Troubleshooting Email Archived Via Outlook Plug-In Missing Attachments

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Overview

Users can easily archive email messages to Sugar using the Sugar Plug-in for Microsoft Outlook. This article covers what to do if email attachments do not carry over to Sugar with the messages as expected.

For more information on installing and using the Outlook plug-in, please refer to the MS Outlook Plug-in documentation.

Symptoms

After synchronizing the Outlook application with Sugar, your emails have copied over without their attachments.

Resolution

Email attachments may fail to archive with messages due to role restrictions in Sugar or due to settings in your plug-in's configuration.

Resolving Role Restrictions in Sugar

To verify a role-related cause, ask your administrator to test the credentials of a user with less restrictive role settings (e.g. their own credentials) on your installation of the Outlook plug-in via the General tab in the SugarCRM Plug-in Settings. Attempt to archive the email to the Sugar instance of this other user. If the test succeeds using the same Outlook plug-in installation, then try loosening the role restrictions in the Notes module for the affected user. For more information on configuring roles, please refer to the Role Management documentation.

Restoring Settings in the Plug-in

A configuration in the Outlook Plug-In's settings may be preventing attachments from archiving. Try restoring the default settings for the affected user by uninstalling and reinstalling the plug-in, selecting "No" when Windows asks if you would like to preserve the plug-in's settings. For steps to complete this procedure, please refer to the MS Outlook Plug-in Installation Guide.