

LEADMASTER CRM SYNC PLUGIN FOR OUTLOOK – CRMT TOOL

LeadMaster offers two methods for integrating with Outlook, a plugin and a Chrome extension. This document explains how to install and use the plugin, also referred to as an add-in.

LeadMaster's CRM Outlook Sync plugin allows the user to sync their calendar and contacts as well as allowing the user to attach emails, sent and received, to contacts in LeadMaster's CRM. Once installed it will appear in the Outlook menu as CRMtool.

Here's a [link](https://www.leadmaster.com/Marketing_Collateral/CRM-Sync/CRMtool%20Sync%20for%20Outlook.exe) to the Installer: https://www.leadmaster.com/Marketing_Collateral/CRM-Sync/CRMtool%20Sync%20for%20Outlook.exe

LeadMaster's CRMtool is compatible with

- Windows 7, 8 & 10
- Microsoft Office 2007, 2010, 2013 & 2016
- Both 32-bit and 64-bit versions.

Follow the instructions as the system prompts you through the installation. If you are updating from a previous version we suggest you uninstall first.

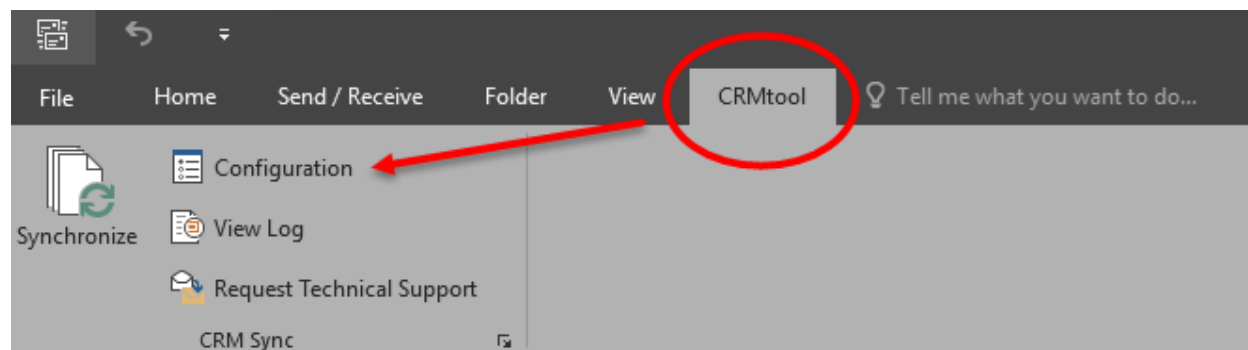
Post Installation Notes – configuring Outlook and LeadMaster.

After a successful installation of the CRMT Tool plugin, you can now configure it to synchronize your Calendar, Contacts and Emails in Outlook with the LeadMaster CRM.

Note: If you are not able to see the CRMtool menu, please see the [Troubleshooting](#) section in page 8 of this document.

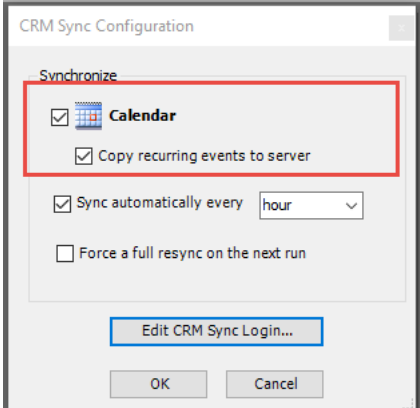
Configuring the CRM Email Add-In Module in Outlook

- 1.) Open Outlook.
- 2.) Click on the CRM Sync tab at the top of your Outlook navigation screen. Select the "Configuration" option.



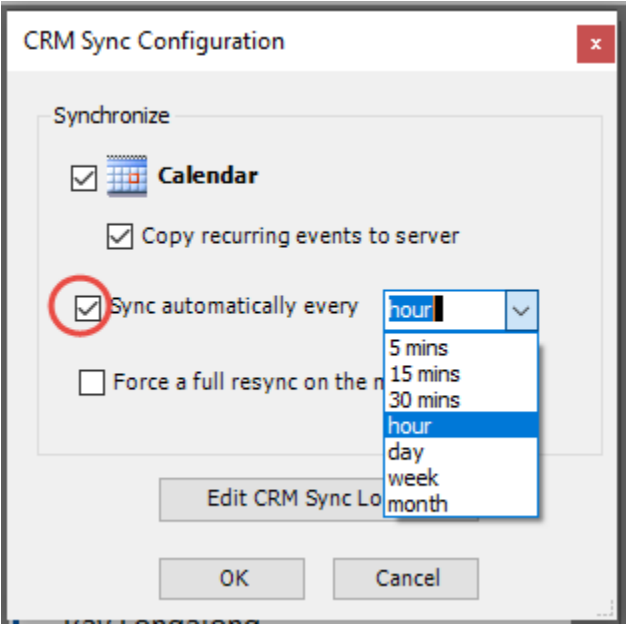
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3.) Place a check in the Calendar box if you want your LeadMaster Events synched with Outlook Calendar and vice versa.



