IBM Notes Plug-in User Guide

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Overview

Sugar's Plug-in for IBM Notes allows users to share information between their IBM Notes client and their Sugar instance. The plug-in can be used to sync data bi-directionally between IBM Notes and Sugar. This guide covers how to use and configure the plug-in after installation.

Prerequisites

- **Installation** : The IBM Notes Plug-in must be successfully installed and configured. Please refer to the IBM Notes Plug-in Installation Guide for instructions on how to install and configure the IBM Notes Plug-in.
- **Active Sugar account** : Users of the IBM Notes Plug-in must have an active Sugar account. If your organization has users on IBM Notes that do not have Sugar accounts, then the IBM Notes events created by non-Sugar users will not get synced to Sugar even if a Sugar user has been invited to the event.
- **Import/Export permission** : Users of the IBM Notes Plug-in must have the ability to import and export records for applicable modules in Sugar. For more information, please refer to the Role Management documentation.
- **Matching email addresses** : To prevent syncing issues, users of the plug-in must use the same primary email address for their Sugar profile and their IBM Notes profile.
- **Matching time zones** : To ensure proper timestamping of events, the time zone for the machine running the plug-in should be the same time zone that is configured for that plug-in's Sugar user.

Terminology

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

Term	**Pertains to**	**Description**
Sync	Contacts, Calendar entries, To Do's (meetings, calls, tasks)	The sync process shares data between Sugar and Notes.

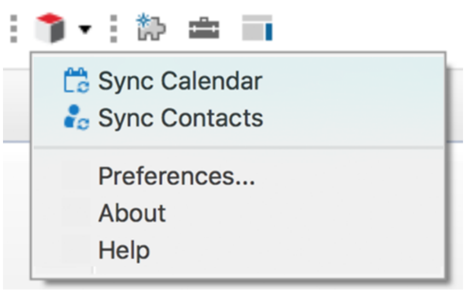
Archive	Email messages	Archiving an email from Notes will make a copy of the message as an email record in Sugar's Emails module.
Link	All record types	Linking records will relate an archived or synced Notes document to a Sugar record without syncing their data or creating any new records.

Menus

The SugarCRM Actions menu is always present in the toolbar of your IBM Notes user interface. It is represented by the familiar Sugar cube icon. When you expand the menu, the options available will automatically pertain to what you are doing in IBM Notes. The following sections explain the default menu options as well as the context-relevant menu options you will see when working with emails, events, and contacts in Notes.

Default Menu

The default menu items are always present as part of the menu. If no document is selected while in Notes, then the default menu items are the only ones shown in the SugarCRM Actions menu.



The default menu items are as follows:

Menu Item	Visibility	Description
Sync Calendar	Always Active	Manually sync with Sugar all To Do and calendar entries that are marked

		for sync.
Sync Contacts	Always Active	Manually sync with Sugar all contacts that are marked for sync.
Preferences	Always Active	Enable or disable auto-sync and set other configurations for contacts and calendar.
About	Always Active	View the version number for your installed plug-in and links to other helpful documents.
Help	Always Active	Navigate to the plug-in's User Guide on the Sugar Support site.

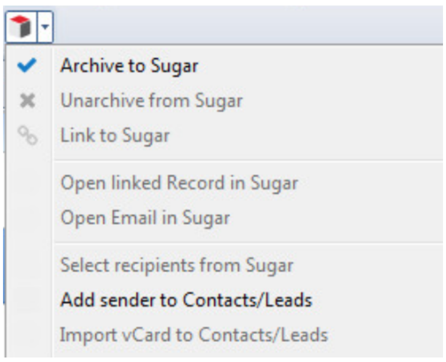
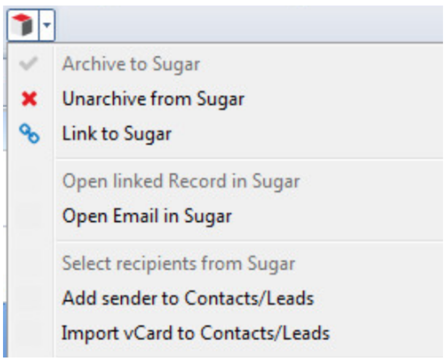
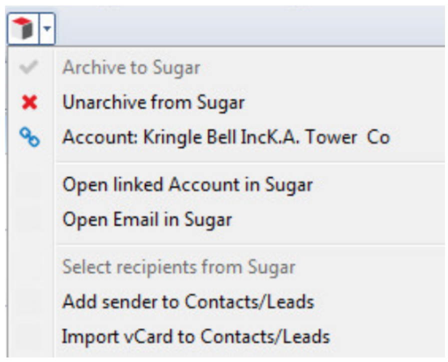
Emails Menu

The SugarCRM Actions menu shows options specific to email archiving and contacts when viewing email in IBM Notes. In addition to the default menu items, the following options are available in the SugarCRM Actions menu for emails in IBM Notes:

Menu Item	Visibility	Description
Archive to Sugar	When one or more email messages are selected	Archive the message as a new email record in Sugar's Emails module. Selecting this menu option enables the next two menu options.
Unarchive from Sugar	When an archived message is selected	Delete the archived email record from Sugar.
Link to Sugar (or name of linked record)	When a message is selected	Link the archived email to a Sugar record.
Open linked Record in Sugar	When a linked message is selected	Navigate to the linked record in Sugar. **Note**: When linked, the word "Record" is replaced with the Sugar record type (e.g., "Open linked

		Account in Sugar").
Open Email in Sugar	When an archived message is selected	Navigate to the copy of this email in Sugar's Emails module.
Select recipient(s) from Sugar	When composing a new email	Select the email's recipients from Sugar's Leads, Contacts, or Users module.
Add Sender to Contacts/Leads	When a message is selected	Add the sender of an email to Sugar as a new contact or a lead.
Import vCard to Contacts/Leads	When a message with a .vcf attachment is selected	Import the data from an attached vCard to Sugar to create a new lead or contact record.

The following screenshots show the expected state of the SugarCRM Actions menu options based on the archived and linked state of a selected email in IBM Notes as described in the previous table.

Unarchived Email	**Archived; Not-Linked Email**	**Archived and Linked Email**
		

Events Menu

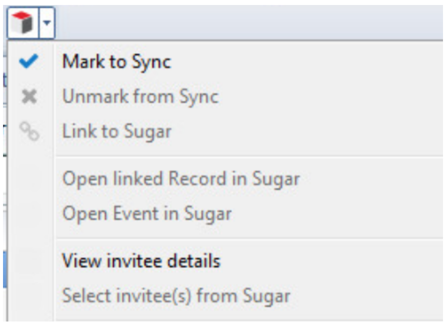
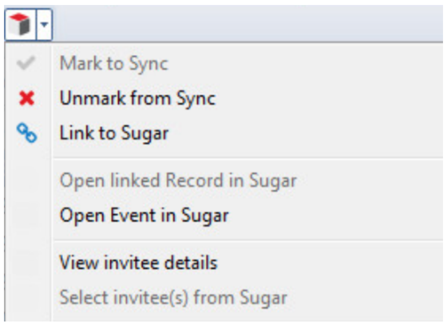
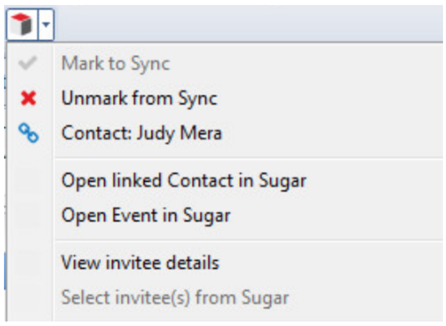
The SugarCRM Actions menu shows options specific to the event's guests and specific to syncing calls, meetings, and tasks when viewing calendar entries and items in the To Do list view in IBM Notes. In addition to the default menu items, the following options are available in the SugarCRM Actions menu for To Do and Calendar events in IBM Notes:

