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Implicit Sync
User Guide

Implicit Sync™

Enterprise Edition

Users Guide

Implicit Inc.

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1. Introduction

Implicit Sync Outlook Add-in allows you to synchronize your Microsoft Outlook® contacts, appointments and tasks with your CRM/Web application account. It also enables you to upload incoming and outgoing email messages from Outlook to the CRM/Web application.

2. Installation

2.1 Preparing for the installation

Before running the Outlook Add-in installation, make sure that the version of the add-in matches the version of Office you have installed on your desktop (2007 or 2010 32/64 bit).

If you are upgrading from a previous version, make sure to uninstall the previous version before installing the new one. To do so, launch Control Panel and go to “Programs and Features” (Vista and Windows 7) or “Add/Remove Programs” (XP), select the Implicit Sync Outlook Add-In and click ‘Remove’.

Make sure to close any Office application before running the installer.

2.2 Installing the Pre-Requisites Components

Before installing the Outlook add-in, the installer will check the desktop for components that are required for Outlook add-ins to work and install/upgrade any missing component:

- .Net Framework 2.0 and above (2007) and .Net Framework 4 client profile (Outlook 2010)
- Microsoft Sync Framework 2.0 Core Components
- Microsoft Office 2007 Primary Interop Assemblies.
- Microsoft SQL Compact Edition.
- Microsoft Visual Studio for Office second Edition Runtime

Once the installation of the pre-requisites is completed, the installer will begin installing the Implicit Sync Add-in.

2.3 Installing the Implicit Sync Outlook Add-In

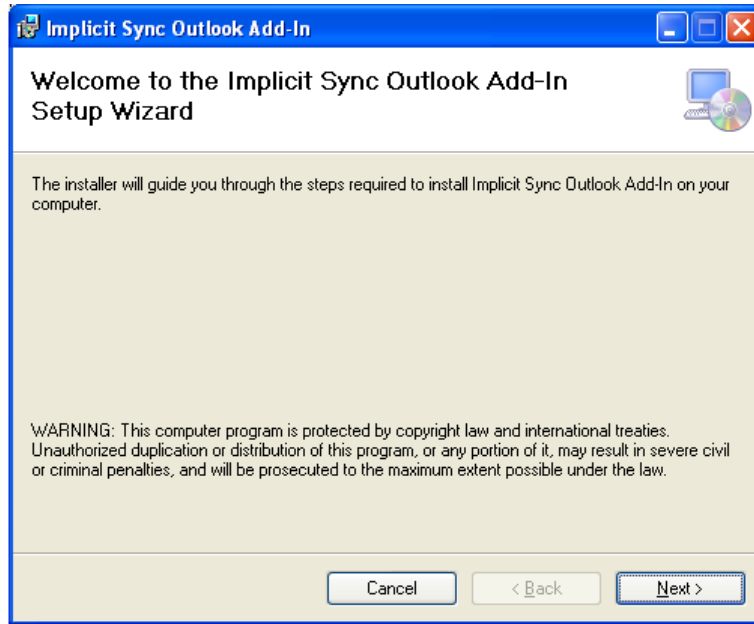


Fig. 1 - Welcome Screen

Click Next to continue. You will be prompted to select the installation folder. By default the installation folder will be set to: \Program Files\Implicit\Implicit Sync. Choose Browse to select a different folder. Then click 'Next'.

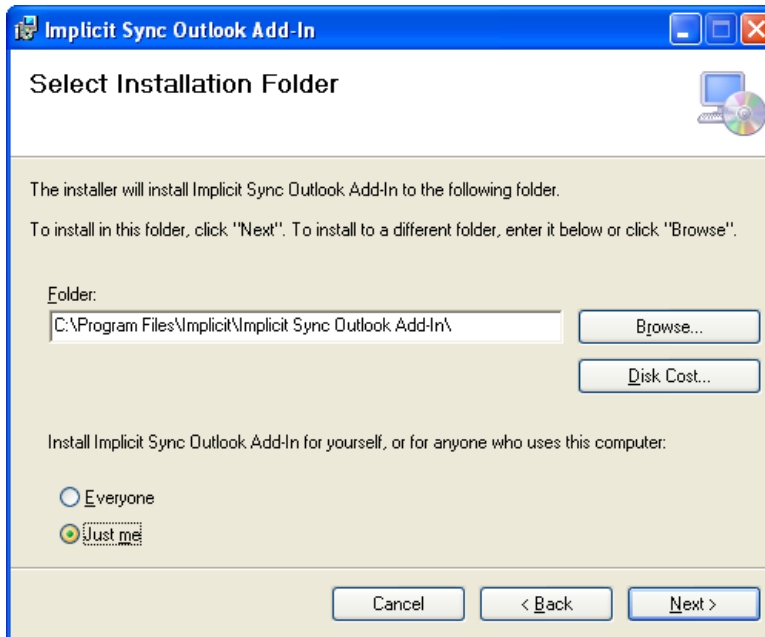


Fig. 2 - Installation Folder Screen

Next, the installer will be prompt you to confirm the installation and start copying the files:

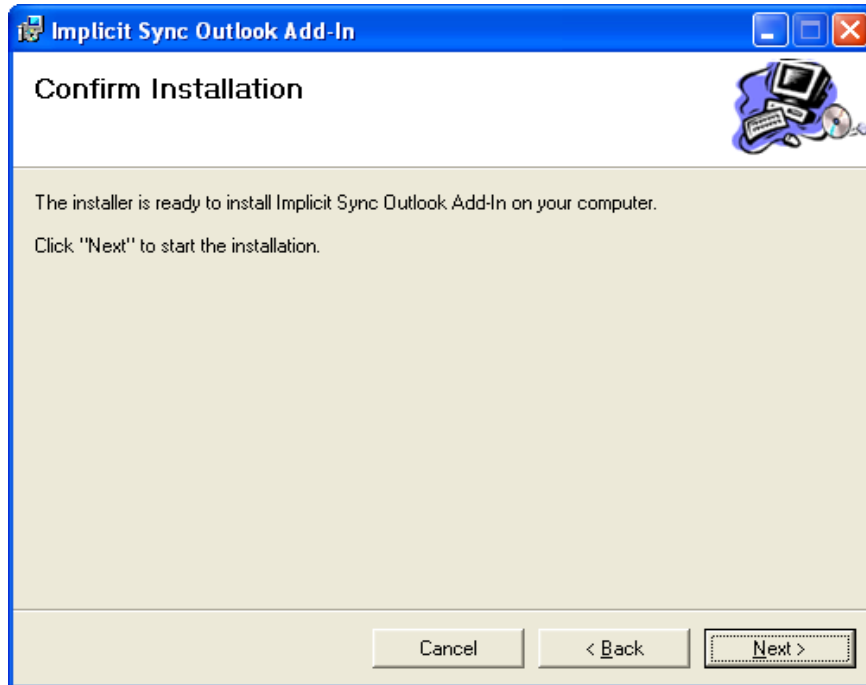


Fig. 3 - Installation Folder Screen

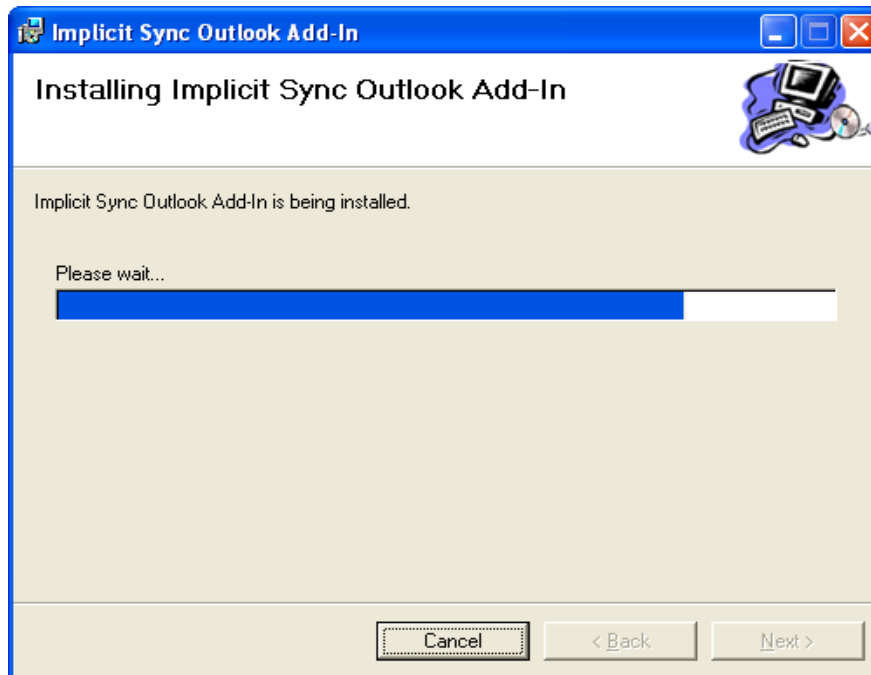


Fig. 4 - Copy Files Screen

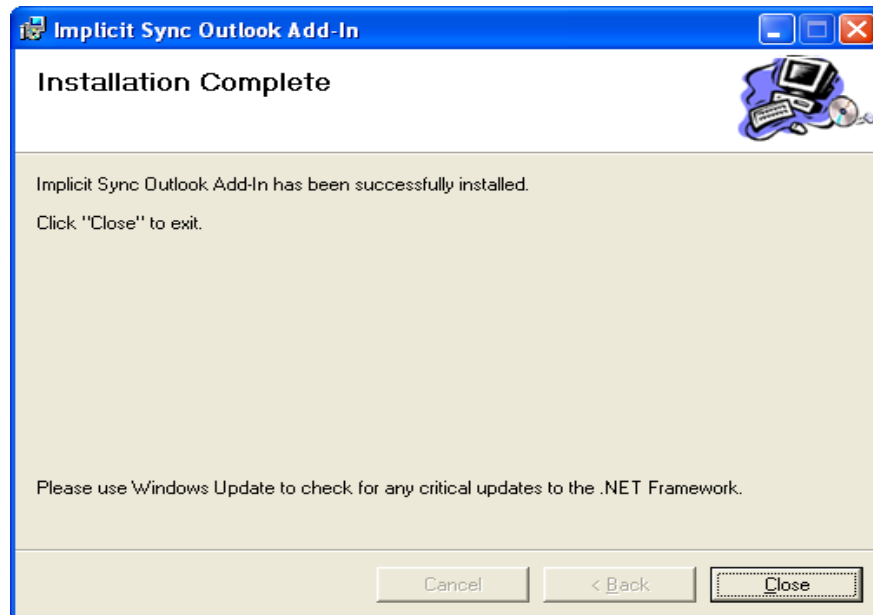


Fig. 5 - Installation Complete Dialog

If Outlook was not closed during the installation, the installer will prompt the user to restart Outlook so that the changes can take effect.

3. Initial Configuration

Upon Launching Outlook for the first time after install, you'll be prompted to enter the Implicit Sync license key:

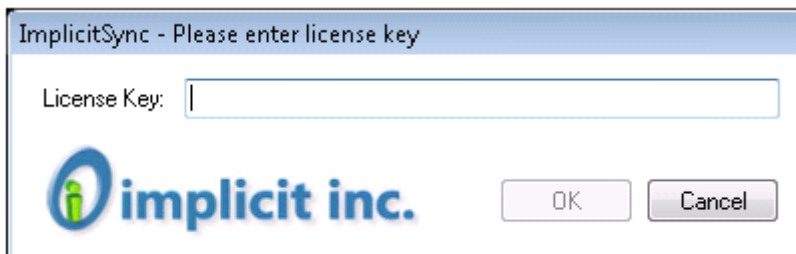


Fig. 6 - License Dialog

The following 'Welcome Dialog' will show up and prompt you to enter your user name and password that you use to login to the web application. You also need to select the root folder where the synchronization will occur. If you are using Exchange and you'd like to synchronize the items in your Exchange mailbox, select the mailbox name. Otherwise, if you are using Outlook in a standalone mode, Outlook "Personal Folders" will be used.

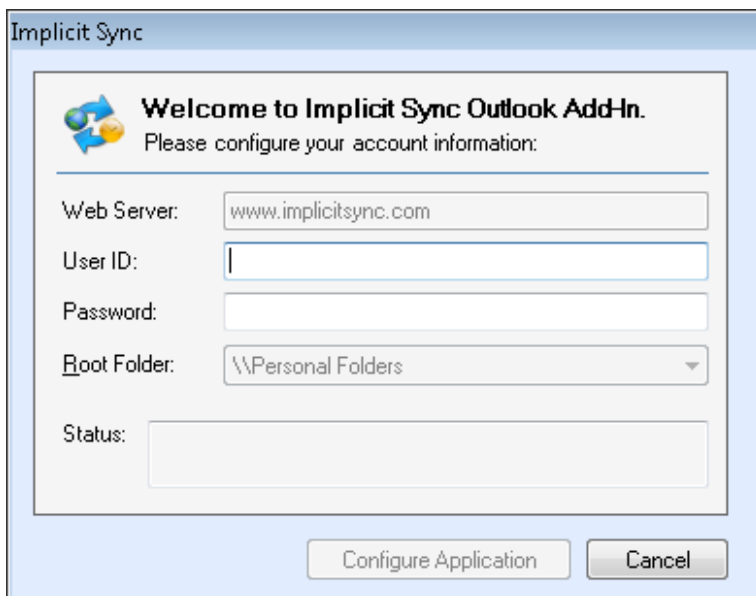


Fig. 7 - Welcome Dialog

Upon clicking "Configure Application" the Outlook add-in will communicate with the Web application to retrieve the configuration information and setup the Implicit Sync folders based on the configuration

file. The location of the folders is configured by the application. Please consult your provider for any application-specific configuration.



Fig. 8 - Implicit Sync Folders

4. Implicit Sync User Interface

4.1 Toolbar

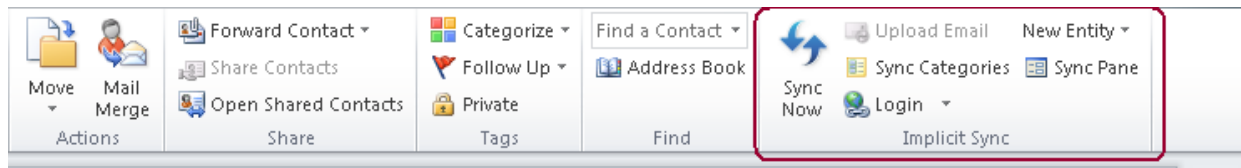


Fig. 9 - Implicit Sync Toolbar

Implicit Sync Outlook Add-in adds a custom toolbar (ribbon on Outlook 2010) to Outlook's main window. The toolbar supports the following functions:

- Sync Now – Manual Sync
- Upload Email – Upload selected email messages to CRM
- Sync Categorize – Categorize Outlook items to CRM Application's business categories
- Login – Go to CRM login page
- Help
- About
- New Entity – Create new application entity
- Sync Pane – Turn Sync pane on or off.