The 'Copy recurring events to server' option lets you choose if you want to sync recurring future events to your calendar.

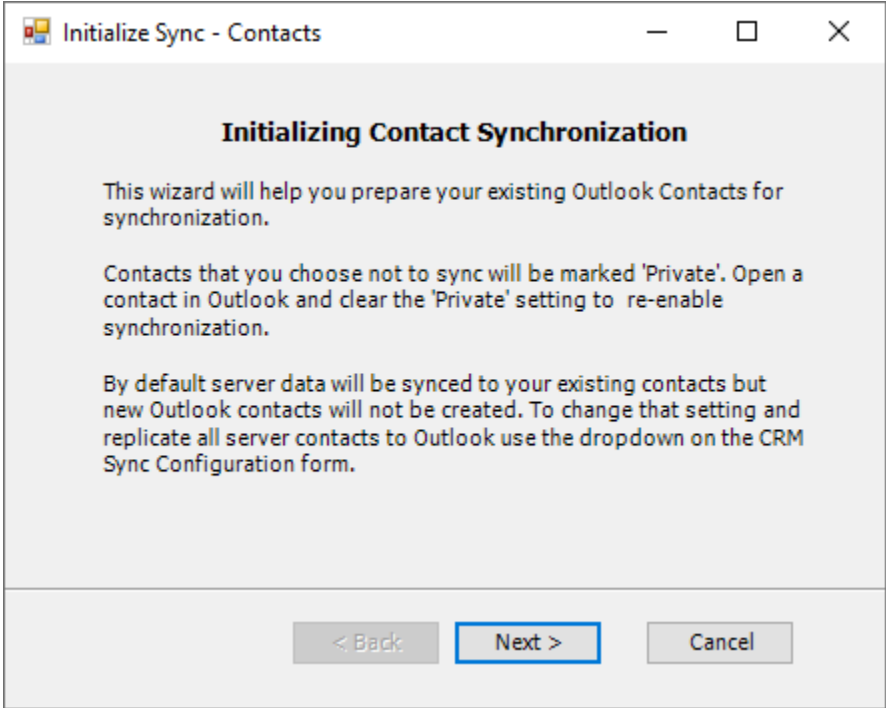
The CRMTTool has the option to either Sync automatically or manually. To sync automatically click the checkbox 'Sync automatically every' and select the desired sync frequency – Monthly, Daily, Weekly or Hourly, or even down to 5 minutes.



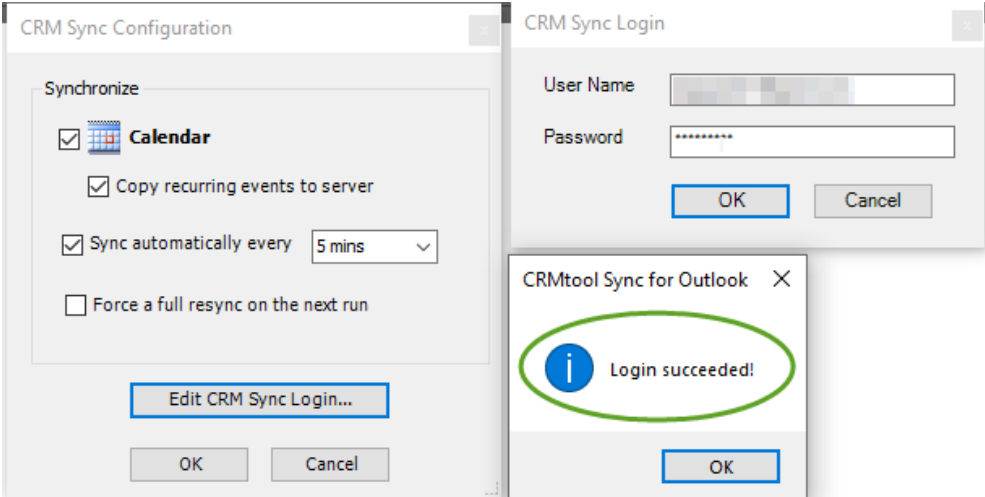
The option to force a full resync on the next run best applies if you have a problem, something isn't working - your calendar events aren't showing up etc. Always go for a resync when you have updated your LeadMaster password. This would also help when you go offline and Outlook uses the Offline cache mode, this ensures any changes that occurred in your Outlook calendar will sync with LeadMaster.

