Getting Started with Infor CRM Sync for Gmail™ version 1.2

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Introduction

Saleslogix is now Infor CRM. Look for the new branding in this release.

Infor CRM Sync for Gmail™ provides you with the ability to share information between Infor CRM and your Gmail account. There are two levels of integration available:

- Google Sync - synchronizes contacts and calendar information
- Google Mail - records e-mail messages from Gmail to Infor CRM

This document describes how to get started with and use Infor CRM Sync for Gmail. Before Infor CRM can integrate with Gmail you must authorize your Gmail Integration connections.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

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Chapter 1

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Using Infor CRM Sync for Gmail™

When configuration for Infor CRM Sync for Gmail is complete, changes to contacts and activities are synchronized between Infor CRM and Gmail.

Infor CRM Sync for Gmail enables:

- Synchronizing contacts
- Synchronizing your calendar activities
- Recording an e-mail message and any attachments as an Infor CRM history record

Authorizing Gmail Integrations

To use Infor CRM Sync for Gmail™ integration you must first authorize the service or services in the Infor CRM Web Client.

You must authorize each service even if you authorized services in a previous release.

- This feature may not be available for all users.
- You must allow pop-ups before you can authorize services. See your browser help for specific instructions on how to allow pop-ups.
- For optimal performance, Infor CRM recommends using a supported version of Firefox or Chrome to authorize services.

To authorize Gmail integrations

1. Before you can authorize, you must either be signed on to Google using the Google account to synchronize with Infor CRM or if there are multiple Google accounts, signed out of Google completely.

   If you are logged on to the wrong Google account, you may experience difficulty synchronizing data between Gmail and Infor CRM.

2. Sign in to the Infor CRM Web Client using the URL provided by the administrator.
3. On the **Tools** menu, click **Options**.
4. Click the **Authorize Services** tab.
5. Click **Authorize** next to the service you want to authorize.
   A new browser window opens.
6. If you are not already signed in to Google, enter your Google **Email** and **Password** and click **Sign in**.

7. Allow access to the listed services.
8. Minimize the window and return to the Infor CRM Web Client browser window.
9. In the **Configure Provider Token** dialog box, in the **User Email** box, type your Gmail address.
10. Click **OK**.
    The Authorize button label changes to Authorized. You may not see your Gmail address listed until you refresh the page.
11. Repeat steps 4-10 for each service you want to authorize.

This information was valid at the time this document was distributed, however the information may have changed. If this information is no longer valid, please refer to Google documentation for granting services access to a Google account.

Synchronizing Contacts with Gmail

In order to synchronize contacts, you must:

- Create and configure the contact sync group
- Do one or more of the following:
  - Add Infor CRM contacts to Gmail
  - Add contacts from Gmail to Infor CRM

Creating a Contact Sync Group

To synchronize contact information between Infor CRM and Gmail, you must designate a contact sync group. If the group does not already exist, then you must first create the contact sync group.

To create a contact sync group

1. Open the **Contacts** List view.
2. Select one or more records by pressing the **Ctrl** or **Shift** key as you click each item.
3. Right-click in the List view grid and select **Save Records as Group**.
4. Give the group a descriptive name.
5. Click **OK**.

Configuring the Contact Sync Group

To synchronize contact information between Infor CRM and Gmail, you must designate the group as the contact sync group. If the group does not already exist, then you must first create the contact sync group.

To configure the contact sync group in the Infor CRM Web Client

1. On the **Tools** menu, click **Options**.
2. Click the **General** tab.
3. Under **Sync Options**, in the **Contact Sync Group** select the ad hoc contact group that will contain the contacts to synchronize.
4. Click **Save**.

Changing the Contact Sync Group

The contact sync group cannot be changed after the initial synchronization cycle. If you selected the wrong group, renamed the group, or need to use a different group, contact your system administrator.

Selecting the Contacts to Synchronize

In order to synchronize contacts between Infor CRM and Gmail you must select which contacts you want to synchronize from each application. You can import contacts from Gmail to Infor CRM or from Infor CRM to Gmail.

If a contact already exists in both applications, you should only select the contact in Gmail by adding it to the Infor CRM group. Selecting the contact in Gmail will create a duplicate contact in Infor CRM. The two contacts will then need to be merged to a single contact before the next synchronization occurs. To merge contacts in Infor CRM see the Infor CRM Web Client help topic "Merging Records" or the Infor CRM Client help topic, "Merging Records from a List View".