4.2 Option Tab

The Option tab provides the following functionality:

- Configure User Account
- Enable/Disable automatic synchronization (periodically) and synchronization cycle interval
- Select which items should be synchronized: Contacts, tasks and calendar
- Set Synchronization Priority – Who has priority when the same item has been modified on both the web and Outlook
- Set rules for preventing duplicate contacts

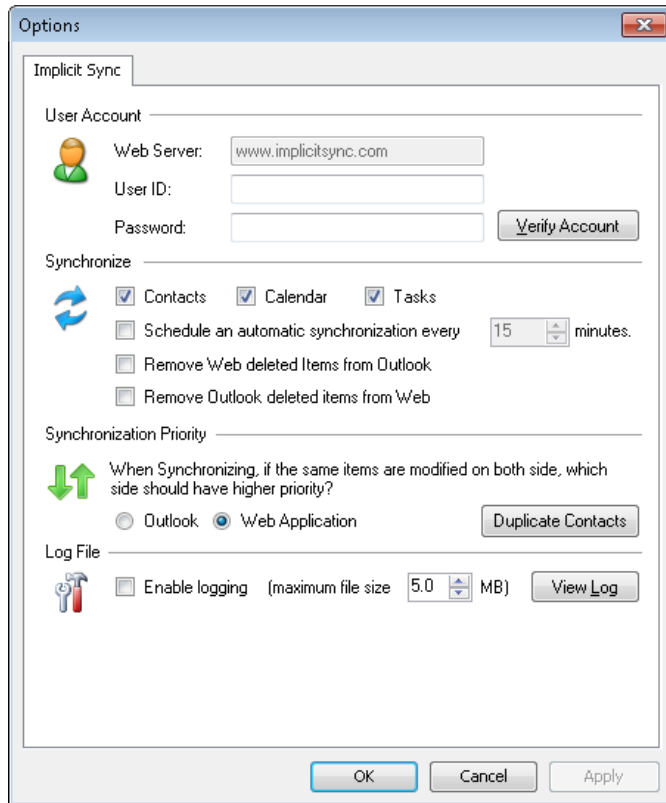


Fig. 10 - Option Tab

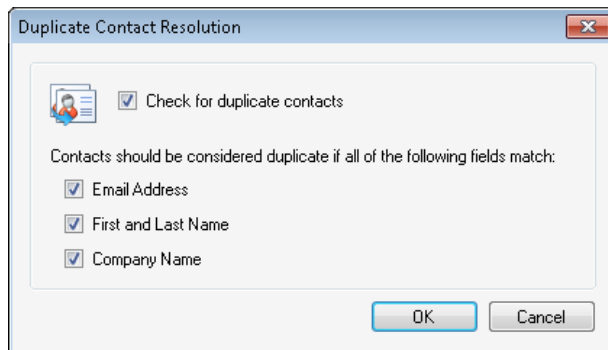
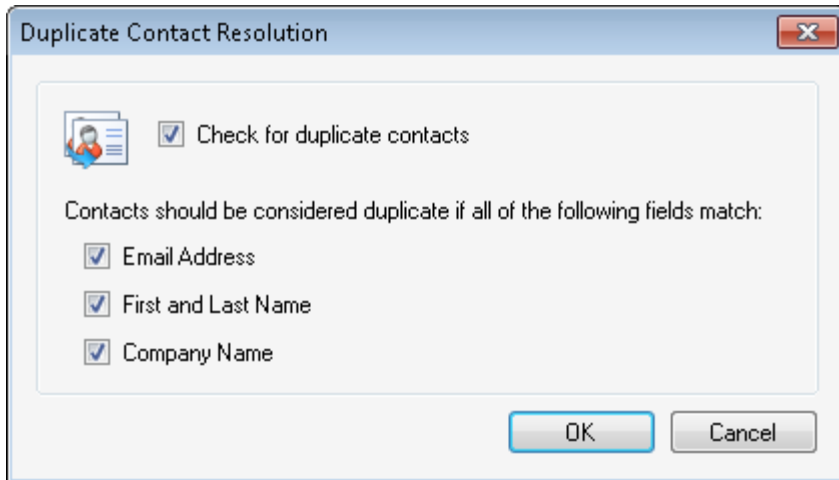


Fig. 10b – Contact Duplicate Resolution



5. Categorization

5.1 Overview

Implicit Sync provides functionality that allows Outlook users to associate Outlook items (contacts, calendar events, tasks and email) with a set of business objects such as a notion of an account, a customer, a project or an opportunity. This action is referred to as "Categorization". Most often the web application will expose a model with this set of core application objects, therefore it is required that the synchronization with Outlook will also be done in the context of this set of categories.

Implicit Sync allows the application to define a set of core business objects (categories) and presents the user with a set of selections for each Outlook item. For example: If the application requires contacts to be associated with a specific Customer and a Project, it can configure Implicit Sync to display these two categories as an extension to the standard Outlook forms and also configure which category is mandatory in order to perform synchronization.

Depending on how your provider has configured Implicit Sync, you may be prompted to categorize Outlook items before they get synchronized with the Web application. In the following example, there are five categories:

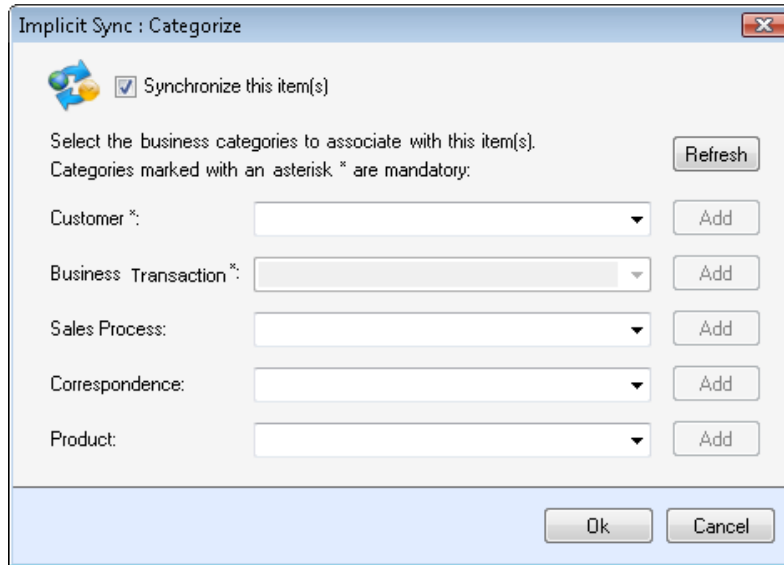


Fig. 11 - Categorization Dialog

To select a category, you can start typing in the drop-down list control. The control will present you with all the categories that match the search string. Alternatively, you can click Enter to view the full list of values.

If the web application has enabled the Refresh functionality, then a Refresh button will show up on the form to allow you to force synchronization of categories with the web application.

Similarly, if the web application has enabled the Add functionality, then an Add button will show up next to each category to allow you to add categories from Outlook and upload them to the web application.

5.2 Categorizing Outlook Items

5.2.1 Categorizing Contacts, Appointments and Tasks

At the bottom of each Outlook form for contacts, appointments and tasks, you will notice an Implicit Sync section that allows you to mark that item for categorization and select the CRM categories to associate with that item. Check “Synchronize this item” to mark item for synchronization.

