



SprinxCRM online

How to set up Outlook sync

System requirements

SprinxCRM Outlook Sync is compatible with the following MS Office:

- **Microsoft Office 2007**
- **Microsoft Office 2010**

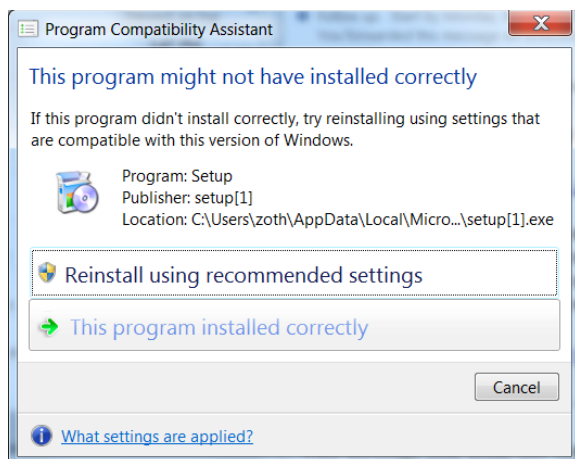
Hardware requirements are same as minimal requirements for given OS and MS Office. Installation requires up to 5 MB disk space.

Installation at local PC

- 1) Close your Outlook
- 2) Go to website and click this url:

<http://www.sprinxcrm.com/Download/SprinxCRM%20OutlookSync/setup.exe>

- 3) It will start installation of SprinxCRM automatically.
- 4) Follow on-screen instructions.
- 5) In some cases, after the installation you might get the window below.
CHOOSE "This program installed correctly"



- 6) Restart MS Outlook to get SprinxCRM Outlook Sync running.

Outlook Sync configuration

There are two main steps in order to configure SprinxCRM Outlook Sync:

- Connection configuration – you will set up connection between SprinxCRM and your Outlook Sync
- Sync Folder configuration - you will choose what folders in your Outlook you want to synchronise with SprinxCRM
- Sync frequency and other configuration – you will set up how often and for how many days back you want your emails get synchronized.

Connection configuration

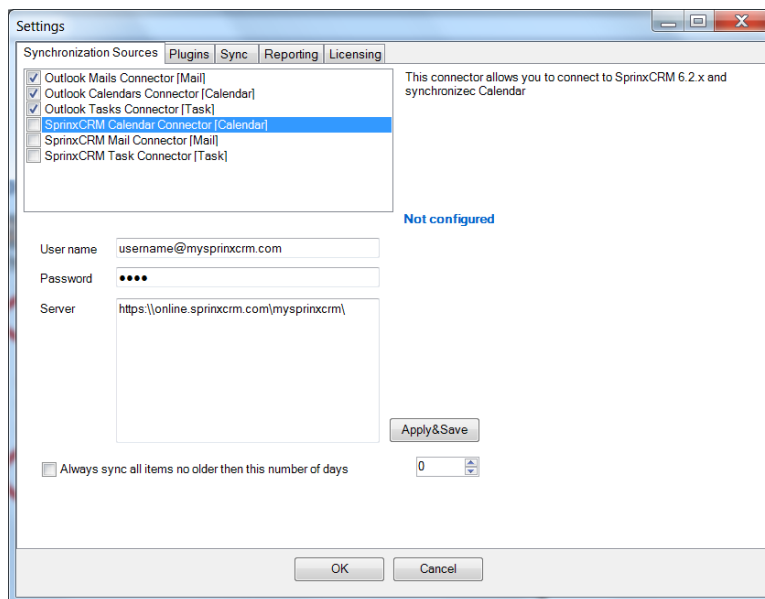
- 1) Open SprinxCRM Outlook Sync settings

Open your Outlook Add-Ins, find SprinxCRM Outlook Sync and click on “Settings”.



2) Configure Connection to SprinxCRM server

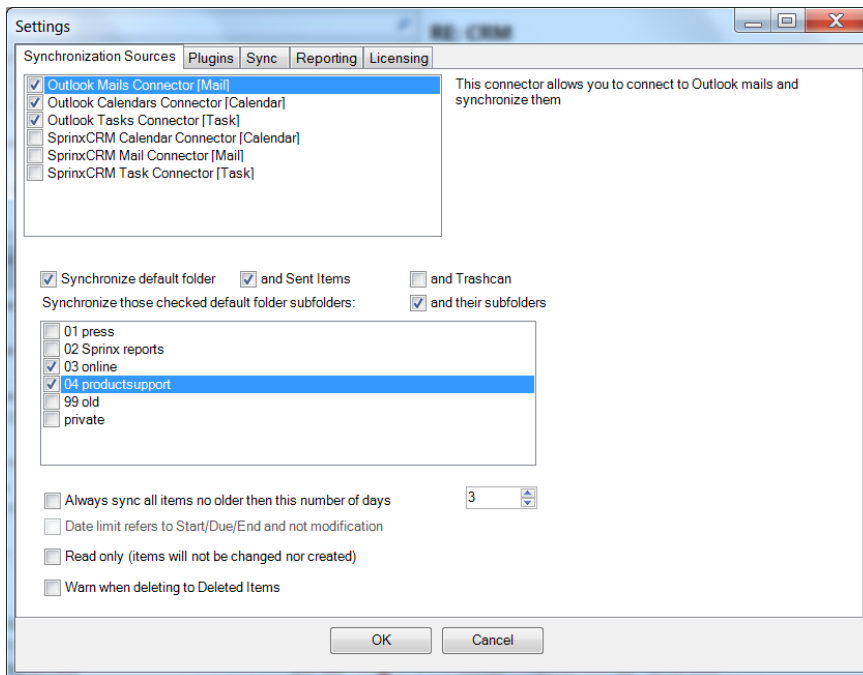
For SprinxCRM Calendar/Mail/Task Connectors enter: username, password and server url including http(s). Note: user name and password must be username and password of an existing user account in SprinxCRM.



