SuperOffice Business Solutions

Caesar For Outlook Manual

Contents

Introduction

Caesar for Outlook (CFO) is an Add-on to Microsoft Outlook installed on the client as a "plug-in" with standard remote installation tools, such as Microsoft's Systems Management Server (SMS).

A settings file can be configured according to your preferences, allowing everything to be set up before any user starts the software.

The architecture is based on SOA and uses .Net framework. All communication with Caesar CRM use Web services (SOAP 1.2).

Caesar for Outlook does not affect, or communicate with the Exchange server. No installation on the Exchange Server is required.

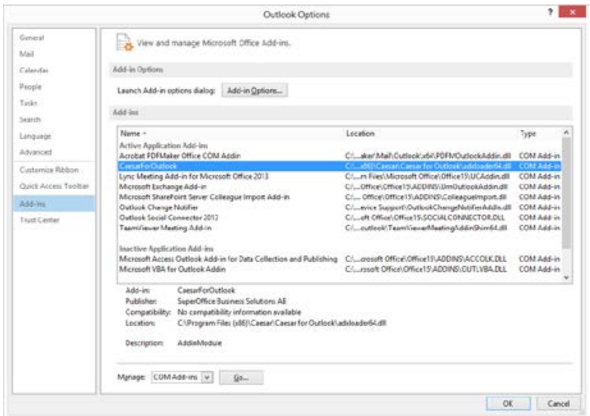
To comply with your security standards, Caesar for Outlook has full support for Single Sign On (Windows authentication).

Installation

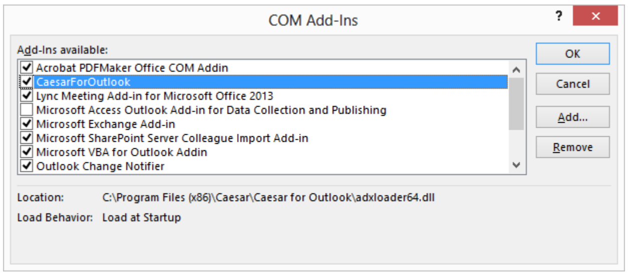
You can install Caesar for Outlook (CFO) directly on each client using the .msi package.

It is also possible to install CFO as a distributed solution using configuration files. Please refer to the section "Applying customizations to Caesar for Outlook installation" in the ReadMe.htm file supplied with the installer for details.

When the product has been installed you will find it in Outlook under **File** > **Options** > **Add-Ins**.



An entry is also created under **Manage COM Add-Ins** (available at the bottom of above dialog):



System settings

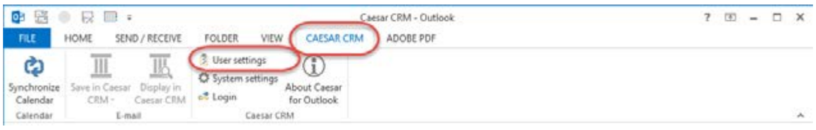
You can define default values for e-mail and calendar in Caesar Admin. You can also set whether users should be able to change the values themselves or if the option should be disabled in the user settings in Outlook.

The settings under E-mail/Calendar in Caesar Admin controls the options available in Outlook, so you should always start by defining the settings there. Please refer to the Caesar Admin documentation for details.

Events in Caesar for Outlook are stored in the system. You can also activate detailed logging that can be of help when installing and setting up the integration to Caesar CRM.

User Settings

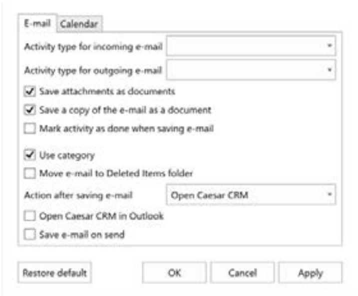
The user settings are found in a separate tab in Outlook called “Caesar CRM”.



If a settings is unavailable in the dialog it is because it has been disabled in user settings from Caesar Admin.

E-mail

Below you will find the user settings for incoming and outgoing e-mail.



Activity type for incoming e-mail

This is where you set what activity type code to use for all received e-mails that you wish to create activities for in Caesar CRM. E-mail address matching is made against the **From:** field in Outlook.