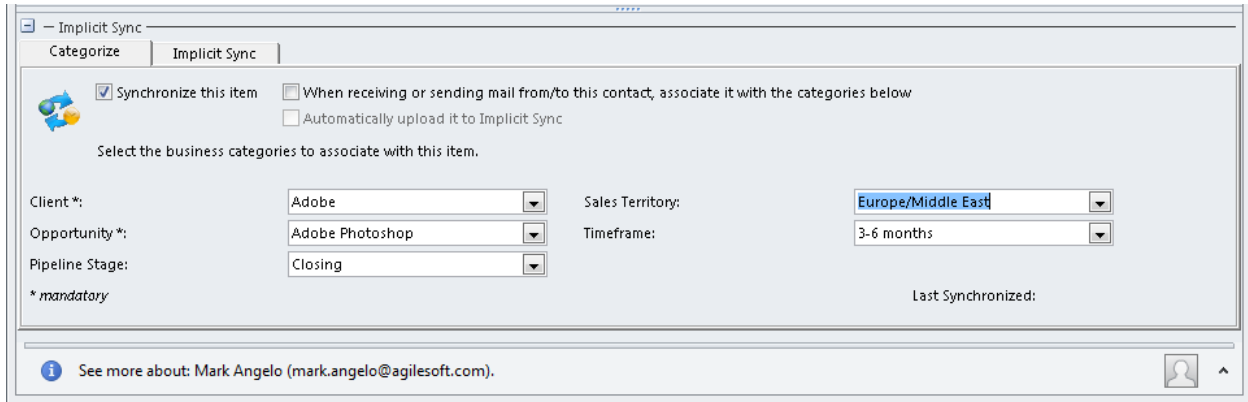


Fig. 12 – Categorizing Items from within the form

5.2.2 Batch Categorization

You may also select a set of contacts, appointments or tasks and click on Sync Categories on the toolbar (or right-click menu). The following would come up and prompt you to select the set of CRM categories to associate with the selected items:

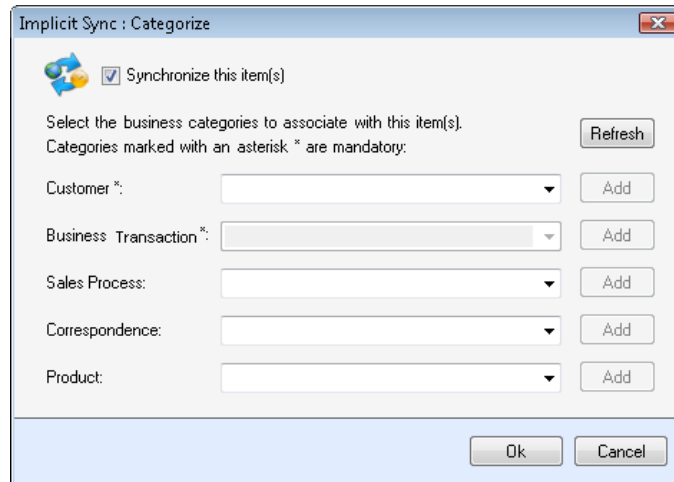


Fig. 13 - Batch Categorization

6. Synchronization

6.1 Synchronization of Contacts, Calendars and Tasks

Implicit Sync supports both manual and periodic synchronization of Outlook items.

To maintain synchronization of contacts, calendars and tasks between the web application and Outlook, each side needs to track three basic events:

- New Items
- Modified Items

- Deleted Items

Each synchronization cycle, each side will notify the other of all the changes (additions, modifications and deletions) that have occurred since the last synchronization cycle.

6.2 Marking Items for Synchronization

Two methods are provided to mark Outlook items for synchronization:

- Associate items with a set of CRM categories by following the process described in section 5.2
- Alternatively, you can use Outlook's native categories. When Implicit Sync add-in is installed it will automatically create an Outlook category called "Synchronize to Implicit Sync". Selecting this category will also mark the item for synchronization

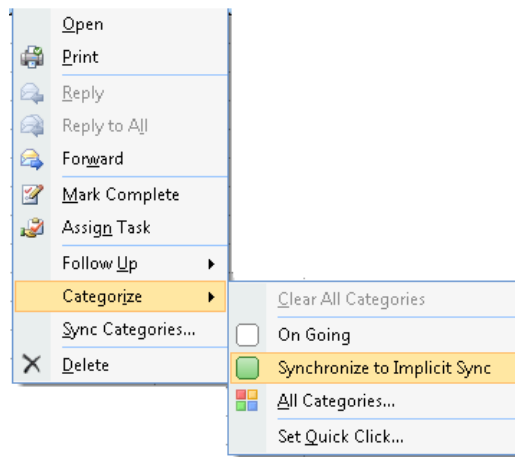


Fig. 14 - Categorization Dialog

6.3 Synchronization Priority

Implicit Sync allows the web application and the user to determine who has a higher priority in synchronizing items that have been concurrently modified on both the web application and Outlook. If within the same synchronization cycle, the same item has been modified on both sides, Implicit Sync will apply the changes based on that priority.

6.4 Offline Mode

Implicit Sync tracks changes to Outlook items even when the user's PC is not connected to the Internet or when the server is down. It utilizes a local database (Access MDB file) to record all changes made to Outlook items while the user is offline and re-synchronizes with the web application as soon as the user re-connects.

6.5 Periodic Synchronization

Synchronization can be configured to occur periodically by enabling the "Schedule an automatic synchronization every N minutes" on the option tab. In this case, the items types (contacts, calendar and tasks) that are selected in the option tab will be automatically synchronized periodically in the background without any user intervention.

6.6 Manual Synchronization

To synchronize manually, click the "Synchronize Now" button on the toolbar. The following dialog would show up:

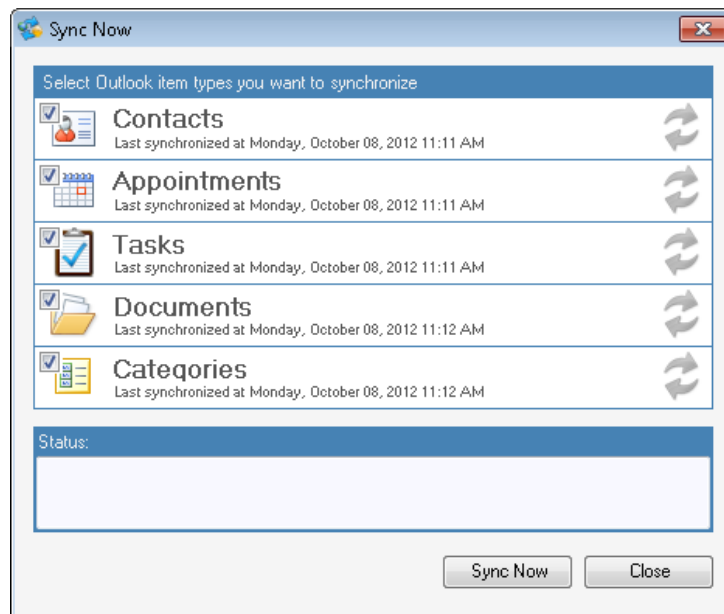


Fig. 15 - Sync Now

Select the type of items you'd like to synchronize and click the Synchronize button.

6.7 Synchronizing with Mobile Phones

Implicit Sync works in conjunctions with Microsoft Active Sync to allow web application to synchronize data with mobile phones. Web application can synchronize contacts, calendar and tasks with by selecting Exchange mailbox default folders. The items will then be synchronized to users' mobile phones via Microsoft Active Sync or other third party synchronization solution.

7. Uploading Email Messages

Implicit Sync supports uploading email messages from Outlook to the Web application. Email messages can be uploaded either at the time of composing and sending messages or by selecting one or more email messages from an Outlook folder and uploading them to the server. The uploaded messages include all header information, message body (text or HTML) and attachments.

7.1 Manual Uploading of Outgoing Email

To upload an outgoing message to the CRM, click on the categorization checkbox below and select the CRM categories to associate with the message. When you're ready to send the message Click on "Upload and Send" shown below. The message will be sent as a regular email message and will be uploaded to the CRM.

