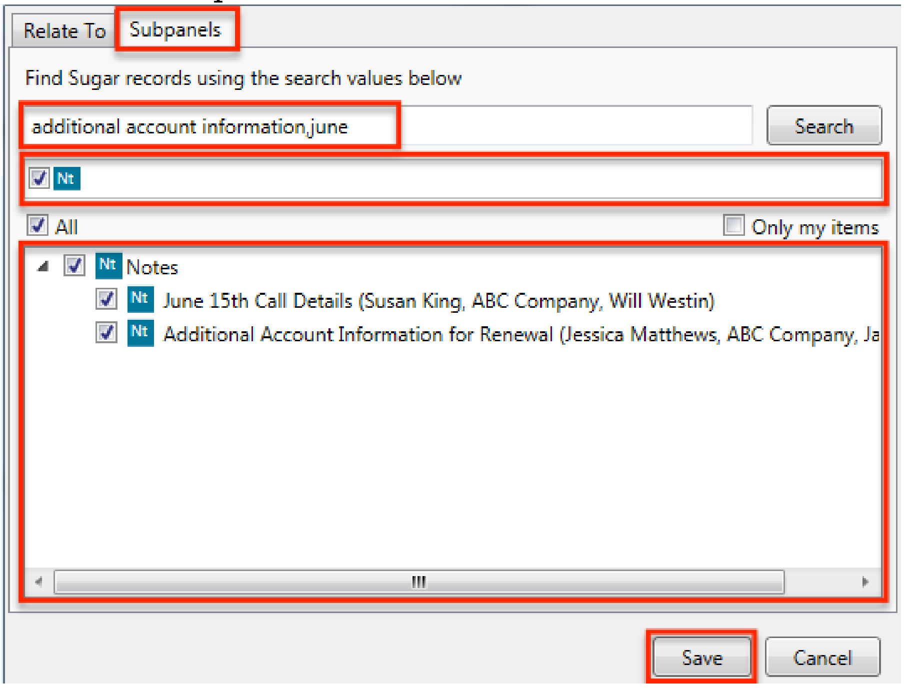
    Via the Mark option:
    

3. To populate the new meeting's Related To field in Sugar, select a module then search for and select your desired record. Mark the "Only my items" box if you want to only search for records assigned to you. The search box will be automatically populated with the current meeting invitee's email address (if applicable).

- **Note**: If you do not want to relate a record via the Related To field, simply uncheck the "Use "Related to" field to relate to a Sugar record" box.



4. If you want to relate other Sugar records via the meeting's related record subpanels, click the Subpanels tab then search for and select your desired record(s) for the available module(s).
    - **Note**: If you want to relate to multiple Sugar records, you can enter multiple keywords into the search box separated by commas (e.g. jane@example.com,send proposal,john smith). The Results panel will display all matching Sugar records for the selected module(s) in the Modules panel.



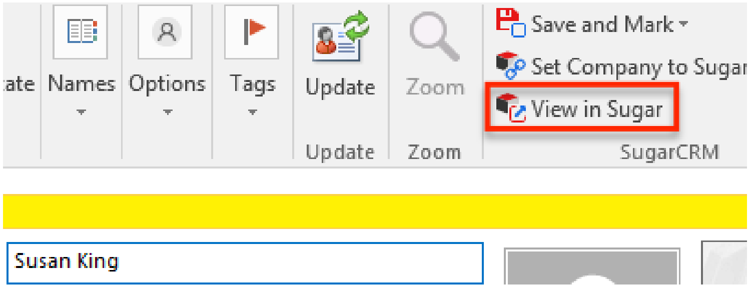
5. Click "Save" then sync with Sugar.

The synced meeting record in Sugar will display your chosen record (e.g. ABC Company) in the Related To field and the Notes subpanel will display the related records as well.

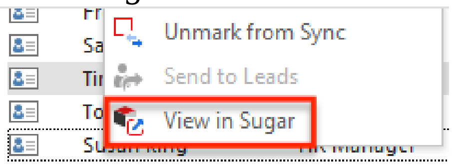
Viewing Synced Records in Sugar

Once the record is synced, you have the option to view the synced record in Sugar. You can either open up the Outlook record and click "View in Sugar" or right-click on the Outlook record's row or calendar cell and select "View in Sugar".

From Outlook record's ribbon:



From right-click menu:



The View in Sugar option will be disabled for Outlook records that are unmarked from sync. Once you click "View in Sugar", the corresponding module's record view (e.g. Contacts) will open in Sugar. You must already be logged into Sugar in order for the record to open or you will be directed to Sugar's login page before you can access the record.

