Implicit FrontEnd

Enterprise class Outlook Integration

Comparison with SugarCRM Plugin

Implicit Inc.

May 2018

implicit inc.
Simply Superior Integration™

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

implicit inc.
Simply Superior Integration™

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

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

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

6

#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
☑ 📭 Jane Connely - All Received / Sent emails	Contacts, Accounts	All
☑ 📭 AG Parr - All Emails	Contacts, Accounts	All
☑ 📭 All Mothly Reports	Contacts, Accounts	All
☑ 📭 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 | Any Contact
               Enter a comma delimite | Any Lead
               Note: you can use wildcc | Select Account
                                          | Select Contact
Subject contains: | Select Lead
                                          | Specify Email address(es)

Perform action and associate with the fol

◉ 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

7

#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: Implicit FrontEnd Quote

Archive as: Implicit FrontEnd Quote

✓	Subject	From	To	Date
✓	RE: Implicit FrontEnd Quote	Ron Man	'Jane Con...	Wed, May 30, 10:3...
✓	RE: Implicit FrontEnd Quote	Jane Connely	Ron Man	Tue, Mar 20, 11:57
✓	RE: Implicit FrontEnd Quote	Ron Man	'Jane Con...	Tue, Mar 20, 11:55
✓	RE: Implicit FrontEnd Quote	Jane Connely	Ron Man	Tue, Mar 20, 11:55
✓	RE: Implicit FrontEnd Quote	Ron Man	'Jane Con...	Tue, Mar 20, 11:52
✓	RE: Implicit FrontEnd Quote	Jane Connely	Ron Man	Tue, Mar 20, 11:52
✓	RE: Implicit FrontEnd Quote	Ron Man	'Jane Con...	Tue, Mar 20, 11:32
✓	RE: Implicit FrontEnd Quote	Jane Connely	Ron Man	Tue, Mar 20, 11:32
✓	RE: Implicit FrontEnd Quote	Ron Man	'Jane Con...	Tue, Mar 20, 11:31
✓	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: Global

Assigned To: Ron Man

☐ 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   Archive   Cancel

8

implicit inc.
Simply Superior Integration™

#5: Email Templates & Mail Merge

Utilize SugarCRM email templates and merge with CRM data

#6: Centralized Configuration

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	☑	☑
Opportunities	☑	☑
Cases	☑	☑
Notes	☑	☑
Leads	☑	☑
Facilities Work Orders	☑	☑

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

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

10

? Show me how to configure these settings

OK   Cancel   Apply

mplicit inc.
mply Superior Integration™

#7: CRM Action Items

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

#8: Web Browsers Integration

Access and utilize Outlook functionality even when you are working directly with SugarCRM inside your web browser

#9: Integrated Documents Archiving

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

#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

implicit inc.
Simply Superior Integration™