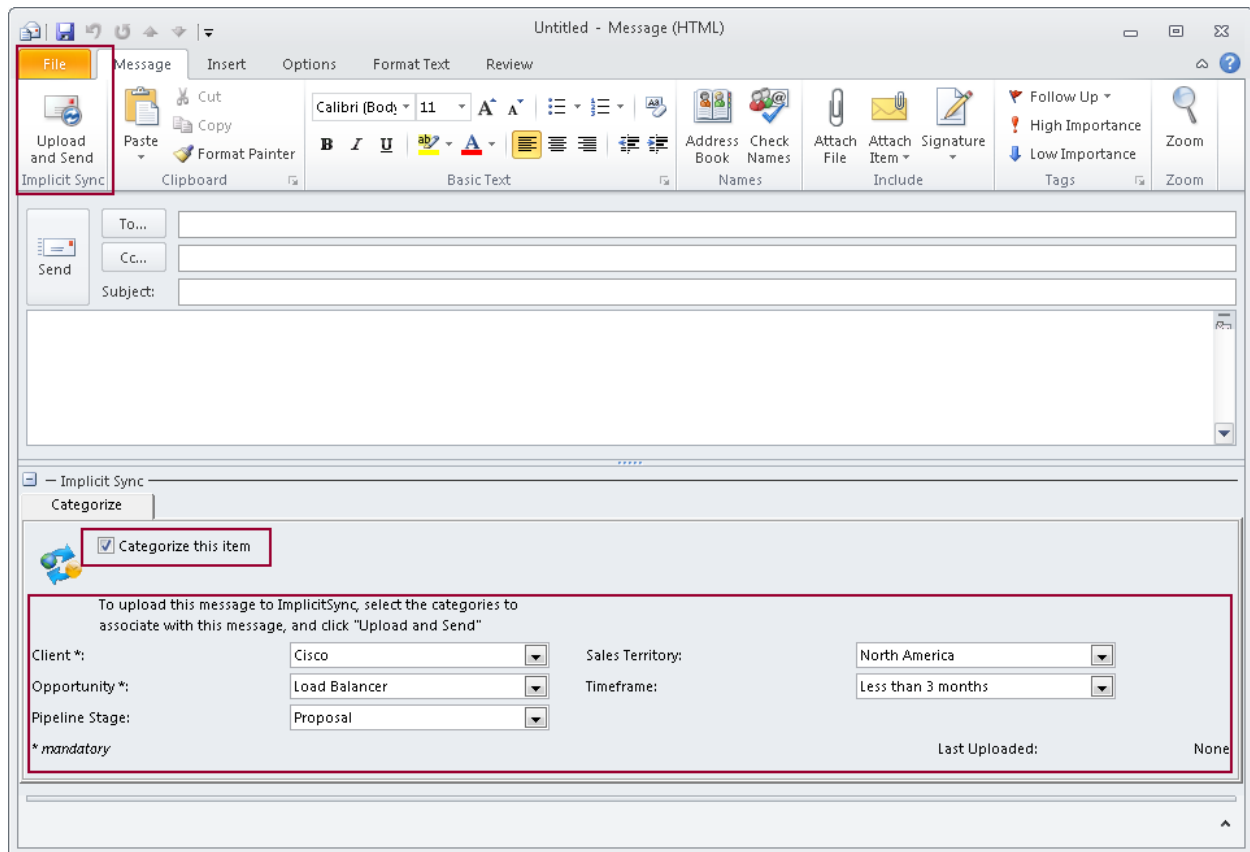


Fig. 16 – uploading Email while sending

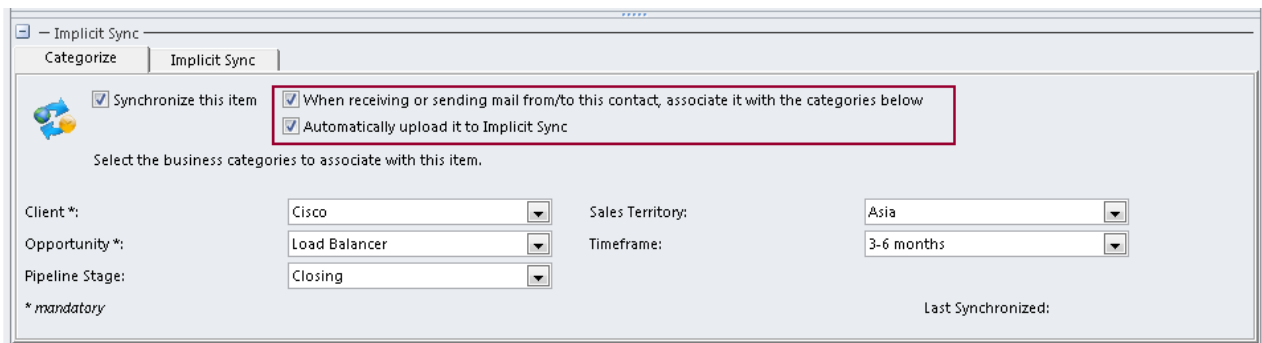
7.2 Manual Uploading of Incoming Email

To upload incoming email, select the messages you want to upload from the Outlook folder and click “Upload Email”. You will be prompted to select the CRM categories to associate with the selected messages and the messages will be uploaded to the CRM.

7.3 Automatic Uploading of Email based on Pre-Set Rules

7.3.1 Contact Based Rules

You may set rules for automatic email upload based on the contacts you are sending emails to or receiving emails from. To set the rule, open the contact form and check the two checkboxes shown below.



The screenshot shows a window titled "Implicit Sync" with two tabs: "Categorize" and "Implicit Sync". The "Implicit Sync" tab is active. It contains a section with a globe icon and two checked checkboxes: "Synchronize this item" and "When receiving or sending mail from/to this contact, associate it with the categories below". Below these is another checked checkbox: "Automatically upload it to Implicit Sync". A red box highlights these three checkboxes. Below the checkboxes is the text "Select the business categories to associate with this item." followed by several dropdown menus: "Client *" (Cisco), "Sales Territory:" (Asia), "Opportunity *" (Load Balancer), "Timeframe:" (3-6 months), and "Pipeline Stage:" (Closing). A note "* mandatory" is at the bottom left, and "Last Synchronized:" is at the bottom right.

Fig. 17 - Auto Upload based on Contacts

7.3.2 Custom Rules based on Outlook’s Rule Engine

You may create custom rules for email uploading using the native Outlook rules engine. You may create any type of rule that Outlook supports. When choosing the action to perform, select “Custom Action” and specify the action to be “Upload Email to CRM”. You may also select a specific set of CRM categories to associate with the uploaded email.

Figure 18 below shows an example of a rule that would execute whenever an email arrives from a specific email address with the word “Quote” in the subject:

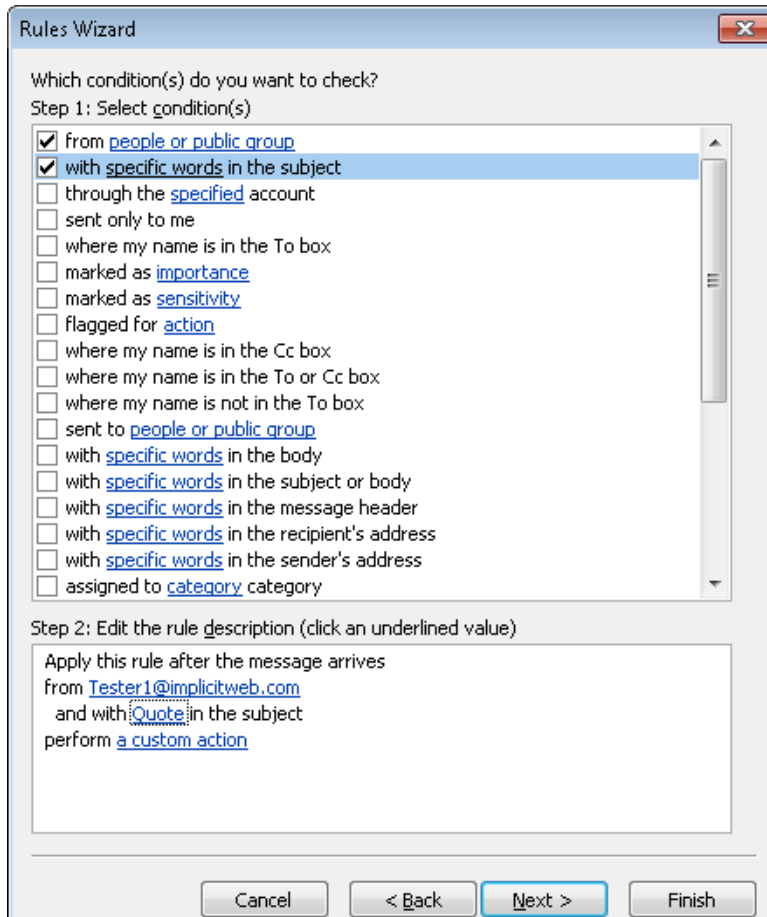


Fig. 18 - Custom Rule

Click "[a custom action](#)" link below to specify the action and select the categories:

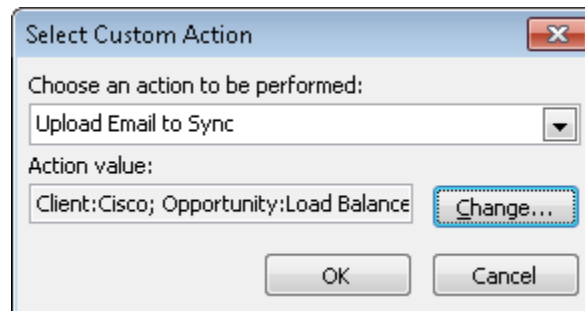


Fig. 19 - Custom Action

7.4 Implicit Sync System Tray (Taskbar) Application

The selected Email messages will be queued up for uploading to the CRM system by Implicit Sync taskbar application shown below:



Fig. 20 – System Tray

The Taskbar application manages the upload queue outside Outlook such that the process runs in the background while you can continue to work with Outlook. You can:

- Hold and resume the upload process
- Cancel a specific message upload
- Retry if upload has failed
- Move message up or down in priority

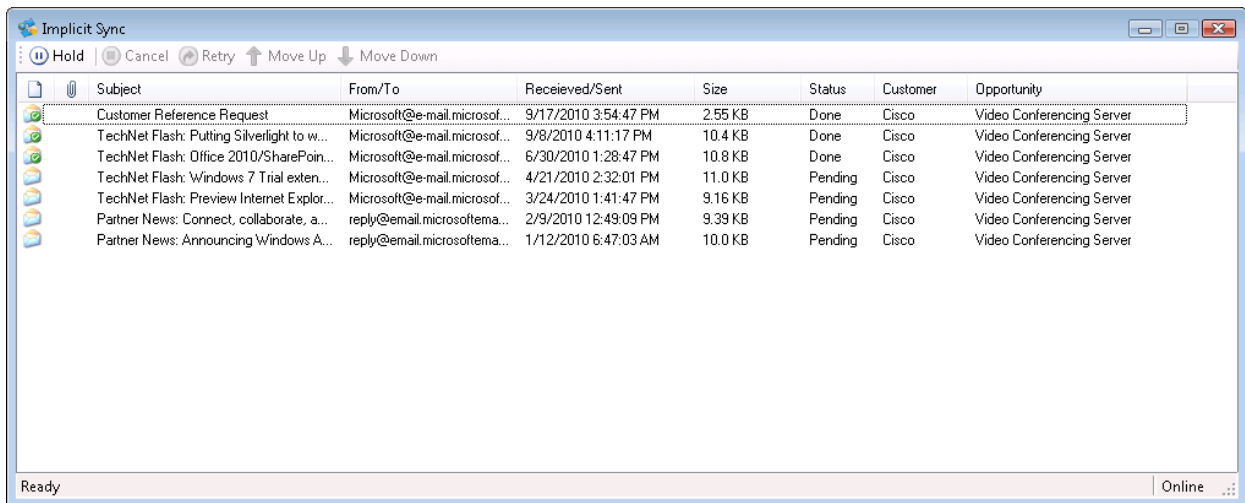


Fig. 21 – Taskbar Application

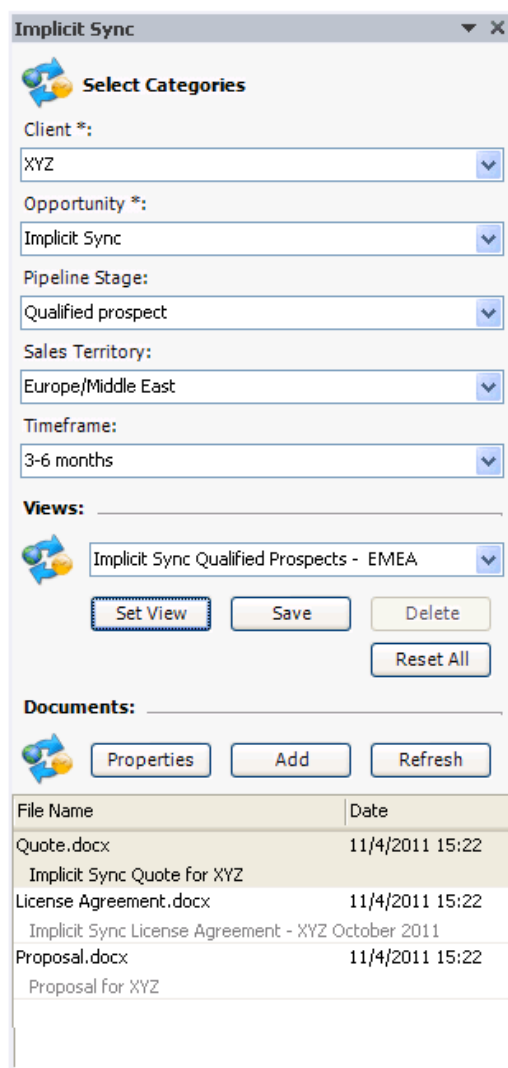
The Taskbar application also allows you to view the status of each message: Pending / Active / Done. It also includes the categories associated with each message (in this example: Customer = Cisco ; Opportunity = Video Conferencing Server).

The taskbar application is particularly useful when working offline and selecting and categorizing messages for upload. All messages will be queued up by the taskbar application and will be uploaded to the CRM application next time you go online.

8. Sync Pane

The sync pane allows you to filter and search for items by CRM categories.

Using the sync pane, you can select different combination of categories in order to filter Outlook folder views. For example, you may search for all emails related to a specific business opportunity, meetings with specific clients or leads in a selected sales territory.



The screenshot shows the 'Implicit Sync' dialog box with the following settings:

- Client *: XYZ
- Opportunity *: Implicit Sync
- Pipeline Stage: Qualified prospect
- Sales Territory: Europe/Middle East
- Timeframe: 3-6 months

Views:

- Implicit Sync Qualified Prospects - EMEA

Buttons: Set View, Save, Delete, Reset All

Documents:

File Name	Date
Quote.docx Implicit Sync Quote for XYZ	11/4/2011 15:22
License Agreement.docx Implicit Sync License Agreement - XYZ October 2011	11/4/2011 15:22
Proposal.docx Proposal for XYZ	11/4/2011 15:22

Fig. 22 - Sync Pane

You may also create “Named Views” by creating a set of commonly used categories, name the set with a business meaningful name and save it in the list of views so you can simply select the view from the saved list.