Menu Item	**Visibility**	**Description**

Mark to Sync	When an unmarked event is selected in the calendar or list view	Sync the event with Sugar's Calls, Meetings, or Tasks module and mark it for inclusion in future automatic and manual syncs. Selecting this menu option enables the next two menu options.
Unmark from Sync	When a synced event is selected in the calendar or list view	Stops syncing the event and asks if you want to delete the corresponding call, meeting, or task record from Sugar.
Link to Sugar (or name of linked record)	When an event is selected	Relate the event to a Sugar record. **Note**: When linked, shows the name of the linked Sugar record (e.g., "Account: Constrata Trust LLC")
Open linked Record in Sugar	When a synced and linked event is selected	When linked, the word "Record" is replaced with the Sugar record type (e.g., "Open linked Account in Sugar"). Click this option to navigate to the linked record in Sugar.
Open Event in Sugar	When a synced event is selected	Navigate to the synced record in Sugar's Tasks, Meetings, or Calls module.
View invitee details	When a meeting is selected	View the lead or contact details associated with the email addresses invited to this event.
Select invitee(s) from Sugar	When creating or editing a meeting	Select the event's invitees from Sugar's Leads or Contacts module.

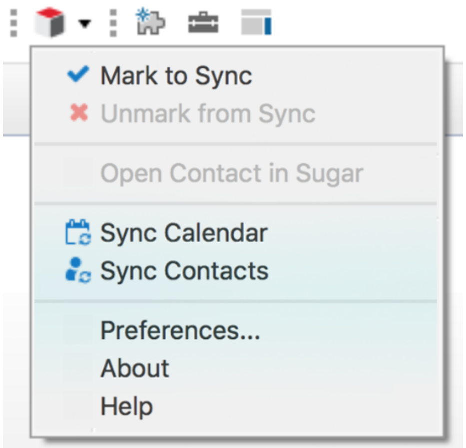
Note: The "Mark to Sync" and "Unmark from Sync" options are disabled from the full edit view and preview of an event in Notes to avoid potential sync conflicts when editing events.

The following screenshots show the expected state of the SugarCRM Actions menu options based on the marked and linked state of a selected event in IBM Notes as described in the previous table.

Unmarked Event	**Marked; Not-Linked Event**	**Marked and Linked Event**
		

Contacts Menu

The SugarCRM Actions menu shows options specific to syncing contacts with Sugar when viewing contacts via list view in IBM Notes.



In addition to the [default menu] items, the following options are available in the SugarCRM Actions menu for contacts in IBM Notes:

Menu Item	Visibility	Description
Mark to Sync	When an unsynced contact is selected in list view	Sync the contact with Sugar's Contacts module and mark it for inclusion in future automatic and manual syncs. Selecting this menu option enables the next two menu

		options.
Unmark from Sync	When a synced contact is selected in list view	Stops syncing the contact and asks if you want to delete the corresponding contact record from Sugar.
Open Contact in Sugar	When a synced contact is selected	Navigate to the synced contact record in Sugar.

Note: The "Mark to Sync" and "Unmark from Sync" options are disabled from the edit and preview views of a contact in Notes to avoid potential sync conflicts while editing.

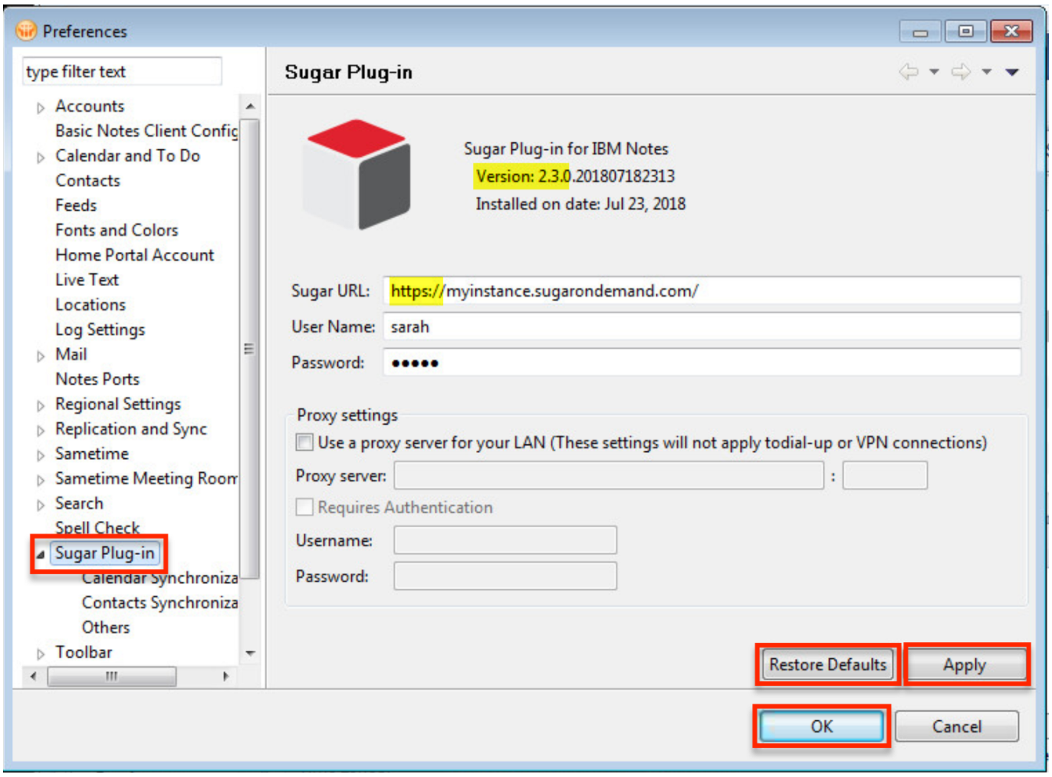
Configuring the IBM Notes Plug-in

The IBM Notes Plug-in's preferences page allows users to connect to their Sugar instance, set the language settings, synchronize data between IBM Notes Plug-in and the Sugar instance, and view the error log. These options are available by navigating to Preferences via the SugarCRM Actions menu. The following sections describe the options available for each user's installation of the plug-in.

Note: If an administrator makes any Studio changes to a Sugar module or creates a new, custom Sugar module, users must navigate to Preferences via the SugarCRM Actions menu and click "OK" to sync the changes from Sugar to IBM Notes.

Basic Settings

Your general connection settings are stored and managed in the basic Sugar Plug-in settings window.

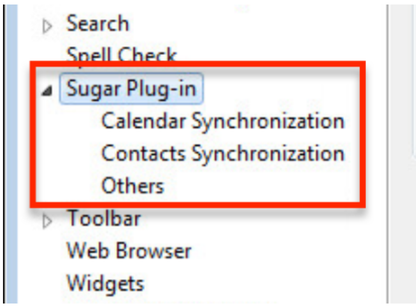


Most of the basic fields are automatically populated when you first install and connect the plug-in. Click "Apply" and then "OK" to preserve any changes to the following options:

- **Sugar URL** : Enter your Sugar instance's URL (including "https://").
- **User Name** : Enter the user name you use to log into Sugar.
- **Password** : Enter the password you use to log into Sugar.
- **Proxy Settings** : If you are using a proxy to connect to the Internet (not common), complete the fields in this section. Contact your network administrator if you need assistance completing these fields.
- **Restore Defaults** : Restore the plug-in to its original settings.

