Outlook Synchronisation Guide

Contents

Introduction

This information assumes you have subscribed, or are planning to subscribe to our **Outlook Synchronisation module**. You can subscribe by selecting this option in the Main Menu item Configuration and then License.

webCRM synchronises the following data with Outlook:

- Outgoing and incoming emails when they are 'ticked' in Outlook
- All Meetings
- All Tasks (called Activities in webCRM)
- All Contacts (called Persons in webCRM)

Outlook synchronization (requires subscription to the Outlook Integration module)

Outlook synchronisation is compatible with:

- Microsoft Windows XP or Microsoft Vista +
- Microsoft Outlook 2003 or Microsoft Outlook 2007 (Standard Outlook or using Exchange server)

You will need to install a small webCRM plug-in to your Outlook. This plug-in adds a few new buttons to your Outlook client and a new tab in the Outlook configuration. At fixed intervals, or when you open and close your Outlook system, the plug-in will connect to your webCRM system and synchronise data. Please note that you need to be connected to the Internet so that data can be transferred.

The Outlook integration module only needs to be configured once for all users. You will need full security access rights to do this i.e. Access = "All rights".

Configuring Outlook Integration with webCRM

Requires webCRM access level = "All rights"

To configure what data can be synchronised between webCRM and Outlook you will need to navigate from the Main Menu to Configuration -> Integration -> Outlook. You will see the following screen:

Data	Synchronize			Condition	Outlook Reminder
Persons:	b2bCRM	<->	Outlook	When Outlook user is assigned as responsible	
Activities:	b2bCRM	<->	Outlook	When Outlook user is assigned as responsible	0:10
Meetings:	b2bCRM	<->	Outlook	When Outlook user is assigned as responsible	3:00
Outbound e-mail:	b2bCRM	<-	Outlook		
Inbound e-mail:	b2bCRM	<-	Outlook		

Field	Map to outlook field
Person: First name	Contact: First name
Person: Middle name	Contact: Middle name
Person: Last name	Contact: Last name
Organisation: Name - Division	Contact: Company
Person: Comment	Contact: Comment
Person: Email	Contact: E-mail
Person: Dir telephone	Contact: Business Phone
Person: Mobile telephone	Contact: Mobile Phone
Person: Title	Contact: Job Title
Person: Salutation	--- None ---

You can determine the level of integration for each data type by selecting the corresponding arrows. You can enable integration from webCRM to Outlook, from Outlook to webCRM, both ways, or no integration at all.

Select if the synchronization shall be for all webCRM data, or for webCRM data only where the current user is appointed responsible (owner). NOTE: The latter option is recommended as you will otherwise copy meetings for all users in to the individual users Outlook calendar.

Select if you want reminders activated in Outlook for Activities and / Or Meetings.

Note: The configuration is common to all users. Individual user configuration is not possible

Next you set up the mapping of data fields. This is done on the same screen as the configuration above. See an example of the field mapping on the next page. If you have defined custom fields in webCRM, these will show in the field mapping.

You will notice that for some of the fields the mapping is fixed. Others you can change. If you subscribe to the B2C version (no organisations) the mapping will look slightly different.

Note: The field mapping is common to all users. Individual user mapping is not possible.

Activity: Description	Task: Subject
Activity: Status	Task: Status
Activity: Date	Task: Due date
Activity: Responsible	Task: Owner
Activity: Comment	Task: Comment
Activity: Action	--- None ---
Activity: Product	--- None ---
Activity: Activity Type	--- None ---
Activity: Seminar date attended	--- None ---
Activity: No of Users	--- None ---
Activity: Order Date	--- None ---
Activity: Lead Grade	--- None ---
Activity: Could be interested	--- None ---
Activity: Email Marketing Only	--- None ---

Note: When entities are created in Outlook and then synchronized with webCRM, the system will assign default values for all data fields in webCRM – even those data that are not synchronized during update / create. For data fields of type drop-down (pick list) the system will assign the value at the top of the pick list if no value is supplied in the data from Outlook.

Installing Outlook Synchronisation

Close your Outlook system and run the Outlook setup program. This is available from your administrator or can be downloaded by navigating to the Main Menu to Configuration -> Integration -> Outlook. The download file is available from the link.

