Connect Tip Sheet

Preamble:

Please note that these tips are not designed to replace the user and administrator documentation on the Sugar Support site and specifically the Sugar Connect documentation. Instead, it is designed as a quick reference sheet for the setup process and for troubleshooting specific situations.

Prerequisites:

- Enterprise mailbox
  - Free accounts(e.g. gmail.com, hotmail.com, etc.) are not supported.
  - Developer accounts (e.g. onmicrosoft.com) are supported.
- A cloud-based mail provider
  - On-premise Exchange servers are not supported.
- SSO is supported via IdM, which requires SugarCloud.
- When using Windows and Office, make sure the versions match the requirements.
- When using O365, the following two configurations are required:
  - No aliases.
  - No simultaneous work and personal accounts.
- In the browser, third-party cookies need to be enabled.
- The Sugar instance must be accessible via the internet if hosted on-premise. Alternatively, the IPs listed in this document need to be allowed.
- In Admin > System Settings > Advanced, verify that "Validate user IP address" is disabled.

Failing to meet any of these prerequisites will result in Sugar Connect not being able to be configured for some or all users.

Installation for individual users in O365:

1. Go to the sidebar > All Apps > Add-Ins.
2. Search for "SugarCRM Connect".
3. Install the Connect Add-In.
4. Test the installation of the Connect Add-In by opening an email. The Connect Add-In should be in the top right corner of the email message menu. If no email is selected in the email client, the Add-In submenu won't appear.

Potential issue:

- Cannot install Add-Ins, or Add-Ins are not available.

Potential root cause:

- Office admin disallowed installation of Add-Ins.

Potential resolutions:

- Work with O365 administrator to allow installation of Add-Ins.

Installation for individual users in Gmail:

1. Go to the sidebar on the left > Get Add-Ins.
2. Search for "SugarCRM Connect".
3. Install the Connect Add-In.
4. Test installation of the Connect Add-In by opening an email. The Connect Add-In should be in the top right corner of the email message menu. If no email is selected in the email client, the Add-In submenu won't appear.

Initial creation/configuration of Connect tenant for all users:

1. Go to the region-appropriate Sugarapps site.
    1. For instances in the Americas region (Sugarcloud instances are on sugarondemand.com), go to https://connect.sugarapps.com/create_tenant
    2. For instances in the EMEA region (Sugarcloud instances are on sugaropencloud.eu), go to https://connect.sugarapps.eu/create_tenant.
2. Set up a new tenant.
3. Wait for tenant creation (5-10 minutes).
4. Verify that the first Connect tenant user is a Sugar admin.
5. Add users (or set up auto-add users).
6. Make sure users are both in Sugar and whatever IdP is used.
7. Make sure users are linked in Sugar and Connect tenant.
    1. Auto-linking is done via email match.
    2. Connect users can alternately be manually linked to Sugar users, negating the need for the email addresses to match.
8. In the Credentials section:
    1. Connect to Sugar instance.
9. Verify Sugar instance (this requires current user to be Sugar admin user). Ensure that the Connect tenant users are linked to users in Sugar. Decide if auto-create users based on domain is desirable.

Potential issues:

- Cannot verify the Sugar instance.
- Users can't sync to the Sugar instance.
- Users can't access the Sugar instance from the Connect sidebar.
- Users can't update Connect admin credentials, or other

Potential root causes:

- Misconfiguration of admin and regular users in Connect tenant.

Potential resolutions:

- Verify configuration of Connect tenant with above suggestions.

Miscellaneous user and email configuration notes:

- If your email infrastructure uses both Outlook and Gmail as email clients, set up two tenants with the same license key and target instance. The tenant just functions as a pass-through, and this setup will not lead to duplicated item syncs. For customers using non-IDM Sugar instances, both Connect tenants should be configured with different "admin" users in the CRM data source.

Calendar, Contact, and Email sync will fail otherwise. This is because the admin user is used to do the actual syncs.

- If multiple domains are administered by the same environment (such as acmecorp.com and acmecorp.co.uk), one tenant can work. If one tenant is used, users can only be auto-created for one domain. Users for the other domain(s) need to be invited manually.
- Users with multiple email addresses (such as jsmith@acmecorp.com and john.smith@acmecorp.com) should be mapped to multiple users in Sugar. Otherwise, using the sidebar will result in logouts. Additionally, if a user has multiple inboxes inside Outlook (in order to access multiple email addresses), the recommendation is to select one inbox to sync to Sugar via Connect. Otherwise, there is a risk that Calendar entries get duplicated inside Sugar.
- When manually linking a Connect user with a SugarCRM user (rather than using the Auto-link feature), click the refresh button (the two circling arrows labeled "Trigger Now") next to the Auto-link switch first. This refreshes the current CRM user list shown when clicking the chain link to select a CRM user. If users are still not refreshed, use the "Refresh" button in the dialog that opens when clicking on the button "Change Linked CRM User". See image below for location of that button.

Sugar Connect Users

The list below shows Sugar Connect users in your tenant. In order for sync to work, these users have to be linked to their SugarCRM account. If you see a message "no CRM user linked" for a user, then click on the chain link to connect the users to their respective SugarCRM account.

Change Linked CRM User

- If users change email providers, they need to create new users in the new Connect tenant.

To configure sandboxes with Connect:

Set up a new tenant following the above instructions. You can reuse the license key and point the tenant at the sandbox. Note that you need to be logged out of your Microsoft or Google account to create a second tenant, or use an Incognito/Private browser mode. Otherwise, the system will default you to your existing tenant.

If users are directed to the wrong tenant or Sugar instance:

- If the user is always presented with the wrong tenant (in the case of being assigned multiple tenants), use an Incognito/Private browser to log in to the tenant, or clear the cookies and cache for *.sugarapps.com.
- If the user is directed to the wrong Sugar instance in Outlook, clear the Outlook cache.

Sidebar setup and troubleshooting

The Connect Sidebar works with an on-premise Sugar instance. It works with SSO only with Sugar Identity Manager, i.e. SugarCloud.

How to set up Sidebar for individual users:

1. Open an email (Sidebar requires email to be open, either in a separate window or in the preview).
2. Access the Connect menu from the Email menu.
3. Select the Sidebar menu item.
4. Log in to Connect (with Office/Gmail login).
5. Log in to Sugar (with Sugar instance login).

To sync specific emails:

- Use tags and folder rules to sync only specific emails by controlling which emails get copied to the "Sync to CRM" folder/tag.
- To sync items in the Sent folder, Outlook client users need to create client-side rules. Server-side rules only work for received messages.

Troubleshooting Sidebar loading issues:

Sidebar issues can generate several different error messages and behaviors. This is a broad overview of some of those symptoms. For potential root causes and resolutions, see further below. The order of the symptoms and root causes are related (in other words, symptom #3 is likely related to root cause #3), but does not guarantee that they're related. As a result, it is recommended to check through all potential symptoms and root causes to see if there is a closer match to your specific situation.

Potential issues:

1. Specific users are not able to load some add-ins.
2. A blank space where the Connect Add-In should show data and general information.
3. