
Implicit FrontEnd

Enterprise class Outlook Integration

Comparison with SuiteCRM Plugin

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May 2018

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 SuiteCRM
- Increase CRM Adoption / Utilization
 - CRM work natively integrated into daily use of Outlook
 - Automate data entry from Outlook into CRM

Feature Comparison	Implicit FrontEnd	SuiteCRM Plugin
Sync Outlook Data with SuiteCRM: Contacts, Calendars	✓	✓
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	✓	
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'. Below this is 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 highlighted in blue. To the right of the table, a 'Details' panel shows the selected account's information, including its name, address, industry, and type. A modal window is open, displaying a form for 'A.G. Parr PLC' with 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' panel and the modal window, containing the text: 'View, create, edit and search for CRM records from within Outlook. FrontEnd syncs the data in the background with SuiteCRM 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

Details: A.G. Parr PLC
San Francisco, CA 94104
Industry: Banking
Type: Customer

A.G. Parr PLC Form Fields:
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 SuiteCRM 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 * [v] Work Order Number * [v]
Created By [v] Requested By [v]
Date Created [v] Assigned to [v]

Work Order 103 - Facilities Work Orders

Date / Time: * ☒ 11/13/2017 [v] 10 [v] : 30 [v]
Created By: Jim
Date Created: ☒ 11/13/2017 [v] 10 [v] : 30 [v]
Work Description: Replace GFI
Building Name / Address: A
Facility Category: Ceiling Tile (FC01)
Conf Room Set-Up (FC02)
Copier / Printer (FC03)
Electrical Problem (FC04)
Furniture Request (FC05)

Work Order Number: * Work Order 103
Requested By: Tammy
Assigned to: Ron Man [v]
Special Instructions: Be Careful
Floor / Room No: 101
Teams: * Customer Support [v]

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

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

#3: Rule-Based Email Archiving Engine

Email Rules Engine

Email Archiving Rules Action Items Rules Create Case Rules

New Rule Change Rule X 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](#)

Archive

Cancel

#5: Email Templates & Mail Merge

The screenshot displays the Microsoft Word interface with the 'Message' ribbon selected. The title bar reads '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', 'Implicit FrontEnd', 'Customer Manager', 'Implicit Sync', and 'My Templates'. A blue callout box points to the 'Email Template' button and the merge fields in the email body, containing the text: 'Utilize SuiteCRM email templates and merge with CRM data'.

Email Header:

From: ronman@Implicitsync.onmicrosoft.com
To: Jane Connely <jane.connely.sugar@gmail.com>
Cc:
Bcc:
Subject: RE: Implicit FrontEnd Quote

Email Body:

\$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,

Mail Merge Task Pane (Implicit FrontEnd):

Mail Merge

Select the mail template from SugarCRM:
Request For Quote
[Update Templates](#)

Select the SugarCRM records to merge with the mail template:

Contact: Jane Connely
Account: A.G. Parr PLC
[Merge](#)

#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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#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








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<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 SuiteCRM web application interface within a browser window. The browser's address bar shows the SuiteCRM URL. The application's header includes a 'CONTACTS' menu and a 'CREATE' button. The main content area shows the profile of 'JANE CONNELLY'. Below the name are tabs for 'OVERVIEW', 'MORE INFORMATION', 'OTHER', and 'ACTIONS'. The 'ACTIONS' tab is active, revealing a form with various contact fields. A context menu is open over the 'ACTIONS' tab, listing options: 'Login', 'Open in Outlook', 'Email', 'Schedule Meeting', 'Related Emails', 'Sync All', and 'About'. A blue callout box points to the 'Open in Outlook' option.

CONTACTS **CREATE**

JANE CONNELLY ☆

OVERVIEW **MORE INFORMATION** **OTHER** **ACTIONS**

First Name:	Jane	Last Name:	Connely
Office Phone:	(408) 555-1212	Mobile:	
Title:	CEO	Department:	
Account Name:	A.G. Parr LLC	Fax:	
Email Address:	jane.connely@agparr.com (Primary)		
Primary Address:	236 Fremont Ave San Jose CA 95051 United States		Other Address:
Description:			
Assigned to:	Ronnie		

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

#9: Integrated Documents Archiving

The screenshot displays the Microsoft Excel interface with a green ribbon. The main worksheet, 'Sheet1', contains an invoice template. A blue callout box points to the 'Implicit FrontEnd' sidebar, stating: 'Archive Office and PDF documents to SuiteCRM right from within Word, Excel and Acrobat.'

Invoice Template Content:

- Row 2: INVOICE #100
- Row 4: COMPANY NAME
- Row 6: ADDRESS
- Row 7: CITY, ST ZIP CODE
- Row 8: PHONE | FAX
- Row 10: DATE
- Row 12: BILL TO
- Row 13: NAME | COMPANY
- Row 14: ADDRESS
- Row 15: CITY, ST ZIP CODE
- Row 16: PHONE
- Row 18: Details
- Row 19: AMOUNT
- Row 20: Description
- Row 21: Amount
- Row 22: Description
- Row 23: Amount
- Row 24: Description
- Row 25: Amount
- Row 26: Description
- Row 27: Amount
- Row 28: SUBTOTAL \$0.00

Implicit FrontEnd Sidebar:

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

#10: Full Offline Support

Two Modes:

- **Tethered Mode** – CRM data is retrieved in real-time from SuiteCRM 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