LEADMASTER CRM SYNC EXTENSION FOR OUTLOOK

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The LeadMaster CRM Extension for Outlook was introduced in August 2019. extending LeadMaster to the email client. Users can create a new record, send emails using email templates, view Contact notes, callbacks and email history.

PREREQUISITIES

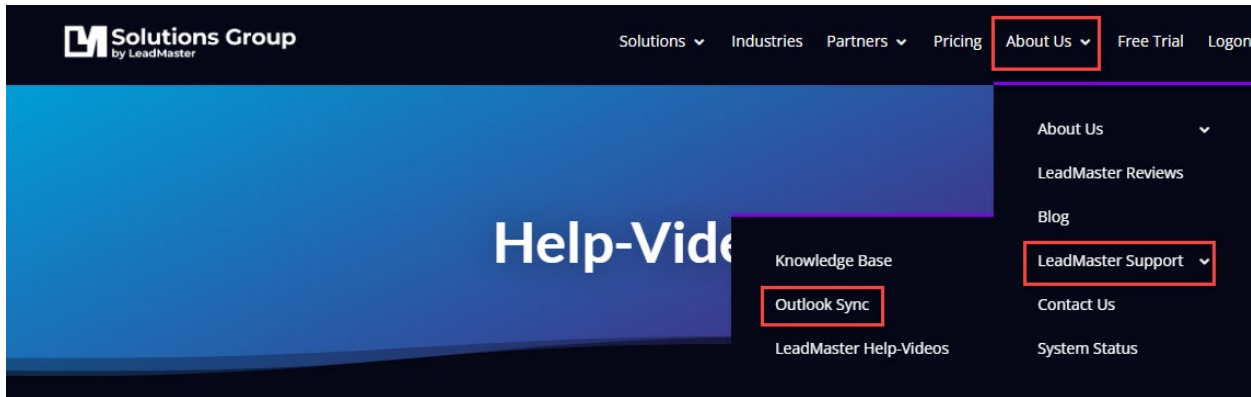The following privileges must be checked or enabled.

On the Logon Privilege page > Under Offline/Mobile Access Privileges:
Email History Access

DOWNLOADING THE OUTLOOK CRM EXTENSION PLUGIN

Visit **www.leadmaster.com** > **About Us** > **LeadMaster Support** then click on **Outlook Sync**

THIS VERSION IS COMPATIBLE WITH:
Windows 7, 8 & 10
Microsoft Office 2007, 2010, 2013 & 2016
Both 32-bit and 64-bit versions.

DOWNLOAD NOW

INSTALLING THE ADD-IN

1. Close Outlook and disable any antivirus software for 10 minutes.
2. Download the latest version of the CRM Add-In module by clicking the **DOWNLOAD NOW** button
3. When prompted, choose Save and browse to save the executable file to your local system or network. Make sure to make a note of the file location
4. If you have an application installed that controls and/or accelerates downloads, please disable it before proceeding.
5. Once the download is complete, locate the .exe file on your local computer or network and double click to begin the installation process.

CONFIGURING THE ADD-IN

After a successful installation of the CRM Outlook extension, you can use the sidebar built into the inbox to transfer data to the CRM and back.

LOGGING IN

1. Open Outlook.
2. Click on the **LeadMaster tab** at the top of your Outlook navigation screen.
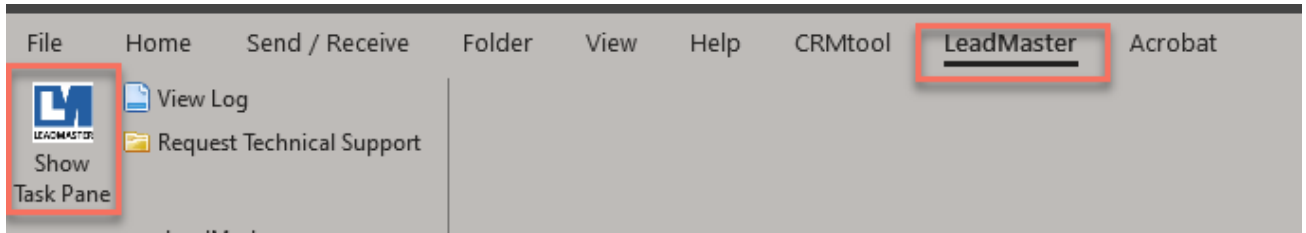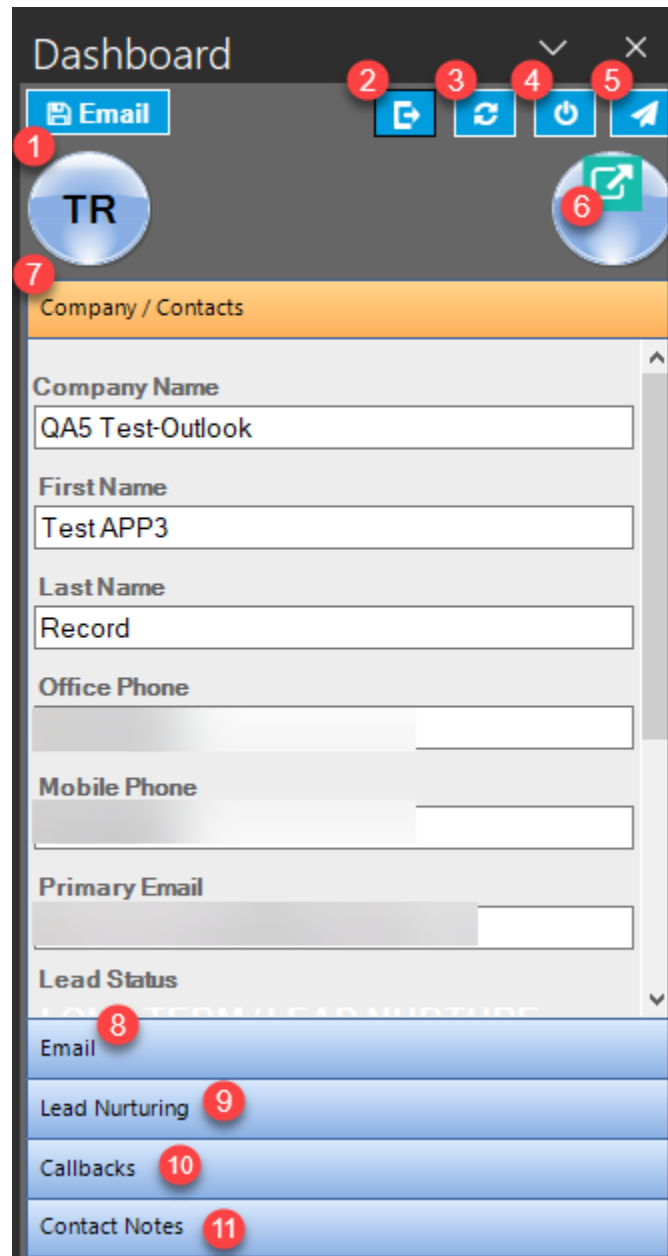