Activity type for outgoing e-mail

This is where you set what activity type code to use for all received e-mails that you wish to create activities for in Caesar CRM. E-mail address matching is made against the **To:** field in Outlook.

Save attachments as document

Allows you to save all e-mail attachments as files linked to the activity.

Save a copy of the e-mail as document

Allows you to save the entire e-mail as an attachment, linked to the activity.

Mark activity as done when saving e-mail

When set, the activity created in Caesar CRM will be set to “Done” directly on Save.

Use today’s date when the e-mail is saved

Sets the date of the activity to today’s date rather than picking the actual send date from the e-mail.

Use category

Allows you to tag the linked appointment with an Outlook category.

Move e-mail to Deleted Items folder

This setting will move the e-mail to the Deleted Items folder in Outlook after saving it as an activity in Caesar CRM.

Action after saving e-mail

After saving the e-mail you have the following options:

- **Open Caesar CRM** – Opens Caesar CRM in your browser and displays the activity in Caesar CRM
- **Display confirmation** – A pop-up dialog is displayed to confirm that the activity has been save in Caesar CRM.
- **No action** – The activity is saved in the background.

Open Caesar CRM in Outlook

After saving the e-mail, Caesar CRM is opened in a frame within the Outlook application, displaying the activity.

NOTE: This feature is not recommended since it may not work due to security settings in Outlook. Please refer to the following link for details:

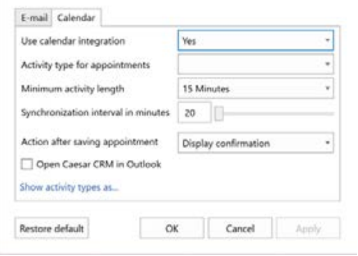
https://support.office.com/en-us/article/Fixes-or-workarounds-for-recent-issues-in-Outlook-for-Windows-ecf61305-f84f-4e13-bb73-95a214ac1230

Save e-mail on send

Saves the e-mail automatically as an Activity when sending the mail i.e. the button “Save in Caesar CRM” is ticked automatically when creating an e- mail in Outlook.

Calendar

Below you will find the user settings for appointments and meetings.



Use calendar integration

Determines whether the CFO Integration should be used: Yes or No.

Activity type for appointments

Determines the default activity type to be created when linking a calendar entry to Caesar CRM.

Minimum activity length

The minimum length in minutes for when an activity should become a calendar entry.

Synchronization interval in minutes

Determines the synchronization interval between Outlook and Caesar CRM. Manual synchronization can also be done using the tab option **Caesar CRM** > **Synchronize Calendar**.

Use category

Determines whether the Caesar CRM category should be used when linking appointments/meetings.

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Show activity types as…

You can decide the status for the Activity created from Outlook, per activity type.

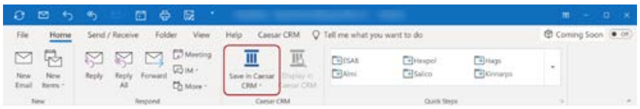
These values reflect the **Appointment** > **Show as** option in Outlook i.e. Busy, Free, Working elsewhere and Out of Office.

This can also be set centrally Caesar Admin, but are not locked for editing.

NOTE: This is a “one time” setting. If you change the status in Outlook on a linked meeting, the status will not change in Caesar CRM. It is always the Outlook settins that is considered “master”.

E-mail - Incoming

Using buttons in Outlook you can save an e-mail as an activity in Caesar CRM directly connected to the customer and contact.



The type of activity created is determined by the User Settings.

Save in Caesar CRM

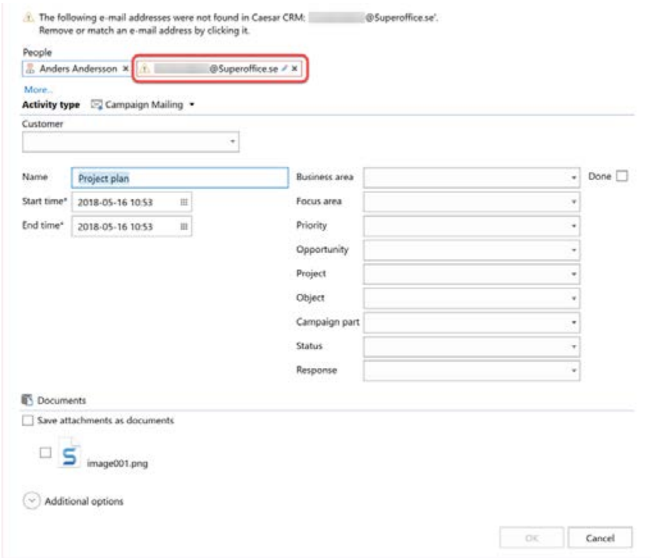
This quick save option allows you to create an activity directly if the contact already exists in the system, provided that you don't have any required fields in the dialog.