Archiving Emails to Sugar

The Sugar Plug-in for Microsoft Outlook allows you to easily archive new and existing Outlook emails to Sugar and relate them to records in any module (e.g. Accounts, Contacts, etc.) that has a relationship to the Emails module and that you have access to by virtue of your Sugar team and roles. There are various ways you can archive your Outlook emails to Sugar such as clicking the Send and Archive option when composing a new email, clicking the Archive to Sugar option in the Mail view, etc. The below sections will cover the various methods available to archive your Outlook emails to Sugar records.

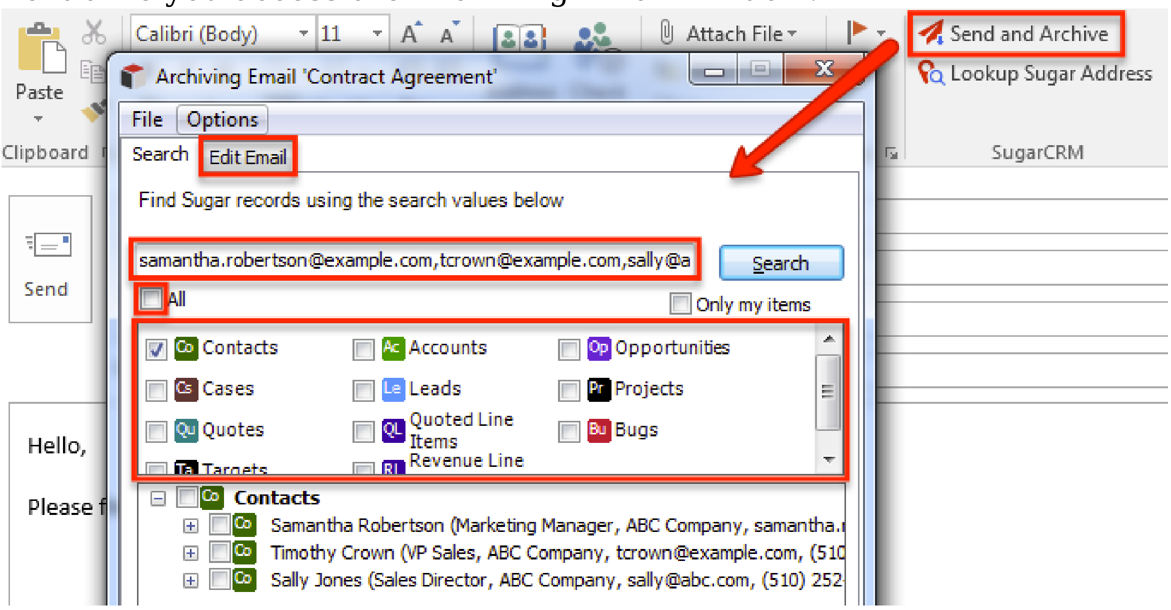
Note: If you are using an IMAP mail account (e.g. Gmail) in Outlook, you must uncheck the "Do not save copies of sent items" option for the IMAP mail account under the Advanced tab of the Internet E-mail Settings window in Outlook. Disabling this option will help ensure that emails get archived to Sugar properly.

Send and Archive

The Sugar Plug-in for Microsoft Outlook allows you to send and archive emails in one simple step. This and the following sections cover how to utilize the Sugar plug-in features to compose then send and archive emails to Sugar.

Once you have composed your email and, optionally, looked up recipient email addresses from Sugar, simply click the Send and Archive option in the ribbon to send the message to the recipient(s) and archive the email to the Sugar record(s). If the spellcheck option (i.e. "Always check spelling before sending") is enabled in Outlook options, then the Spelling and Grammar dialog box will automatically appear if any spelling errors are detected in the email. Once the spelling errors are corrected, the Archiving Email window will open, allowing you to find and select the Sugar record(s) you want to relate the email to.

The default tab for the Archiving Email window is the Search tab. The tab's search box will automatically be populated with the email addresses in the email's To and CC fields to pull up matching Sugar records. You can have the plug-in search throughout all available modules in the Modules panel or choose to only include certain modules in the search by selecting the checkbox next to the specific module(s) name (e.g. Contacts). If you are assigned to a role that restricts access to a module (e.g. Leads), then that module will not be available to select in the Modules panel. You may select and deselect all modules by toggling the "All" checkbox above the Modules panel and clicking "Search" again. Any changes made in the Modules panel will be preserved and the same modules will be selected the next time you access the Archiving Email window.