3. Then click on "Show Task Pane" to display the CRM extension sidebar.
4. Enter your LeadMaster CRM credentials to log in.
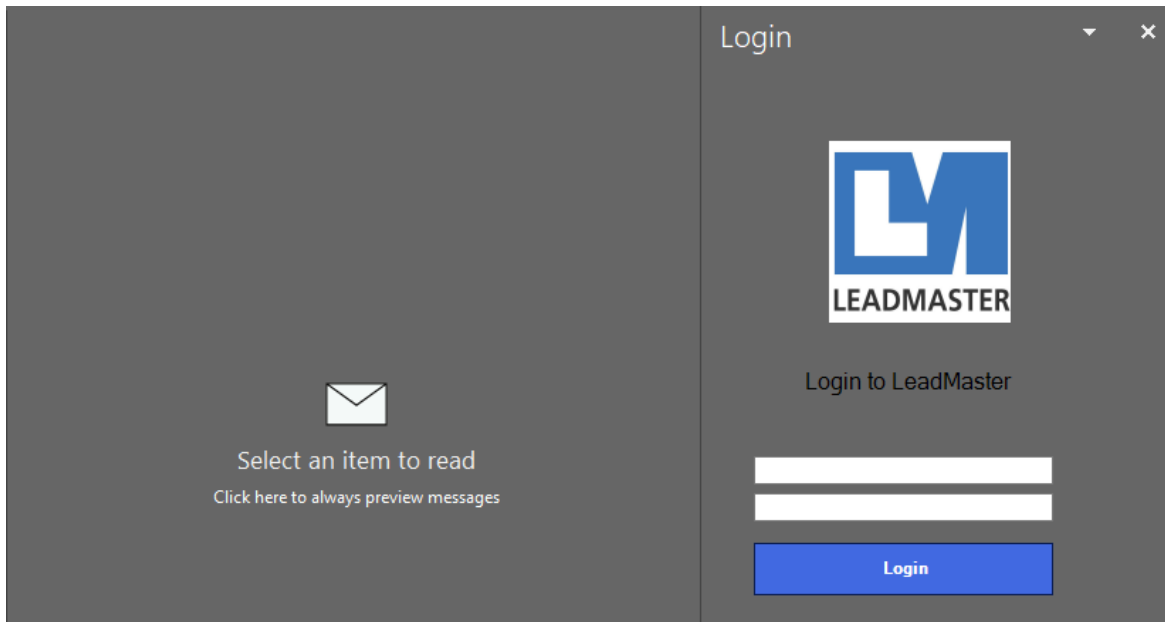
Note: The credentials in LeadMaster and Outlook must match - both should be updated whenever the user's password is updated or changed in the Web.