The default values set for the activity in CFO are used and the activity is saved in the background.

If the contact cannot be found a dialog is opened allowing you to add the contact or edit the e-mail address. The contact frame is highlighted in red at the top of the dialog and the missing address is also visible in the warning message.

Contact is missing

If the e-mail address of the sender does not already exist in Caesar CRM, you can add it when you save the e-mail as an activity.

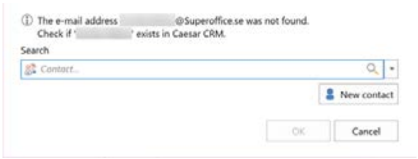


Add a contact

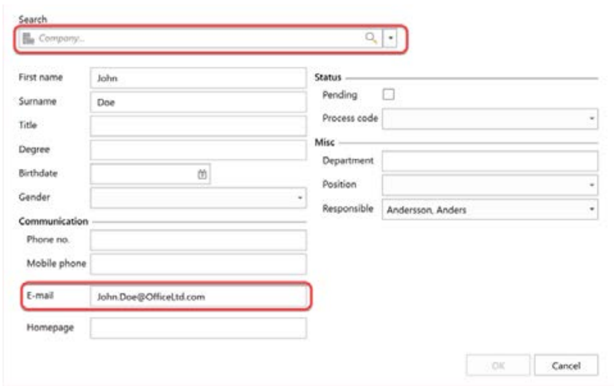
If the e-mail address of the sender does not already exist in Caesar CRM, you can add it when you save the e-mail as an activity.

1. Click the edit icon next to the highlighted e-mail address.

2. A new dialog is opened where you can search for an existing contact or add a new one using the “New contact” button.



3. This dialog uses the same Contact search providers as in Caesar CRM.
4. If the contact cannot be found in the system, click the **New contact** button to add him or her and connect to desired customer.
5. You must enter an existing company in order to add a contact.



6. The e-mail address is then automatically retrieved from the e-mail and added to the e-mail address field for the contact.

The sender will now be available as a contact both in Caesar CRM and in Caesar’s address book in Outlook. This is also indicated by the Contact icon next to the name.

Edit and Save in Caesar CRM

Before saving the activity in Caesar CRM, a dialog is opened allowing you to:

- Add new Contacts
- Edit Contact information
- Change linked Customer
- View and Edit notes
- Look for Responsible using Search providers
- Change default Responsible (from <Logged in user>).

Dialog

The dialog used when opening CFO is maintained just like any other dialog in Caesar CRM.

When the dialog is connected to the specific e-mail activity code used, and if set to be used in the Caesar for Outlook settings, the dialog is displayed when creating the activity from the e-mail.

Please refer to the Caesar Admin documentation and to the chapter **User Settings** in this document.

Notes

If you have added a Notes field to the dialog in Caesar Admin, this field will also be displayed in the “Edit and Save”-dialog, and you can edit the content before saving the activity.

Matching against Caesar CRM

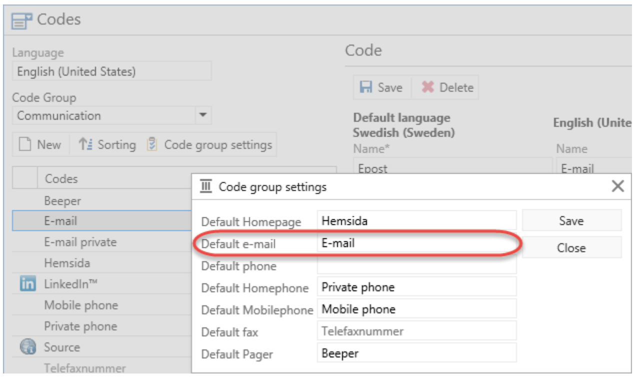
When an activity is created from CFO the e-mail address is matched against all communication codes with the category “e-mail” connected to contacts, individuals and users.