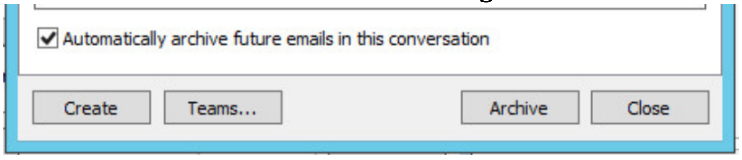
When archiving a single email, the Archiving Email window will contain an "Edit Email" tab, allowing you to edit the contents of the email before syncing to Sugar. The changes you make to the email's content will not affect the original Outlook email.

Below the search bar and module selection panel, the results panel will display all Sugar record(s) (e.g. Samantha Robertson, Timothy Crown, Sally Jones) that match the current search query and module selection along with some field values (e.g. title, phone, email) pulled from the module's list view in parentheses. Click the Plus icon next to a row to view a record's related records (e.g. cases and opportunities). Select one or more of the records that you want to relate to the email in Sugar. If you mark the top-level module (e.g. Contacts) in the Results panel, then all records (e.g. Samantha Robertson, Timothy Crown, and Sally Jones) belonging to that module in the result set will automatically be selected.

Note: When an email is archived to a contact record, the Sugar plug-in will automatically archive the email to the contact's related account as well.

Additional Archive Options

At the bottom of the Archiving Email window are the following options:



- **Automatically archive future emails in this conversation**: Select this box to enable auto-archive for any more emails received in this thread. For more information on auto-archiving, refer to the Archiving Future Emails to Sugar Automatically section.
- **Create**: Create a new Sugar record on-the-fly to relate to the email. For more information, refer to the Archiving Emails With New Sugar Records section.
- **Teams**: Search for and select the team(s) that you want to assign to the email record.
    - "Only my teams" is selected in the Teams selector window by default.
    - Use the Search box to filter the displayed teams.
    - After entering a search query, you may deselect "Only my teams" to show a filtered result set from all teams in Sugar.
    - If you choose not to select a team, then the plug-in will assign the email to your default primary team. In the event that you change your primary default team in Sugar, you must restart Outlook for the plug-in to start using your new default team for archived emails. Any emails already archived to Sugar will not be affected by a change to your default team.
- **Cancel**: Close the Archiving Email window without archiving the email to Sugar. Any records you may have created via the "Create" button before canceling will remain saved in Sugar.
- **Archive**: Click the Archive button to archive the email to Sugar and relate the email record to the selected records. This option will remain grayed out

until a related record has been selected in the results panel.

After clicking "Archive", a dialog box will appear indicating that the email is being archived and will close once the archiving is complete. You can still archive the same email multiple times to other Sugar modules via the Archiving Email window. Archived email(s) are marked with the SugarCRM category in Outlook to help identify emails that have already been archived to Sugar.

Note: The SugarCRM category can be configured via the SugarCRM Plug-in Settings if you want to utilize a new category or disable the action going forward. Within the setting, you can also disable the plug-in from marking archived emails with a flag.

Once archived, the email will appear in the Sugar record's History dashlet in the intelligence pane, as well as the Emails subpanel. For more information on archived emails in Sugar, refer to the Emails documentation. The email record in Sugar will be assigned to your primary default team in Sugar.

Note: Users will be able to view archived emails in Sugar as allowed by their team membership and assigned roles. For more information on teams and roles, refer to the Team Management and Role Management documentation.

Quick Archive

Now, if you want to allow for quick archival of emails to a single recipient without utilizing the Archiving Email window, you can disable the "Send and Archive always display Archive to Sugar screen" option via the SugarCRM Plug-in Settings window.

Going forward, when you send and archive an email to a single recipient, the Sugar plug-in will automatically look for a matching contact or lead record in Sugar based on the email address, then archive the email without any further action from you.

The plug-in will first check the Contacts module to locate a matching record and if no match is found, then it will check the Leads module. If a matching Sugar contact or lead record is found, then the email will be archived instantly. However, there may be situations where no matching records are found or there are multiple email recipients, where the Archiving Email window will be necessary. When situations such as these arise, the Archiving Email window will automatically open to allow you to find or create the record(s) to archive the email in Sugar.