UNDERSTANDING THE CRM EXTENSION SIDEBAR

1. Save and log the currently opened Email to the Contact in the CRM
2. Log out from the extension
3. Reload or refresh the extension sidebar
4. Close the sidebar
5. View and go to the Record/Contact in the LeadMaster CRM
6. Open the LeadMaster CRM in a new window
7. View the Record/Contact information
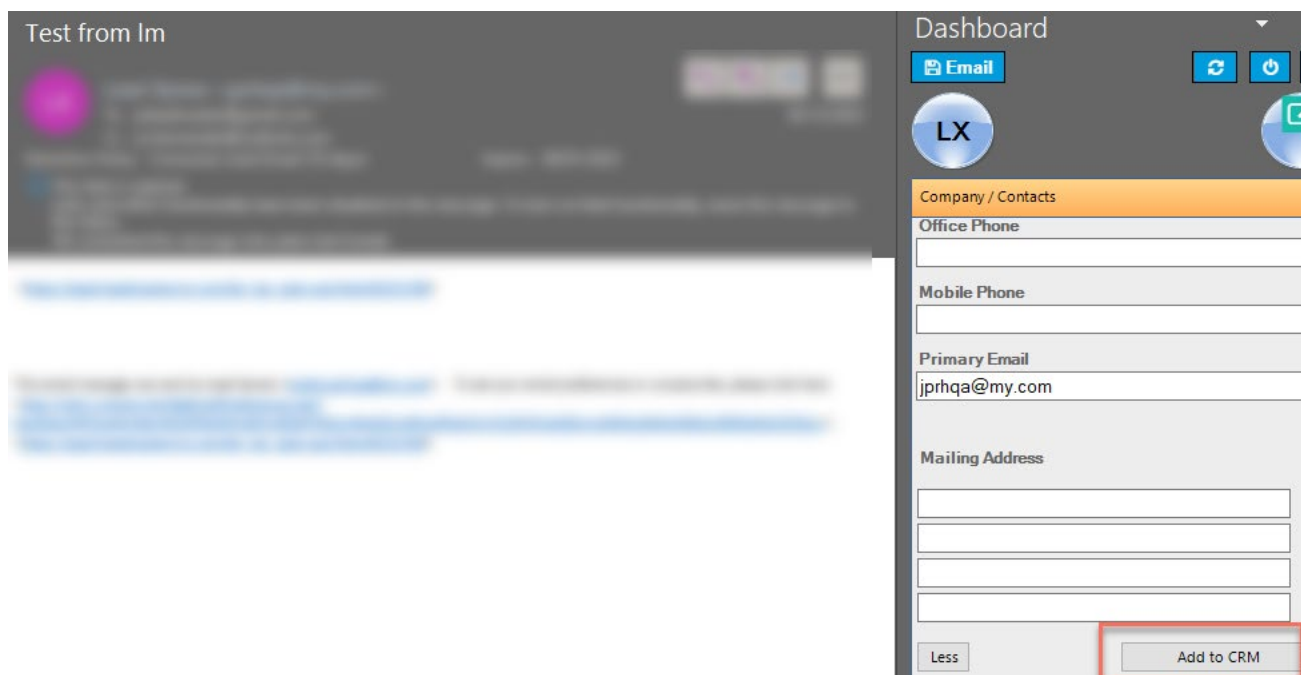8. View the Contact email history

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9. View the lead nurturing campaigns
10. View scheduled callbacks and appointments
11. View Contact notes

CREATE AND ADD CONTACTS TO THE CRM

When opening an email, the CRM extension searches against the **Sender's email address.** If not associated with an existing Company/Contact in the CRM, the extension will give you the option to add the contact to the CRM.

To add a contact from an open Outlook email to the CRM, click on "**Company/Contacts**" in the sidebar to expand the Contact Information section. You will see that the information are dynamically inserted from Outlook. Make any modifications you deem necessary and add any additional information you may find useful and click on "**Add to CRM**."

The changes will be reflected in LeadMaster, and will be retained in the Outlook extension.

UPDATE AN EXISTING CONTACT

If the Sender's email address is associated with an existing Contact in the CRM, the Contact information will show data from the CRM including the "Lead Status" if set.
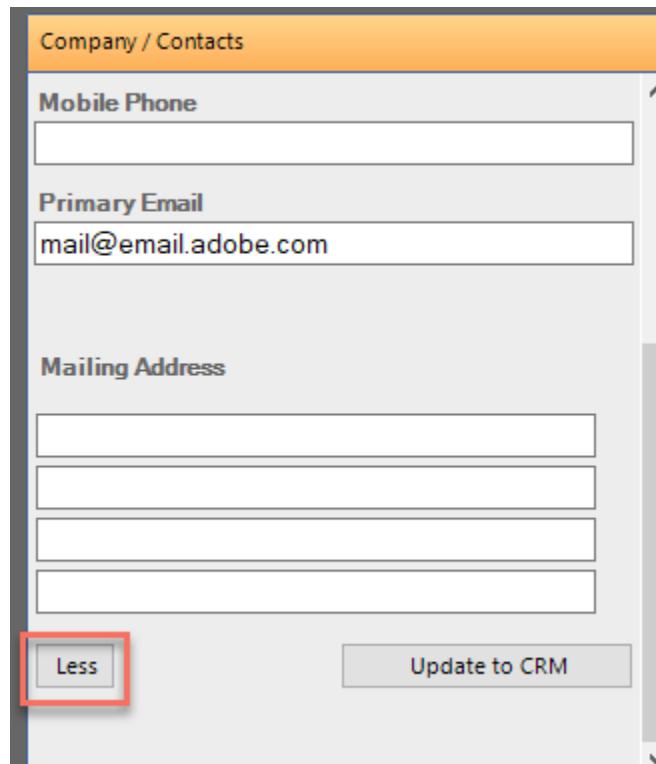