9. Implicit Sync Dashboard

The dashboard is a quick and easy way to view and manage your business activities related specifically to the CRM. By selecting the CRM categories you can see different slices of business activities:

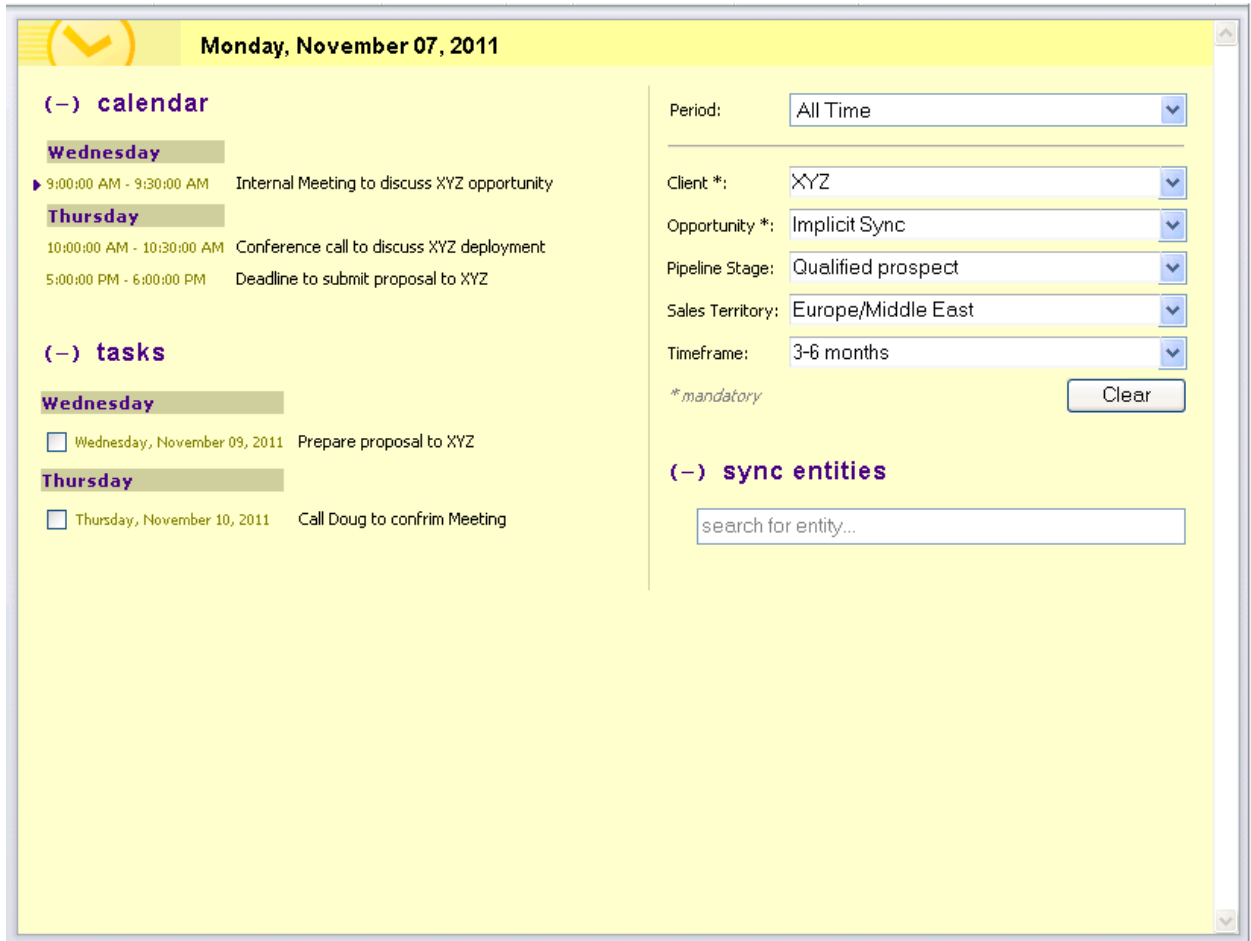


Fig. 23 - Dashboard

You may open the items simply by clicking on the subject

The dashboard also allows you to view the CRM entities and open them directly from within the dashboard.

10. CRM Entities

CRM Entities are custom Outlook forms that group together all related items: emails, contacts, appointments, tasks and documents that are associated with the same or similar sets of categories. Using entities, Outlook users are able to create and display different slices of data depending on the specific business concepts of the application.

Application Entities are represented as custom Outlook forms that combine:

- Contacts
 - Received/Sent email
 - Calendar events
 - Tasks
 - Documents
- You can dynamically create business entities by click on “New Entity” on the main Outlook ribbon. A form will open and prompt you to select the categories that define the entity. You may select a very specific set of categories such as “Europe opportunities for client XYZ expected to close in 3 months” or wider criteria such as “All opportunities in Asia”

The following example shows such entity:

The screenshot shows a custom Outlook form titled "Untitled - SyncEntity". The ribbon includes "File", "SyncEntity", "Insert", "Options", "Format Text", and "Review". The "SyncEntity" ribbon has "Save & Close", "Entity", and "Entity Items" buttons. The form fields are:

- Entity Name: [Text Box]
- Entity Type: Opportunity [Dropdown]
- Include: Contacts, Tasks, Documents, Calendar, Email, Web Page
- Client *: Adobe [Dropdown]
- Opportunity *: Adobe Photoshop [Dropdown]
- Pipeline Stage: [ALL] [Dropdown]
- Sales Territory: Asia [Dropdown]
- Timeframe: Less than 3 months [Dropdown]

Buttons: Refresh, New Node, Report

Fig. 24 - Entity Form

11. Document Synchronization

Implicit Sync Enterprise Edition allows you to synchronize documents with the CRM. You can sync document directly from within Word and Excel or from the desktop.

11.1 Microsoft Word and Excel Sync Panes

To sync document from within Word/Excel click the Sync Pane ribbon button:

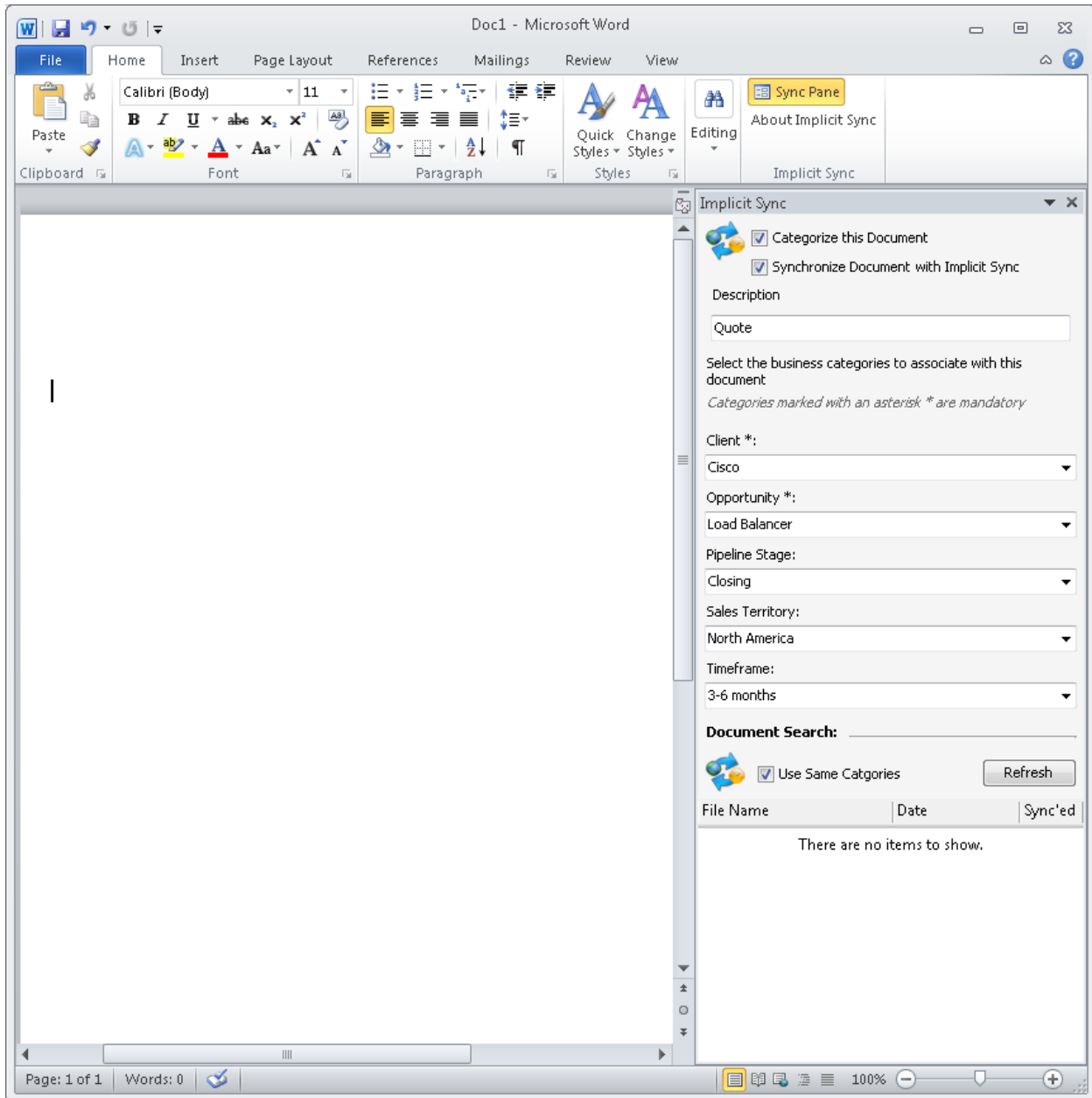


Fig. 26 - Word Sync Pane

You will be prompted to save documents if not already saved.

Click the checkboxes to “Categorize this Document” and “Synchronize it with Implicit Sync” and select the CRM categories to associate with the document.

You can then continue to edit the document and save it to your local folder. The document will be synchronized on the next synchronization cycle.

If the CRM supports it, document synchronization is bi-directional and new/modified documents may be pushed down from the CRM into your local folders.

Note: Just as in Windows, documents are considered unique based on the folder they are stored in. You may create documents with the same name in different folders and sync them. If you move documents that have been synchronized to a different folder, they are considered to be a new document and you will need to configure them again for synchronization.

11.2 Synchronizing Documents from Desktop

You may synchronize any document type that the CRM allows you. To synchronize documents other than Word/Excel (such as Acrobat PDF) select the document from Windows browser, right-click and select “Send To” → “implicit Sync”

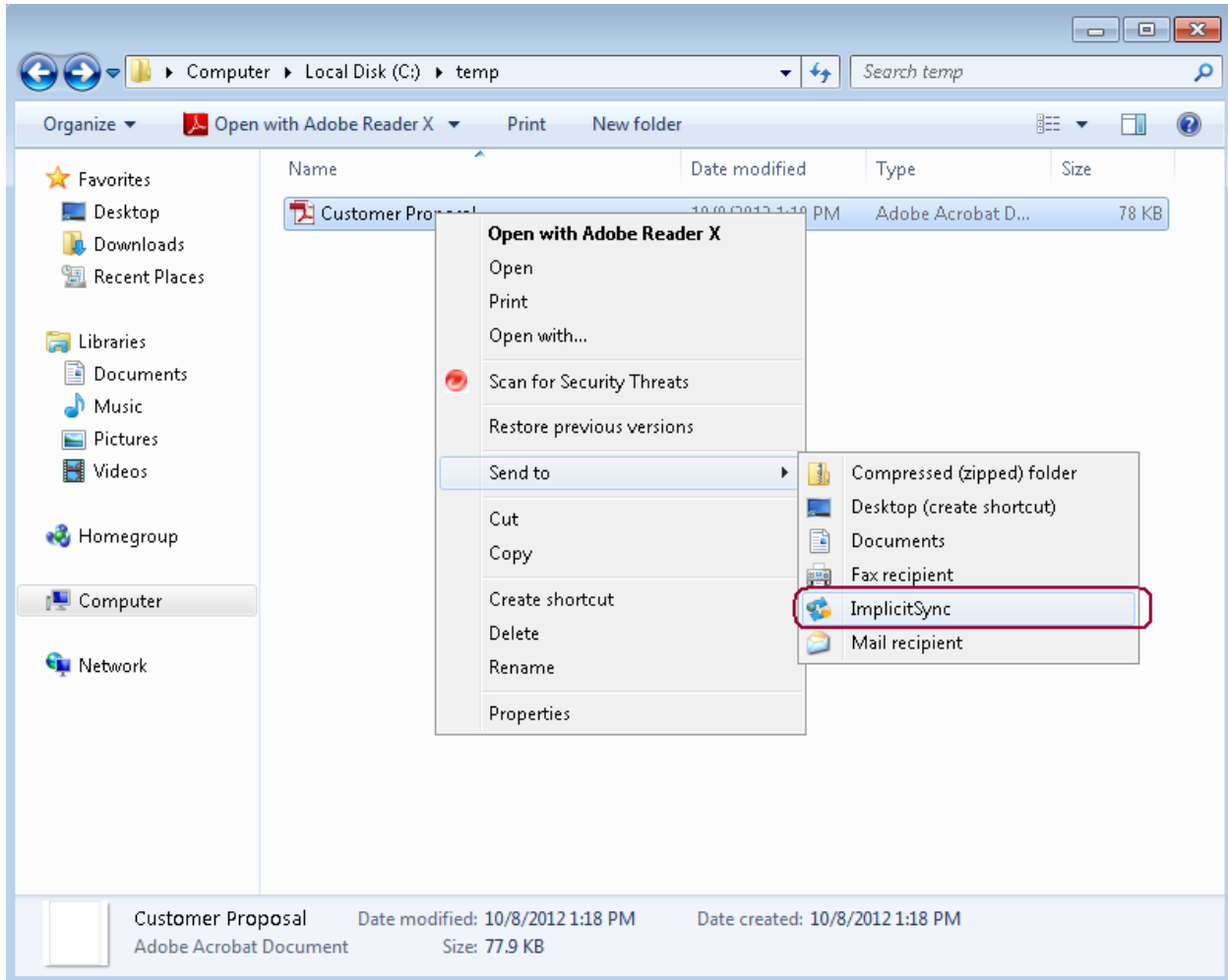


Fig. 27 - Sync Document from Desktop

You will be prompted to categorize the documents the same way you did from within Word/Excel:

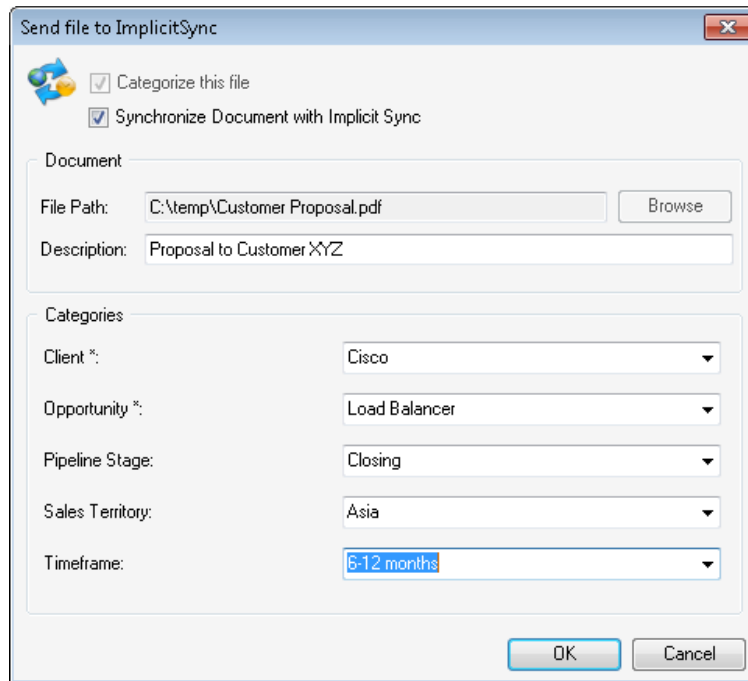


Fig. 28 - Categorize Document from Desktop

The document will be synchronized on the next synchronization cycle.