Matching only takes place against active contacts.

If the e-mail address exists on several contacts or individuals they will all be added to the activity.

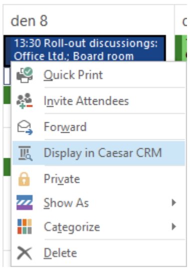
If an e-mail address exists on both a user and a contact, the user takes priority and the contact will not be added.

If an e-mail address cannot be found in Caesar CRM, and you choose to add it to a contact or an individual, it is added with the communication code set as Default e-mail in Caesar Admin.



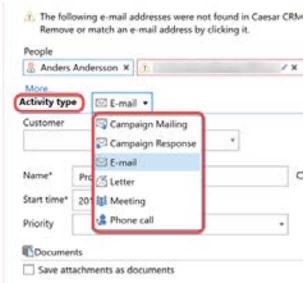
Open activity from Outlook

When you have saved an e-mail as an activity you can open it in Caesar CRM using the “Display in Caesar CRM” menu button or right-click menu option.

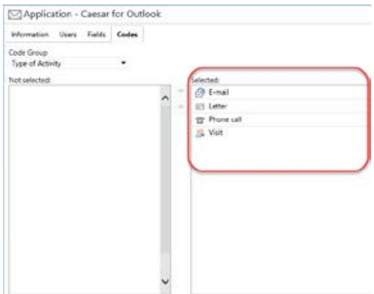


Activity type

When you create an activity using Caesar for Outlook you can select an activity type. This allows you to design dialogs connected to the activity type code and thus control what fields to display, to set as mandatory etc.



The activity types available in the list are determined by the activity type codes assigned to the Caesar for Outlook application in Caesar Admin.



Attachments

Documents and files can be saved and connected to the activity in Caesar CRM. You can configure whether a document should be saved automatically or you can choose to save it each time an e-mail is received.

Save Options

You can save the e-mail in different ways in Caesar CRM.

Save only as text or as a file

This option only saves the text from the message in the notebook field of the activity.

You can also save a copy of the e-mail as an msg-file (containing layout and attachments) connected to the Caesar CRM activity.

Save e-mail on selected contact

The button “Edit and save in Caesar CRM” allows you to save an e-mail on the contact and company of your choice.

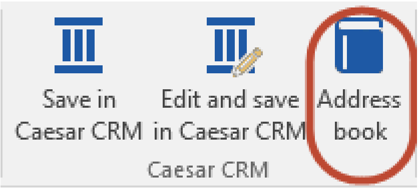
Example: You receive an e-mail from a colleague that you want to connect to the company that is mentioned in the message.

E-mail – Outgoing

You can save e-mails as activities in Caesar CRM on Send in Outlook

Address book

To find contacts that exists in Caesar CRM who you wish to send an e-mail, you can use the Address book feature in CFO.



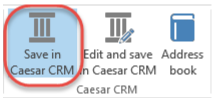
The address book is available directly from Outlook when you compose new e-mails, reply to an e-mail or forward an e-mail.

It uses the same quick search as in Caesar CRM. This means that you can type the first letters of e.g. first name, surname and company name to retrieve the address of the contact.

The type of activity created is determined by the **User Settings**.

Save in Caesar CRM

After composing your e-mail and it's ready to be sent, click the **Save in Caesar CRM** button. The button becomes highlighted indicating that it is toggled.



Click **Send** in Outlook.

If the e-mail address of the recipient doesn't exist in Caesar CRM, a dialog is displayed allowing you to add it to an existing contact or to create a new contact.