 You may update the contact by clicking on **"Company/Contacts**," change any information you see fit, and click on "**Update to CRM**."
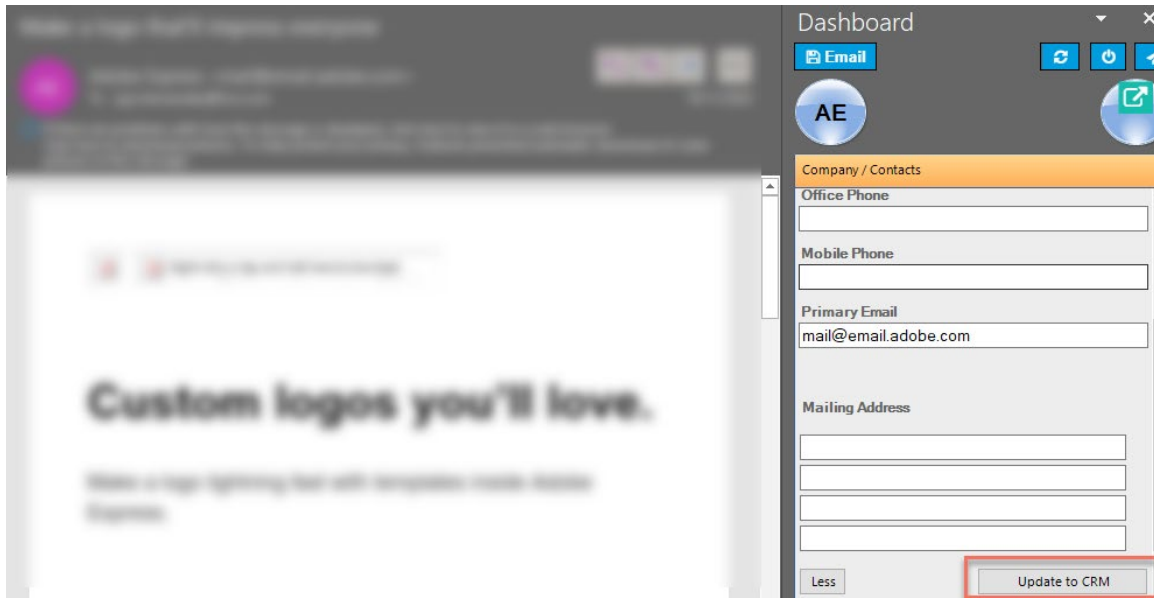
Add additional information by clicking the more button at the bottom of the sidebar. Insert address information easily so your contact information in the LeadMaster CRM is complete.