Advanced Settings

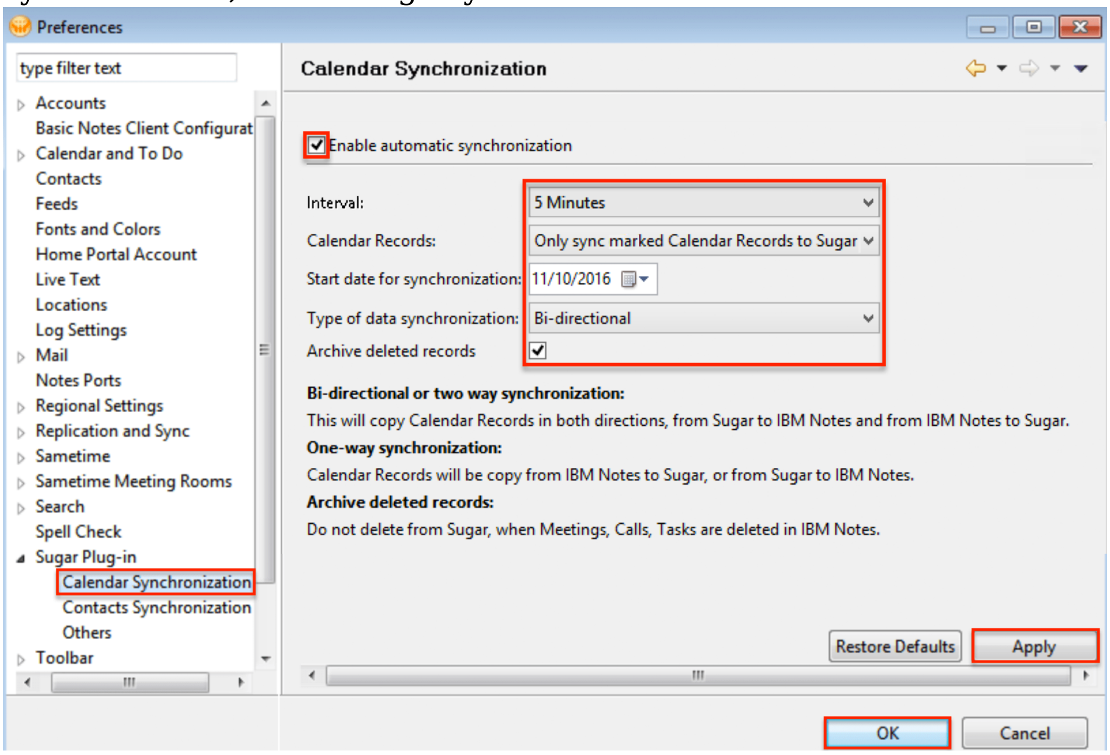
The advanced settings allow users to adjust calendar settings, modify contacts settings, and change logging and language settings. To access the advanced settings, select one of the options nested within the Sugar Plug-in basic settings:



- Calendar Synchronization : Enable automatic sync and adjust the calendar sync settings.
- Contacts Synchronization : Enable automatic sync and adjust the contact sync settings.
- Others : Adjust the plug-in language, access the log file, and control the pre-loading of results in search windows.

Calendar Synchronization

The Calendar Synchronization settings allow users to enable auto sync, adjust auto sync intervals, and change sync direction.



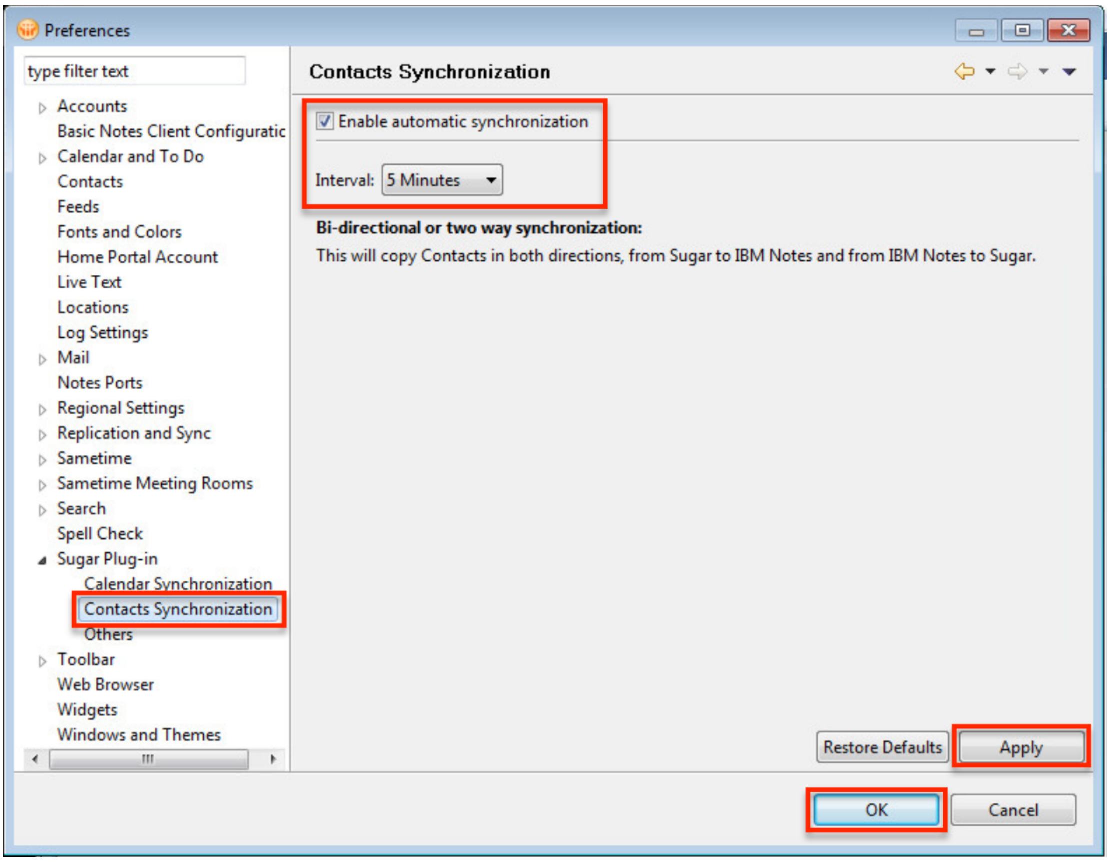
Click "Apply" and then "OK" to preserve any changes to the following options:

- **Enable automatic synchronization** : Select the checkbox to enable auto-sync for calendar events.

- **Interval** : Adjust how frequently auto-sync should run for events.
- **Calendar Records** : Choose to sync either all calendar records or only marked calendar records.
- **Start date for synchronization** : Choose a start date for when synchronization should begin.
- **Type of data synchronization** : Choose the direction of the data synchronization between IBM Notes and Sugar.
    - **Bi-directional** : Sync data both ways between IBM Notes and Sugar.
    - **One way (IBM Notes to Sugar)** : Sync data only from IBM Notes to Sugar.
    - **One way (Sugar to IBM Notes)** : Sync data only from Sugar to IBM Notes.
- **Archive deleted records** : If an IBM Notes record is synced to Sugar and then later archived or deleted in IBM Notes, the plug-in will delete the corresponding record from Sugar on next sync unless "Archive deleted records" is enabled in the plug-in's preferences. This preference is enabled by default for each user's installation.
    - **Note**: A meeting can only be unsynced and deleted from Sugar if the user disables "Archive deleted records".