Calendar

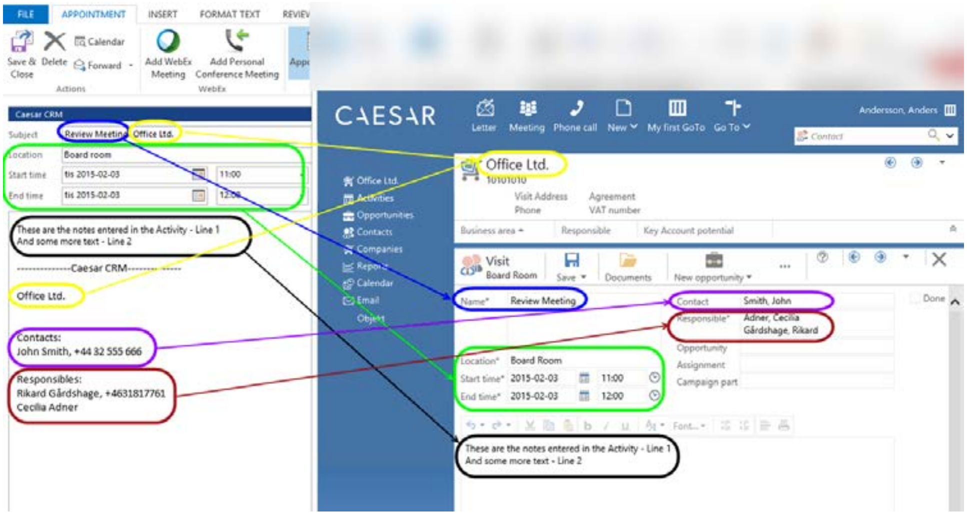
You can create two types of entries in the Outlook calendar: “Appointment” and “Meeting”.

The activity type and duration controls if the activity shows up in Outlook and are determined by the **User Settings**.

The default duration is set to 15 minutes to avoid creating appointments with the same start and end time.

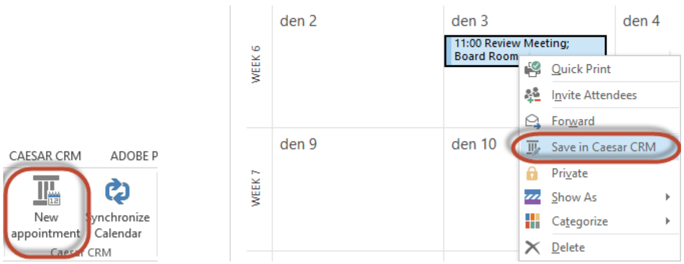
Shared Information

Below picture illustrates the information shared between a Calendar entry in Outlook and an Activity in Caesar CRM.

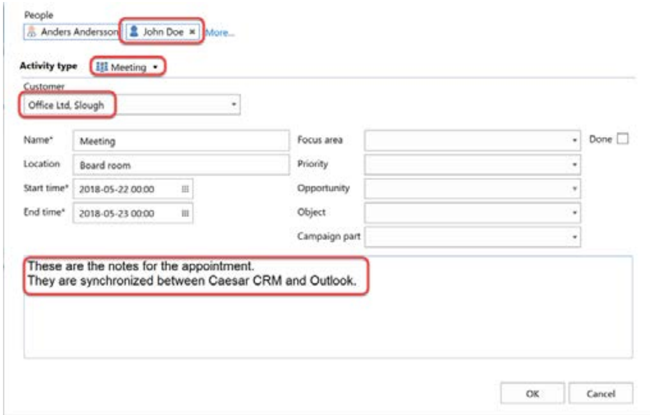


Appointment

You can create a new appointment connected to an activity in Caesar CRM from Outlook using the “New Appointment” button. Or you can right click an existing appointment and select “Save in Caesar CRM” to create a linked activity.

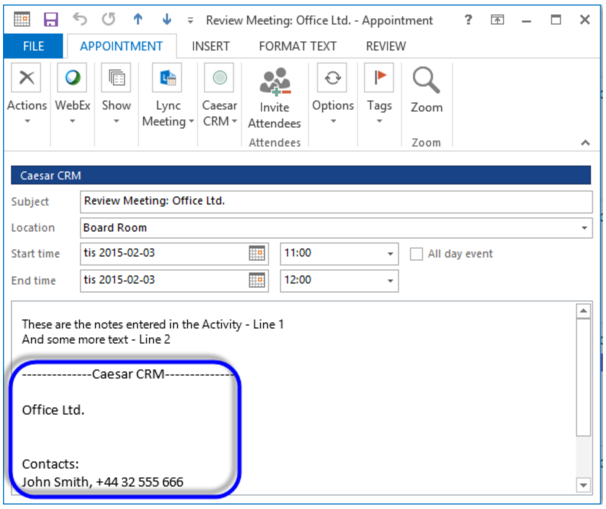


This will open the CFO dialog where you can connect the appointment to an existing or new) contact on a customer. You can also select what activity type to link it to and you can enter notes.