VIEW EMAIL HISTORY

Track and view emails through Outlook, and take critical actions straight from the inbox to follow up on messages sent. Head to the CRM to see when emails were opened, and what links were clicked – allowing you to understand what email campaign content is resonating.
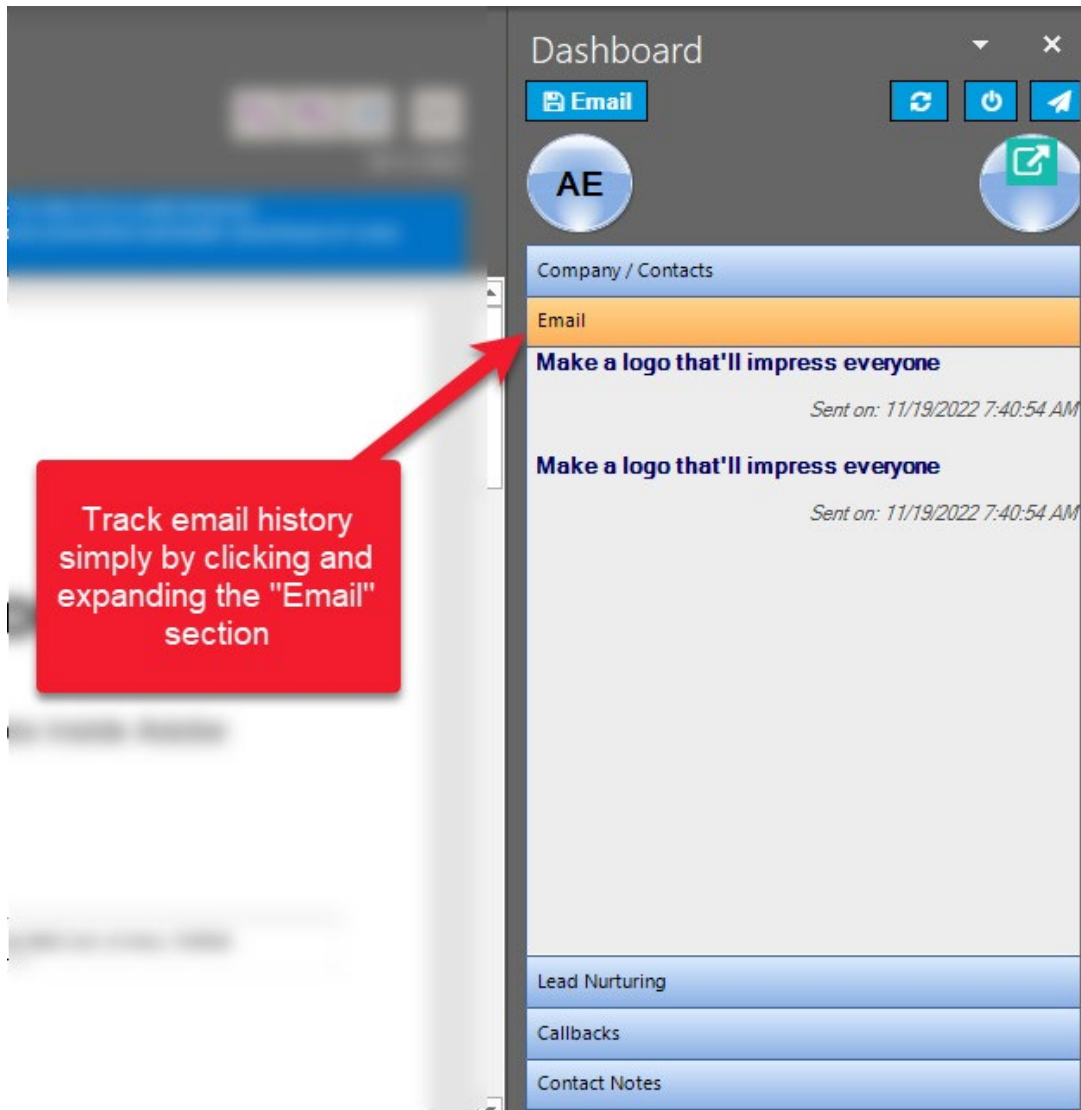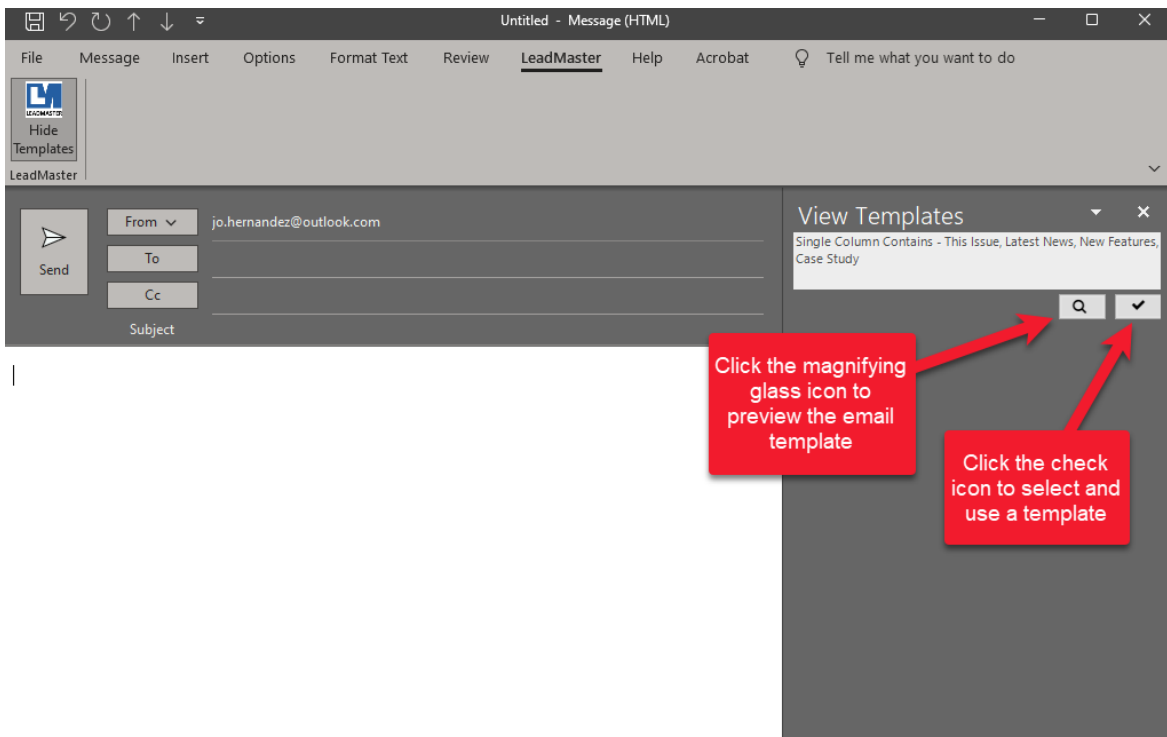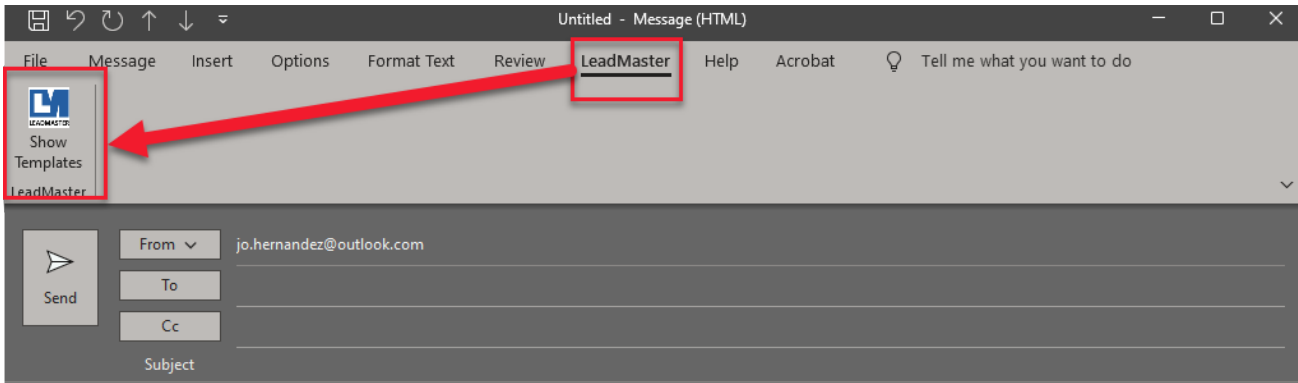
SAVE AND LOG EMAILS TO CONTACTS

