
Implicit FrontEnd

Enterprise class Outlook Integration

Comparison with SugarCRM Plugin

Implicit Inc.

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Implicit FrontEnd New Paradigm

Access all your CRM Data and do all your CRM Work from within Outlook

- Increase Productivity
 - No more switching back and forth between Outlook and SugarCRM
- Increase CRM Adoption / Utilization
 - CRM work natively integrated into daily use of Outlook
 - Automate data entry from Outlook into CRM

| Feature Comparison | Implicit FrontEnd | SugarCRM Plugin |
|---|-------------------|-----------------------|
| Sync Outlook Data with SugarCRM: Contacts, Calendars, Tasks | ✓ | ✓ |
| Create new CRM Records from Outlook: Accounts, Opportunities, Contacts... | ✓ | Minimal set of fields |
| Full Access to all CRM Data from within Outlook | ✓ | |
| Full Support for Custom Modules / Custom Fields | ✓ | |
| Email Side-Panel | ✓ | ✓ |
| Email Archiving | ✓ | ✓ |
| Rule-Based Auto-Email Archiving | ✓ | |
| Email Conversation Thread Archiving | ✓ | |
| Email Templates and Mail Merge | ✓ | |
| Centralized Team-based Administration and Configuration | ✓ | |
| CRM Action Items | ✓ | |
| Web Browsers Integration | ✓ | |
| Integrated Document Archiving from Word, Excel and Acrobat | ✓ | Separate Plugins |
| Full Offline Support (Tethered and Non-Tethered Modes) | ✓ | |

10 reasons to select Implicit FrontEnd as your Outlook Integration Solution

#1: Access your CRM Data from Outlook

The screenshot displays the SugarCRM 'Accounts' module interface within an Outlook window. The top navigation bar includes icons for 'Sync to Outlook', 'Create New', 'Remove from Outlook', 'Refresh', 'Accounts', 'Leads', 'Opportunities', 'Cases', 'Notes', and 'Sync Now'. The main area shows a table of accounts with columns for Name, City, Phone Number, User, and Last Modified Date. The account 'A.G. Parr PLC' is selected, and its details are shown in a pop-up window. The details window includes fields for Name, Web Site, Office Phone, Office Fax, Billing Address, Shipping Address, Email Address, Industry, and Type. A blue callout box points to the details window with the text: 'View, create, edit and search for CRM records from within Outlook. FrontEnd syncs the data in the background with SugarCRM server'.

| Name | City | Phone Number | User | Last Modified Date |
|--------------------|---------------|----------------|---------|---------------------|
| 360 Vacations | Sunnyvale | (743) 464-7206 | Ron Man | 2017-10-10 02:34:03 |
| 360 Vacations | San Mateo | (182) 283-2022 | Ron Man | 2016-08-01 11:53:47 |
| A.G. Parr PLC | San Francisco | (378) 194-0002 | Ron Man | 2018-05-24 16:30:23 |
| Avery Software Co | Cupertino | (320) 013-8679 | Ron Man | 2015-08-11 08:29:58 |
| Calib Systems Inc. | Cupertino | (296) 710-6259 | Ron Man | 2015-08-11 08:29:58 |

A.G. Parr PLC Details

Name: A.G. Parr PLC
Web Site: http://www.agparr.com
Office Phone: (415) 794-0002
Office Fax:
Billing Address: Street: 1 Montgomery St, City: San Francisco, State: CA, Postal Code: 94104, Country: USA
Shipping Address: Street: 1 Montgomery St, City: San Francisco, State: CA, Zip Code: 94104, Country: USA
Email Address: info@agparr.com
Industry: Banking
Type: Customer

View, create, edit and search for CRM records from within Outlook. FrontEnd syncs the data in the background with SugarCRM server

#2: Supports Custom Modules/Fields

Customize [X]

Fields | **Columns**

Select the SugarCRM fields that you would like to display and synchronize with Outlook.

| | |
|---------------|---------------------|
| Date / Time * | Work Order Number * |
| Created By | Requested By |
| Date Created | Assigned to |