Any of the following will result in duplicate records in both Gmail and Infor CRM:

- Selecting the contacts in both Gmail and Infor CRM.
- Selecting the contact in Infor CRM by adding the contact to the contact sync group.
- Failure to merge the duplicate contacts in Infor CRM before the next synchronization cycle occurs.

Selecting Infor CRM Contacts to Synchronize with Gmail

By adding contacts to your contact sync group any changes you make to those contacts are synchronized between Infor CRM and Gmail, based on your sync settings. By removing contacts from the contact sync group, you will stop synchronizing the contact and delete the contact from Gmail.

To add contacts

1. Open the **Contacts** List view.
2. Select one or more records by pressing the **Ctrl** or **Shift** key as you click each item.
3. Right-click in the List view grid and select **Add to an existing Group** or from the Task Pane, select **Add to Group**, and point to your contact sync group.

To remove contacts

1. In the **Contacts** List view, open your contact sync group.
2. Find the contacts you want to remove.
3. Right-click in the List view grid and select **Remove from Group**.

Selecting Contacts from Gmail to Synchronize with Infor CRM

In order for Gmail contacts to synchronize with Infor CRM, you must select which Gmail contacts to import to Infor CRM. Contacts are selected for synchronization by assigning the Infor CRM label to each contact you want to synchronize.

The Infor CRM label is not available in Gmail until after the first synchronization cycle has completed.

To select Gmail contacts to synchronize with Infor CRM

1. In Gmail, go to the **Contacts** view.
2. Select the contacts you want to synchronize.
3. Click the Groups menu, and select **Infor CRM**.
   After the next synchronization, the contacts will be added as new contacts in Infor CRM.
4. Click **Apply**.

This information was valid at the time this document was distributed, however the information may have changed. If this information is no longer valid, please refer to Google documentation for adding or removing contacts to a group.

Synchronizing Contacts with Gmail

Synchronizing contacts between Infor CRM and Gmail enables you to change a contact record in either application and have the change reflected in both applications. Your administrator must configure and grant permission before you can synchronize contacts with Gmail.

During a synchronization cycle, Infor CRM compares fields in both applications, and makes changes to ensure both applications contain the same information. Only data in fields mapped between the applications is transferred. The data is compared and changes are made to ensure the information matches. For example, if a record has been added to one application and not to the other, that record is added to the incomplete application.

Understanding Contact Sync Behavior

- Information is synchronized in both directions.

  This behavior may be different in your implementation. Synchronization direction is determined by your administrator.

- During the initial sync contacts are linked based on the email address.
- If a contact record currently exists in both Infor CRM and Gmail, a new contact record is created in both applications. See "Selecting the Contacts to Synchronize" on page 5 for best practices to minimize and resolve duplicate records.
- If a synchronized contact from Infor CRM does not exist in Gmail, then:
  - A new contact is created.
  - The contact is added to the Infor CRM group in Gmail.

- If a contact does not exist in Infor CRM, then:
  - A new contact is created in Infor CRM.
    - If a matching account (company name) exists in Infor CRM, then the new contact will be associated with the existing account.
    - If more than one matching account exists in Infor CRM, then the new contact will be associated with the first account that is found.
    - If a matching account (company name) cannot be found in Infor CRM, then a new account is created.
      - The account is created with a type of Prospect, status of Active, owned by "Everyone", and the Account Manager is the user adding the contacts.
      - If the contact does have a company (account) defined, then an account is created in Infor CRM using the company name as the account name.
      - If the contact does not have a company (account) defined, then an account is created in Infor CRM using the contact's last name and first name.
  - The address and phone information is only synchronized with the contact, not the account.
  - The contact is added to the contact sync group.
- If the same record is updated in both applications during the same sync cycle, by default, the Gmail change wins.

Conflict resolution can be customized by the administrator. Your experience may be different if your installation has been customized.