Save and log the currently opened Email to the Contact in the CRM by Clicking the "**Email**" icon on the top-left part of the extension sidebar.
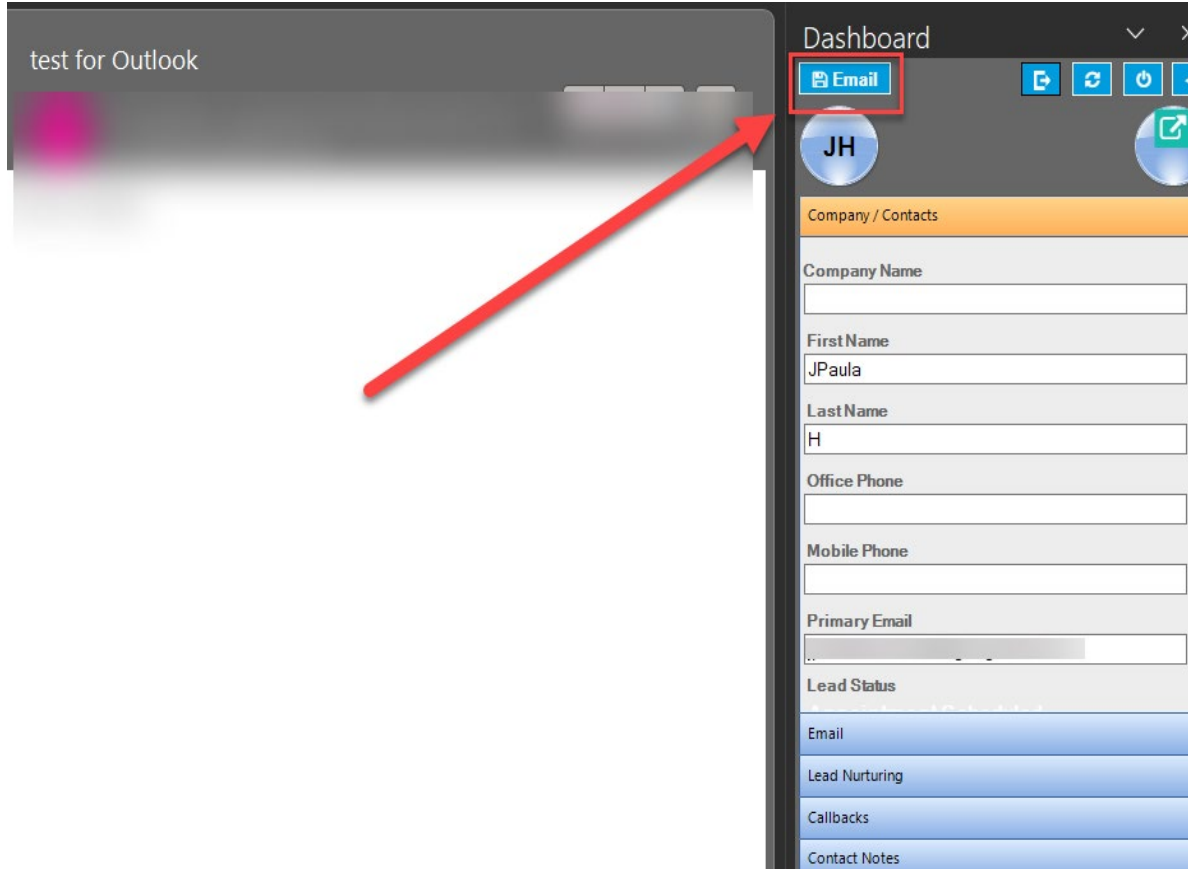
SEND CUSTOMIZED EMAILS

Another timesaving feature is the ability to access pre-built email marketing templates stored in the LeadMaster system from Outlook when composing an email.

On the compose email window, click on the "**LeadMaster**" tab then click the "**Show Templates**" button to view and access all of your active LeadMaster email templates.

Click the magnifying glass icon to preview the email template

Click the check icon to select and use a template

Note: Only **ACTIVE PERSONAL** Email Templates will be displayed and will be accessible from within Outlook.


