



White Paper

Enterprise-Class Outlook Integration

Implicit FrontEnd 8

SuiteCRM & SugarCRM

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EXECUTIVE SUMMARY

Implicit FrontEnd empowers organizations to unify their email and CRM workflows and streamline daily operations for sales, support, and customer-facing teams. Fully embedded in Microsoft Outlook, this product provides seamless access to CRM records such as contacts, accounts, opportunities, meetings etc. enabling users to view, edit, search, and manage CRM data without leaving their inbox.

Key features include a configurable side panel showing relevant CRM context for emails; multitude of email archiving tools (from one-click to fully automated rule-based archiving); robust browsing and search capabilities across all CRM modules including custom modules and two-way synchronization of calendars, calls and contacts.

With centralized administration and user-specific customization, this integration delivers a scalable, secure, and highly efficient CRM experience directly inside Outlook.

BENEFITS

- **Save Time and Boost Productivity**
Eliminate context-switching by accessing, viewing, and editing CRM records without leaving Outlook. Quickly browse, search, and update CRM data in real time, including seamless support for custom modules and fields.
- **Enhance Customer Engagement**
Respond faster and more effectively with instant visibility into relevant CRM information, context-aware side-panel actions.
- **Increased CRM Adoption and Utilization**
Allow users to perform their daily CRM activities seamlessly in Outlook, remove barriers to use and encourage greater CRM adoption and more consistent, effective CRM utilization.
- **Track and archive emails to related CRM records**
Archive emails with flexibility—from one-click to advanced multi-record options and auto-email rule-based archiving—ensuring that every customer interaction is accurately logged and easily traceable in CRM.
- **Seamless Data Synchronization**
Keep Outlook contacts, calendars, meetings, and calls in sync with CRM records, maintaining a single data repository.
- **Maintain Security and Control**
Enforce CRM permissions within Outlook to ensure data integrity, while providing administrators with flexible configuration options to tailor the integration to business needs.
- **Centralized Installation and Configuration**
Install add-in centrally via Microsoft 365 or Exchange on-prem admin center and enable CRM admin to manage users' configuration.
- **Multi-platform Support**
Supports Microsoft 365, Exchange on-prem, Windows, Mac, Mobile, Web, Classic Outlook, New Outlook.

TECHINICAL OVERVIEW

Architecture

Implicit FrontEnd consists of two components:

Implicit FrontEnd Add-in – Installed on either Microsoft 365 or Exchange on-prem. It can be installed through the admin center on corporate accounts or by users on their individual accounts. If installed by admin, the admin can select the users or groups who would be given access to the add-in.

Implicit FrontEnd Desktop App – Microsoft limits access of Outlook add-ins to the email message that the user has selected in Outlook. To overcome this limitation and offer functionality that requires background processing, Implicit provides a desktop app that tightly works in conjunction with the Outlook add-in and offers features such as calendars and contacts sync and auto-email archiving.

Deployment

- **Desktop App Installation** – The desktop app is installed by users directly from the Add-in. In deployments where users are restricted from installing software on their desktops, Implicit provides MSI installers that can be centrally and silently installed by administrators over the network for a pre-defined group of Implicit users.
- **Microsoft 365 Permissions:** Administrators can centrally manage permissions granted to Implicit FrontEnd to access users' mailboxes including access to email, calendar, contact etc.
- **Configuration Management:** Administrators can centrally manage user configuration, including license key, selecting CRM modules that are accessible by the add-in, selecting the modules in the side panel and their order of appearance, Sync settings and email archiving rules.

Security and Compliance

- **CRM Connectivity:** Securely connects to CRM via REST API
- **Microsoft 365 Connectivity:** Securely connects to Microsoft 365 via REST and Graph APIs.
- **Exchange on-prem Connectivity:** Securely connects to Exchange on-prem via Exchange Web Services.
- **Authentication:** Supports SAML Single-Sign-On or basic authentication.
- **CRM Data Security and Privacy:** CRM data exchange takes place directly between users' desktops and your CRM server. No CRM data flows through Implicit.
- **Permissions Enforcement:** Fully respects CRM's role-based permissions. Users can only view and access modules they have permissions to access. CRM fields' attributes such as mandatory, read-only etc. are retrieved from CRM and enforced in Outlook.
- **Enterprise-Ready Deployment:** Supports deployment in regulated environments with administrator-level control over settings, module availability, and user permissions.