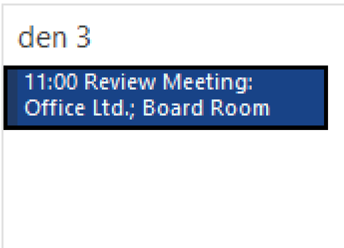
All changes made to your appointment/activity will be updated automatically between Outlook and Caesar CRM. The synchronization time is set to 20 minutes by default (ref. **User Settings**).

When you connect an appointment in Outlook to Caesar CRM, contact information such as visiting address and phone number is copied from Caesar CRM to the notes field in Outlook.



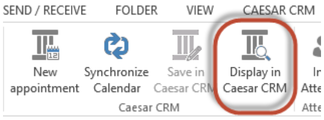
If the activity is created from Caesar CRM, it will be copied to Outlook in the next synchronization.

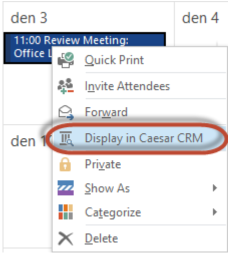
The heading of the linked appointment is set automatically based on the company it is connected to and the activity name.



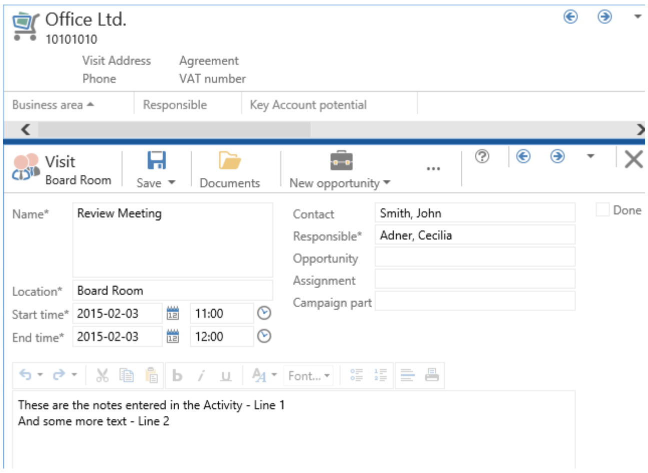
The Outlook **Category** set to tag the meeting as Caesar CRM is also applied, making it easy to distinguish from other appointments.

You can open a linked activity in Caesar CRM using the “Display in Caesar CRM” button or right-click menu option in Outlook.





The linked activity is displayed in Caesar CRM:

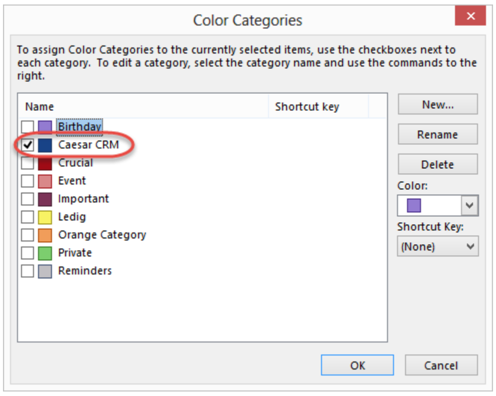


If you synchronize the Outlook-calendar to your cell phone, the contact information will become available there as well.

Category

Activities connected to Caesar CRM will automatically receive their own category to help you separate your work activities from your private ones.

The category is created when installing CFO and you can pick the color for the new category in the Outlook settings.



You can enable or disable use of category in the Outlook tab **Caesar CRM** > **User settings** > **Use category**.

Status

You can decide the status per type for the Activity synchronized with Outlook, either in Caesar Admin or in Caesar CRM > User settings in Outlook.

Please note however that if you change the status in Outlook on a linked calendar entry, the status will not change on the Activity in Caesar CRM.

It is always the Outlook setting that is considered “master”.