VIEW LEAD NURTURING TRACKS

Show a list of Lead Nurturing tracks by clicking "Lead Nurturing" from the extension sidebar.
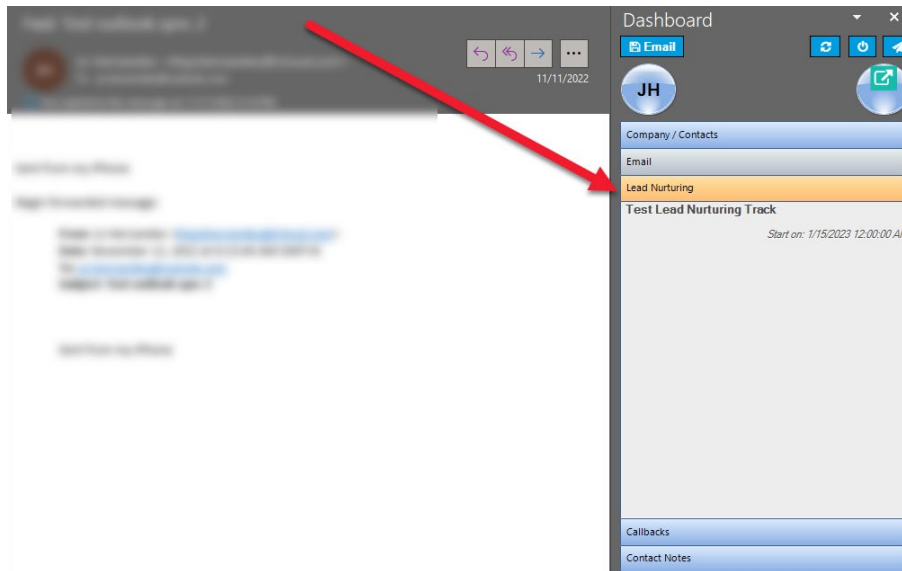

VIEW SCHEDULED CALLBACKS AND EVENTS

Never miss an appointment! View a list of scheduled callbacks and appointments from Outlook within seconds, and be reminded of these events within the LeadMaster system. Previous callbacks are displayed as well so you can keep track of points of contact.
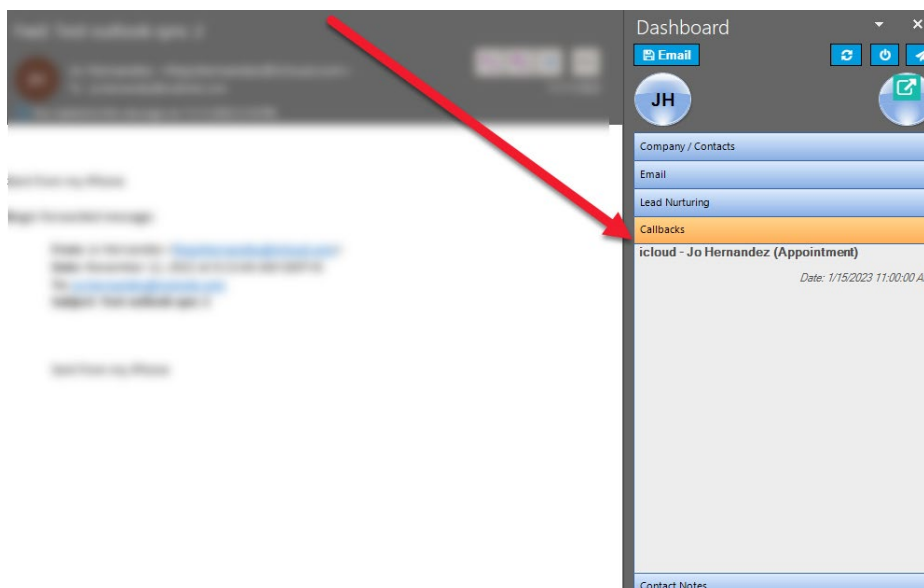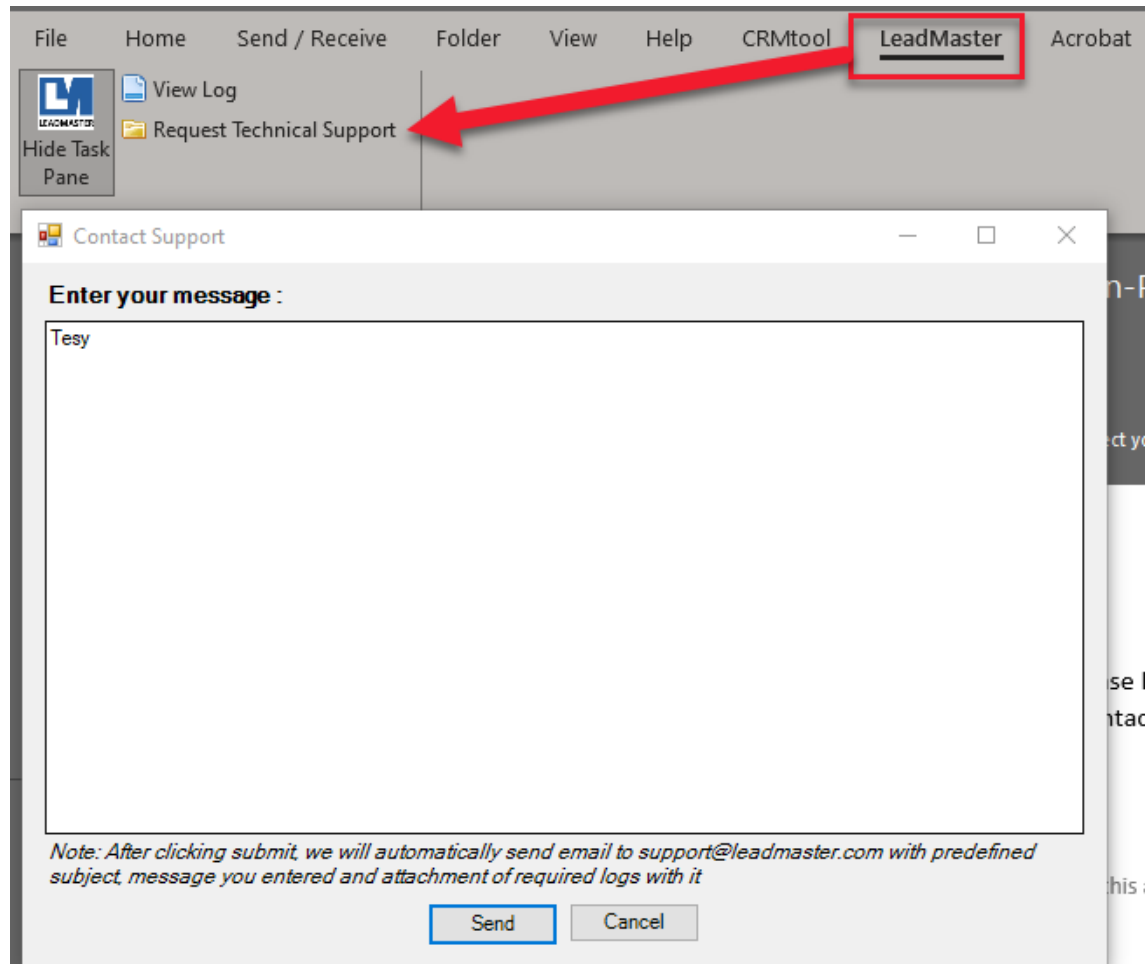
VIEW CONTACT NOTES