Important:

- You must be connected to the Internet during the installation process.
- Your Outlook must be shut down while installing
- The plug-in is approximately 3 MB of size
- Some of the installation steps may take a few minutes – please be patient and do not click Cancel/Abort

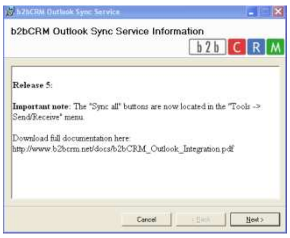
Note:
You may need to be logged on your PC as administrator. Depending on your security settings you may be asked to "Allow" the installation to continue. Do so when prompted.

The screenshots below show the typical process however please note they may not be completely identical to the screens you will see:

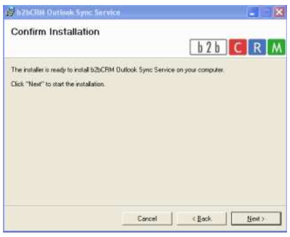
Click Run

Click Next

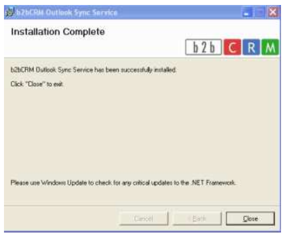
Click Next



Click Next



Click Next



Click Close

Open your Outlook – you need to be connected to the Internet at this point.

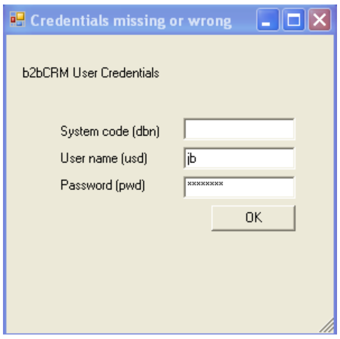
In order for Outlook to communicate with webCRM you must enter:

- System code (dbn)
- User name (usd)

- Password (pwd)

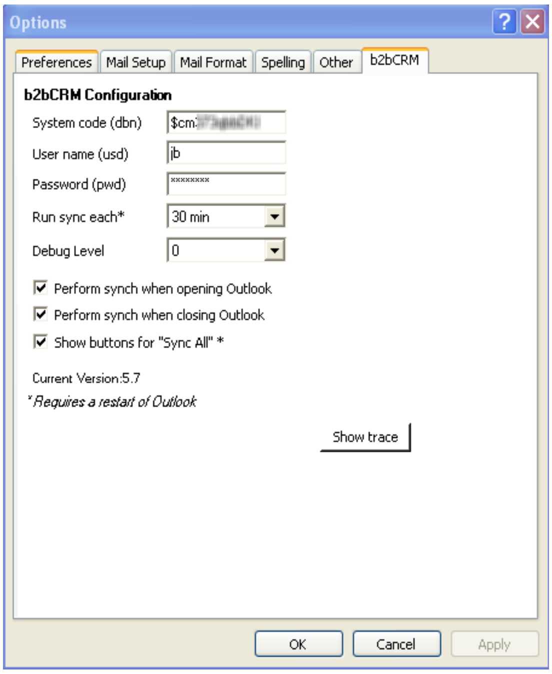
You can find the dbn value to enter by navigating to Configuration-> Integration -> Outlook. From this screen you will be able to see the Outlook dbn code = cm3xxxxx.

Accordingly you will find your user name and password in the welcome mail originally send to you upon start up. If you need a re-issue, go to 'configuration -> users' click the pencil left of your name and press the button 'send email with login details'.



If system code, user name or password is missing or incorrect, this message will be displayed

Outlook options and preferences



In Outlook click "Tools" and "Options" and then the webCRM tab. If you haven't already entered System code, User name and Password, do so now.

Outlook synchronization with webCRM can be run at varying intervals. Simply select your choice from the drop down list. Select "-----" for no automatic synchronization at intervals. In addition to the timer you can configure Outlook to synchronize with webCRM at opening and/or closing.