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Note: If you have Sync Contacts enabled and checked, the initializing of Sync Contact dialog will popup depending on the frequency selected, you can uncheck for the moment or adjust to longer frequency.



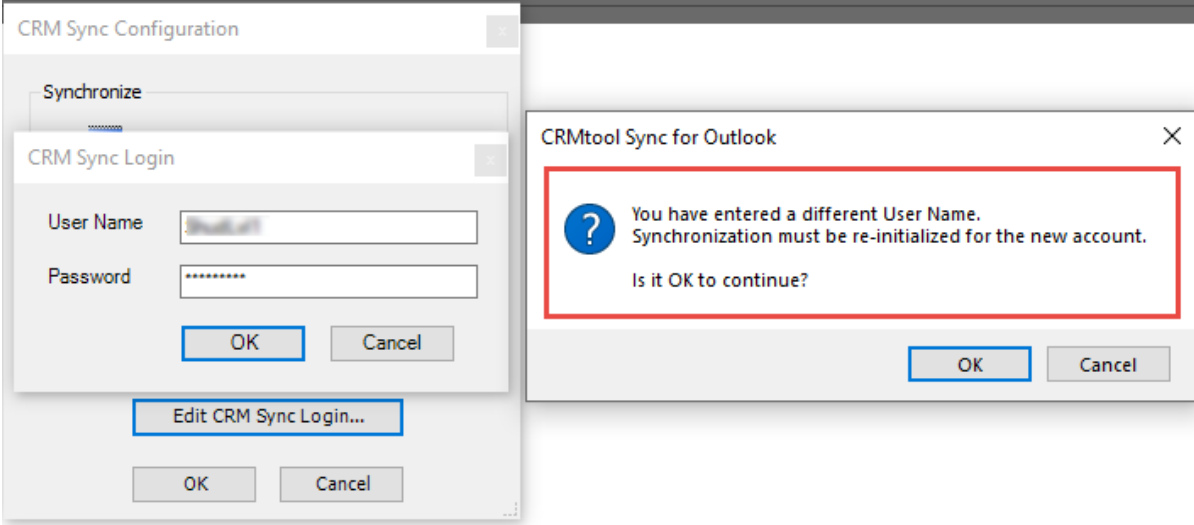
4.) Enter/Edit CRM Sync Login – the Username and password used here are the same credentials used in logging in the LeadMaster CRM.



Please take note that you can only use an account that has only assigned to a single Database / Workgroup.

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If you are changing to a different logon, the same rule applies that the logon must be associated with only one database / workgroup. You'll be asked to re-initialize your sync for the new logon.

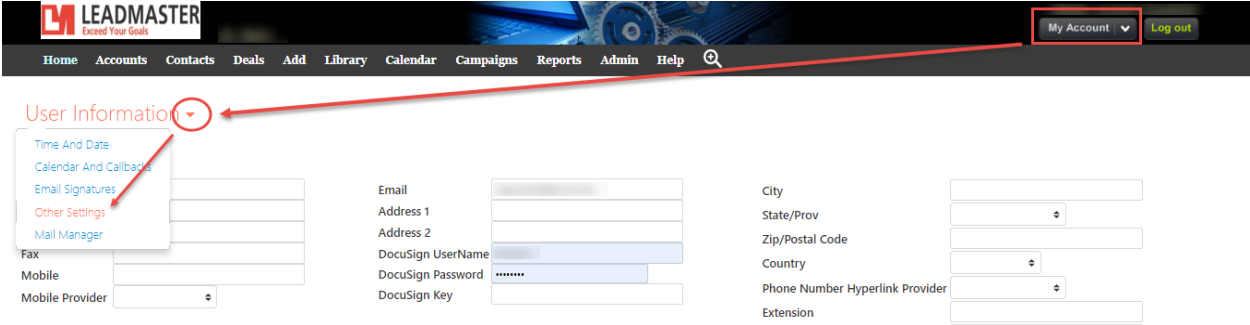


5.) The 'Synchronize' button is a manual command to sync both Outlook and LeadMaster whenever there are changes in the Events or Contacts.