Contacts Synchronization

The Contacts Synchronization settings allow users to enable auto sync and adjust auto sync intervals.

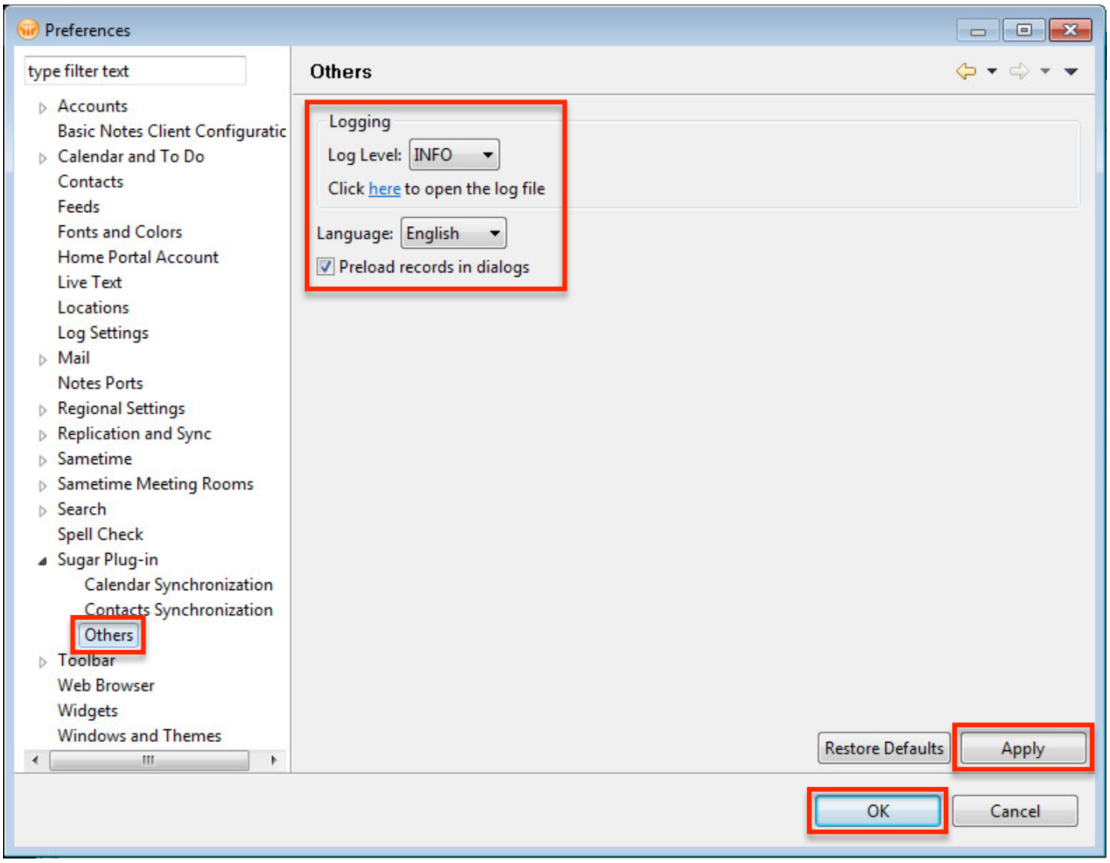


Click "Apply" and then "OK" to preserve any changes to the following options:

- **Enable automatic synchronization** : Select the checkbox to enable auto-sync for contacts.
- **Interval** : Adjust how frequently auto-sync should run for contacts.

Others

The Others section contains options for logging, language, and record pre-load in search views.



- **Log Level** : To view the plug-in's log, click the link displayed under the log level. The amount of detail in the log depends on the Log Level option selected.Please note that the verbosity of higher levels of logging can impact the performance of your applications. We do not recommend leaving the log level any higher than the default Error level unless actively troubleshooting an issue. The logging levels in order of most verbose to least are as follows:
  - **Debug** : Logs most events to help debug the application
  - **Info** : Logs informational messages and database queries
  - **Error** : Logs only error events in the application
- **Language** : Select your preferred language.
- **Preload records in dialogs**: When enabled, the plug-in will automatically display results when searching for Sugar records from within IBM Notes (e.g. when linking to Sugar records or creating a new contact in Sugar). If the preload option is disabled, users will need to click the Search button in order for Sugar records to appear. Leaving this disabled may improve client performance.

Understanding Sync Behavior

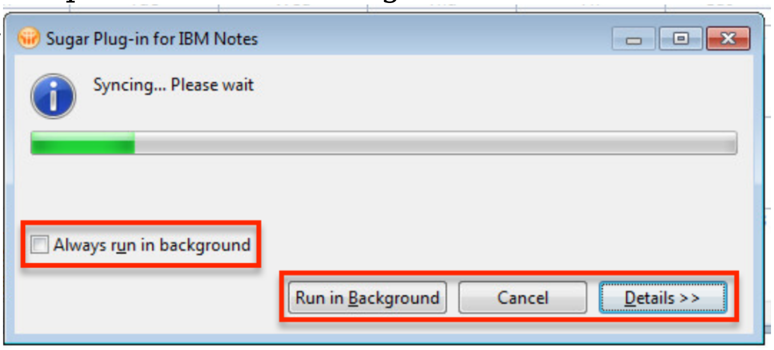
When a Notes document is marked for sync, it will create a new record in Sugar on the first sync and, in future automatic and manual syncs, replicate any updates made to the synced records in Sugar or in IBM Notes between the two systems. Some situations and document types are intentionally omitted from sync activities. For more information, please refer to the following sections, which outline the rules of synchronization.

- Sync Features and Limitations
- Sync Rules for Meetings and Events
- Sync Rules for Data Conflicts

Sync Features and Limitations

Please keep in mind the following general requirements and limitations when syncing:

- **Character limits and formatting** : For calendar events, Sugar's description field is plain text and enforces a 65,535-character limit. IBM Notes, on the other hand, has no limit and uses rich-text formatting. For this reason, Sugar will convert the description of synced events to plain text and truncate the content if it exceeds the character limit.
- **Required email address** : When creating and syncing a contact or lead in either direction, an email address is required. If the Email Address field for a synced contact or lead is erased via Data Privacy in Sugar, the plug-in will permanently disable sync for the corresponding Notes record and prevent the record from being marked for sync. For more information about data erasure in Sugar, please refer to the Data Privacy Guide.
- **Sync-processing options** : When a sync is running, a window will appear to show its progress. The following options are available in the progress window:
    - **Run in Background** : Click this button to hide the progress window for the current sync activity.
    - **Always run in background** : Enable this option to hide the progress window for all future sync activities.
    - **Cancel** : Click the Cancel button to stop the current sync.
    - **Details** : Expand or collapse the real-time log viewer for the current sync process.