Folder sync configuration

- 1) Go to SprinxCRM Outlook Sync settings
- 2) Select folders you want to synchronize with SprinxCRM

For Outlook Mails/Calendars/Tasks connectors select what folders you want synchronize: default folder, selected folders, including subfolders option, etc.



Note: Tasks and Calendar are sync both ways (SprinxCRM \Leftrightarrow MS Outlook), emails are sync only one way (MS Outlook \Rightarrow SprinxCRM). Contact are also sync one way (SprinxCRM \Rightarrow MS Outlook)

Other Sync configuration options

There are several other options tweaking sync behavior.

Follow onscreen descriptions for configuration options you can use to adjust sync process.

Outlook Sync functionality

Calendar and task sync functionality

Items from Calendar are sync both way. Appointment created in MS Outlook will be sync to SprinxCRM and Appointment created in SprinxCRM will be sync to Outlook. Changes are also reflected on both locations and sync.

! Deletion of an Event or task in MS Outlook will not be performed in SprinxCRM. This feature is a benefit of SprinxCRM as a “general storage” of your communication.

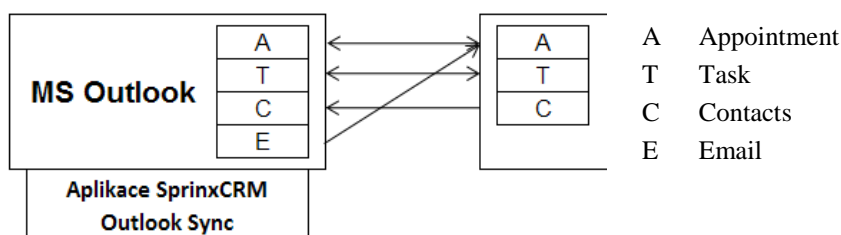
Contact sync functionality

Contacts (companies and persons) are sync only from SprinxCRM to Outlook.

ISync will transfer only Contacts that current user is assigned as a an account manager.

Email sync functionality

Email sync is one way from Outlook to SprinxCRM. Sync will check emails in selected folders. Sync will transfer only emails that have same email address with Contact email address in SprinxCRM. Such email will be sync to the Contact as a sent or received email by the user. Sync will transfer email body and attachments. Only sent BCC emails will be attached to SprinxCRM contact.



Sync schema between MS Outlook and SprinxCRM

Rules for attaching emails to Contacts

Sync will attach emails to Contacts according following rules:

- 1) No emails having email address domain configured in the “Company Domain list” will be sync into SprinxCRM. This feature enables to omit internal company communication from being sync into SprinxCRM. Note: the “Company Domain list” is not configured at SprinxCRM online.
- 2) Emails having same email address as a contact in SprinxCRM are attached to the contact.
- 3) If there is no contact with matching email address, the sync will look at “Stop list” and will check whether email address domain is listed in the list. If there is the domain listed then email is not synced into SprinxCRM. Note: this feature will allow you to omit emails sent from free mails as a spam etc. Stop list is configurable in the administration.
- 4) If there is no contact with matching email address and the domain is not listed in “stop list” then sync will look for a Company contact having email address with same domain as the email. If there is such a company the email will be attached to the company. If there is no company having same domain the email will not be transferred to SprinxCRM. Note: this will allow you to have sync communication with your customer personnel that is not recorded in your SprinxCRM.

Outlook Sync troubleshooting

There are several typical issues why your email will not appear in SprinxCRM:

- 1) Senders or recivers email address is not found in SprinxCRM contacts
- 2) Domain part of the email address is listed in “Company domain” list
- 3) Domain part of the email address is listed in “Stop list”

- 4) Email has been delivered to Outlook profile that is not default (SprinxCRM sync only from default Outlook profile)