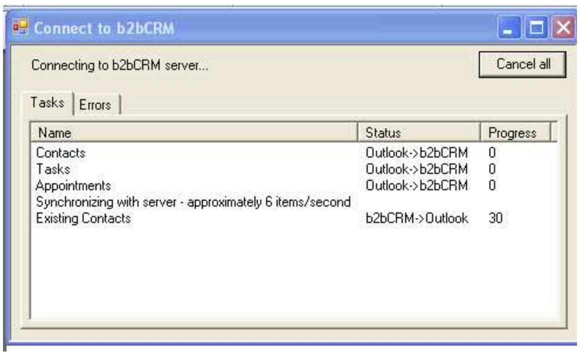
Displaying the "Sync all" buttons is usually only required during the initial synchronization, or if you want to synchronize everything again. Otherwise do not display the "Sync all" buttons.

Debug level shall be 0 under normal circumstances.

IMPORTANT NOTE: The Outlook configuration in the webCRM system determines which data entities are synchronised. The configuration must be done by a webCRM user with access rights = "All rights". See the last section of this document for more details.

Progress window

You will see a progress window every time Outlook connects to webCRM.



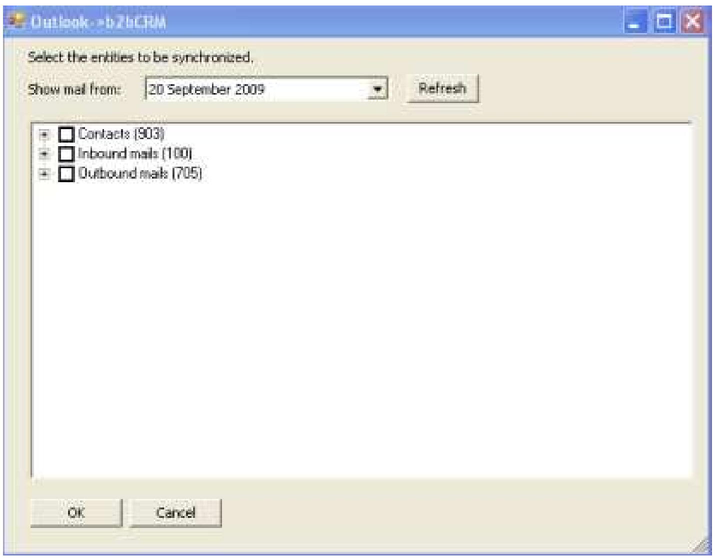
Initial Data Synchronization - the "Sync all" functions.

The "Sync all data" functions are located in the "Tools->Send/Receive" menu in Outlook.

You would only normally need to sync all data during the initial synchronization, or if for some reason you need to synchronize everything again.

When you click "b2bCRM -> Outlook", this screen will appear. You can now select which data to retrieve from webCRM. Only the data types configured in webCRM for synchronized with Outlook are displayed.

Activities with status "Completed" are not synchronized to Outlook tasks. When you click " Outlook -> webCRM -> " this screen below will appear.



You can expand the contacts and emails and select which items you want created/updated in webCRM.

Tasks and Appointments in Outlook cannot be created as webCRM Activities and Meetings this way. This is because Outlook has no reference to the Organisation/Person the Activity/Meeting must be associated with in webCRM.

Note: the date at the top. Here you can set the date from which e-mails should be copied to webCRM.

Note: In order for contacts to be created / updated in webCRM the Contact name and Company field for the contact must have a value assigned. (For the B2C version (no organisations) a valid Contact name + e-mail address should be used instead)

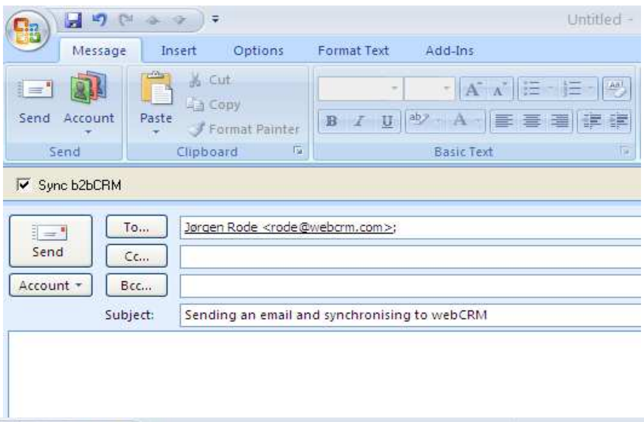
For e-mails to be created in webCRM, the Person with the same email address must already exist in webCRM.