Sync Rules for Meetings and Events

Please keep in mind the following rules when syncing meetings, appointments, all-day events, and To Do events:

- **Event chairperson** : Every meeting event in IBM Notes has a designated chairperson (a.k.a. the meeting's organizer or "the chair"). Only events that are chaired by the plug-in's logged-in user will sync to Sugar.
    - When a meeting syncs to Sugar, the chair becomes the assigned user for the meeting record in Sugar.
    - If the meeting's chairperson does not match up with any users that are configured in your Sugar instance, then the meeting will not sync to Sugar.
    - If you are a guest for an event chaired by another user of Sugar and the IBM Notes Plug-in, then that event will sync to Sugar from the chair's account.
- **Guest sync**
    - Invitees marked "Optional" or "FYI" on a Notes event in are not included in the syncing process.
    - Invitees marked "Required" on a Notes event become guests on the synced Sugar record only if the invitee already exists as a contact or lead in Sugar.
    - When synced from Sugar to IBM Notes, however, all guests on the Sugar record become required invitees for the IBM Notes event.
- **Non-Sugar guests** : To prevent unintended data loss, a synced IBM Notes event that has non-Sugar guests can only be modified from the IBM Notes side.
- **Special events** : Out-of-office, anniversary, and reminder events in Notes are ignored during sync.
- **Private events** : Events marked "Private" in IBM Notes will only sync unidirectionally and will display the subject line "Busy" in Sugar. Once the private event syncs to Sugar, subsequent changes to the call, meeting, or task will not sync back from Sugar to Notes.
- **Recurrent events** : When syncing recurring meetings, please keep in mind these additional rules and behaviors.
    - Because Sugar does not contain a "Monthly by Day" option in its calendar, Monthly by Day and custom interval meetings created in IBM Notes cannot be synced to Sugar.
    - When a recurring meeting with non-Sugar guests is synced from IBM Notes to Sugar, only the parent meeting in Sugar will contain all invitees as guests. The child meetings will have only the guests that are Sugar users as guests.
    - You cannot use Sugar to delete or reassign an occurrence from a series of meetings that have been synced to Sugar from IBM Notes.

Sync Rules for Data Conflicts

Please keep in mind the following rules which apply to data conflicts:

- **Conflict handling** : When a record is synced and both versions of the synced record have recent changes, any changes made to the IBM Notes record will win over changes made to the Sugar record.
- **Deleted records** : If an IBM Notes record is synced to Sugar and then later archived or deleted in IBM Notes, the plug-in will delete the corresponding record from Sugar on next sync unless "Archive deleted records" is enabled in the plug-in's preferences. This preference is enabled by default for each user's installation.
- **Erased records (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, please 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 Notes record and prevent the record from being marked for sync. If the individual later provides consent for your organization to use their information, you will need to create a new record in Notes 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 Notes record on the next sync. You can enter new values for the erased fields in Notes, but the values of those fields will not sync back to Sugar.

Marking Documents for Sync to Sugar

When you mark an IBM Notes record for sync, it will instantly sync to the appropriate module in Sugar and create a new record. Then, when future syncs occur either manually or automatically, any changes detected on the Notes or Sugar record will be copied to the other synced record.

Any IBM Notes record that is linked to a Sugar record is automatically marked for sync, and you can also enable the plug-in to automatically sync contacts and calendar items. To set up auto-sync, select "Preferences" from the SugarCRM Actions menu and then adjust the settings for Calendar Synchronization and Contacts Synchronization.

The following sections explain what to expect when marking contacts and events for sync from IBM Notes to Sugar.

Note: Some situations and document types are intentionally omitted from sync activities. For more information, please refer to the sections under Understanding Sync Behavior.

Marking Contacts for Sync

Marking a contact for sync in IBM Notes syncs the contact to Sugar's Contacts module as a new record on the first sync and applies any changes to the contact from either side on subsequent sync activities.

To mark an IBM Notes contact for sync, open the contact record and select "Mark to Sync" from the SugarCRM Actions menu. A contact record will be instantly created in Sugar. Subsequent updates to the contact in Sugar or in IBM Notes will be copied between the two systems in future automatic and manual syncs.

- **Automatic sync** : To set up auto-sync, select "Preferences" from the SugarCRM Actions menu and then adjust the settings for Contacts Synchronization.
- **Manual sync** : To manually sync contact records between IBM Notes to Sugar, select "Sync Contacts" from the SugarCRM Actions menu to re-sync all contacts that are currently marked for sync. You can manually force a sync this way at any time with or without auto-sync enabled.

Marking Events for Sync

When syncing events, the type of event in IBM Notes will determine where it syncs in Sugar:

- Marking a "Meeting" calendar entry for sync in IBM Notes syncs the event to Sugar's Meetings module.
- Marking an "Appointment" or "All Day Event" calendar entry for sync in IBM Notes syncs the event to Sugar's Calls module.
- Marking a "To Do" event for sync in IBM Notes syncs the event to Sugar's Tasks module.

Note: For exceptions and special considerations, please review the guidelines listed in the Understanding Sync Behavior section of this page.

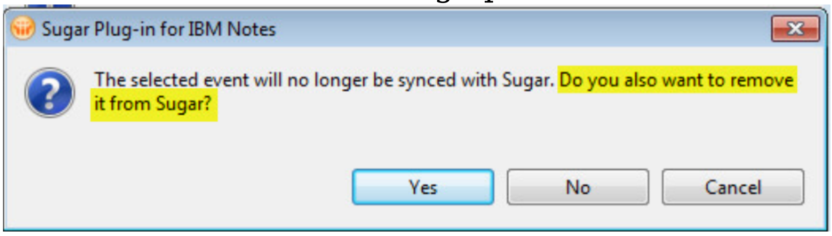
To mark an IBM Notes event for sync, navigate to the calendar or list view, select the event, and select "Mark to Sync" from the SugarCRM Actions menu. The "Mark to Sync" and "Unmark from Sync" options are disabled from the edit views and previews of events in Notes to avoid potential sync conflicts when editing events. Upon marking the event for sync, a corresponding record will be instantly created in Sugar. Subsequent updates to the event in Sugar or in IBM Notes will be copied between the two systems in future automatic and manual syncs.

- **Automatic sync** : To set up auto-sync for events you create, select "Preferences" from the SugarCRM Actions menu and then adjust the settings for Calendar Synchronization.
- **Manual sync** : To manually sync the event records that you create, select "Sync Calendar" from the SugarCRM Actions menu to re-sync all events that are currently marked for sync. You can manually force a sync this way at any time with or without auto-sync enabled.

Unmarking Documents from Sync to Sugar

After an IBM Notes document has been marked for sync, the SugarCRM Actions menu in IBM Notes will display an option to "Unmark from Sync", which discontinues future sync events for the contact or event and asks the user if they would like to simultaneously delete the synced Sugar record. The deletion of the synced record in Sugar will take effect only after clicking "Sync Calendar" for events or "Sync Contacts" for contacts from the SugarCRM Actions menu.

Follow these steps to unmark a Meeting event from sync as an example:

1. Select the synced meeting in calendar view or list view in IBM Notes. For contacts, select the contact in list view.
2. Expand the SugarCRM Actions menu and click on "Unmark from Sync".
3. Choose one of the following options from the confirmation window:


    - **Yes** : Stop syncing data for this record and delete the synced meeting record from Sugar.
        - **Note**: This option requires "Archive deleted records" to be disabled in the Calendar Synchronization settings. The preference is enabled by default for each user, so you must manually disable the option.
    - **No** : Stop syncing changes but do not delete the meeting from Sugar.
    - **Cancel** : Return to the IBM Notes record without making any changes.
4. Finally, return to the SugarCRM Actions menu and click "Sync Calendar" to complete the action. If you are unmarking a contact from sync, select "Sync

Contacts" for this step instead.

