

ActionCOACH CRM – Sugar Outlook Sync Program

This guide will show you step by step how to install and configure the Outlook Sync program you can purchase for your ActionCOACH CRM. The program is offered by a third-party company and is available as a 30 day trial to start. After your trial you will be required to purchase the program to continue use. Although this program works with your ActionCOACH CRM it is not supported by the CRM support. For more information or support levels beyond this document, you must contact the third-party company.

To Install

1. Start by visiting the CRM Support page at: [Http://www.actioncoachcrm.com](http://www.actioncoachcrm.com)



2. Next click the SUPPORT link at the top of the web site.



3. Scroll down the page slightly and look for the section describing the possible Add-ons for your CRM. The first item describes the Outlook Sync program. Click where it says "Please [click here](#) to download a tool to help you with the same." You will be redirected to a new web page with several options.

4. Scroll down the page and look for the section labeled “Connect”. Inside this section you will see several versions of the program you can download depending on your version of Outlook.

[Learn More](#) [Buy Now](#)

Sugar Network is available for \$119 per user per year for Sugar Open Source customers. Sugar Plug-ins for Microsoft Outlook, Word, and Mozilla Thunderbird are already included with [Sugar Professional and Enterprise editions](#). Sugar Learning Credits are [purchased separately](#).

Connect

Sugar Open Source is most effective when integrated with other productivity applications so users can reduce manual reentry of information and share important customer information.

Sugar Network delivers the integration your company needs through Sugar Plug-Ins for Microsoft Office. Subscribers receive one license to [Sugar Plug-In for Microsoft Outlook](#), which allows users to manage Sugar data from within the familiar Outlook user interface.

Sugar Network includes one license to [Sugar Plug-In for Microsoft Word](#), which merges SugarCRM data into the popular Microsoft Word format.

Sugar Plug-In for Mozilla Thunderbird allows users to archive emails from Thunderbird to Sugar.

Microsoft Office Extensions

Plug-In for Microsoft Outlook 2007	Learn More	Demo	30-day Trial	Included
Plug-In for Microsoft Outlook 2003	Learn More	Demo	30-day Trial	Included
Plug-In for Microsoft Word 2007	Learn More	Demo	30-day Trial	Included
Plug-In for Microsoft Word 2003	Learn More	Demo	30-day Trial	Included
Plug-In for Mozilla Thunderbird				Included

Learn


CRM success depends on user education and adoption. Sugar University offers a single location for end-user, power-user, and administrator training on SugarCRM.


Sugar University consists of an online library and instructor-led learning sessions. Access to the online library and the basic end-user seminars are now available at no charge. Please see [Sugar University](#) for full details.


To attend learning sessions for administrators and power-users, Sugar Learning Credits (SLC) are required. Sugar Network includes **one (1) Sugar Learning Credit (value \$30) per Network purchase** to attend Sugar University online learning sessions and enable you to get the most out of Sugar Open Source. [Purchase additional Sugar Learning Credits](#).

Basic End-User Learning Sessions

5. Click one of the red icons to the right of your version of Outlook.

 [Learn More](#) - Click here to learn more about the program.

 [Demo](#) - Click here to see a demonstration of use.

 [30-day Trial](#) - Click here to download and install the 30 day trial version.

6. When installing the 30 day trial, be sure to follow the installation wizard to complete the process.

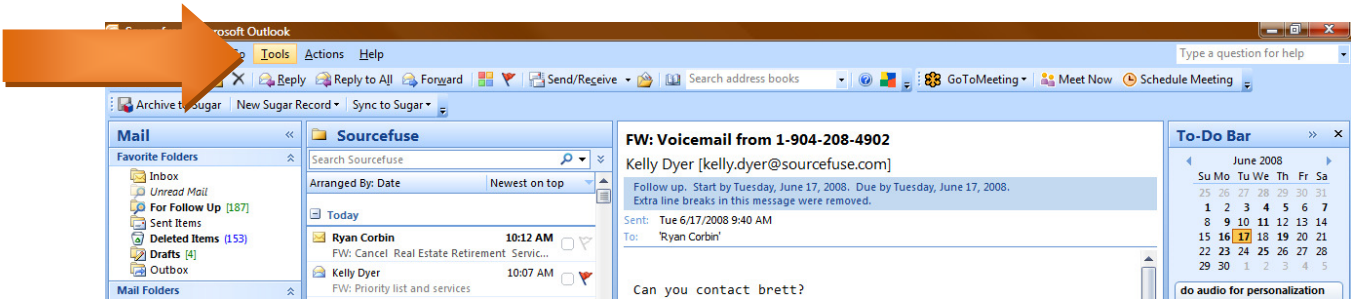
7. Once installation is complete, please restart your computer.