Data Customization Support

- **Dynamic Layout Rendering:** Automatically retrieves and displays CRM record layouts in Outlook exactly as configured in CRM, including custom modules, fields, custom layouts and customized views.
- **Custom Modules:** Fully supports viewing and editing custom CRM modules and fields, ensuring that any CRM customization is available to users inside Outlook without extra setup.

Email Archiving Capabilities

- **One-Click Archive:** Quickly archive emails to CRM records from side panel.
- **Advanced Archiving Tool:** Search CRM, select multiple records for association, customize subjects, and apply rules for future messages in a conversation.
- **Auto-Archiving Rules Engine:** Define rule-based archiving based on email addresses, domain names, or organization-wide CRM contacts/leads.

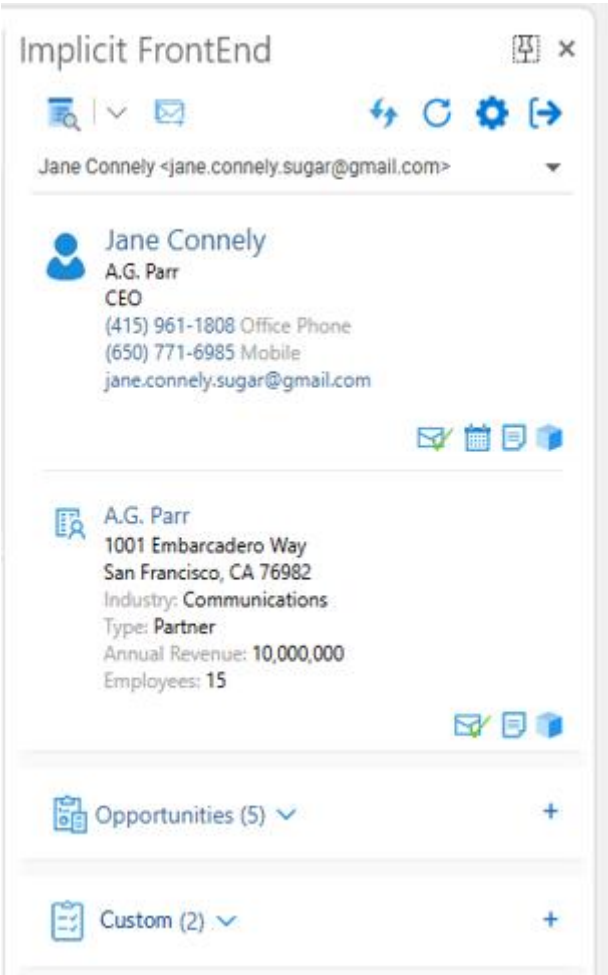
Browsing and Searching CRM Records

- **CRM Browser Window:** Dedicated window to browse or search all CRM records by module, apply filters, and view/edit records without leaving Outlook.
- **Configurable Module List:** Admins can control which modules are available for browsing to align with CRM permissions.

FEATURES AND FUNCTIONALITY

Side-Panel

Implicit FrontEnd side-panel displays relevant CRM information alongside emails, enabling users to take quick, informed actions without leaving their inbox. When an incoming or outgoing email is selected in Outlook, the side-panel identifies the CRM contact or lead and displays the related CRM records including account, opportunities, cases, meetings, tasks as well as custom modules. The list of modules and their order of appearance is configurable. Users can view or edit CRM records directly from the side-panel and take actions such as archive the email to selected records, schedule meetings and create notes.



Viewing/Editing CRM records

To provide seamless CRM experience inside Outlook, save time and improve efficiency, Implicit enables users to view and edit CRM records natively in Outlook without having to switch platforms. The records appear in their **native CRM layout**, including standard and custom fields. Data integrity and security are maintained by enforcing CRM permissions in Outlook.