Archiving Emails to Sugar

The IBM Notes Plug-in allows you to archive email in IBM Notes to Sugar. Archiving simply means that you are creating a copy of a sent or received message in Sugar's Emails module. Users cannot edit an email's content, dates, or recipients once it has been archived. For more information on archived mail in Sugar, please refer to the Emails documentation.

To archive an email from IBM Notes to Sugar, simply select a sent or received Notes email and then choose "Archive to Sugar" from the SugarCRM Actions menu. The Notes email is instantly archived as a new email record in Sugar and two new options become available for the email in the SugarCRM Actions menu: Link to Sugar and Unarchive From Sugar, each of which are explained in their respective sections of this page.

Note: Draft messages can be archived, but because drafts have an empty "From" address, the plug-in may associate the email with records that have empty email addresses in Sugar. For this reason, it is not a best practice to archive draft emails.

Mass Archiving Emails

To archive several emails to Sugar at once, simply select the emails in list view in IBM Notes and then select "Archive to Sugar" from the SugarCRM Actions menu. All of the selected, unarchived messages will be archived to Sugar.

Note: Mass archiving IBM Notes emails to Sugar works when configured using a Domino server.

Unarchiving Emails From Sugar

When you unarchive an IBM Notes email, you will delete the copy of the email from Sugar's Emails module. If the archived email was linked to a Sugar record, that link will also be lost. When multiple emails are unarchived via list view, then all of the selected, archived emails will be unarchived, unlinked, and deleted from Sugar.

Linking IBM Notes Documents to Sugar Records

The IBM Notes Plug-in allows you to link and mass link IBM Notes records to

Sugar records. Any IBM Notes document that has been archived or marked for sync by the Sugar Plug-in can be linked to a Sugar record from any of the following modules (subject to team and role assignments of the logged-in user): Accounts, Bugs, Cases, Contacts, Leads, Opportunities, Quotes, Revenue Line Items, Targets, and custom modules that have a relationship with the Activities module.

Please take note of the following rules which apply to linking:

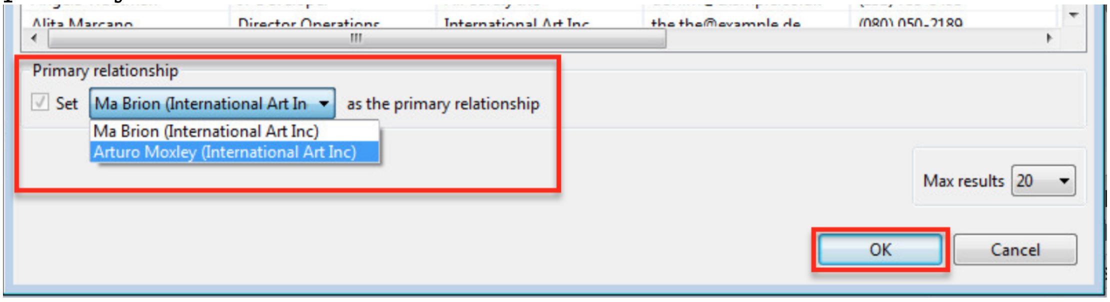
- Before linking a Notes record to a Sugar record, the IBM Notes document must be archived or marked for sync.
- When a user adds a sender to Sugar, the created contact or lead will also be automatically linked to the IBM Notes email or meeting and marked for sync. Please refer to the Adding Senders to Contacts or Leads section of this documentation for more information.
- When linking a Sugar record to an IBM Notes meeting record, you must click "Save and Send Invitations" in order to complete the linking process.
- Embedded images within emails will not be imported to Sugar unless you add a notes.ini setting in the Domino server. Please refer to the Inline Images documentation on the IBM website for more information.

Once a Notes document has been archived or marked for sync, the "Link to Sugar" option becomes available in the SugarCRM Actions menu. If the Notes document has already been linked to a Sugar record, then the menu option will instead display the name of the linked Sugar record (e.g., "Account: Constrata Trust LLC"). You can click on the name of the linked Sugar record to re-open the "Link to Sugar" window, allowing you to remove the current relationship and link the email to a different Sugar record. For more information on the available menu options, please refer to the Menus section of this page.

The linking feature provides many-to-many support between IBM Notes and Sugar, so you can link one or more Notes documents to one or more Sugar records simultaneously. To link records, follow these steps:

1. Select the Notes document you would like to link to Sugar. To select multiple Notes documents, hold the shift or control key while selecting the Notes documents in list view.
2. Expand the SugarCRM Actions menu and click "Link to Sugar". If the "Link to Sugar" menu option is grayed out, confirm that the IBM Notes document has been archived or marked for sync.
3. Search for the Sugar record or records to link. The following search options are available:
    - **Module** : Select a Sugar module (e.g. Contacts) from the dropdown list to display only records within that module.
    - **My Items** : Check the "My items" checkbox to show only Sugar records assigned to you.
    - **Search bar** : Enter text into the search bar and click "Search" to

show records that contain your search query.
4. Select the record you would like to link with the Notes document(s). To link to more than one Sugar record, hold the shift or control key while selecting and then use the Primary Relationship dropdown to specify which Sugar record should appear in the SugarCRM Actions menu as the document's primary linked record.



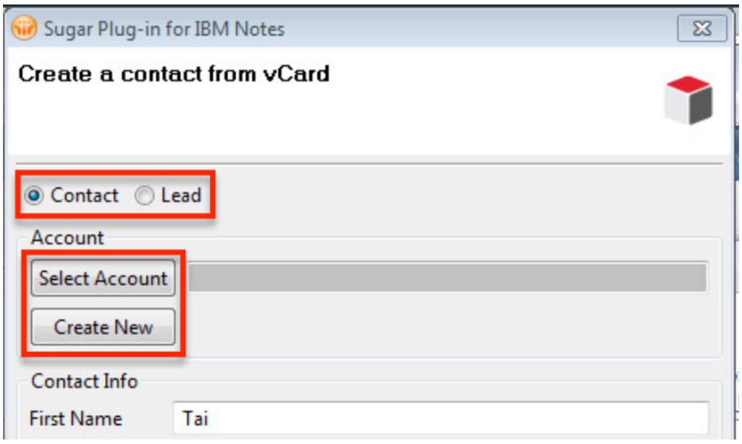
The primary linked Sugar record will now appear in the SugarCRM Actions menu when viewed from the IBM Notes record. You can click "Open linked Record in Sugar" to navigate to the primary linked record in your Sugar instance. You can find any non-primary relationships in the relevant subpanels for the archived email or synced record in Sugar.

Adding and Linking a Sender to Sugar

The IBM Notes Plug-in allows users to add the sender of an email as either a contact or a lead in Sugar. The email record will automatically be linked to the Sugar lead or contact.

Use the following steps to add the sender of an email or meeting as a record in Sugar:

1. Open a received email or meeting in IBM Notes.
2. Expand the SugarCRM Actions menu and select "Add Sender to Contacts/Leads".
3. In the new window, choose to create either a contact or a lead by selecting the appropriate option.
4. Click the Select Account button to search for an existing Sugar account for the new lead or contact. Alternatively, click the Create New button to add a new account record to Sugar that will be related to the new lead or contact.



5. Review the contact details in the remaining fields and adjust them if needed. Click "OK" to finalize the details which will sync to Sugar the next time you manually or automatically sync IBM Notes contacts.
6. Optionally, use the "Sync Contacts" option in the SugarCRM Actions menu to manually initiate the sync action.