Note: By default, the Contacts option is not available in the Configuration box but if you want to have this feature available, the [instructions](#) are on page 9 of this document.

Configuring the CRM Email Add-In Module in LeadMaster

When logging into the LeadMaster CRM application, click on 'My Account' and then click on 'User Settings' and you may need to click the 'More' button to see the Outlook Sync parameter that allows you to determine what the application should do if the contacts do not match an existing record when you sync.



LEADMASTER CRM SYNC PLUGIN FOR OUTLOOK – CRMT00L

Other Settings ▾

Change Password

Banner: Workgroup default skin

Default Tab on Home Page: Info Center Cases

Default Page: Clicking on the 'Company' hyperlink from search results, accounts and reports takes you to:
 View Sales Update Edit Profile Review And Take Action
 Profile

Page Layout Display: Display All Sections

Add to Sales Rep Comments/Notes checked: Show Preview Pages:

Message Ticker: Show Left Menu:

Left Menu Options: Accordion/Account View

Add Me to Bcc:

Outlook Sync: If a contact is not matched with an existing record during sync:
 Automatically create a new record with new contact as primary
 Save contact to the Filing Cabinet

Currency: Display currency values in the following currency:
 The system setting for currency

Workgroup ID 27781
 Logon ID 130522

UPDATE CANCEL

There are two options when the contact doesn't **uniquely** exist in LeadMaster. One option is to save the email to the Filing Cabinet. You can access the Filing Cabinet via a hyperlink on your Home Page. You can then manually link the contact or create a new record.

Filing Cabinet - Email Message History

Email Messages 1 thru 1 - (1 total email messages)

Page Options Record Options Help Guide

All Email Messages in the Filing Cabinet

From Address	To Address	Subject	Date Sent	Action
<input type="checkbox"/> windowsinsiderprogram@e-mail.microsoft.com		Get our best performing Insider Preview build yet for 19H1.		Link to an existing record <input checked="" type="radio"/> <input checked="" type="radio"/> <input checked="" type="radio"/>

15 per page

Page Results: << 1 >> of 1

Create New Record For Email Message

Delete Email Message

The other option is to automatically create a new record with the contact.

Other Settings ▾

Change Password

Banner: Workgroup default skin

Default Tab on Home Page: Info Center Cases

Default Page: Clicking on the 'Company' hyperlink from search results, accounts and reports takes you to:
 View Sales Update Edit Profile Review And Take Action
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Message Ticker: Show Left Menu:

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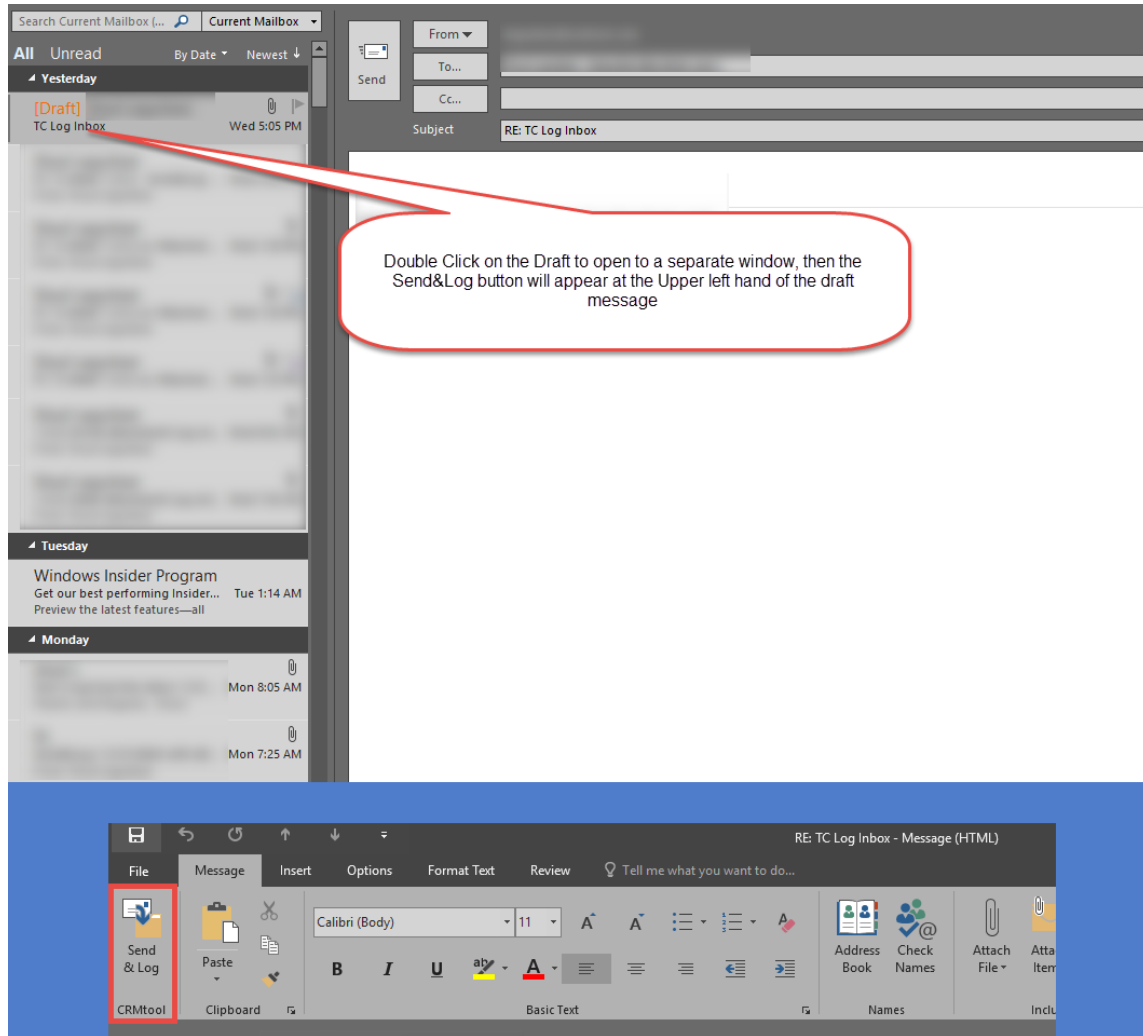
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UPDATE CANCEL

Using the CRM Email Add-In Module

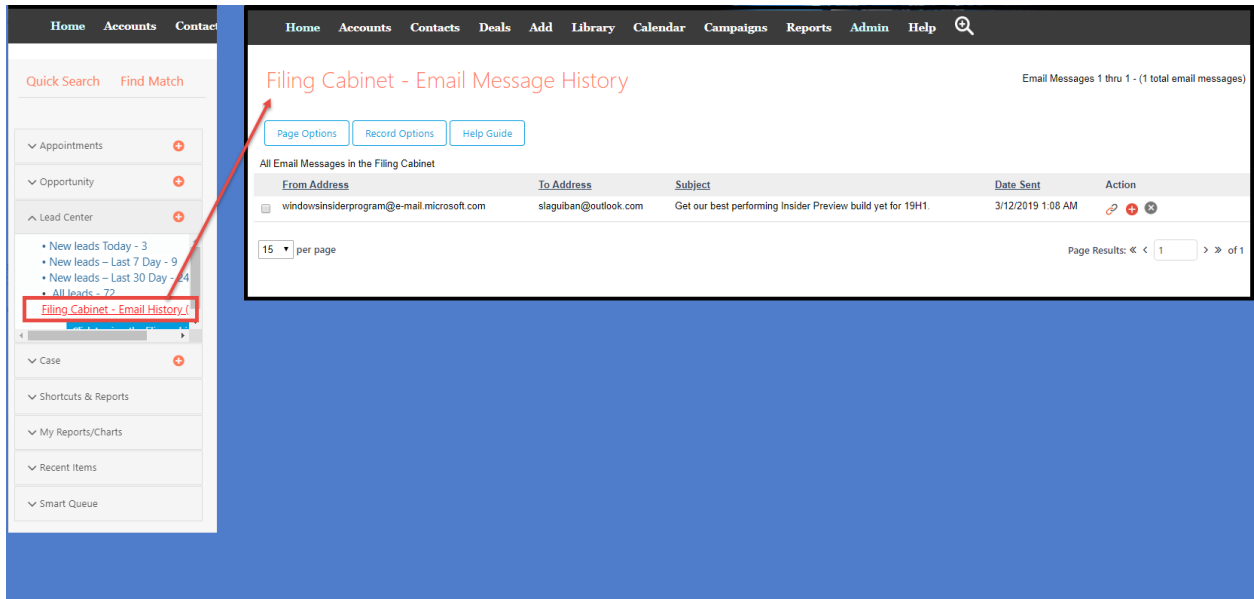
- 1.) Open Outlook
- 2.) When creating a new Outlook email, you will see an additional send option on the top navigation bar of the email – Send & Log. This also applies to Reply, Reply All, Forward but you need to open the draft message in a separate window to display the Send&Log button.