Failure to follow the above instructions will cause the data records to be ignored.

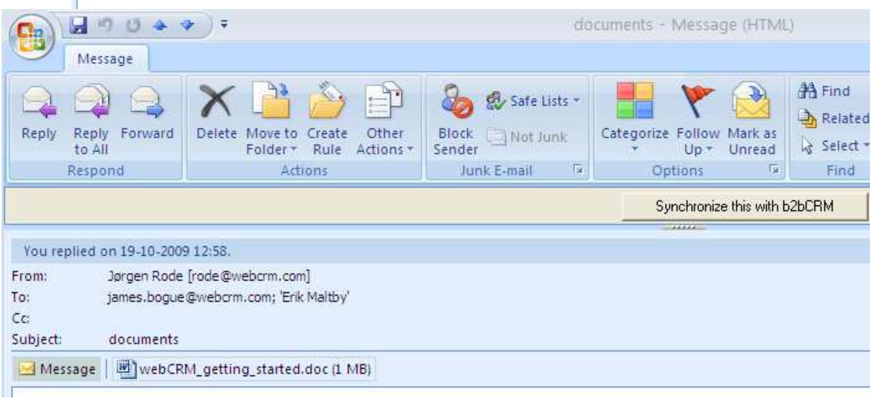
Even though the "Sync all" buttons are displayed in Outlook, nothing will be created in webCRM unless the same type of data synchronisation has been enabled in your webCRM Outlook configuration. This must be done by a webCRM user with access rights = "All rights".

Synchronising Emails

Outbound: Create outbound e-mails in Outlook as you would normally do. If you want the e-mail to be copied to webCRM, you must first fill in all e-mail data. Then you tick the "Sync b2bCRM" button. Outlook immediately connects to webCRM and creates the Outlook e-mail as an outbound e-mail in webCRM.



If the first email address in the "To" field does not match an existing e-mail addresses in webCRM, nothing is created in webCRM. If more than one result is found on an email address, the first one is chosen.



Inbound: If you want an inbound e-mail copied to webCRM, simply click the "Synchronise this with webCRM" button. Outlook immediately connects to webCRM and creates the Outlook e-mail as an inbound e-mail in webCRM. If the "From" email address does not match any existing e-mail addresses in webCRM nothing is created in webCRM.

Notes on e-mail:
E-mails can only be synchronized from Outlook to webCRM. E-mail attachments are never copied from Outlook to webCRM.
In general outbound e-mails should be sent from webCRM. However, you can send e-mails from your Outlook and have them copied to webCRM (attachments are not copied).

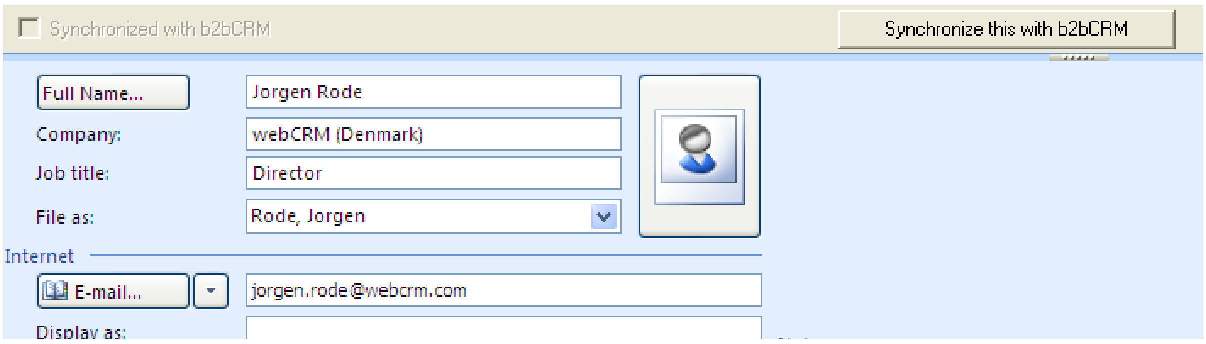
In the webCRM system you can CC or BCC your own e-mail address in order to have an outbound e-mail from webCRM copied to your Outlook with attachments. However, it will appear in your Outlook e-mail in-box. You can manually move it to the sent e-mail folder if you prefer.