Using the Outlook Sync Program

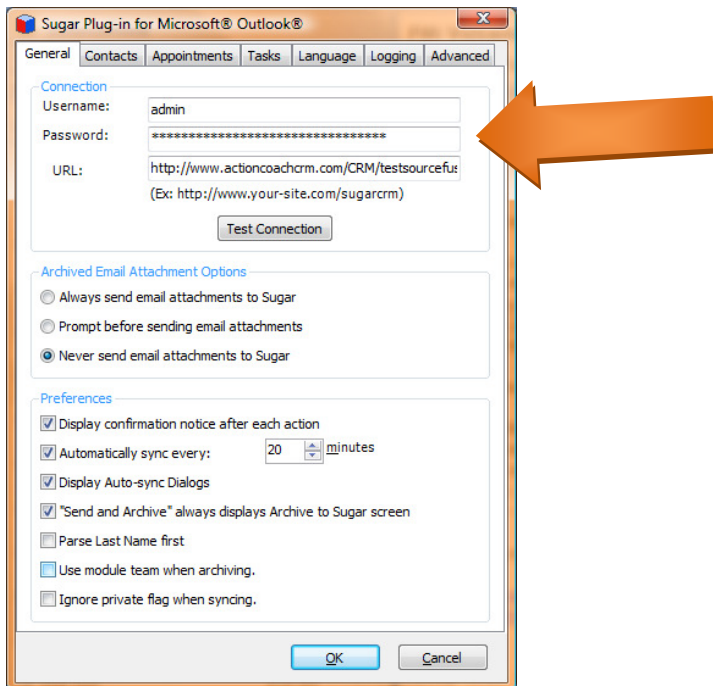
After installing the trial version of the Outlook Sync program, you will have a few changes that will appear inside your Outlook email program. For purposes of this document, the picture examples you see were created using Outlook version 2007.

Configure your Outlook Sync Program

1. Start by opening your Outlook program
2. Click TOOLS at the top of your Outlook program



3. When the drop down menu appears, click on the option called "SUGAR OPTIONS"
4. Next, type in your user name and password of your new ActionCOACH CRM. This information was provided to you in an email when you purchased your CRM. Then type the exact URL of your CRM which is also available to you in the original registration email.



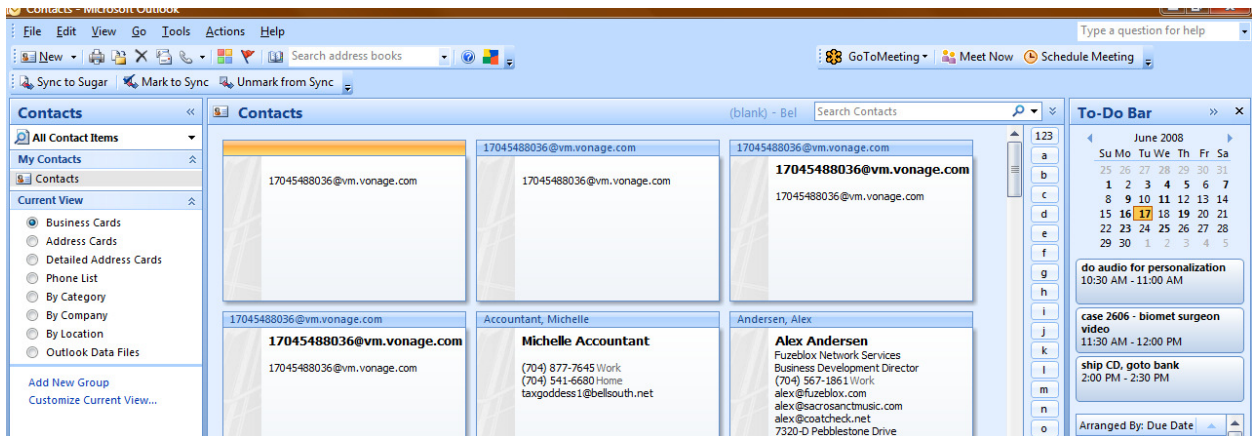
5. Click the button labeled “TEST CONNECTION” to ensure that your information was typed correctly. If the test is successful you will see a window telling you the same. If unsuccessful you will need to modify your user name, password or URL to ensure accuracy.

Syncing Information from Outlook to the CRM

The Outlook sync program does not automatically sync all your contacts, appointments and tasks. You must decide which items to sync by manually “marking” them from your Outlook.