Synchronization

Time, **location** and **notes** are synchronized automatically between Caesar CRM and Outlook. If changes are made in Outlook when you are offline, they will be synchronized once you are back online.

The interval synchronized is 50 days back and 365 days forward in time.

Meeting

Meetings allow you to invite others and then save it as an activity in Caesar CRM. All invited users and contacts (**To:** field) are added as responsible or contact (depending on if and where they exist in Caesar CRM).

When you create a meeting, Outlook receives ownership of the connected activity and keeps track of who responds and makes sure everybody has the same information.

If you change the time for the meeting, Outlook prompts you with a question whether to send an update to all participants.

Changes made in Outlook are updated automatically in Caesar CRM. Since Outlook owns the meeting all updates are **only sent one way**: from Outlook to Caesar CRM. This means that no changes made in Caesar CRM will be synchronized.

NOTE: All meeting changes must be done in Outlook. You cannot create a meeting and invite people from Caesar CRM; it has to be created from Outlook.

Recurrence

You can create recurring appointments and meetings in Outlook and connect to activities in Caesar CRM.

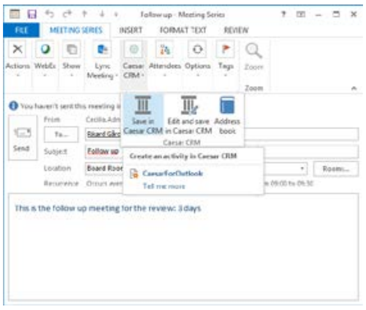
All updates on recurring entries must be done from Outlook since updates on schedule and participants are managed through the Outlook functionality.

NOTE: It is only the first occurrence in the calendar that will be connected automatically. All subsequent appointments/meetings will have to be manually linked using the “Save in Caesar CRM” option for each individual occurrence.

Example

A meeting is created in Outlook to occur once a day for three days in a row.

You click the button **Save in Caesar CRM** to link it to Caesar CRM (the button will become toggled).



You then click the **Send** button in Outlook to invite the participants.

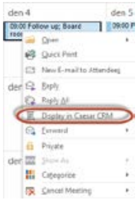
Depending on whether a contact or user exists in Caesar CRM, the CFO dialog appears allowing you to enter customer information and other data. You create the activity by clicking **OK**.

The following message is displayed:

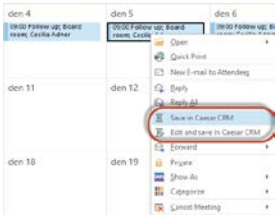
Click **Close** to return to the Outlook calendar view.

Three meetings have now been created in the calendar.

If you right-click on the first occurrence in the calendar the option **Display in Caesar CRM** will be available in the menu.



If you right-click on the two other meetings only the options **Save in Caesar CRM** and **Edit and save in Caesar CRM** will be available. This is because the subsequent two meetings have no link to Caesar CRM.



In order to connect these subsequent meetings you have to use the **Save in Caesar CRM** option(s) and manually create a linked activity to each entry.

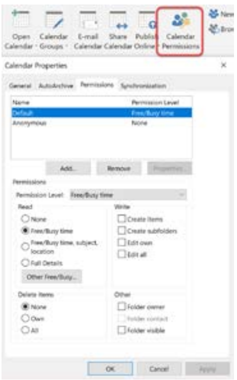
Other user's calendar

It is also possible to create meetings as activities in Caesar CRM from another person's calendar.

In order to make this work you have to have the proper permissions to that other person's calendar.

The person in question must also exist as a user in Caesar CRM with proper role permission i.e. Create Activity.

Below is an example from settings in Outlook 365.



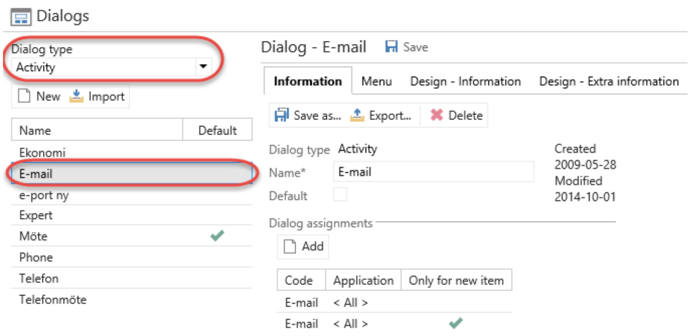
Workflow

It is possible to customize the workflow for e-mail and calendar to fit your way of working.