The lead or contact will now be available in the IBM Notes contact list. The new Sugar lead or contact will automatically be linked to the email or meeting in IBM Notes, and the email or meeting will be archived under the new Sugar record. Please refer to the Linking IBM Notes Records to Sugar Records section of this documentation for more information on linking records via the IBM Notes Plug-in.

Unlinking IBM Notes Records From Sugar Records

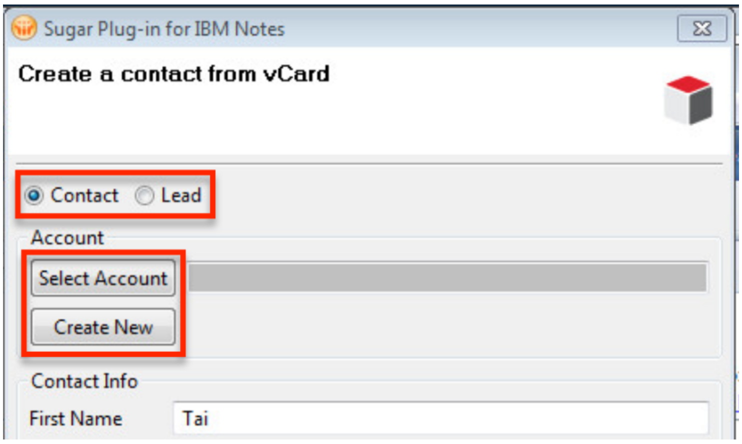
Once you have linked a document in IBM Notes to a Sugar record, you can unlink it at any time using the "Unlink from Sugar" option in the SugarCRM Actions menu. This action will remove the relationship without deleting any other data from Sugar or from IBM Notes. You can later re-link the Notes document to a Sugar record if you wish.

Importing vCards to Sugar

A vCard is a virtual business card and often contains a person's name, email address, phone number, etc. Users can receive vCard files as attachments in emails. The IBM Notes Plug-in allows users to import vCards to Sugar to create a new lead or contact record within Sugar.

It is important to note that this will not mark the contact for sync; it will only create a contact record in Sugar. Please refer to the Marking Contacts for Sync section of this documentation for instructions on how to mark contacts for sync.

Use the following steps to import a vCard to Sugar:

1. Open the IBM Notes email containing the vCard.
2. Expand the SugarCRM Actions menu and select "Import vCard to Contacts/Leads".
3. In the new window, choose to create either a contact or a lead by selecting the appropriate option.
4. Click the Select Account button to search for an existing Sugar account for the new lead or contact. Alternatively, click the Create New button to add a new account record to Sugar that will be related to the new lead or contact.


5. Review the contact details in the remaining fields and adjust them if needed. Click "OK" to finalize the details which will sync to Sugar the next time you manually or automatically sync IBM Notes contacts.
6. Optionally, use the "Sync Contacts" option in the SugarCRM Actions menu to manually initiate the sync action.

Please refer to the Marking Contacts for Sync section of this documentation if you would like to mark the contact for sync going forward.

Opening Archived, Synced, and Linked Records in Sugar

Selecting one of the options to open a synced, linked, or archived record will open the Sugar record in your default browser. When viewing a synced or archived Notes document, expand the SugarCRM Actions menu and select one of the following options, which will be available based on your location in the Notes application (as explained in the Menus documentation above):

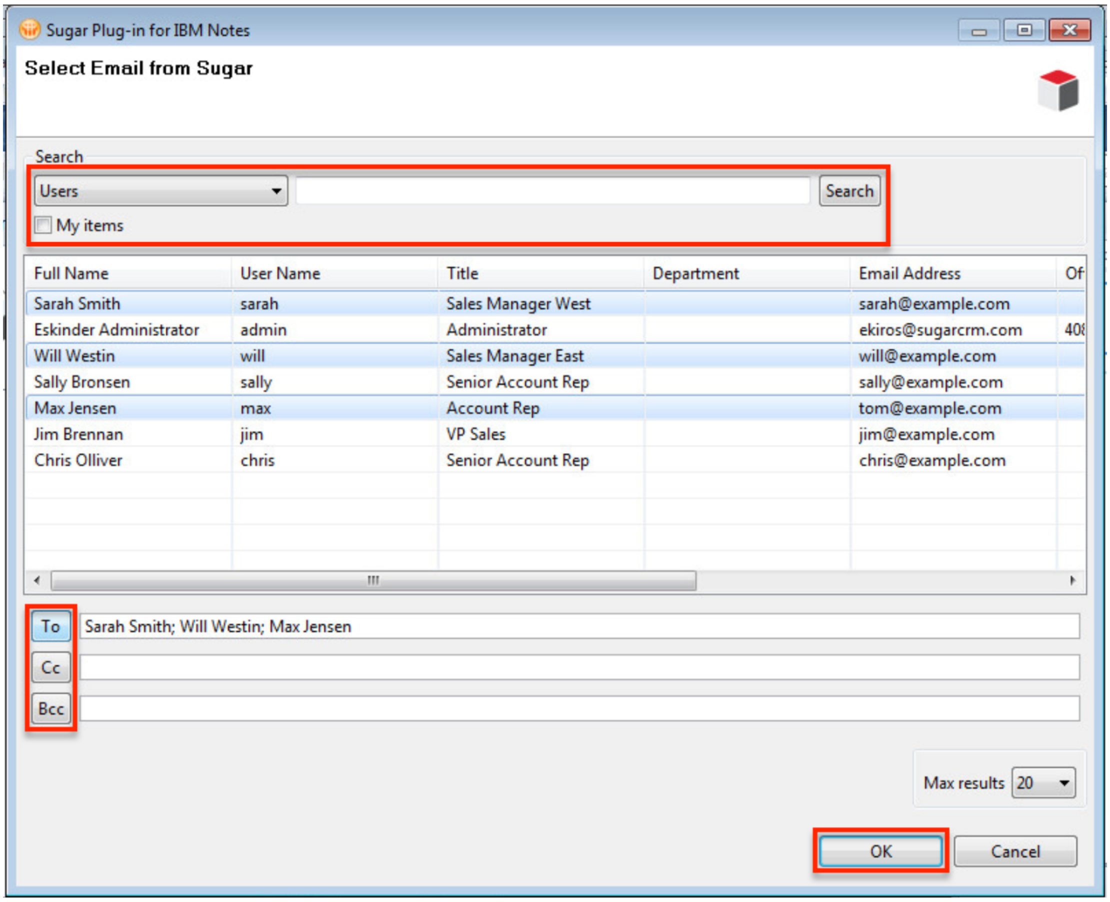
- **Open Linked [Record] in Sugar** : Open the primary linked record in Sugar.
- **Open Email in Sugar** : Open the archived email in Sugar's Emails module.
- **Open Event in Sugar** : Open the synced call, task, or meeting record in Sugar.
- **Open Contact in Sugar** : Open the synced contact record in Sugar's Contacts module.

Selecting Recipients and Invitees From Sugar

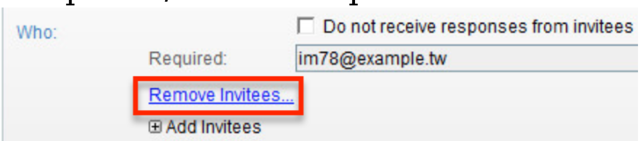
When drafting an email in IBM Notes, the "Select recipient(s) from Sugar" option will be enabled in the SugarCRM Actions menu. When creating a meeting in IBM Notes, the "Select invitee(s) from Sugar" option will be enabled in the SugarCRM Actions menu. These options behave the same way to allow users of IBM Notes to quickly search for and add Sugar leads, contacts, and users as recipients and invitees.