The following table summarizes the expected behavior of when the Archiving Email window will appear:

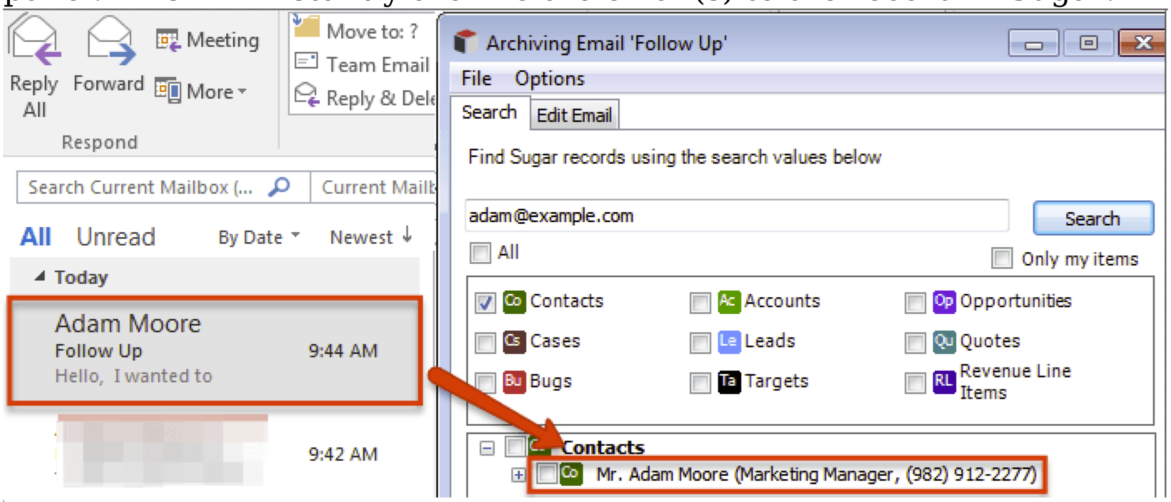
"Send and Archive Always Displays Archive to Sugar Screen" setting	Single Email Recipient	Matching Record Found in Sugar	Expected Behavior
Disabled	Yes	Yes	Archives the email instantly
Disabled	Yes	No	Archiving Email window displays
Disabled	No	--	Archiving Email window displays
Enabled	--	--	Archiving Email window displays

Note: The Send and Archive option is not available in Outlook 2013's quick response template. But, you can click the Pop Out button on the upper left of the quick response template to open up the full form layout, which will include the Send and Archive option.

Archiving Existing Emails

The Sugar Plug-in for Microsoft Outlook also allows you to easily archive your existing emails to Sugar. Simply select the email message in Outlook and click the "Archive to Sugar" option in the ribbon or right-click on the email and select "Archive to Sugar".

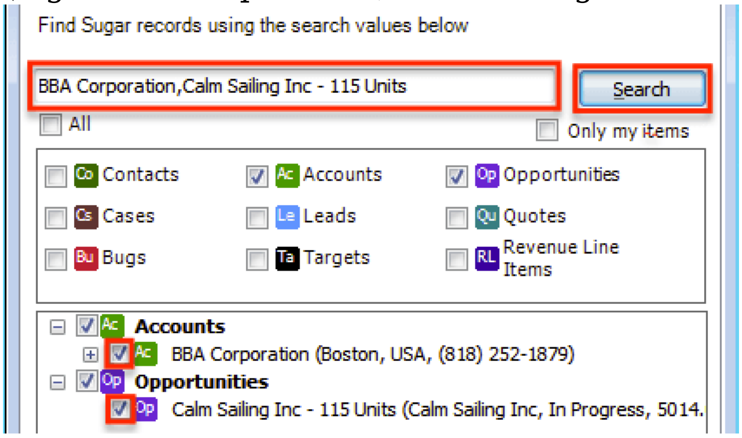
You can also archive emails by dragging and dropping the email message from your Mailbox directly onto the Sugar record (e.g. Adam Moore) in the Results panel. This will instantly archive the email(s) to the record in Sugar.



For complete details on the options available when archiving emails to Sugar, refer to the [Archiving Emails to Sugar] section of this page.

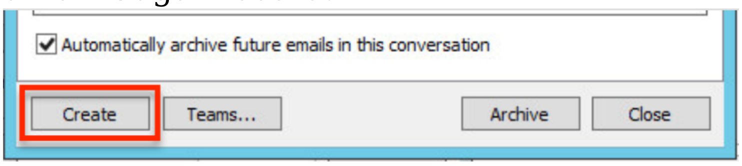
Relating Archived Emails to Sugar Records

You can archive emails and relate them to records in any of the Sugar modules available in the Modules panel of the Archiving Emails window. In addition, you can also archive the email to multiple Sugar records at once by entering one or more keywords (e.g. name or subject) into the Search box separated by commas (e.g. "BBA Corporation,Calm Sailing Inc - 115 Units").