The optional webCRM module "Inbound e-mail and web-site integration" supports e-mail attachments which are copied from Outlook to webCRM. Please see separate documentation for this module.
Outlook offline: When your computer isn't connected to the Internet, you can still modify all data check marked as "Synchronized with webCRM". When you do reconnect to the Internet and open or close Outlook updated data will be synchronised.

If you create new data when Outlook is offline you cannot click the "Synchronise this with webCRM" button. When the Internet connection is present at a later time, you can click the "Synchronise this with webCRM" at that time and add Organisation name/E-mail address as appropriate.

Synchronising Contacts

Creating a new contact in Outlook:
Create the new contact in Outlook as you would do normally. If you want the contact to be synchronised with webCRM, you must first fill in all the contact data – the Company name is mandatory. Then you click the "Synchronise this with webCRM" button. Outlook immediately connects to webCRM and creates
the Outlook contact as an Organisation and a Person in webCRM. If the organisation already exists in webCRM – the contact is added as a new Person to that organisation.



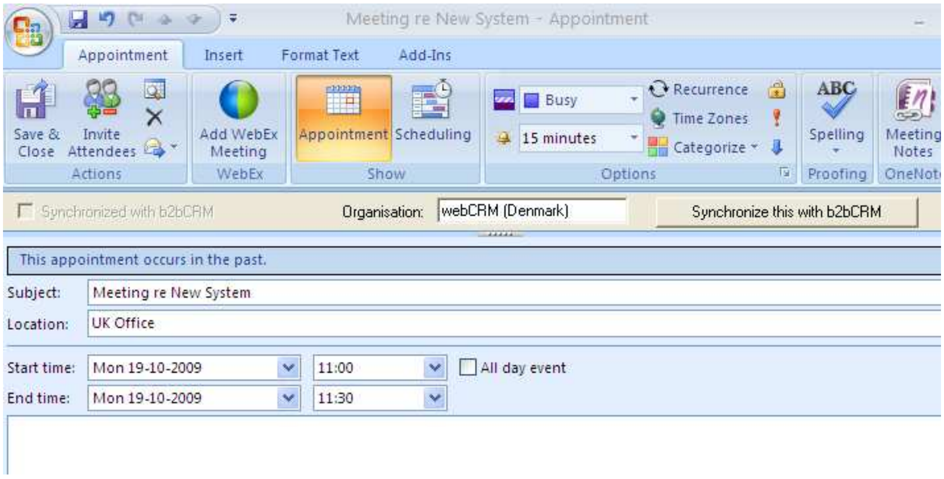
Creating a new contact in Outlook – for the B2C version (no Organisations in webCRM):
Create the new contact in Outlook as you would normally do. If you want the contact to be synchronised with webCRM, you must first fill in all the contact data – either the Company name or an e-mail address must be filled in. Then you click the "Synchronise this with webCRM" button. Outlook immediately connects to webCRM

and creates the Outlook contact as a Person in webCRM. If you update any of the mapped fields Outlook and webCRM will be updated when the system synchronises.

Please note if you delete a contact in Outlook it will not be deleted in webCRM

Synchronising Meetings / Appointments

Create the new appointment in Outlook as you would do normally. If you want the appointment to be synchronised with webCRM, you must first fill in all appointment data.
The Organisation name at the top is mandatory, and must be the name of an existing organisation in webCRM.
Then you click the Synchronise this with webCRM" button.



Outlook immediately connects to webCRM and creates the Outlook appointment as a Meeting in webCRM.

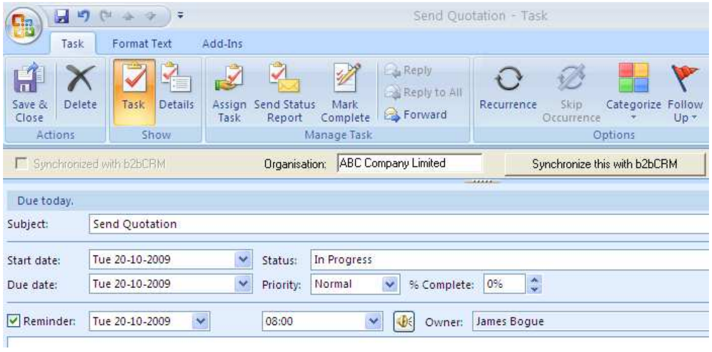
Note: Appointments booked in Outlook stretching over more than one day, will ONLY be booked as a one day appointment in webCRM. Accordingly with holidays or absence booked in Outlook. Therefore we recommend you book multiple day arrangements in webCRM.