- Deleting a contact in Gmail will remove the contact from the Contact Sync group and remove the link.
- Deleting a contact in Infor CRM will remove the contact from the Gmail "Infor CRM" group and remove the link.
- In some fields, Gmail allows more characters than Infor CRM allows. When information is synchronized to Infor CRM, the additional characters will be truncated to meet the Infor CRM character limit. If the field is not edited in Infor CRM, then the field in Gmail will not be updated and will therefore retain the truncated characters, so no data is lost.

Synchronizing Your Calendar and Tasks With Gmail

Calendar integration allows you to synchronize calendar items between Infor CRM and Gmail. Your administrator must configure and grant permission before you can synchronize calendars with Gmail.

During a synchronization cycle, Infor CRM compares fields in both applications, and makes changes to ensure both applications contain the same information. Only data in fields mapped between the applications is transferred. The data is compared and changes are made to ensure the information matches. For example, if a record has been added to one application and not to the other, that record is added to the incomplete application.

Understanding Calendar Sync Behavior

- Information is synchronized in both directions.

  This behavior may be different in your implementation. Synchronization direction is determined by your administrator.

- If the same record is updated in both applications during the same sync cycle, by default, the Gmail change wins.

  Conflict resolution can be customized by the administrator. Your experience may be different if your installation has been customized.

- During the initial sync, activities (phone calls, meetings and personal activities) are linked only if they match on all of the following criteria:
  - Regarding/Subject
  - Start Date/Time
  - Duration
  - User
- If a matching activity cannot be found, then a new activity will be created.
- To-dos and tasks are linked only if they match on all of the following criteria:
  - Regarding/Subject
  - Start Date/Time
- If a to-do or task cannot be found, then a new record will be created.
- Deleting an activity in either application deletes the activity in both applications.
- When an activity that was created in Infor CRM is synchronized with Gmail, the following information from the General tab is included in the notes section of the activity in Gmail:
  - Contact/Account
  - Lead/Company
  - Opportunity
  - Ticket
  - Activity Leader

  Manually updating this section of the notes is not recommended.

- Activity leaders, members and resources:
  - If an activity is created in Gmail:
    - If a member or a leader of an activity is synchronizing with Gmail, when the activity is synchronized each user will get their own activity record in Infor CRM where the user is the leader. All other members will be listed in the Infor CRM activity Participants tab.
    - If a member or leader of activity is not synchronizing from Gmail to Infor CRM, then an activity will not be created in Infor CRM for that user.

        - If the leader edits the activity in Infor CRM, it updates each activity in Gmail and synchronizes the changes to each activity in Infor CRM.
        - If a member edits the activity in Infor CRM, then a new activity will be created for that user in Gmail with the user as the leader. This activity will no longer receive any changes made by the leader to the original activity.

Snoozing or dismissing an alarm in Infor CRM is not considered an edit, and therefore a new activity will not be created in Gmail.

    - If an activity is created in Infor CRM and the leader is synchronizing with Gmail:
        - The activity is synchronized to Gmail and Gmail creates one activity with the leader as the organizer and each member is an attendee.
        - Each member will receive Gmail notifications for the activity.
        - If the leader edits the activity in Infor CRM, it updates the activity in Gmail.
        - If the leader edits activity in Gmail it updates the activity in Infor CRM.

The leader's changes overwrite any changes made by a member in either Infor CRM and Gmail.

    - If an activity is created in Infor CRM and the leader is **not** synchronizing with Gmail:
        - A separate activity will be created in Gmail for each activity member.
        - Activity members will not receive Gmail notifications for the activity.
        - If the leader edits the activity in Infor CRM, then the activity is updated for each user in Gmail.
        - If a member edits the leader's activity in Infor CRM, then the activity is updated for each user in Gmail.
        - It is not recommended for a member to update the activity in Gmail, because a duplicate activity will be created in Gmail for any other members.
        - It is not recommended for a member to update the activity in Gmail, because a duplicate activity will be created for that user in Infor CRM with the user as the leader. The user will remain as a member of the original activity and therefore will receive any changes to the original activity, but the duplicate activity will not receive any changes.

Snoozing or dismissing an alarm in Gmail is not considered an edit, and therefore a new activity will not be created Infor CRM.

- Unconfirmed and confirmed activities will synchronize.
- Activities that are declined in either application are synchronized.
    - Declined activities display on your Gmail calendar only if the "Show events you have declined" option is set to Yes.
    - Declined activities do not display on your Infor CRM calendar.
- Activity types in Infor CRM may synchronize to different activity types in Gmail. See "Understanding Calendar Data Exchange" for details.
- Activity attachments are not synchronized between Infor CRM and Gmail.

