



## **MS Outlook synchronization Guide**

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## 1. Terrasoft CRM settings

When a contact is imported to Terrasoft CRM system creates an account for it. By default the "Account type" field is set as mandatory field. But as an account type is absent in the Outlook the synchronization process may cause the error. That is why before the synchronization select in Terrasoft CRM: [Tools] -> [System settings] -> [Administrating] -> [Mandatory fields] -> [ObligatoryCompanyFields]

**System settings**

### System settings

- All parameters
  - Parameters
    - Tasks and Processes
    - Numbering
      - Invoice number
      - Contract number
      - Amount calculation
  - Plugins
  - Administrating
    - Default access
    - Files
    - Log
    - Mandatory fields**
    - Phone number mask

Code	Value
ObligatoryContactFields For a contact	#Name#
ObligatoryCompanyFields For an account	#Name#Companytype_id#
ObligatoryMarketingFields For a campaign	#Name#
ObligatoryOrderFields For an invoice	#Amount#Currency_id#Invoice
ObligatoryOpportunityFields	#Name#StartDate#Amount#C

Default value is #Name#Companytype\_id#. It is necessary to change the value to #Name#

**Edit parameter**

Code: ObligatoryCompanyFields

Data type: String

Value: #Name#

Description: For an account

Script... OK Cancel

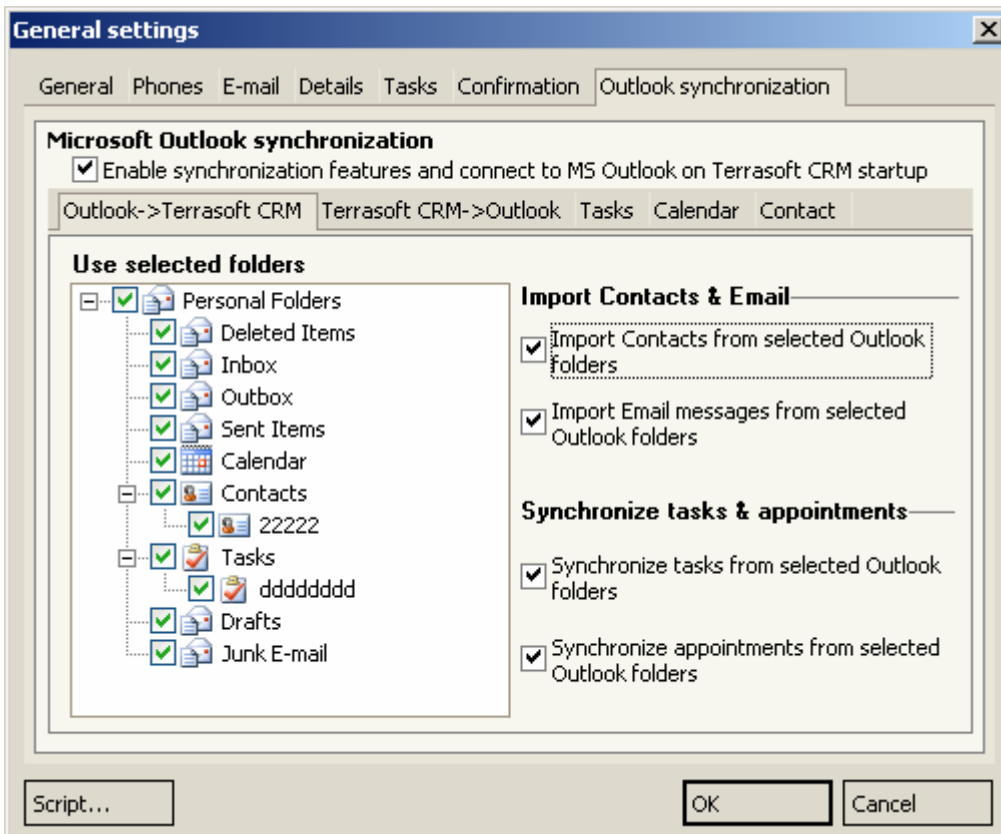
**! Then restart Terrasoft CRM**

## 2. Outlook Synchronization settings

To adjust Outlook Synchronization settings select in Terrasoft CRM: [Tools] -> [General settings] -> [Outlook synchronization]