Show a list of Notes for the Contact from within Outlook by clicking and expanding the "Contact Notes" section from the sidebar.
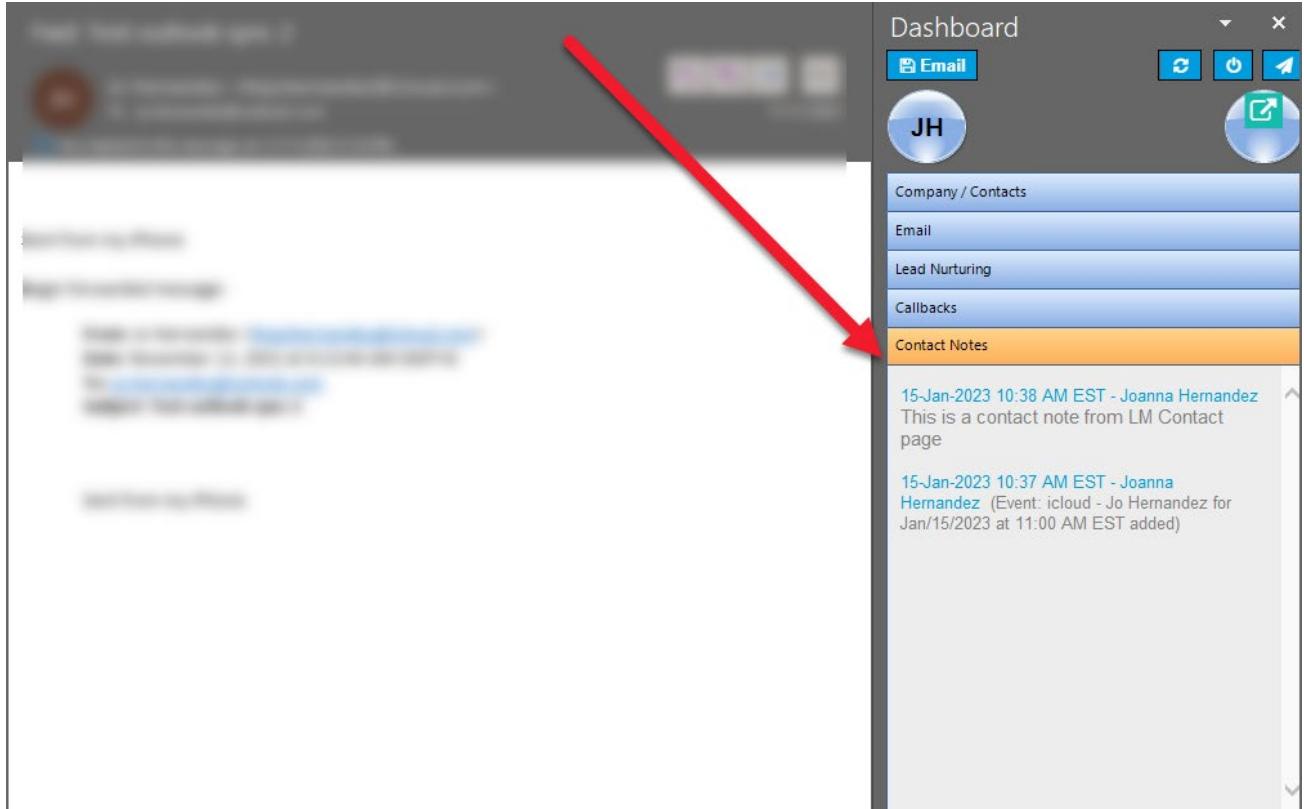
REQUEST TECHNICAL SUPPORT

If you are experiencing problems with the CRM extension, you may create a Technical Support Request by clicking the **Technical Support Request** button in the **LeadMaster** tab.

The add-in will create an email pre-addressed to LeadMaster support with pre-defined subject message you entered and attachment of required logs with it.