Once archived, the email will appear in the Sugar record's History dashlet in the intelligence pane as well as the Emails subpanel.

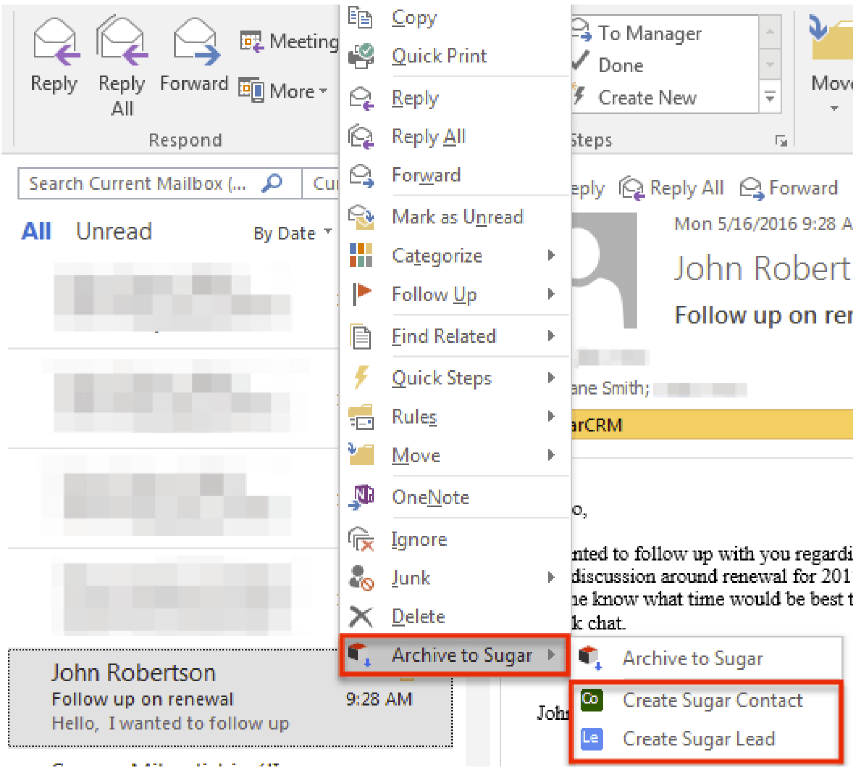
If the related record does not already exist in the system, there are various ways you can create new Sugar records while archiving emails using the Sugar plug-in. For example, if you are attempting to archive a new email to a Sugar contact (e.g. Peter Williams), but the matching record cannot be found, you can click the Create button in the Archiving Email window then select a module (e.g. Contact) to create a new Sugar record.



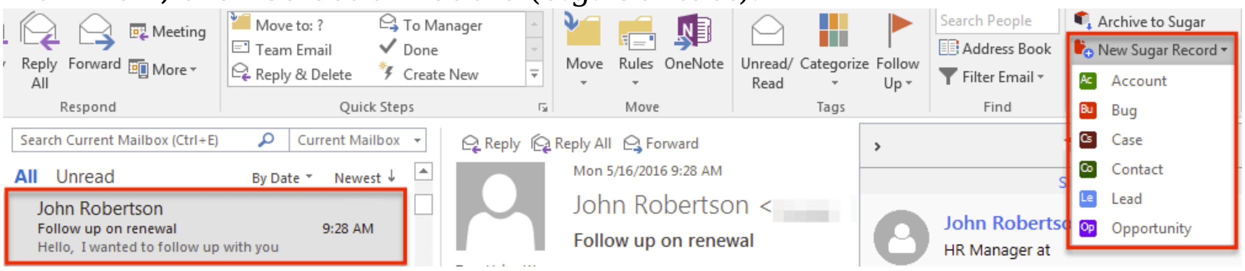
Note: Any new record you create during the archival process will be instantly created in Sugar even if you cancel the archiving process.

For existing emails, you can also do one of the following:

- Right-click on an existing email, select "Archive to Sugar", then choose either "Create Sugar Contact" or "Create Sugar Lead".



- Select an existing email, select "[New Sugar Record]()" in the ribbon on the Mail view, then select a module (e.g. Contact).