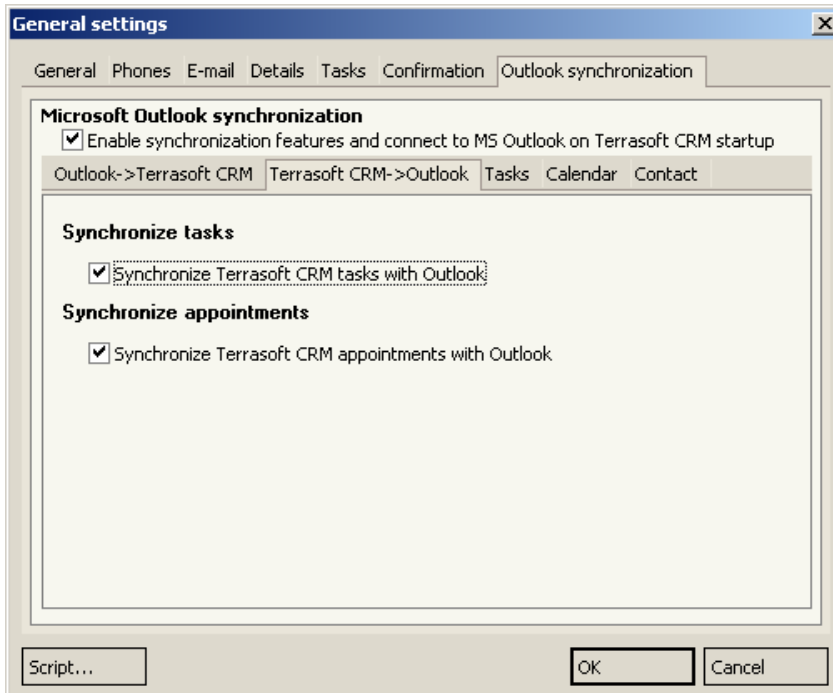
### 2.1 [Outlook -> Terrasoft CRM] tab

- Check the box [Enable synchronization features...] to export Outlook folders tree to Terrasoft CRM. At that the folders tree will be displayed.
- Select the Outlook folders you want to import to Terrasoft CRM.
- Select record types you want to import to Terrasoft CRM (contacts, emails, tasks, appointments).



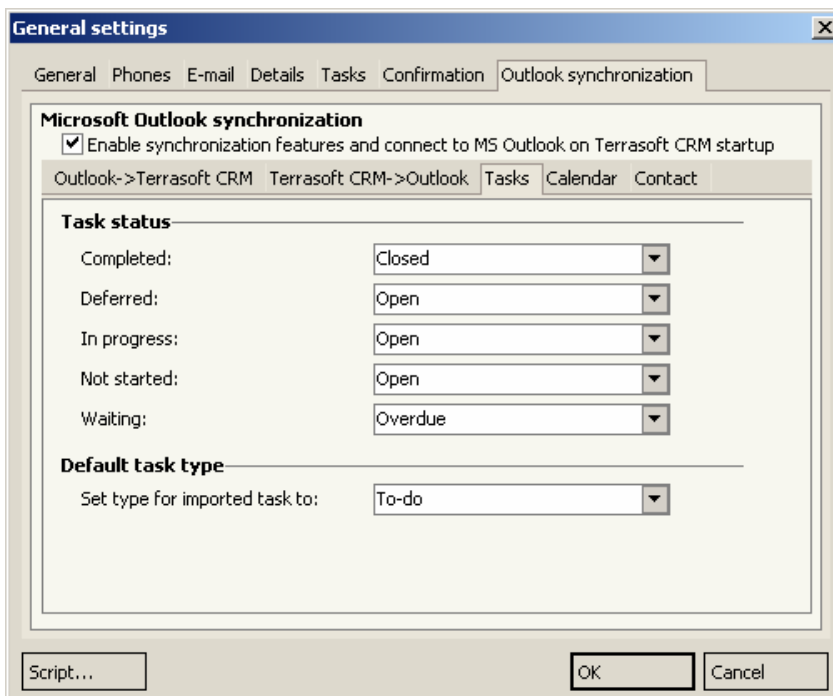
## 2.2 [Terrasoft CRM -> Outlook] tab

Check the corresponding boxes to export tasks and appointments. Appointment in Terrasoft CRM is task with "Show in schedule" box checked.



## 2.3 [Tasks] tab

- Put in correspondence task statuses in Terrasoft CRM with task statuses in the Outlook.
- You can also select the task type for imported to Terrasoft CRM tasks in the [Default task type] field



## 2.4 [Calendar] tab

- Put in correspondence appointment statuses in Terrasoft CRM with appointment statuses in the Outlook.
- You can also select the task type for imported to Terrasoft CRM appointments in the [Default task type] field

**General settings** [X]

General Phones E-mail Details Tasks Confirmation Outlook synchronization

**Microsoft Outlook synchronization**

Enable synchronization features and connect to MS Outlook on Terrasoft CRM startup

Outlook->Terrasoft CRM Terrasoft CRM->Outlook Tasks **Calendar** Contact

**Appointment state**

Set status for future appointments: Open

Set status for current appointment: Open

Set status for past appointments: Closed

**Default task type**

Set type for imported appointment to: Appointment

Script... OK Cancel

## 2.5 [Contact] tab

Put in correspondence phone types.