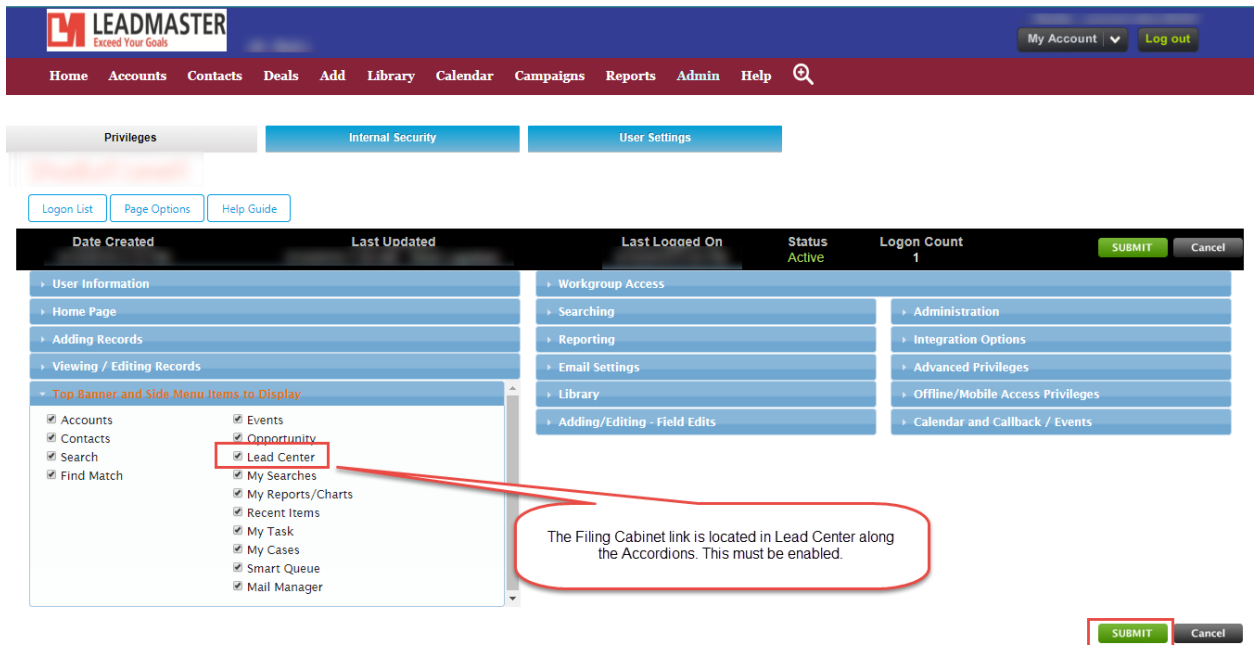
- 3.) Select the Send & Log option if you wish to send the email out to the recipient as well as log the email within your CRM Database.
- 4.) When opening an existing email in your in box, you will see an additional send option on the top navigation bar of the email – Log message. Select the Log Message option if you wish to send a copy of this email to your CRM database. It will be attached to the Contact in the CRM. You'll find all of the messages you've logged in the Email History section on the Contact page.

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5.) When Logging into the LeadMaster application, emails that do not match an existing unique email address in your online DB records will be placed in a **Filing Cabinet that can be accessed in the Leads** accordion on your Home page. If you don't see the 'Lead Center' the name may have been changed or it may not be enabled.



Note: In the Admin Menu, Privileges, Top Banner and Side Menu Items to Display. Enable the Lead Center option, then Submit.