AC A.G. Parr LLC ✎ ↻ 📷

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Business Card

Website http://www.agparr.com	Industry Biotechnology
Member of A.G. Parr LLC	Type Partner
Business Center Name	Service Level
Assigned to Ron Man	Office Phone (378) 194-0001
Tags	
Dep Field	

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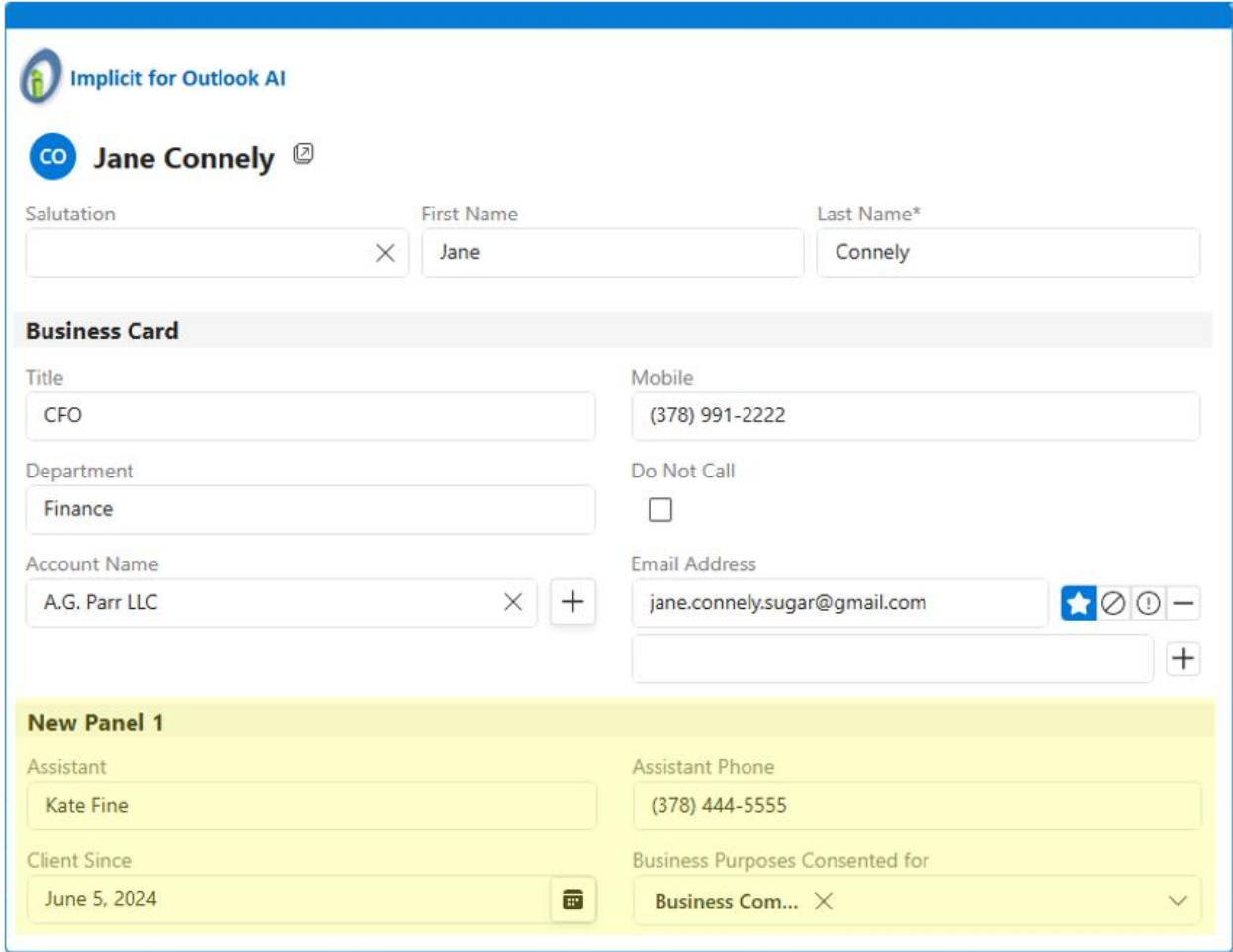
Records also include a 'Relate to' section (equivalent to sub-panel in the CRM) where related records are displayed in card view and can be accessed directly from this window.

The screenshot displays a CRM interface with a sidebar on the left containing expandable sections: Meetings, Tasks, Notes, Contacts (selected), Opportunities, and Leads. The main content area shows five contact cards under the 'Contacts' section. Each card includes a circular profile icon with 'CO', a name, and contact details such as City, State, Email (Primary), and Office Phone. A 'Load more...' link is positioned between the third and fourth cards.