The create form will open where you can enter the record's details. The "Archive Email?" box will automatically be selected if an existing email is selected on the Mail view. For more information on creating new Sugar records, refer to the [Creating New Sugar Records]() section of this page. Once you click "OK", the new record will be created in Sugar and the selected email will get archived to the record as well. The archived email will appear in the Sugar record's Emails subpanel as well as the History dashlet in the intelligence pane.

Note: If you are creating a new record while archiving a new email to Sugar, you will return to the previous Archiving Email window once you click "OK" on the create form. You will now be able to select the matching record from the Results panel since the record has been created in Sugar. Simply select the record (e.g. Peter Williams) then click "Archive" to archive the email to Sugar.

Relating Emails to Custom Module Records

Users also have the ability to archive Outlook emails to custom modules in Sugar.

The custom module must have an existing relationship to "Activities" in Sugar in order for the module to be available in the Modules panel when archiving. For more information on creating a relationship, refer to the Studio documentation. Once the custom module is created in Sugar, restart Outlook and the custom module will appear in the Modules panel of the Archiving Email window.

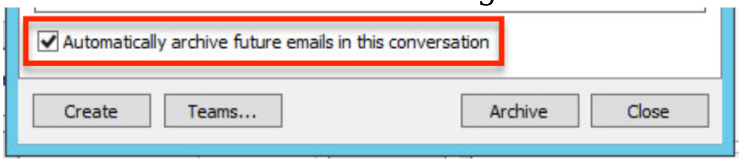
In order to archive an email to the custom module, simply enter the keyword into the Search box of the Archiving Email window and make sure that the custom module (e.g. Help Desk) is marked in the Modules panel. The record(s) matching the search criteria will be displayed, allowing you to select and archive the email to that Sugar record.

Archiving Future Emails to Sugar Automatically

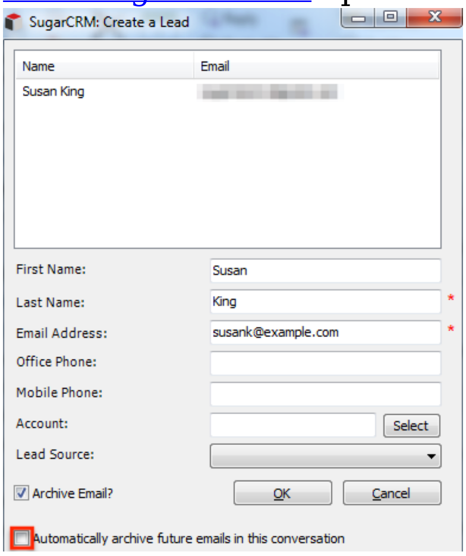
The Sugar Plug-in for Microsoft Outlook includes an option to automatically archive all future email correspondences associated to an archived email. Once the option is enabled for the archived email, all associated inbound and outbound email correspondences will be automatically archived to Sugar going forward.

The option to automatically archive future emails appears in the following places when archiving emails in Outlook:

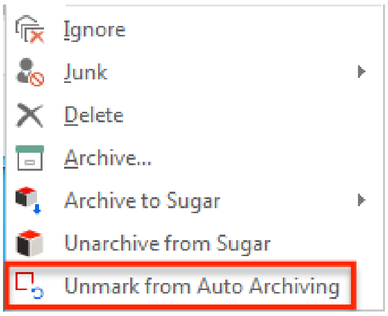
- At the bottom of the Archiving Email window:



- On the create form when creating a new Sugar record from Outlook via the New Sugar Record option or the Side Panel (e.g. Create a Lead):



If you no longer want to automatically archive future emails to Sugar, you can disable the option by right-clicking on the specific Outlook email and then selecting "Unmark from Auto Archiving". All previously archived emails will remain in Sugar and any subsequent email correspondences associated to the archived email will not be automatically archived going forward.



Note: When an email in the conversation gets unarchived from Sugar, the auto-archive option will automatically become disabled for future emails in the conversation and the Unmark from Auto Archiving option will be removed from the right-click menu. If you want to preserve this auto-archiving option for future emails that get archived in this conversation, simply navigate to the SugarCRM Plug-in Settings window and disable the "Stop conversation auto-archiving upon email unarchive" option.