Troubleshooting links to the knowledge base:

[Outlook Sync FAQ](#)

[Outlook is displaying a message saying it experienced a serious problem with the CRM Sync add-in](#)

[Can't uninstall CRMtool Sync for Outlook?](#)

[Not all Outlook Calendar events are being sync'd with LeadMaster](#)

[Why does email from LeadMaster come from CRMTTool.net instead of my address](#)

[CRMSync Tool - doesn't log emails](#)

[CRM Sync - Why doesn't it sync](#)

[How can I tell which version of the CRM Sync tool I'm using](#)

[How does Outlook Sync with LeadMaster? How does the CRM Sync Tool work?](#)

[Does the Outlook Integration allow notes within a contact card to sync?](#)

[CRM Sync Tech Support](#)

[CRM Sync for Email without Outlook \(file@crmtool.net\)](#)

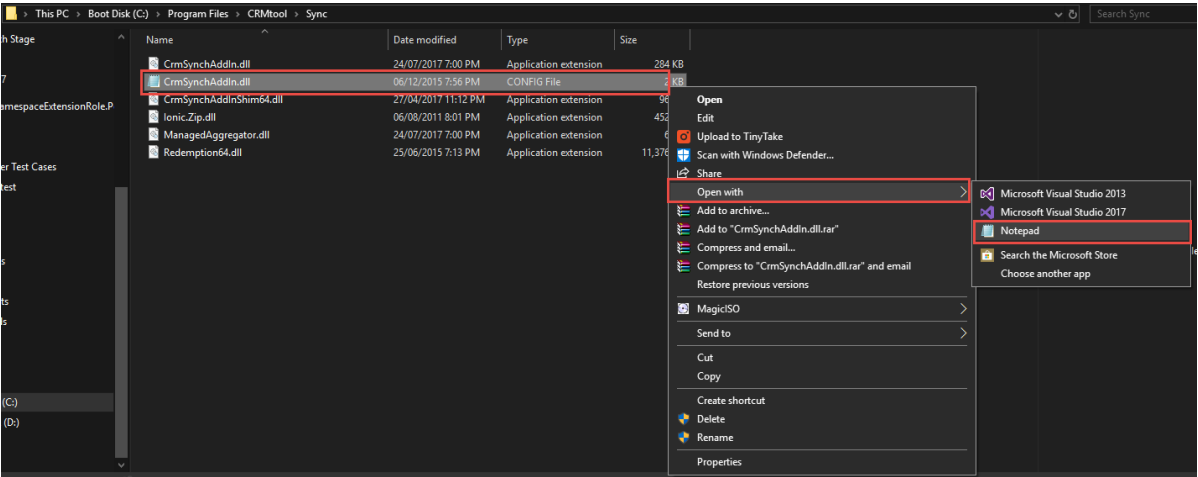
[Not all Outlook Calendar events are being sync'd with LeadMaster](#)

All other documentations related to the Outlook Sync is found here:
<http://64.132.240.34/kbbase/index.php?CategoryID=40&bp=0|20|2|1|1>

LEADMMASTER CRM SYNC PLUGIN FOR OUTLOOK – CRMTTOOL

Adding Contacts in the Menu:

- 1.) Close Outlook.
- 2.) Navigate to the folder: C:\Program Files\CRMtool\Sync , if you don't find the CRMTTool folder here, then navigate to C:\Program Files (x86).
- 3.) Open with Notepad the file “CrmSynchAddIn.dll” – CONFIG file



- 4.) Look for the “SyncContacts” text and it’s corresponding value is set to ‘False’ by default,
- 5.) change it to ‘True’. Save and Close the file.

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```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <configSections>
    <sectionGroup name="applicationSettings"
type="System.Configuration.ApplicationSettingsGroup, System, Version=4.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" >
      <section name="CrmSynchAddIn.Properties.Settings"
type="System.Configuration.ClientSettingsSection, System, Version=4.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" requirePermission="false" />
    </sectionGroup>
    <sectionGroup name="userSettings" type="System.Configuration.User SettingsGroup, System,
Version=4.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" >
      <section name="CrmSynchAddIn.Properties.Settings"
type="System.Configuration.ClientSettingsSection, System, Version=4.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" allowExeDefinition="MachineToLocalUser"
requirePermission="false" />
    </sectionGroup>
  </configSections>
  <applicationSettings>
    <CrmSynchAddIn.Properties.Settings>
      <setting name="CrmSynchAddIn_com_leadmaster_outlook_CrmSyncService"
serializeAs="String">
        <value>http://64.132.240.176/outlook/Default.aspx</value>
      </setting>
    </CrmSynchAddIn.Properties.Settings>
  </applicationSettings>
  <userSettings>
    <CrmSynchAddIn.Properties.Settings>
      <setting name="LogLevel" serializeAs="String">
        <value>verbose</value>
      </setting>
      <setting name="Reset" serializeAs="String">
        <value>False</value>
      </setting>
      <setting name="SyncContacts" serializeAs="String">
        <value>True</value>
      </setting>
      <setting name="EndpointURL" serializeAs="String">
        <value>https://www.leadmaster.com/outlook/Default.aspx</value>
      </setting>
    </CrmSynchAddIn.Properties.Settings>
  </userSettings>
</configuration>
```

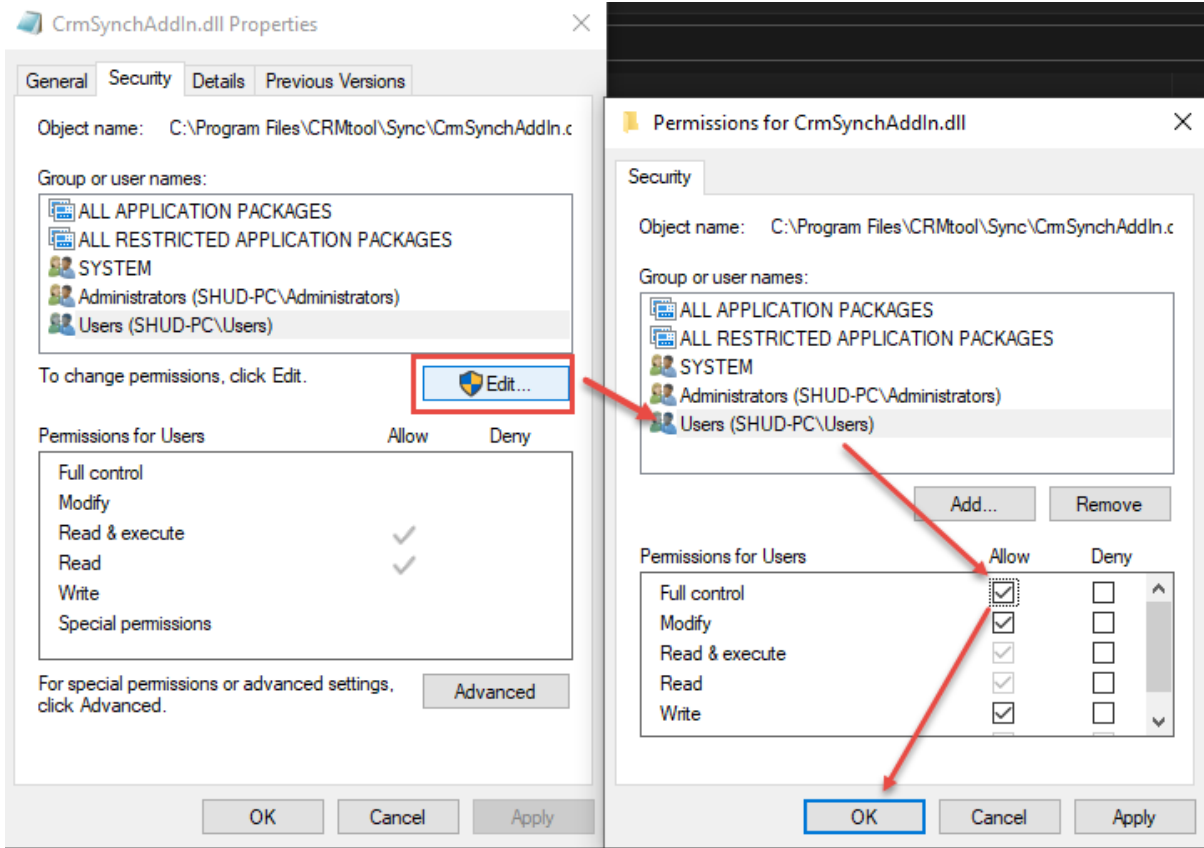
Notepad

Do you want to save changes to C:\Program Files\CRMT00L\Sync\CrmSynchAddIn.dll.config?

Save Don't Save Cancel

Note: If you are not being allowed to save changes due to Admin privileges, you can adjust the permissions by Right click on the file > Select Properties > Security Tab > Edit > Select Users > Check 'Full Control'. Please refer to your IT Admin for Corporate setup.

LEADMASTER CRM SYNC PLUGIN FOR OUTLOOK – CRMTTOOL



6.) Open Outlook, go to CRMTTool tab, then Configuration. You can now see your options for Sync of Contacts.

