

Getting Started with Saleslogix Sync for Gmail™

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Developed by Saleslogix User Assistance

Getting Started with Saleslogix Sync for Gmail™

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Getting Started with Saleslogix Sync for Gmail™

Saleslogix is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, Accounting Integration, and Support automation solutions.

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

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

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

Authorizing Google Integrations

To use Saleslogix Sync for Gmail you must first authorize the Google service or services in the Saleslogix Web Client.



- 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, Saleslogix recommends using a supported version of Firefox or Chrome to authorize the Google services.

To authorize Saleslogix Sync for Gmail integrations

1. Before you start, make sure that you are either logged on to Google using the Google account you want to synchronize Saleslogix with or if you have multiple Google accounts, sign out of Google completely.



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

2. On the **Tools** menu, click **Options**.
3. Click the **Authorize Services** tab.
4. Click **Authorize** next to the service you want to authorize.
A new browser window opens.
5. If you are not already signed in to Google, enter your Google **Email** and **Password** and click **Sign in**.
6. Allow access to the listed services.
7. In the browser window, follow the instructions to copy the code in the box.
To copy, select the code text, and then press Ctrl+C.
8. Minimize the window and return to the Saleslogix Web Client browser window.
9. In the **Configure Provider Token** dialog box, in the **User Email** box, type your Gmail address.
10. Click in the **Authorization Code** box, and paste the code you copied in step 6.
To paste, click in the box and press Ctrl+V.

11. Click **OK**.
The Authorize button label changes to Authorized. You may not see your Gmail address listed until you refresh the page.
12. Repeat steps 4-11 for each Google 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 Google

In order to synchronize contacts, you must:

- Create and configure the contact sync group
- Do one or more of the following:
 - Add Google contacts to Saleslogix.
 - Add Saleslogix contacts to Google.

Creating a Contact Sync Group

To synchronize contact information between Saleslogix and Google, 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. Give the group a descriptive name. For example, SyncSaleslogix.
4. Click **OK**.

Configuring the Contact Sync Group

To synchronize contact information between Saleslogix and Google, 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 for Google

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 Saleslogix and Google you must select which contacts you want to synchronize from each application. You can import contacts from Google to Saleslogix or from Saleslogix to Google.

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



Any of the following will result in duplicate records in both Google and Saleslogix:

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

Selecting Saleslogix Contacts to Synchronize with Google

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

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 Google Contacts to Synchronize with Saleslogix

In order for Google contacts to synchronize with Saleslogix, you must select which Google contacts to import to Saleslogix.

To select Google contacts to synchronize with Saleslogix

1. In Google, go to the **Contacts** view.
2. Select the contacts you want to synchronize.
3. Click the Groups menu, and select **Saleslogix**.



The Saleslogix label is not available in Google until after the first synchronization cycle has completed.

After the next synchronization, the contacts will be added as new contacts in Saleslogix.

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 Google

Once configured, you can synchronize contacts between Saleslogix and Google. Your administrator must configure and grant permission before you can synchronize contacts with Google.

Understanding Contact Sync Rules

- Information is synchronized in both directions.
- If a contact record currently exists in both Saleslogix and Google, a new contact record is created in both applications. See "[Selecting the Contacts to Synchronize](#)" on page 3 for best practices to minimize and resolve duplicate records.
- If a synchronized contact from Saleslogix does not exist in Google, then:
 - A new contact is created.
 - The contact is added to the Saleslogix group in Google.
- If a contact does not exist in Saleslogix, then:
 - A new contact is created in Saleslogix that is owned by "Everyone" and the Account Manager is ADMIN.
 - If the Google contact does not have a company (account) defined, then an account is created in Saleslogix using the contact's last name and first name.
 - If the contact does have a company (account) defined, 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 Google 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 Google will remove the contact from the Contact Sync group and remove the link.
- Deleting a contact in Saleslogix will remove the contact from the Google "Saleslogix" group and remove the link.
- In some fields, Google allows more characters than Saleslogix allows. When information is synchronized to Saleslogix, the additional characters will be truncated to meet the Saleslogix character limit. If the field is not edited in Saleslogix, then the field in Google will not be updated and will therefore retain the truncated characters, so no data is lost.

Synchronizing Your Calendar and Tasks With Google

Once configured, you can synchronize your calendar between Saleslogix and Google. Your administrator must configure and grant permission before you can synchronize your Saleslogix and Google calendars.

Understanding Calendar Sync Rules

- Information is synchronized in both directions.
- If the same record is updated in both applications during the same sync cycle, by default, the Google change wins.



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

- Deleting an activity in either application deletes the activity in both applications.
- Activity leaders, members and resources:
 - Member and resource information is not synchronized.
 - If the user is a member or a leader of an activity, when the activity is synchronized the user will be listed as the leader.
- Unconfirmed and confirmed activities will synchronize.
- Declined activities:
 - Activities that are declined before a synchronization cycle are not synchronized.
 - Activities that are declined in Google before or after a synchronization cycle remain on the user's calendar in both applications To remove the activity, either remove the activity in Google or delete the activity in Saleslogix.
- Activity types in Saleslogix may synchronize to different activity types in Google. See the Understanding Calendar Data Exchange table for details.
- Activity attachments are not synchronized between Saleslogix and Google.
- Saleslogix to-dos are synchronized as tasks in Google.
 - Recurring Saleslogix to-dos are not synchronized from Saleslogix to Google.
 - Tasks created in Google are synchronized to Saleslogix as timeless to-dos.
- Activities completed in Saleslogix remain on the Google calendar, but are marked as complete.
- In some fields, Google allows more characters than Saleslogix allows. When information is synchronized to Saleslogix, the additional characters will be truncated to meet the Saleslogix character limit. If the field is not edited in Saleslogix, then the field will retain the truncated characters in Google, so no data is lost.

UNDERSTANDING CALENDAR DATA EXCHANGE

The following table lists how Saleslogix calendar data is synchronized with Google:

Saleslogix	Sync	Google
Meetings	sync as	Events*
Phone Calls	sync as	Events*
Personal Activities	sync as	Events marked "Private"
To-Dos (non-recurring)	sync as	Tasks
To-Dos (recurring)	do not sync	
Events	do not sync	
Timeless Phone Calls, Meetings or Personal Activities	sync as	Timeless Events

*Google events are not the same as Saleslogix Events. Saleslogix Events do not synchronize with Google.

Using Google Mail Integration

If your company uses Google Mail integration, you can record Google Gmail messages as history items for the associated Saleslogix contact. For example, you can:

- Compose an e-mail message in Gmail, and then apply the Saleslogix/SendToSLX label to record the e-mail body and any attachments to the associated Saleslogix record.
For more information about applying labels refer to the Google help.
- Select an e-mail message in Gmail, and then apply the Saleslogix/SendToSLX label to record the e-mail body and any attachments to the associated Saleslogix record.

If you add the Saleslogix/SendToSLX label and send the e-mail, the following will occur:

Description	In Saleslogix	In Gmail
If the e-mail address matches a single contact or lead in Saleslogix	An e-mail history record is logged for the matching contact or lead.	The e-mail is labeled Saleslogix/Recorded.
If the e-mail address matches multiple contacts or leads in Saleslogix	An e-mail history record is logged for the matching contact or lead with the most history.	The e-mail is labeled Saleslogix/Recorded.
If the e-mail address cannot be found in Saleslogix	An e-mail history record is not logged.	The e-mail is labeled Saleslogix/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 at 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 Saleslogix 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 **Administration**, 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 Saleslogix 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 **Administration**, 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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