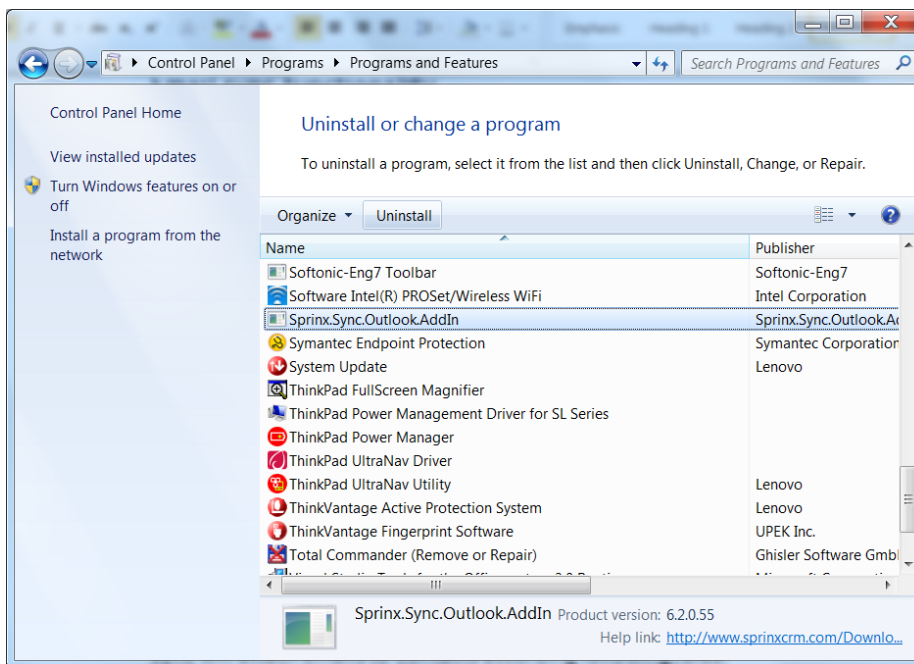
Outlook Sync uninstallation

You can uninstall SprinxCRM Outlook Sync in two steps:

- 1) Remove Outlook Sync from programs on your PC
- 2) Remove Outlook Sync Add-In from your MS Outlook

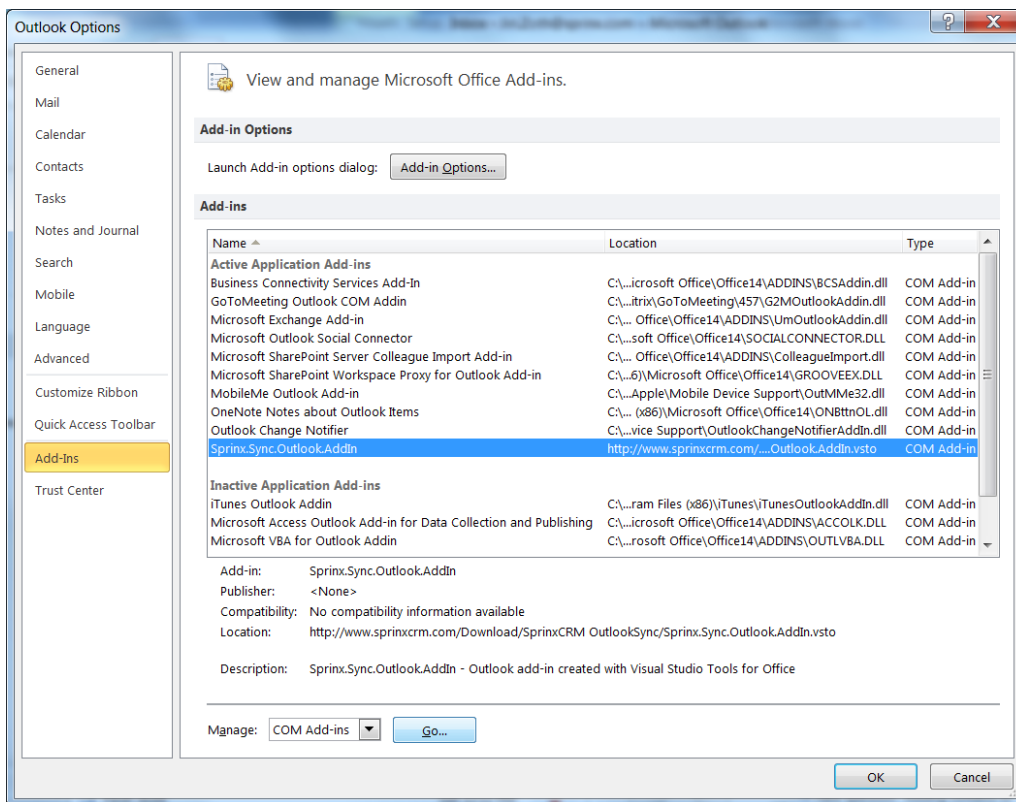
Remove Outlook Sync from programs

- 1) Go to: Control panel > Programs > Uninstall a program
- 2) Select: Sprinx.Sync.Outlook.AddIn
- 3) Click: Uninstall and follow on screen instructions



Remove from Outlook Add-ins

- 1) Go to: MS Outlook > File > Options > Add-Ins
- 2) Click button: "Go"



- 3) Select: Sprinx.Sync.Outlook.AddIn
- 4) Click button: Remove