Admin tool to design dynamic forms for custom CRM modules in Outlook

Work Order 103 - Facilities Work Orders [Min] [Max] [X]

| | | | |
|---------------------------------|---|------------------------------|------------------|
| Date / Time: * | <input checked="" type="checkbox"/> 11/13/2017 10 : 30 | Work Order Number: * | Work Order 103 |
| Created By: | Jim | Requested By: | Tammy |
| Date Created: | <input checked="" type="checkbox"/> 11/13/2017 10 : 30 | Assigned to: | Ron Man |
| Work Description: | Replace GFI | Special Instructions: | Be Careful |
| Building Name / Address: | A | Floor / Room No: | 101 |
| Facility Category: | Ceiling Tile (FC01) Conf Room Set-Up (FC02) Copier / Printer (FC03) Electrical Problem (FC04) Furniture Request (FC05) | Teams: * | Customer Support |

[Open in SugarCRM](#) **Save** **Cancel**

#3: Rule-Based Email Archiving Engine


Email Rules Engine


Email Archiving Rules | Action Items Rules | Create Case Rules

New Rule | Change Rule | Delete

| Name | Module | Rec |
|---|--------------------|-----|
| <input checked="" type="checkbox"/> Jane Connely - All Received / Sent emails | Contacts, Accounts | All |
| <input checked="" type="checkbox"/> AG Parr - All Emails | Contacts, Accounts | All |
| <input checked="" type="checkbox"/> All Monthly Reports | Contacts, Accounts | All |
| <input checked="" type="checkbox"/> Qualified Leads - Sales inquiries | Contacts, Accounts | All |

Rule Description:

 Apply this rule when I send/receive email:
From: Any Lead
To/Cc: sales@implicitweb.com
Subject contains: -any-
Archive to:
all recipients and their respective accounts

 [Show me how to create Email Rules](#)

Implicit FrontEnd Rule

Rule

Rule Name: Qualified Leads - Sales inquiries

Action: Archive Email

When I receive / send emails from / to the following email addresses

Apply To: ☒ Received Emails ☒ Sent Emails

From: Any Lead

To/Cc: sales@implicitweb.com

Subject contains:

Perform action and associate with the following record:

☒ Archive email to all recipients and their respective accounts


☐ Archive email to the following record:

Module:

Record:

Team: Global

Assigned To: Ron Man

 [Show me how to configure rules](#)


OK Cancel

Dynamic email archiving rules based on email parameters

#4: Email Conversation Archiving

Archive a complete email conversation thread in one action

Archive Conversation

 **Archive Conversation to SugarCRM**

Archive the following emails that Outlook identified as being part of this conversation to the SugarCRM record specified below.

Conversation topic:

Archive as:

| <input checked="" type="checkbox"/> | Subject | From | To | Date |
|-------------------------------------|-----------------------------|--------------|--------------|----------------------|
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Ron Man | 'Jane Con... | Wed, May 30, 10:3... |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Jane Connely | Ron Man | Tue, Mar 20, 11:57 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Ron Man | 'Jane Con... | Tue, Mar 20, 11:55 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Jane Connely | Ron Man | Tue, Mar 20, 11:55 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Ron Man | 'Jane Con... | Tue, Mar 20, 11:52 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Jane Connely | Ron Man | Tue, Mar 20, 11:52 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Ron Man | 'Jane Con... | Tue, Mar 20, 11:32 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Jane Connely | Ron Man | Tue, Mar 20, 11:32 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Ron Man | 'Jane Con... | Tue, Mar 20, 11:31 |
| <input checked="" type="checkbox"/> | RE: Implicit FrontEnd Quote | Jane Connely | Ron Man | Tue, Mar 20, 11:28 |

☒ Archive each email to its respective recipients and their accounts

☐ Archive all emails to the following record:

Related To:


Related To Item:

Team:

Assigned To:

☐ Automatically archive all future messages in this conversation to the selected CRM records

Note: Depending on the number of emails and size of attachments, this operation may take some time. It will be executed in the background and you can continue using Outlook while the emails are being archived.