**General settings** [X]

General Phones E-mail Details Tasks Confirmation Outlook synchronization

**Microsoft Outlook synchronization**

Enable synchronization features and connect to MS Outlook on Terrasoft CRM startup

Outlook->Terrasoft CRM Terrasoft CRM->Outlook Tasks Calendar **Contact**

**Contact phone type**

Mobile phone: Mobile

Home phone: Home

Office phone: Office

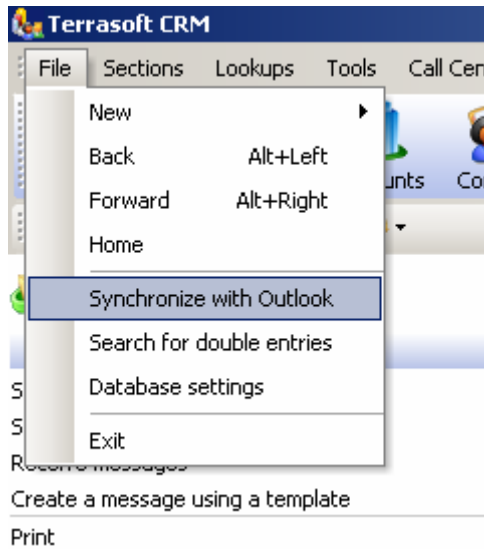
Fax: Fax

Script... OK Cancel

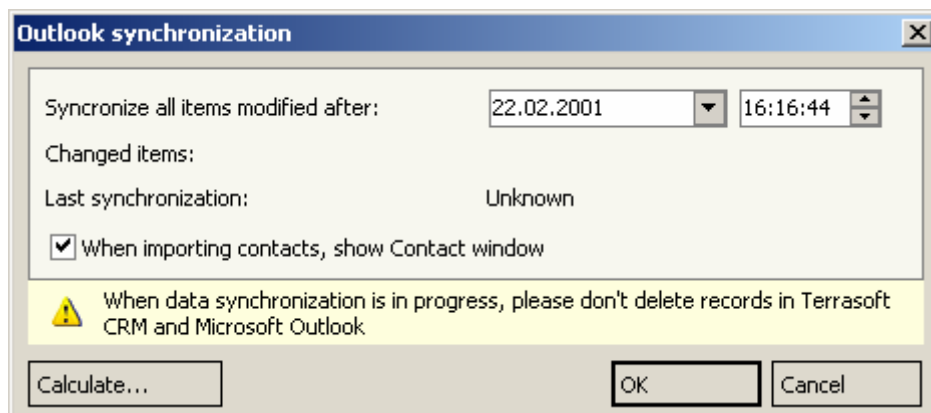
### 3. Synchronization

First it is necessary to create Email account in Terrasoft CRM. Go to [Email] section -> select: [Service pane] -> [Email accounts] -> create Email account.

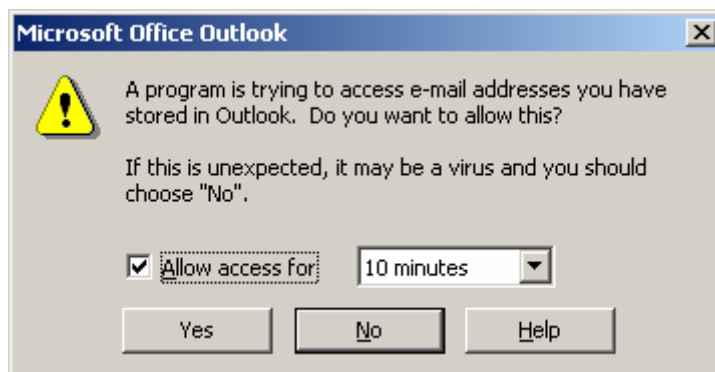
To start synchronization select in Terrasoft CRM: [File] -> [Synchronize with Outlook]



Select the period of synchronization. If you want to view and correct the Contact window when the contact is imported to Terrasoft CRM, check the corresponding box



It is necessary to allow access for records in Outlook during the synchronization



After synchronization is complete the summary box will appear:



Next time when you enter Terrasoft CRM the system will ask you if you want to synchronize with Outlook according to the current synchronization settings