Name	City	State	Email (Primary)	Office Phone
Lorenzo Gomez	Ohio	CA	lorenzo@Gomez.com	
Ms. Victoria Rogers		AL	sugarcrmdemo7.6@gmail.com	
tester1 tester1	San Francisco	CA	tester1@implicitweb.com	(378) 194-0002
Chelsea Lopresti	Ohio	NY	dev16@example.tw	(144) 845-3927
Parker Ehlers	Los Angeles	NY	support34@example.cn	(644) 924-1959

Seamless support for custom modules/fields

As mentioned above, Implicit dynamically retrieves the records layout information from the CRM and applies it in Outlook. This provides customers with an extremely important benefit of automatically and seamlessly bringing all their customizations to Outlook. That includes custom modules, custom fields and customized layouts and views. As you can see in the example below, a new custom panel “New Panel 1” with a set of custom fields were added to the CRM contact module and are visible and accessible from Outlook.



Browsing / Searching CRM records

In addition to being able to view and edit CRM records related to specific email messages, users are also able to browse and search all CRM records directly from Implicit and view/edit records (subject to their permissions). They can search for records by setting the corresponding filters.

The list of modules is configurable by the administrator.


The screenshot displays a CRM interface with a table of accounts and a search sidebar. The table has columns for Name, City, Billing Country, Phone, Email Address, and Date Modified. The search sidebar includes a 'Search' button, a dropdown menu for 'Accounts', and a 'View' dropdown set to 'All Accounts'. Below these are 'Filters' for Name, Type, Industry, Street, City, State, Postal Code, Country, Office Phone, Website, Assigned to, and Email Address. At the bottom of the table, it shows 'Showing 1 - 20 of 146 records' and a pagination control with page numbers 1 through 5.

Name ↓	City	Billing Country	Phone	Email Address	Date Modified
360 Vacations	Palo Alto	France	(743) 464-7206	support@example.ne	2023-08-09
360 Vacations	San Mateo	USA	(182) 283-2022	beans.support.qa@e	2023-05-19
A.G. Parr LLC	San Francisco	USA	(378) 194-0001	info.phone@example	2023-11-14
AAA					2017-10-09
ABC Corp					2019-02-01
Acc 321				info@acc321.net	2024-03-21
Acc 323	Palo Alto	United States	7778	info2@acc323.com	2024-03-23
Acc 323 from C...	San Francisco	United States	3331		2024-03-23
Avery Software ...	Cupertino	USA	(320) 013-8679	im43@example.com	2023-04-09
Calib Systems Inc.	Cupertino	USA	(296) 710-6259	test@test.com	2022-12-07
Calm Sailing Inc	Salt Lake City	USA	(210) 306-0532	hr.beans@example.tv	2022-06-10
Calm Sailing Inc	Cupertino	USA	(404) 076-1757	phone.section@exam	2022-06-10
Calm Sailing Inc	Santa Monica	USA	(497) 118-2064	support.support.bear	2022-06-10

Email Archiving to CRM

Implicit offers multiple email archiving methods to fit different customer engagement scenarios:

- **One-click email archive** – Archive an email to a CRM record on the side-panel
- **Advanced Archiving Tool** – Archive emails to multiple records, search across CRM modules, customize the subject, and set rules for future emails in an email conversation.

 **Archive Email to CRM**


Subject:



Archive to all email recipients who are CRM contacts / leads and their respective accounts


Associate with the following records:


Type	Name
<input checked="" type="checkbox"/> Contacts	Jane Connely
<input checked="" type="checkbox"/> Accounts	A.G. Parr LLC
<input type="checkbox"/> Opportunities	A.G Parr Customization Configuration and Training
<input type="checkbox"/> Opportunities	New Demo Opp for AG Parr
<input type="checkbox"/> Opportunities	Demo to Oskar
<input checked="" type="checkbox"/> Opportunities	New Opp for AG Parr
<input type="checkbox"/> Opportunities	A.G. Parr PLC - 162 Units

Associate with this record:

Related To: 