- Infor CRM to-dos are synchronized as tasks in Gmail.
    - Recurring Infor CRM to-dos are not synchronized from Infor CRM to Gmail.
    - Tasks created in Gmail are synchronized to Infor CRM as timeless to-dos.
- Activities completed in Infor CRM remain on the Gmail calendar, but are marked with asterisks on both sides of the subject line.
- In some fields, Gmail allows more characters than Infor CRM allows. When information is synchronized to Infor CRM, the additional characters will be truncated to meet the Infor CRM character limit. If the field is not edited in Infor CRM, then the field will retain the truncated characters in Gmail, so no data is lost.

Understanding Calendar Data Exchange

The following table lists how Infor CRM calendar data is synchronized with Gmail:

Infor CRM	Sync As	Gmail
Meetings	sync as	Events*
Phone Calls	sync as	Events*
Personal Activities	sync as	Events*, flagged as Private
To-Dos	sync as	Tasks
Events	do not sync	
Timeless Phone Call, Meeting, or Personal Activity	sync as	Timeless Events*

*Event does not refer to Infor CRM Events, which are not synchronized with Gmail.

Understanding Email Integration

Email integration allows you to record emails from Gmail as history items for the associated Infor CRM contact or lead.

Use email integration to:

- Record to Infor CRM History from your inbox or sent items.
- Save email attachments to Infor CRM.

Recording an Email Message to History

You can log email messages to the History tab in Infor CRM.

To log email messages to history

- Do one of the following:
    - Compose an email message in Gmail, and then apply the **Infor CRM/Send To CRM** label to record the email body and any attachments to the associated Infor CRM record.
    - Select an email message in Gmail, and then apply the **Infor CRM/Send To CRM** label to record the email body and any attachments to the associated Infor CRM record.
      For more information about applying labels refer to the Google help.

Label	Description
Infor CRM	Label group name to identify the Infor CRM labels.
Infor CRM/Send To CRM	Select this label to record an e-mail to history in Infor CRM.
Infor CRM/Missing Contact	This label is applied if, after selecting the Infor CRM/Send To CRM label, no matching e-mail address is found in Infor CRM.
Infor CRM/Recorded	This label is applied, if after selecting the Infor CRM/Send To CRM label, a matching e-mail address is found in Infor CRM and a history record is created.

When you record an email message to history, the following will occur:

Description	Infor CRM	Gmail
If the email address matches a single contact or lead in Infor CRM	An email history record is logged for the matching contact or lead. Any attachments will appear on the Attachments tab of the matching contact or lead to which the email history was logged.	The email is labeled Infor CRM/Recorded.
If the email address matches multiple contacts or leads in Infor CRM	An e-mail history record is logged for the matching contact or lead with the most history. Any attachments will appear on the Attachments tab of the matching contact or lead to which the email history was logged.	The email is labeled Infor CRM/Recorded.
If the email address cannot be found in Infor CRM	An email history record is not logged.	The email is labeled Infor CRM/Missing Contact.

Reviewing Your Synchronization Activity

Use the Sync History views to review your integration synchronization activity.

Using the Sync History Views

The Sync History List view provides a list of synchronization history records. Use the filters to narrow the list or click a job name to view more details, for example the status.

Sync History List View

The Sync History List View displays information about synchronization cycles run between Infor CRM and external integrations.

- To sort the grid by a particular field, click one of the column headings.
- To only display logs that meet specific criteria, use filters.
- To only display logs for a certain time-frame, select one of the provided groups.

To open the Sync History List view

- On the Navigation Bar, click **Integration**, and then click **Sync History**.

Sync History Detail View

Use the Sync History Detail view to see detailed information about a synchronization history item. Synchronization history items are associated with jobs run between Infor CRM and an external integration. Sync history information shows what records were synchronized and when they were synchronized and can provide information for troubleshooting synchronization problems.

To open the Sync History detail view

- On the Navigation Bar, click **Integration**, and then click **Sync History** to open the Sync History List view. If necessary, use the Lookup to locate a history item, and then click the log name.

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