If you change the time or description of the appointment in either Outlook or webCRM, these changes will be synchronised.

If you require to enter a Private appointment that you wish to be synchronised to webCRM just enter '*' in the Organisation name.

Synchronising Activities / Tasks

Creating a new task in Outlook:

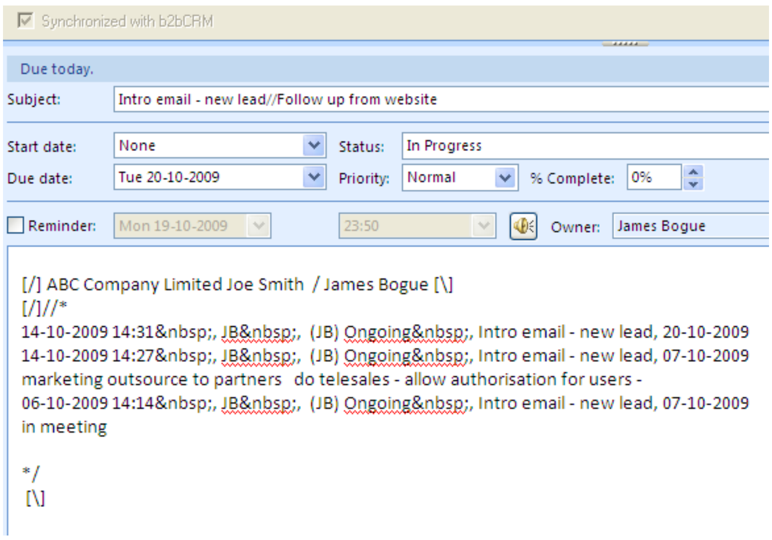


Create the new task in Outlook as you would do normally. If you want the task to be synchronised with webCRM, you must first fill in all the task data. The Organisation name at the top is mandatory, and must be the name of an existing organisation in webCRM. Then you click the "Synchronise this with webCRM" button. Outlook immediately connects to webCRM and creates the Outlook task as an Activity in webCRM.

Creating a new task in Outlook – for the B2C version (no Organisations in webCRM):

Create the new task in Outlook as you would do normally. If you want the task to be synchronised with webCRM, you must first fill in all the task data. The "Organisation" input at the top is supplemented with "email" and is mandatory. It must be the Organisation name or email address of an existing Person in webCRM. Then you click the "Synchronise this with webCRM" button. Outlook immediately connects to webCRM and creates the Outlook task as an Activity in webCRM. If the Organisation name or email address is not unique (more then one match) nothing is created in webCRM.

When Activities are synchronised into Outlook any notes from the activity are also copied into the body of the task as shown in the example.



Notes for Contacts, Tasks and Appointments

(= Organisations/Persons, Activities and Meetings)

Deleting data in webCRM does not delete data in Outlook. Deleting data in Outlook does not delete data in webCRM.

The "Synchronised with webCRM" checkbox at the top of Contacts, Tasks and Appointments in Outlook denotes if the data is marked to be synchronised with webCRM. Data created in Outlook and not synchronised with webCRM can be synchronised at a later time simply by clicking the "Synchronise this with webCRM" button.

webCRM and Outlook will synchronise data only when there is a time gap of at least 2 minutes between the latest update timestamp in webCRM and Outlook.

Outlook and webCRM stores an internal ID for the synchronisation process. This ID depends on the folder the data is stored in. This means that whenever data is moved from one folder in outlook to another, the ID is altered. Hence we don't recommend moving data to another folder in Outlook once the data has been synchronised.

Synchronised data cannot be un-synchronised. Delete the data instead, and create a new instance.
Comments for Meetings and Activities in webCRM are copied to Outlook between the characters "[/]" and "[\]". This is necessary in order for the synchronisation to keep track of comments written in webCRM and comments written in Outlook. When you add text to comments in Outlook, you should always insert the text after the "[\]" characters.