 [Show me how to archive a conversation](#)

#5: Email Templates & Mail Merge

The screenshot displays the Microsoft Word interface with a message template titled "RE: Implicit FrontEnd Quote - Message (HTML)". The ribbon includes tabs for File, Message, Insert, Options, Format Text, Review, Developer, and Help. The Message tab is active, showing options like Archive and Send, Email Template, Attach from SugarCRM, Paste, Clipboard, Basic Text, Names, Include, Tags, and various Implicit FrontEnd and My Templates options.

A blue callout box points to the merge fields in the email body, stating: "Utilize SugarCRM email templates and merge with CRM data".

The email body contains the following merge fields:

\$contact_name

\$contact_title, \$account_name

\$account_shipping_address_street \$account_shipping_address_city,
\$account_shipping_address_state \$account_shipping_address_postalcode

Dear \$contact_first_name,

Thank you for your interest in Implicit FrontEnd. Per your request, please find attached quote.

Best Regards,

The right-hand pane shows the "Implicit FrontEnd" task pane with the "Mail Merge" section. It prompts the user to "Select the mail template from SugarCRM:" with a dropdown menu showing "Request For Quote" and an "Update Templates" link. Below, it prompts to "Select the SugarCRM records to merge with the mail template:" with dropdowns for "Contact:" (Jane Connely) and "Account:" (A.G. Parr PLC), and a "Merge" link.

#6: Centralized Configuration

CRM admin can centrally configure and dynamically manage FrontEnd configurations for multiple teams / users

Implicit FrontEnd Options

General

Tethered Mode

Sync Configuration

Email Archiving

Side Panel

CRM Action Items

Administration

Advanced

As a SugarCRM administrator, you can create different FrontEnd configurations and publish them to different SugarCRM teams (or SuiteCRM groups).

To deploy a configuration, configure all settings on your own system, then select one or more teams and click 'Publish'. You can also make changes to configurations (except for 'Initial Sync' settings) by loading the configuration for a selected team, modifying it and re-publishing it. Note that any changes to configurations will take effect only after users re-start Outlook. To deploy the same configuration for all users, select the 'Global' team.

| | Team | Active Configuration |
|--|-----------------------|----------------------|
| | Sales - Asia | |
| | Sales - EMEA | |
| | Sales - North America | |
| | Test 365 | |
| | Test Roles | |

Publish Configuration

Load Configuration

Remove Configuration

☒ Allow users to change their own settings

Module-level Permissions - Set privileges to access / modify SugarCRM records via FrontEnd

| Module | Create New | Modify |
|------------------------|-------------------------------------|-------------------------------------|
| Accounts | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Opportunities | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Cases | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Notes | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Leads | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Facilities Work Orders | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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These permissions are enforced by FrontEnd in addition to the native SugarCRM user permissions per module.

?

Show me how to configure these settings

OK

Cancel

Apply

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Simply Superior Integration™