Dialogs

You can decide what field to display and if any fields are mandatory.

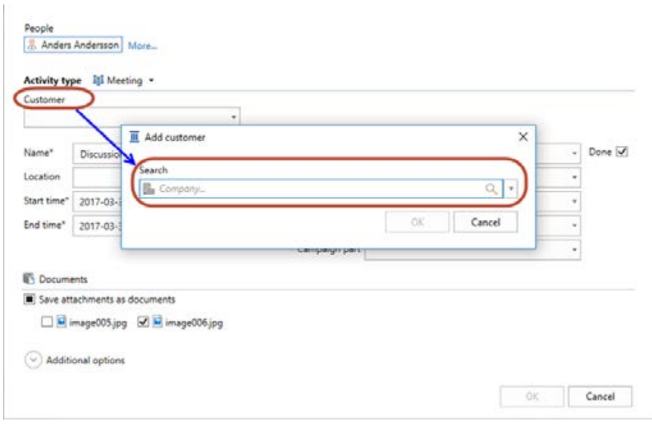
You do this by creating your own dialog and connecting it to the activity type for e-mail in Caesar Admin.



Search reports

When you look for contacts, companies and users in Caesar for Outlook, the Quick search in Caesar CRM is used.

You can customize or add your own search report (Quick search) using Caesar Saint Designer.



Publishing

For a quick search to be available in Caesar for Outlook it must be published using the **Global** option.

Customer search

A customer report is available as Company search only if the **parameter** “Individual” is set to “No”.

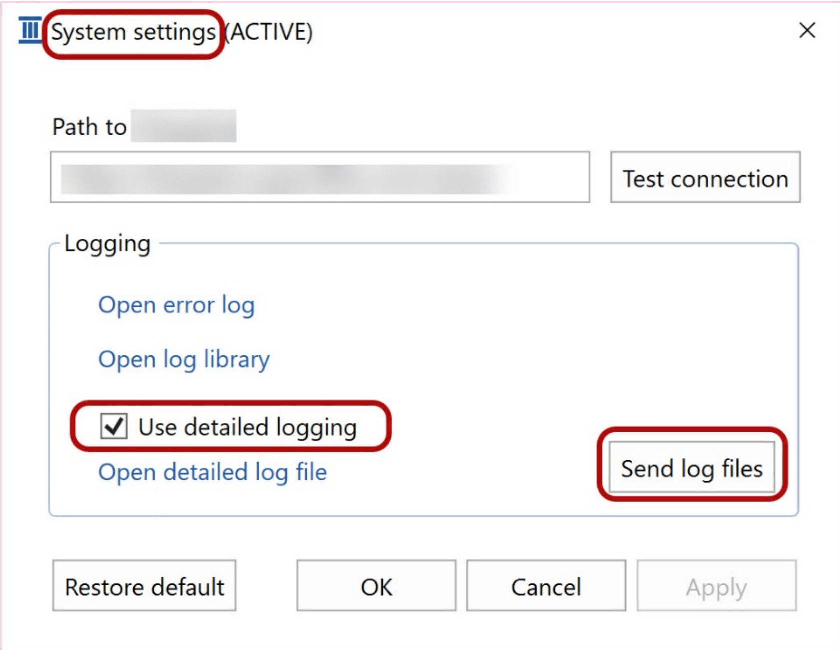
If this parameter is not set, the search report will not appear in CFO.

Support and Troubleshooting

If you run into problems in CFO and need to contact Caesar Expert Center, please do the following:

1. Tick the option **Use detailed logging** under the **System settings**.

   NOTE: Make sure to **Apply** the change.
2. Recreate the steps that generated the error.
3. Send files to ExpertCenter@superoffice.se using the **Send log files** button.



Installation and Add-in Issues

If you experience problems with the installation or loading the Caesar for Outlook Add-In, please refer to following separate documents:

- Caesar for Outlook Installation and Troubleshooting
- Caesar for Outlook Add-In Troubleshooting