

Solutions Group by LeadMaster



CRMTOOL SYNC FOR OUTLOOK VERSION 1.4.0.0

(MAY 2019 VERSION)

LEADMASTER

CRMTOOL SYNC

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LEADMASTER CRMTOOL SYNC FOR OUTLOOK

[LeadMaster's CRM Outlook Sync](#) plugin allows the user to sync their calendar and contacts as well as allowing the user to attach emails, sent and received, to contacts in LeadMaster's CRM. Once installed, it will appear in the Outlook menu as CRMtool.

PREREQUISITIES

The following privileges must be checked or enabled.

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

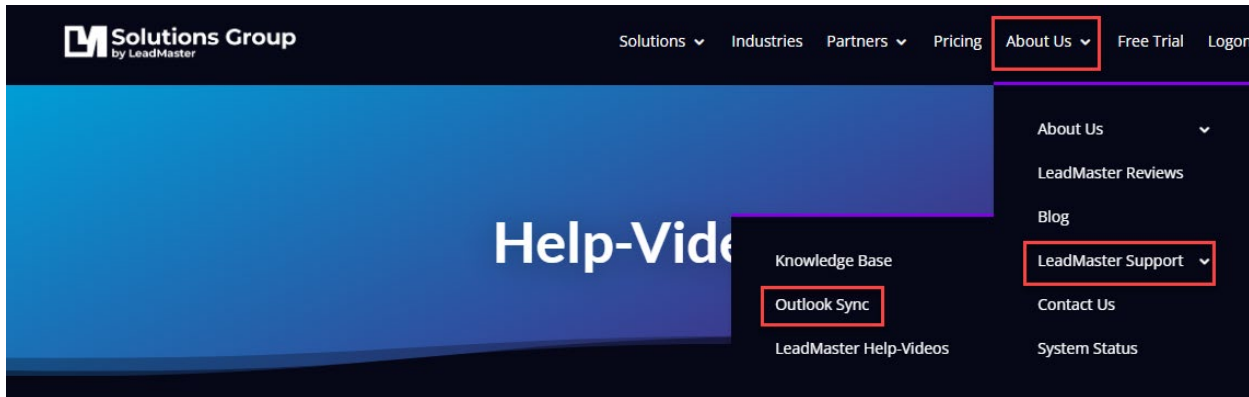
Outlook Sync Access

Email History Access

Offline/Mobile Access Privileges			
<input type="checkbox"/>	Mobile access	Last accessed	
<input checked="" type="checkbox"/>	Outlook Sync Access	Last accessed 1/13/2015	Version 1.2.9.2
<input checked="" type="checkbox"/>	Email History Access	Last accessed	Version

DOWNLOADING THE OUTLOOK ADD-IN/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

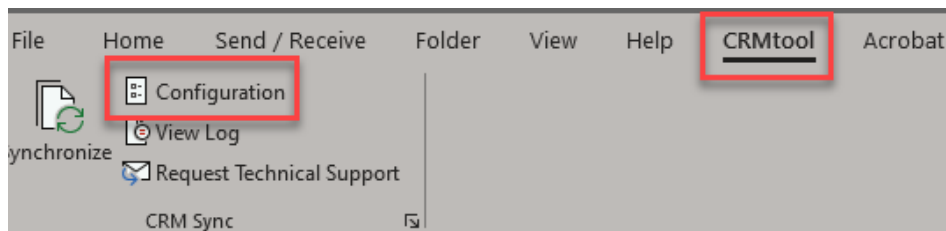
1. Close Outlook and disable any antivirus software for 10 minutes.
2. Download the latest version of the CRM Add-In module by clicking the [DOWNLOAD NOW](#) button
3. When prompted, choose Save and browse to save the executable file to your local system or network. Make sure to make a note of the file 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

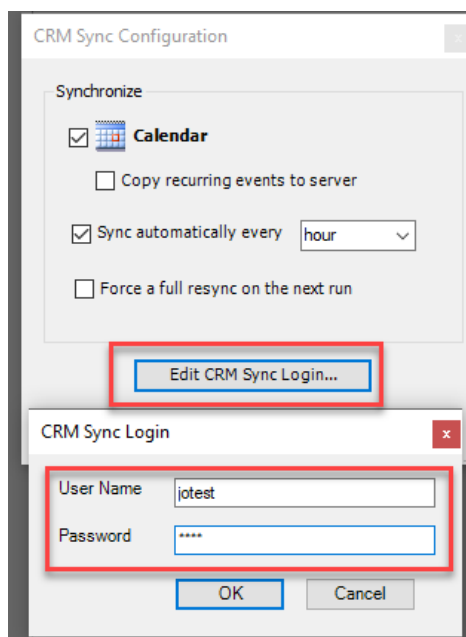
After a successful installation of the CRMTool plugin, you can now configure it to synchronize your Calendar, Contacts and Emails in Outlook with the LeadMaster CRM.

LOGGING IN

1. Open Outlook.
2. Click on the **CRM Sync tab** at the top of your Outlook navigation screen. Select the **"Configuration"** option.

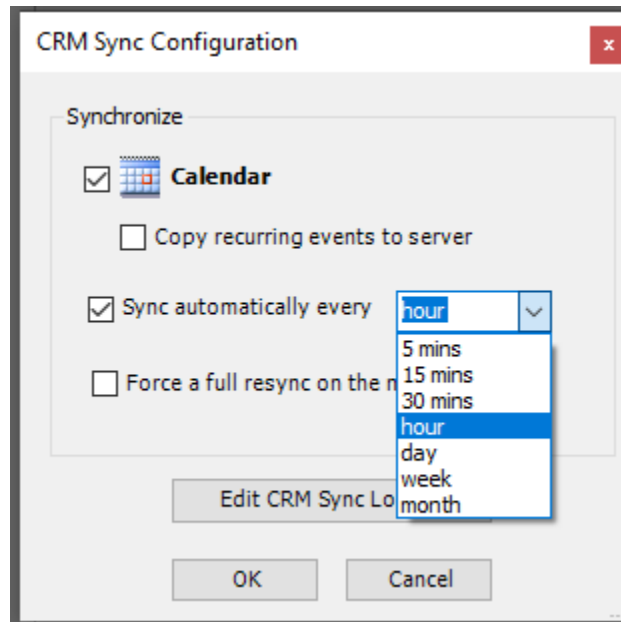


3. On the Configuration window, click on **"Edit CRM Sync Login"** and enter your LeadMaster credentials.
4. You should get the notification 'Login Succeeded'. Click **OK**.



Note: 1. For the CRMTool plugin to work, your logon must have access to a single Workgroup only. 2. The credentials in LeadMaster and Outlook must match - both should be updated whenever the user's password is updated or changed in the Web.

CALENDAR SYNC



Calendar - Place a check in the Calendar box if you want your LeadMaster Events synched with Outlook Calendar and vice versa.

Copy recurring events to server - This option lets you choose if you want to sync recurring future events to your calendar.

Sync Automatically – The CRMTool has the option to either Sync automatically or manually. To sync automatically click the checkbox 'Sync automatically every' and select the desired sync frequency – Monthly, Daily, Weekly or Hourly, or even down to 5 minutes.

Force a full resync on the next run – This option best applies if you have a problem, something isn't working - your calendar events aren't showing up etc. Always go for a resync when you have updated your LeadMaster password. This would also help when you go offline and Outlook uses the Offline cache mode, this ensures any changes that occurred in your Outlook calendar will sync with LeadMaster.

CONTACT SYNC

By default, the Contacts option is not available in the Configuration box. If you want the feature enabled, follow the steps below:

1. To enable the **CRMTool Contact Sync**, navigate to your computer's local drive and open CRMTool's installation folder – usually in:

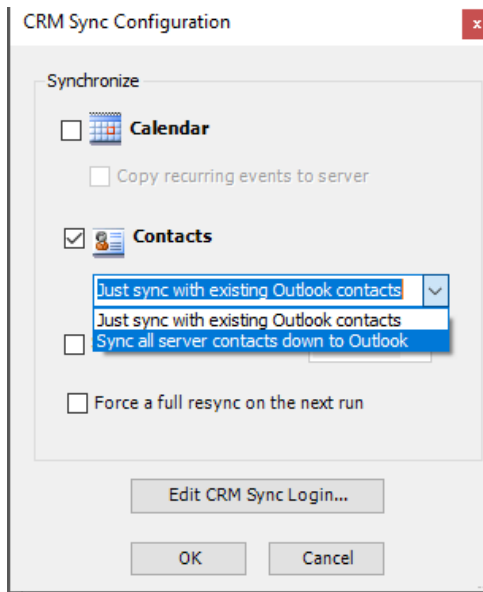
C:> **Program Files > CRMTool > Sync >** and look for the *CrmSynchAddIn.dll.config* file.
2. Right click on the **CrmSynchAddIn.dll.config** file and open it in notepad - (Note that editing and saving a config file requires Administration privileges)
3. Look for the string highlighted below – and change SyncContacts setting to **TRUE** > Save.

```

    <setting name="SyncContacts" serializeAs="String">
      <value>False</value>
    </setting>
  </CrmSynchAddIn.Properties.Settings>
</userSettings>
</configuration>

```

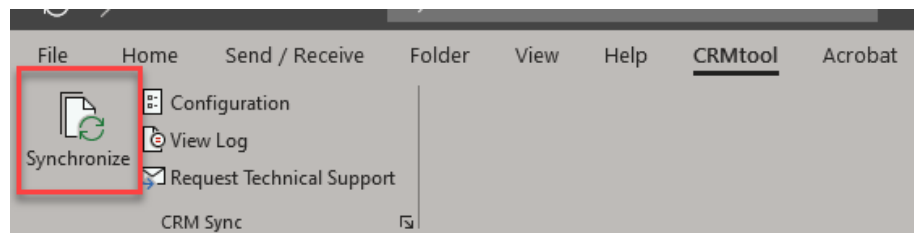
4. Once changes have been saved, Launch Outlook > go to the **CRMTool tab** > and open the **Configuration** window.
5. Place a check in the **Contacts box** and select from the 2 Contact Sync options:

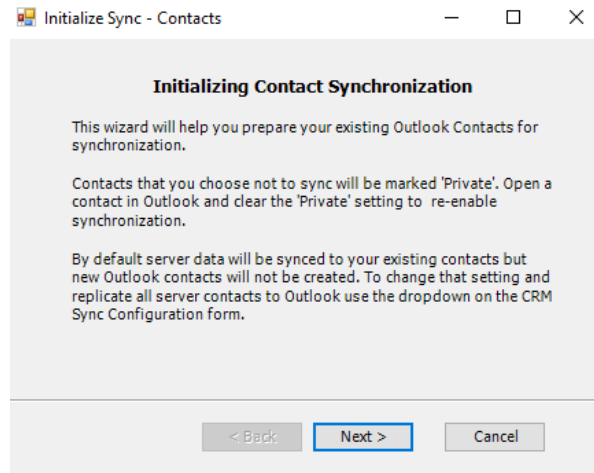


Sync with existing Outlook contacts only – Selected by default. Server data that matches existing Outlook contacts will be synced but new Outlook contacts will not be created.

Sync all server contacts down to Outlook – All server data will be synced down to Outlook and new Outlook contacts will be created.

6. Click **"OK"** to save the changes.
7. Click the **"Synchronize"** button to Initialize Contact Sync.

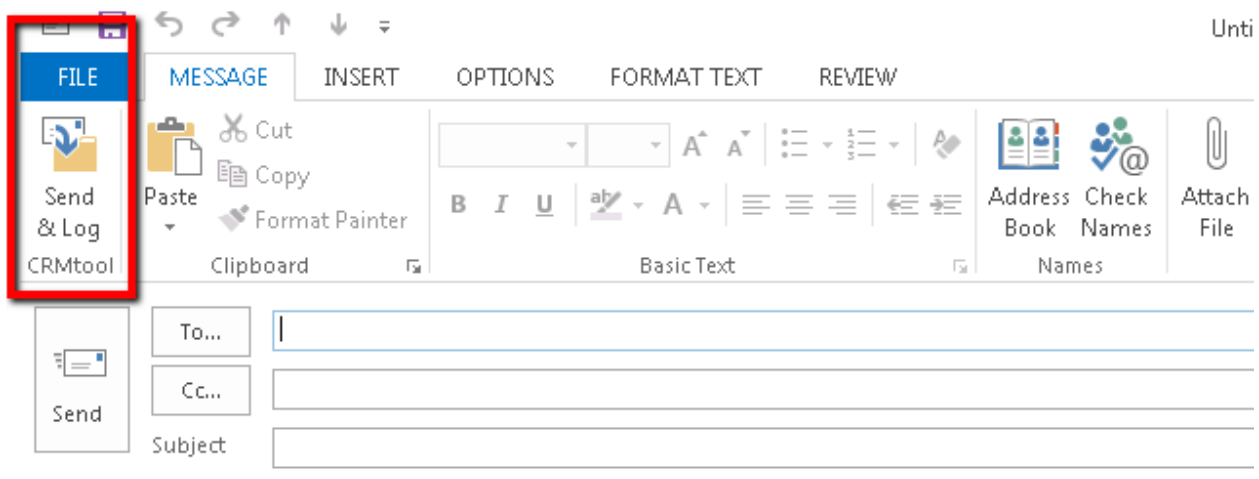




EMAIL SYNC

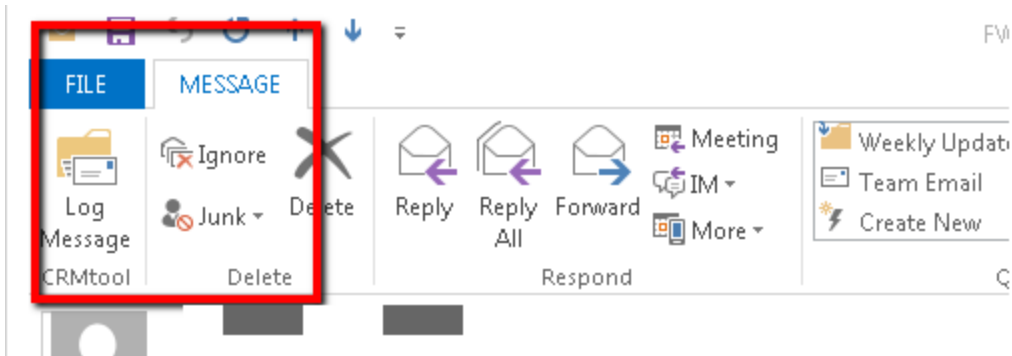
1. **Send & Log** – for Outgoing emails sent from LeadMaster

Displayed on the actual “**Compose Email**” page. The **Send & Log Button** checks for a matching record associated with the recipient’s email address in a single instance.



2. **Log Message** – for incoming emails.

The button is displayed on the actual Email page. The **Log Message** button checks for a matching record associated with the email address of the Sender of the existing mail and logs the email at the contact level in LeadMaster. Click the **Log Message** option if you wish to send a copy of this email to your CRM database. It will be attached to the Contact in the CRM.



You'll find all of the messages you've logged in the **Email History section** on the **Contact page**.

When logging an email from Outlook to multiple recipients, the email gets logged and attached to the **1st email address** in the To field.

Scenario 1:

To: test@test.com, test1@test.com
 CC: test3@test.com

The CRMTTool will check if the recipient's email address (test@test.com) is associated with an existing contact – if **Yes, it gets logged to the matching contact**.

If test@test.com is not associated with a contact – and test1@test.com is, the log will still get routed to the Filing Cabinet.

Scenario 2:

To:
 CC:
 BCC: test@test.com, test1@test.com

Both emails are associated with existing contacts in LM – the email log still gets routed to the filing cabinet.

CONFIGURING THE CRM EMAIL ADD-IN MODULE IN LEADMASTER

When logging into the LeadMaster CRM application, click on 'My Account' and then click on 'User Settings' and you may need to click the 'More' button to see the Outlook Sync parameter that allows you to determine what the application should do if the contacts do not match an existing record when you sync.

The screenshot shows the LeadMaster CRM application interface. At the top right, there is a 'My Account' dropdown menu and a 'Log out' button. Below the navigation bar, the 'User Information' dropdown menu is open, showing options like 'Time And Date', 'Calendar And Calendars', 'Email Signatures', 'Other Settings', and 'Mail Manager'. The 'Other Settings' option is highlighted in red. Below this, there are various form fields for user information, including Email, Address 1, Address 2, DocuSign Username, DocuSign Password, DocuSign Key, City, State/Prov, Zip/Postal Code, Country, Phone Number Hyperlink Provider, and Extension. There is also a 'Change Password' button. The 'Other Settings' section is expanded, showing various configuration options such as Banner, Default Tab on Home Page, Default Page, Page Layout Display, Add to Sales Rep Comments/Notes checked, Message Ticker, Left Menu Options, Add Me to Bcc, Outlook Sync, and Currency. The 'Outlook Sync' option is highlighted in red, and the 'UPDATE' button is also highlighted in red.

There are two options when the contact doesn't uniquely exist in LeadMaster.

One option is to **save the email to the Filing Cabinet**.

You can access the Filing Cabinet via a hyperlink on your Home Page. You can then manually link the contact or create a new record.

The screenshot shows a CRM dashboard with a top navigation bar containing: Cases not Closed, Kanban, Open Cases, Home, Accounts, Contacts, Deals, Reports, and Lib. On the left is a sidebar menu with categories: Outlook, Gmail, LM's Cases, Call Backs/Events, and Lead Center. Under Lead Center, there are sub-items: New leads - Last 7 Day - 2, New leads - Last 30 Day - 14, All leads - 844, Filing Cabinet - Email History (9 em) (highlighted with a red box), SMS Cabinet, and SMS History. The main content area features a large blue pie chart and a smaller 3D pie chart below it. Text below the smaller chart reads: 'Records w no open callbacks Total number of records: 811'.

Filing Cabinet - Email Message History

The screenshot displays the 'Filing Cabinet - Email Message History' interface. At the top right, it says 'Email Messages 1 thru 1 - (1 total email messages)'. Below this are three buttons: 'Page Options', 'Record Options', and 'Help Guide'. The main content is a table titled 'All Email Messages in the Filing Cabinet' with columns: From Address, To Address, Subject, Date Sent, and Action. A single record is shown with 'From Address' as 'windowsinsiderprogram@e-mail.microsoft.com' and 'Subject' as 'Get our best performing Insider Preview build yet for 19H1'. The Action column contains icons for linking, creating, and deleting. Three callout boxes point to these icons: 'Create New Record For Email Message' (points to the plus icon), 'Delete Email Message' (points to the X icon), and 'Link to an existing record' (points to the chain link icon). At the bottom left, there is a '15 per page' dropdown. At the bottom right, it says 'Page Results: << 1 >> of 1'.

The other option is to automatically create a new record with the contact.

When selected, a new record will be created if the contact/email being synced does not match an existing record in the CRM.

Other Settings ▾

Change Password

Banner Workgroup default skin

Default Tab on Home Page Info Center Cases

Default Page Clicking on the 'Company' hyperlink from search results, accounts and reports takes you to:
 View Sales Update Edit Profile Review And Take Action Profile

Page Layout Display Display All Sections

Add to Sales Rep Comments/Notes checked Show Preview Pages

Message Ticker Show Left Menu

Left Menu Options Accordion/Account View

Add Me to Bcc

Outlook Sync If a contact is not matched with an existing record during sync:
 Automatically create a new record with new contact as primary
 Save contact to the Filing Cabinet

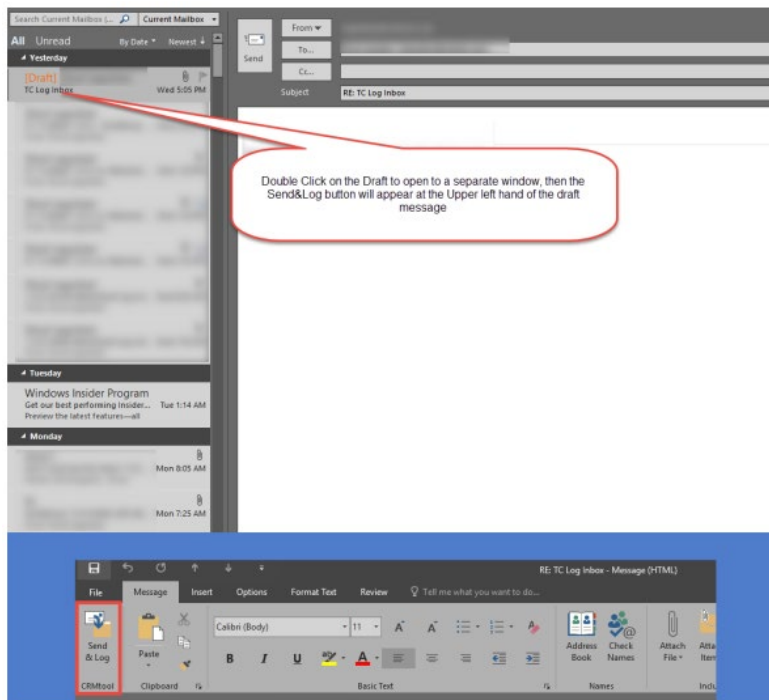
Currency Display currency values in the following currency:
 The system setting for currency

Workgroup ID 27781
 Logon ID 130522

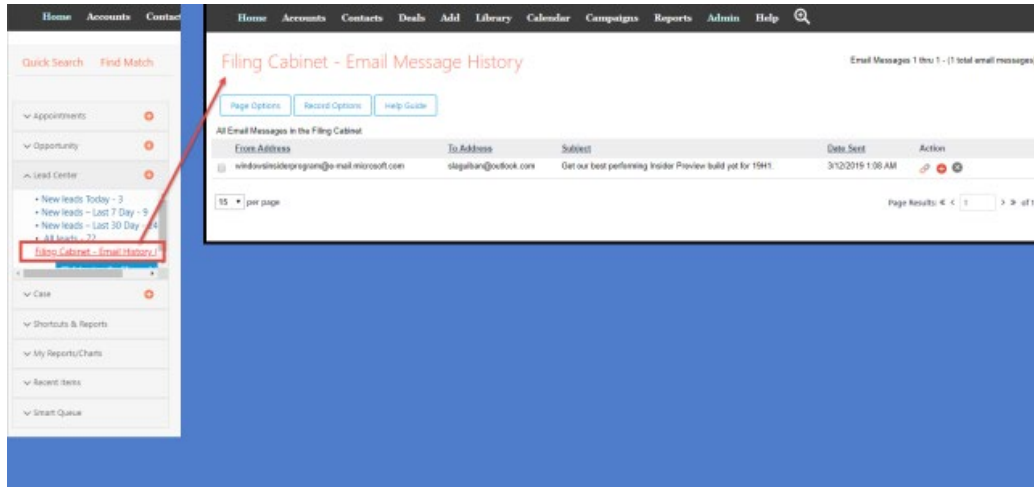
UPDATE CANCEL

USING THE CRM EMAIL ADD-IN MODULE IN OUTLOOK

1. Open Outlook
2. When creating a new Outlook email, you will see an additional send option on the top navigation bar of the email – Send & Log. This also applies to Reply, Reply All, Forward but you need to open the draft message in a separate window to display the **Send&Log** button.



3. Select the Send & Log option if you wish to send the email out to the recipient as well as log the email within your CRM Database.
4. When opening an existing email in your in box, you will see an additional send option on the top navigation bar of the email – Log message. Select the Log Message option if you wish to send a copy of this email to your CRM database. It will be attached to the Contact in the CRM. You'll find all of the messages you've logged in the Email History section on the Contact page.
5. When Logging into the LeadMaster application, emails that do not match an existing unique email address in your online DB records will be placed in a Filing Cabinet that can be accessed in the Leads accordion on your Homepage. If you don't see the 'Lead Center' the name may have been changed or it may not be enabled.



LOGON PRIVILEGE

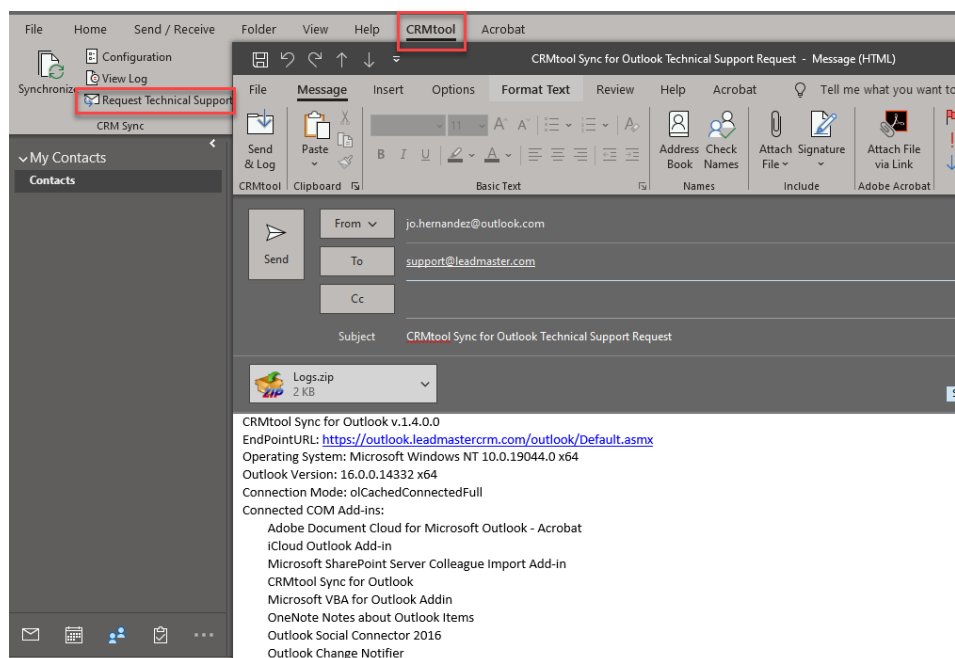
On the Logon Privilege page > Under Top Banner and Side Menu Items to Display > Enable the Lead Center option, then submit.

Top Banner and Side Menu Items to Display

<input checked="" type="checkbox"/> Accounts <input checked="" type="checkbox"/> Contacts <input checked="" type="checkbox"/> Search <input checked="" type="checkbox"/> Find Match <input checked="" type="checkbox"/> Check For Match	<input checked="" type="checkbox"/> Events <input checked="" type="checkbox"/> Opportunity <input checked="" type="checkbox"/> Lead Center <input checked="" type="checkbox"/> My Searches <input checked="" type="checkbox"/> My Reports/Charts <input checked="" type="checkbox"/> Recent Items <input checked="" type="checkbox"/> My Task <input checked="" type="checkbox"/> My Cases <input checked="" type="checkbox"/> Smart Queue <input checked="" type="checkbox"/> Mail Manager
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REQUESTING TECHNICAL SUPPORT

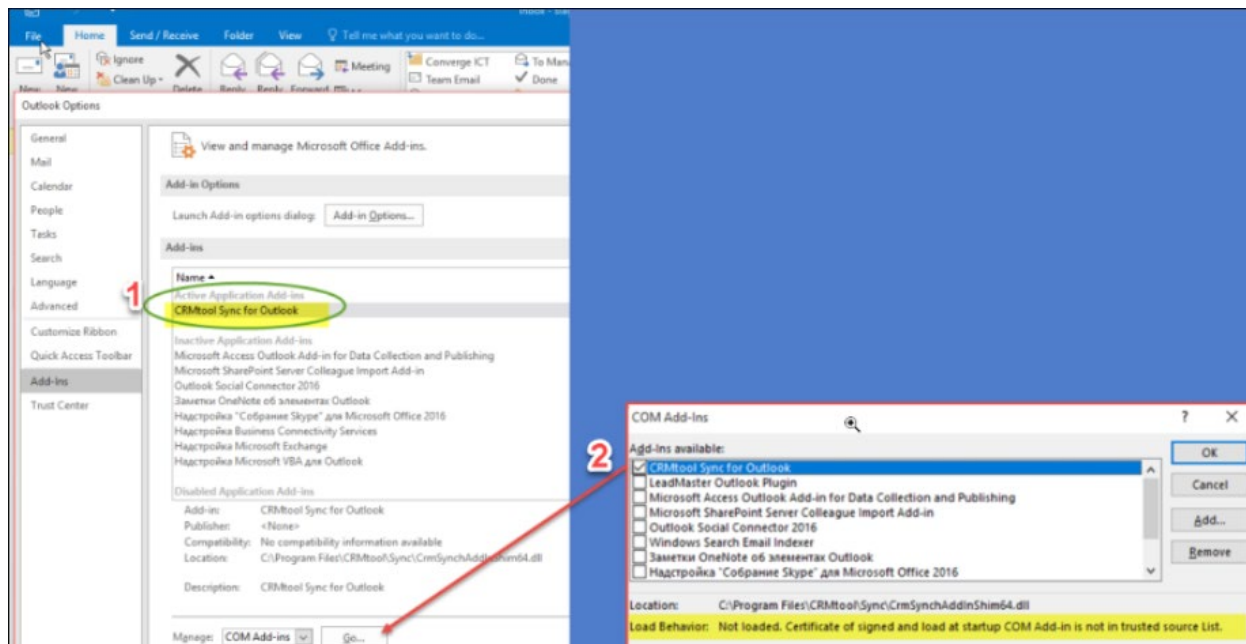
If you are experiencing problems with the CRMTTool add-in, you may create a Technical Support Request by clicking the **Technical Support Request button** in the CRMTTool tab.



The add-in will create an email pre-addressed to LeadMaster support with a generated application log and diagnostic information which includes the installed CRMTool Sync add-in version, PC Operating System, Outlook version and connection.

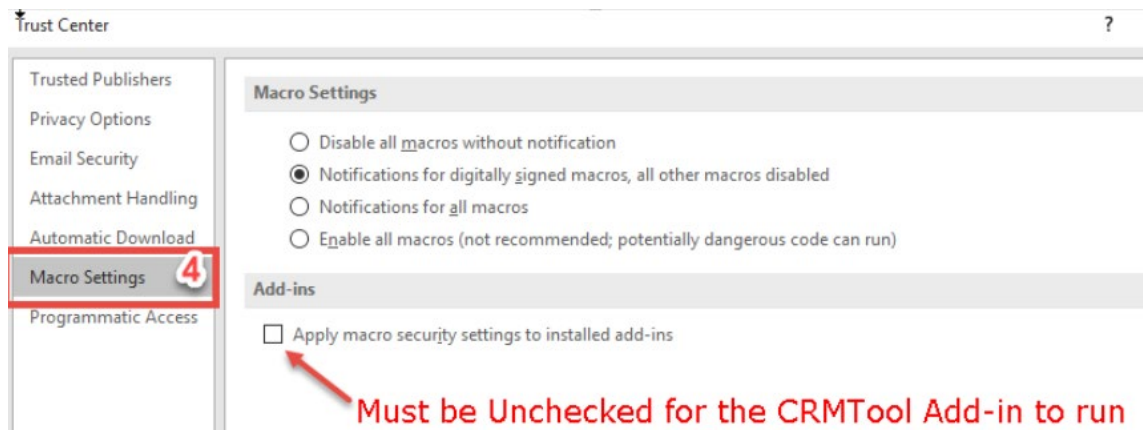
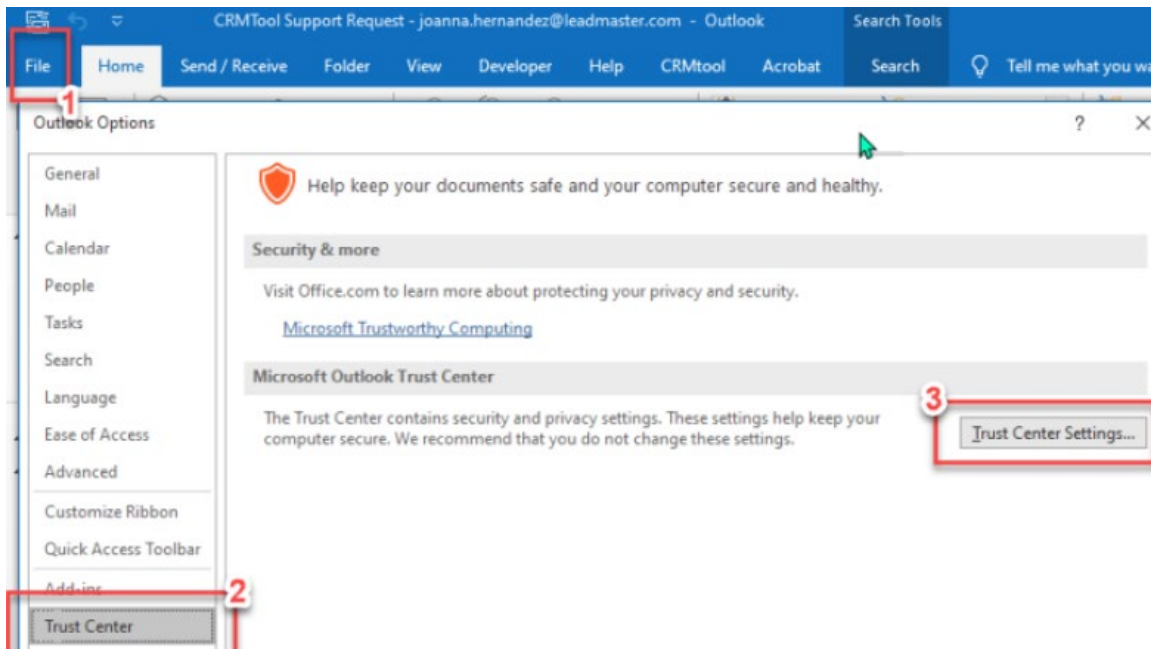
VERIFY IF THE ADD-IN IS INACTIVE OR HAS BEEN DISABLED

1. On the menu, click File, then Options.
2. In the Outlook Options window, select Add-Ins. You will notice that "CRMTool Sync for Outlook" is already listed under the Active Applications. (If it is under the Disabled or Inactive Application Add-ins list, click on the "GO" button besides the COM Add-Ins and make sure to have the CRMTool sync for Outlook checked in the COM Add-Ins window.)



If the add-in is Active but not showing, check the Load Behavior – if the same as the one highlighted in the photo above - Load Behavior is Not Loaded. Certificate of signed and load at startup COM Add-in is not in trusted source List – do the following:

1. Go to File, then Options
2. Select Trust Center
3. then Click Trust Center Settings
4. Select Macro Settings: If checked, remove the check in the box for Apply macro security settings, click OK then Restart Outlook.

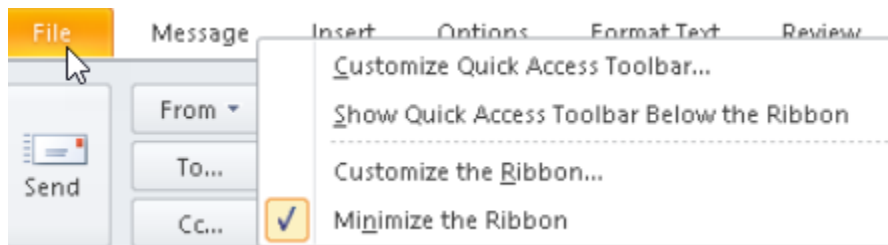


SEND& LOG BUTTON IS NOT SHOWING WHEN COMPOSING OR READING EMAIL MESSAGES

Outlook Ribbon Bar is minimized



To expand and show the ribbons/options, click on any of the tab menus or the arrow button near the close button.



Or, right click on any of the tabs and uncheck "Minimize the Ribbon"

HOW TO CHECK TIME ZONE AND DATE FORMAT SETTINGS ON YOUR LOCAL PC

1. Go to Start > Settings > Control Panel > Date and Time
2. On the Time Zone tab, check to make sure that the Time Zone setting matches what is set in the online application under User Settings
3. Go to Start > Settings > Control Panel > Regional and Language Options
4. On the Regional Options tab, check to make sure that the language setting is suitable for your time zone. For example, if your time zone is in the US, this should read English (United States) but if your time zone is in Australia, this should read English (Australia). This setting will control the format that dates appear in on your system. This should match what is set in the online application under User Settings.