Follow these steps to add Sugar contacts, leads, and users as recipients or invitees in IBM Notes:

1. Create a new mail or meeting event in IBM Notes.
2. Expand the SugarCRM Actions menu and click "Select recipient(s)/invitee(s) from Sugar".
3. Search for the Sugar record or records to add as recipients or invitees. The following search options are available:
    - **Module** : Select a Sugar module (e.g. Users) from the dropdown list to display only records within that module.
    - **My Items** : Check the "My items" checkbox to show only Sugar records assigned to you.
    - **Search bar** : Enter text into the search bar and click "Search" to show records that contain your search query.
4. Click on the name of the lead, contact, or user that you would like to add as a recipient or invitee. To select more than one Sugar record, hold the shift or control key while selecting.
5. Move the selected recipients/invitees to the To/CC/BCC or Required/Optional/FYI fields by clicking on the appropriate button below the search results frame.



6. Continue searching for and adding names as needed. Additional names will append to the list of recipients or invitees. Please note that you cannot remove names from the To/CC/BCC or Required/Optional/FYI fields in the SugarCRM selection window once you add them, but you can click "Cancel" in the Sugar window or easily remove names via the "Remove Recipients/Invitees" option in the IBM Notes document.



7. Click "OK" to close the window and continue composing your email or meeting as usual with the selected Sugar recipients/invitees.

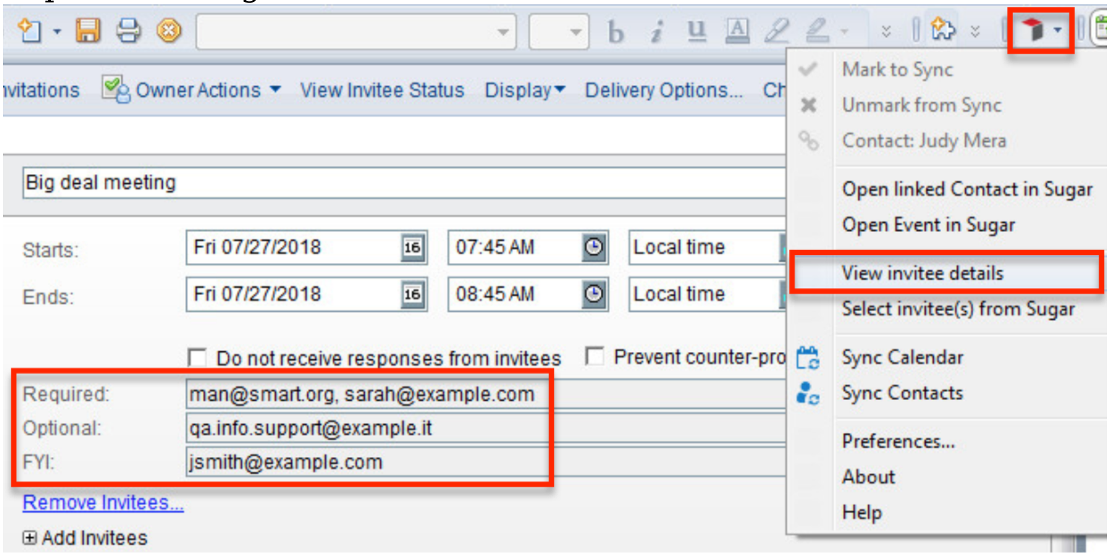
Viewing Invitee Details From Sugar in IBM Notes

When viewing or creating an IBM Notes meeting, you can view the invitees' Sugar information without navigating away from IBM Notes.

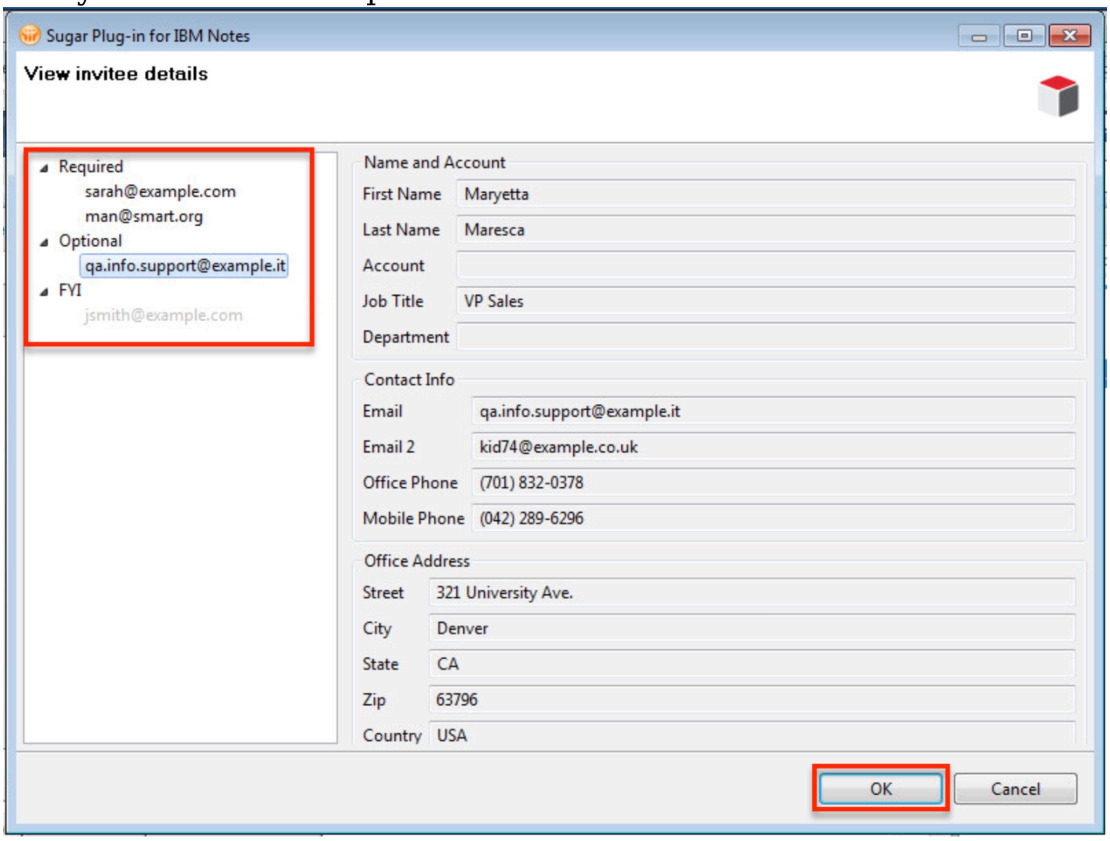
Use the following steps to view Sugar invitee details when creating a new meeting:

1. Go to your IBM Notes calendar.
2. Create or open a meeting-type calendar event.

3. Enter the email address(es) for a Sugar record in the Required, Optional, or FYI fields.
4. Expand the SugarCRM Actions menu and select "View invitee details".



5. A window will open with the meeting's invitees in the panel to the left of the window. Any invitees that are not found in Sugar will be grayed out. Click on an email address to view the invitee's Sugar data. Click "OK" when ready to return to the previous view.



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