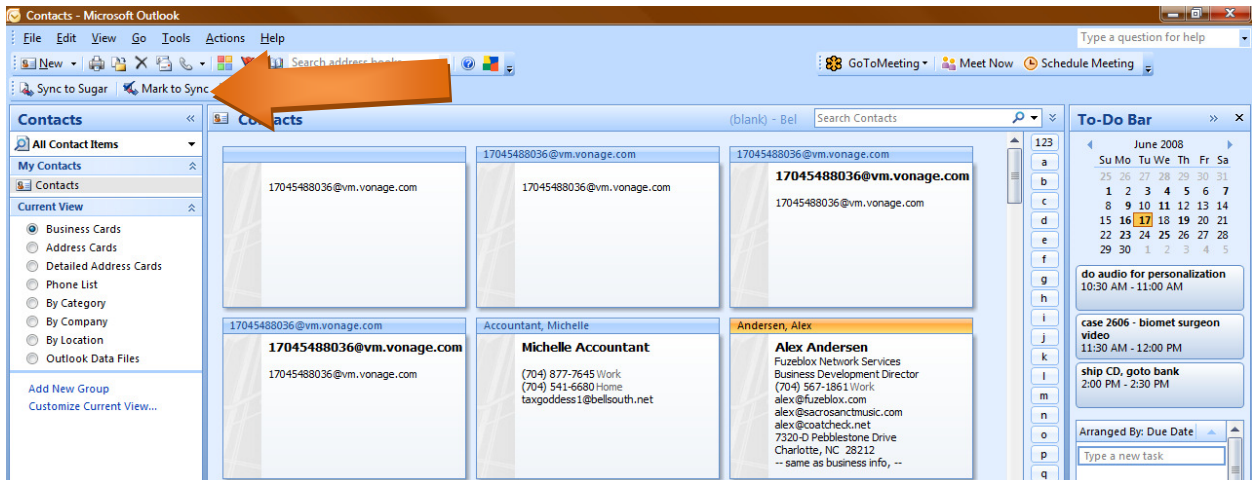
Syncing

1. To sync your information, start by opening the section in Outlook you want to sync. For example: Your Contacts



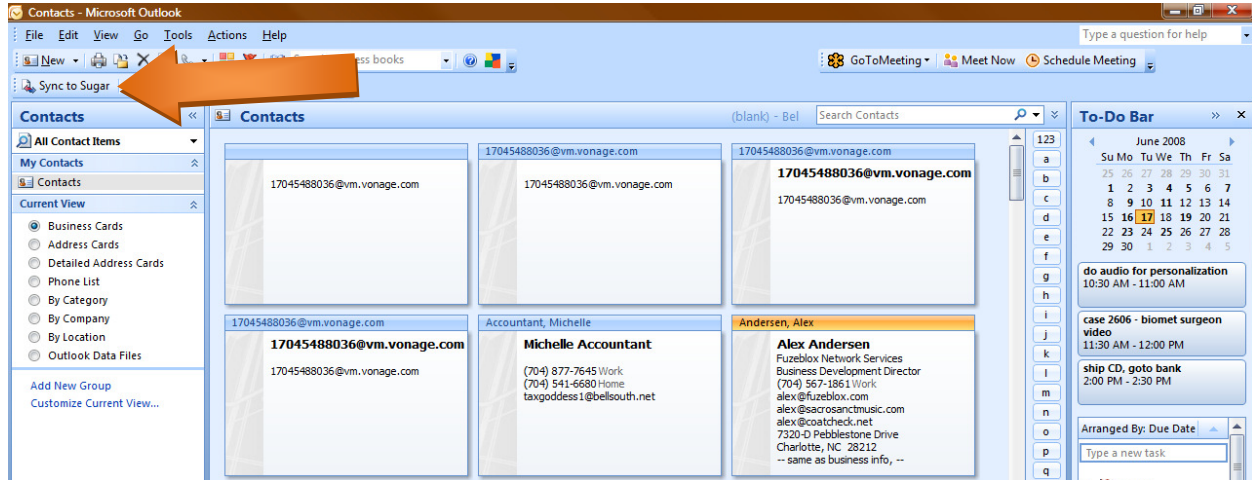
2. Next click a contact in your list once to highlight it.

3. Then click the “Mark to Sync” button that was installed by the Outlook Sync module.



4. By marking this contact to sync, you have now told the program that you want this contact to appear inside the CRM.

5. Next click the button labeled “Sync to Sugar” to send this item to your CRM.



6. Repeat for each contact or task or appointment.

****TIP**** - You can also click EDIT at the top of the screen and click “SELECT ALL” to select all contacts, tasks or appointments at the same time. Once all are selected, follow the previous steps starting at #3 above.