10

#7: CRM Action Items

CRM Action Items

New

Mark as Done

Dismiss

Refresh

Move Up

Move Down

Move to List

View


CRM Action Items

| | | From | Subject | Related | Related To | Received / Sent |
|----------------|--|---------------------|-------------------------------------|-------------|-------------------|----------------------|
| Due: Today | | | | | | |
| 1 | | Jane Connely | Microsoft Customers and Part... | Opportunity | Demo | Tue, May 15, 11:1... |
| 2 | | barb@apprize... | | Account | JDK | Fri, May 25, 8:05 |
| 3 | | Axialis Software | Axialis FLAT DESIGN Icons - M... | Account | Axialis | Wed, May 23, 11:... |
| 4 | | Jeff Young | Demo | Account | AG Parr | Wed, May 30, 11:... |
| Due: Tomorrow | | | | | | |
| 1 | | Felix Komrash | Checking | Opportunity | FrontEnd Licenses | Tue, May 29, 7:11 |
| 2 | | Chris Beaver | Re: Board Seat Inquiry | Contact | Chris Beaver | Thu, May 24, 10:2... |
| 3 | | David McKenna | Quote | Contact | David McKenna | Thu, May 24, 5:56 |
| 4 | | Felix Komrash | Follow Up | Lead | Felix Komrash | Sun, May 27, 6:12 |
| Due: This Week | | | | | | |
| 1 | | Natalie Daniel | SugarCRM Account | Contact | Natalie Daniel | Wed, May 30, 6:4... |
| 2 | | Everleap SSL s... | SSL certificate | Account | Everleap | Tue, May 15, 10:1... |
| 3 | | Server Intellect... | Server Intellect - Ticket Pendin... | Account | Everleap | Mon, Jan 29, 12:1... |

Snooze

Mark as Done




Dismiss








Jane Connely

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CEO

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(415) 910-6700 Mobile
jane.connely.sugar@gmail.com









A.G. Parr PLC

San Francisco, CA 94104

<http://www.agparr.com>

Opportunities (2)

+

Turn your customers' emails into action items. Manage, prioritize and stay on top of your high-value opportunities

#8: Web Browsers Integration

The screenshot displays the SugarCRM web interface within a browser window. The address bar shows the URL: <https://implicitivent.sugarondemand.com/#Contacts/17c7ff96-3ca1-11e7-8537-02d9144ab1cf>. The navigation bar includes tabs for Accounts, Contacts (selected), Opportunities, Leads, and Calendar. The contact profile for Jane Connely is shown, with fields for Title (CEO), Department, Account Name (A.G. Parr PLC), Tags, Primary Address, Fax, Twitter Account (tw_t_jane), Mobile (415) 910-6700, Do Not Call (checked), Email Address (jane.connely@agparr.com, jane.connely.sugar@gmail.com), Alternate Address, Office Phone (415) 910-6701, and D&B Principal Id. A context menu is open over the contact profile, listing options: Login, Open in Outlook, Email, Schedule Meeting (highlighted), Related Emails, Sync All, and About. A blue callout box points to the 'Schedule Meeting' option with the text: 'Access and utilize Outlook functionality even when you are working directly with SugarCRM inside your web browser'.

12

SUGARCRM

Mobile Shortcuts Feedback Help

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#9: Integrated Documents Archiving

The screenshot displays the Microsoft Excel interface with a green ribbon at the top. The main workspace shows an invoice template with fields for 'INVOICE #100', 'COMPANY NAME', 'ADDRESS', 'CITY, ST ZIP CODE', 'PHONE | FAX', 'DATE', 'BILL TO', 'NAME | COMPANY', 'ADDRESS', 'CITY, ST ZIP CODE', 'PHONE', 'Details', 'AMOUNT', and 'SUBTOTAL'. A blue callout box points to the 'Implicit FrontEnd' sidebar on the right, which contains a checkbox for 'Archive this document on SugarCRM' and a table of document history.

Archive Office and PDF documents to SugarCRM right from within Word, Excel and Acrobat.

Implicit FrontEnd

☒ Archive this document on SugarCRM

Description

Select the business categories to associate with this document

Categories marked with an asterisk * are mandatory

Related To: Account

Related To Item: A.G. Parr PLC

Team: Global

Assigned To: Ron Man

Document Search:

☒ Use Same Categories [Refresh](#)

| File Name | Date | Sync'd |
|-------------------------|-----------------|--------|
| Proposal to A.G. Par... | 5/10/2018 15:37 | Yes |
| my Excel file.xlsx | 3/28/2018 17:08 | Yes |

#10: Full Offline Support

Two Modes:

- **Tethered Mode** – CRM data is retrieved in real-time from SugarCRM and does not need to be synced to Outlook
- **Non-Tethered Mode** – CRM data is synced to Outlook and is fully accessible when offline:
 - View, update or create CRM records; Archive emails
 - All edits are cached locally and automatically synced upon re-connecting