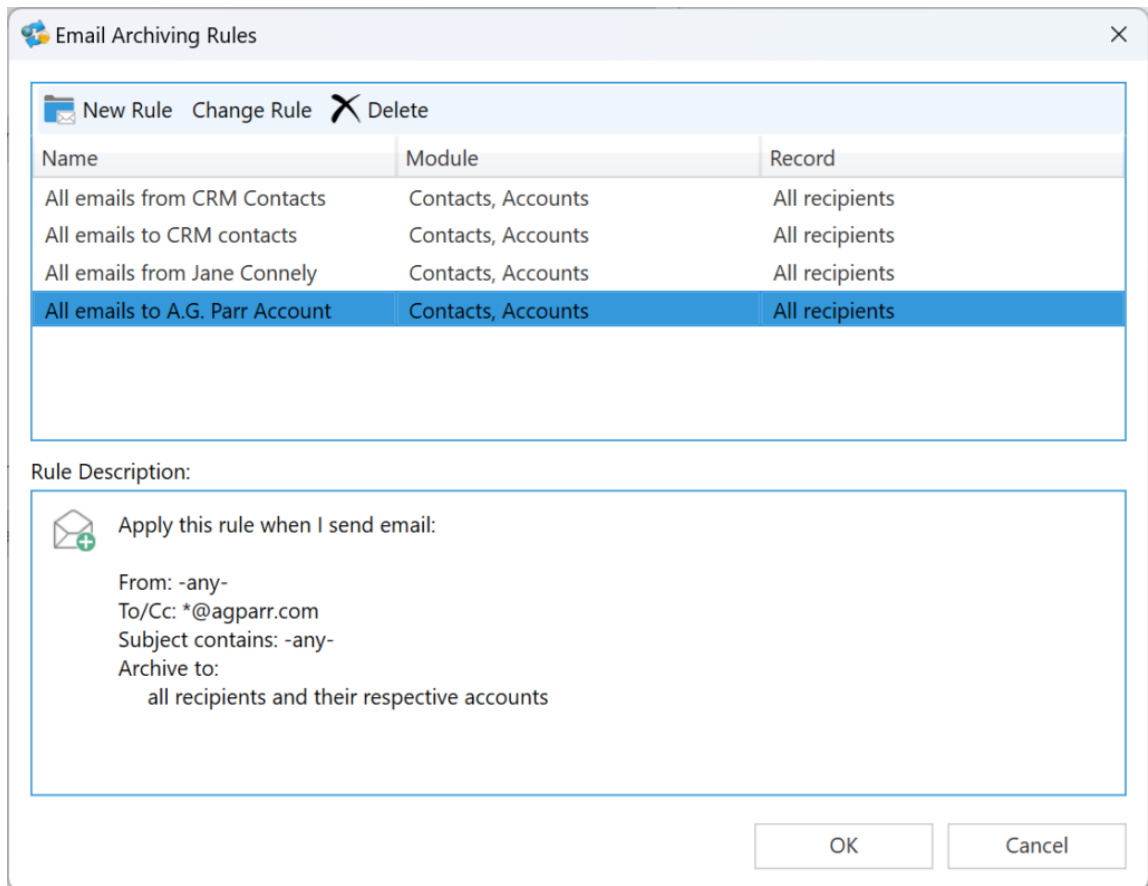
Related To Item:  

Team: 

Assigned To: 

Automatically archive all future messages in this conversation to the selected CRM records

- **Auto-Email Archiving** – Use a rule-based engine to automate archiving based on:
 - Specific email addresses
 - Account domain names
 - Organization-wide rules for all CRM contacts/leads



Synchronizing Calendars, Calls and Contacts

Implicit enables users to keep their Outlook contacts and calendars in sync with your CRM contacts, meetings and calls. Users can control the synchronization of each module separately as well as relate meetings to specific records.

Implicit for Outlook

Sync this meeting with CRM

[Meeting AI Insights](#)

Meeting is related to:

Module:

Record:

Assign meeting to:

User:

Team:

Meeting Call

Meeting type:

Status:

Note: The meeting will be synced to CRM after the invite is sent.

[Open in CRM](#)

[AI Insight](#)

Transcribe meeting and generate AI Insights

NEXT STEPS

1. Please visit our website at: <https://outlook-integration.com/>
2. Watch the [introductory video](#)
3. Review Implicit FrontEnd 8 [White Paper](#)
4. Install the product on your Microsoft 365 account directly from: [Microsoft AppSource](#)
5. Register for a [30-day free trial](#) or [contact us](#) to schedule a private demo.
6. Contact sales at sales@implicitweb.com or at: +1 (408) 737-9609
7. Additional Resources:
 - a. [Admin Guide](#)
 - b. [User Guide](#)