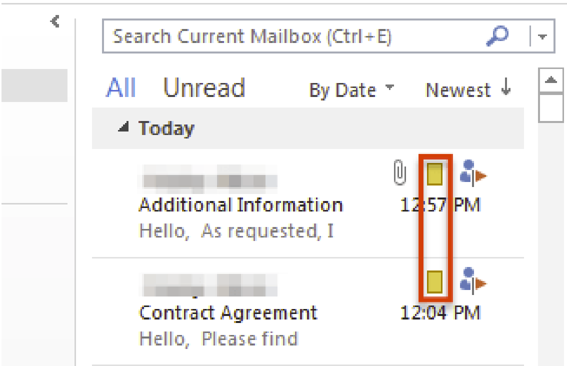
Archiving Emails to Sugar Contacts and Leads Automatically

The Sugar Plug-in for Microsoft Outlook allows users to automatically archive incoming and outgoing emails if the email is received from a contact or lead or if the email has a Sugar lead or contact in the To or CC fields. For outgoing messages, the plug-in will also auto-archive the email to Sugar contacts or leads listed as recipients in the BCC field. To enable the auto-archiving feature, simply mark the "Automatically archive all incoming and outgoing Outlook emails for Contact/Lead" checkbox in the SugarCRM Plug-in Settings. Please note that the outbound/inbound email must include at least one contact or lead that is assigned to you in order for the auto-archive to trigger. Once archived, the email will appear in the Emails subpanel of the Sugar contact and/or lead record, as well as in the History dashlet. The archived email can also be viewed from Sugar's Emails module. For more information on archived emails in Sugar, refer to the Emails documentation.

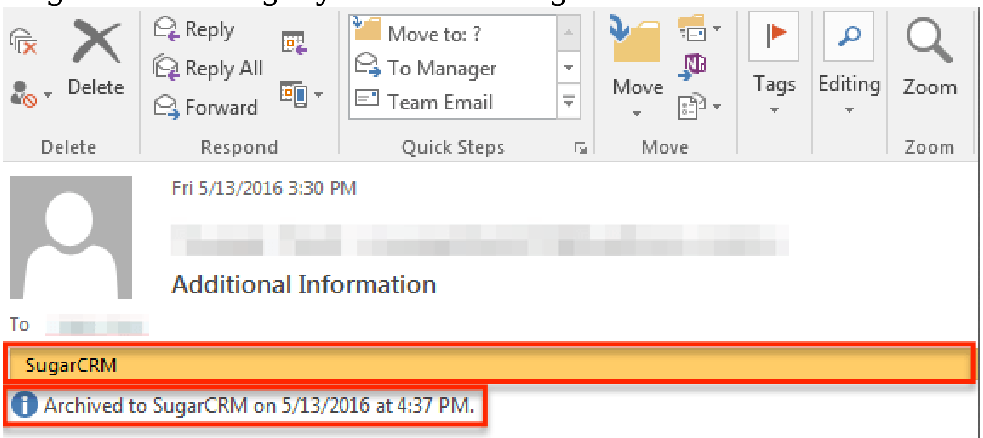
Identifying Archived Emails in Outlook

Categories and flags are used to identify emails in Outlook that have been archived to Sugar. For more information on managing these options, refer to the SugarCRM Category options under the Advanced Tab section of this page.

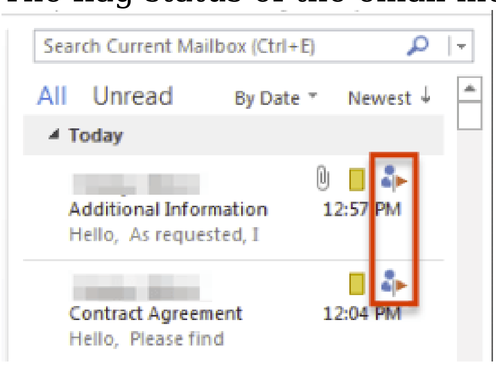
- The email will be marked with the SugarCRM category in the Mail view:



- The email displays the timestamp of the archive and is marked with the SugarCRM category in the message header area:

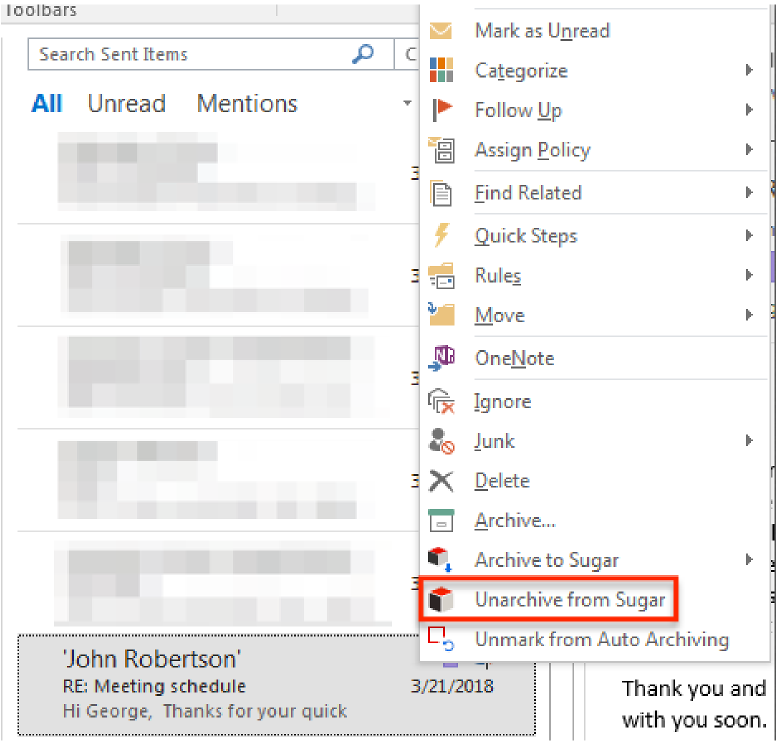


- The flag status of the email message is updated if not previously flagged:



Unarchiving Emails

As you utilize the Sugar plug-in, there may be occasions where you find it necessary to unarchive certain emails from your Sugar instance. Archived emails can easily be unarchived from Sugar by right-clicking on the specific email and selecting "Unarchive from Sugar". You can also unarchive multiple emails at the same time by selecting each email in the mail view and selecting "Unarchive from Sugar" from the right-click menu.



A dialog box will appear indicating that the email is being unarchived from Sugar and will close once the process is completed. The archived email(s) will be removed from Sugar's database and will no longer appear in the record's History dashlet (Intelligence Pane) nor in the Emails subpanel for Sidecar modules. In addition, the SugarCRM Category will be removed from the Outlook email(s) since it is no longer archived. If you want to archive the emails to the Sugar records again at a later time, simply click the Archive to Sugar option in the email ribbon or right-click on the email and select "Archive to Sugar".

Note: If the automatically archive future emails option was enabled for the archived email, then upon unarchiving the email, the option will be disabled for future emails in the conversation and the Unmark from Auto Archiving option will be removed from the right-click menu. If you want to preserve this auto-archiving option to allow future emails in the conversation to continue archiving to Sugar, simply navigate to the SugarCRM Plug-in Settings window and disable the "Stop conversation auto-archiving upon email unarchive" option.

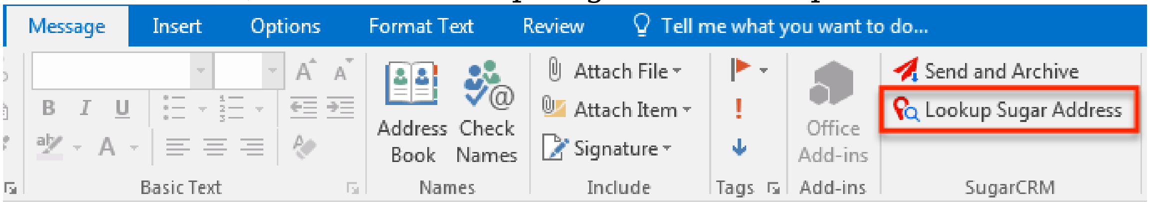
Note: If you are using an IMAP mail account (e.g. Gmail) in Outlook, the ability to unarchive emails from Sugar is not available.

Looking Up Sugar Email Addresses

When composing an email or creating a calendar event in Outlook, you can look up a contact's or lead's email address in Sugar to use as an invitee or populate the email's To, CC, and BCC fields. To perform the search, click the "Lookup Sugar

Address" option in the ribbon and the "Contacts and Leads" window will open.

Note: If you are assigned to a role that restricts access to both the Contacts and Leads modules, then the Lookup Sugar Address option will be disabled.



By default, the search will be filtered to display only records assigned to you, but you can uncheck the "Only my items" box to search all contact and lead records in Sugar. If you are assigned a role where access to one of the modules (e.g. Leads) is disabled, then those module records will not be available to search for and select.

To perform a search, enter the contact's or lead's name in the Search box then click "Search" or hit "Enter" on your keyboard. You can select the record's name(s) from the results list then click the "Add To", "Add CC", or Add BCC" button to add the email address(es) to the corresponding field. If you want to remove any email address from the field, simply highlight the specific email address and click the Remove button. Once all of the email addresses have been added, click "OK" and the email's To, CC, and/or BCC fields will be populated accordingly.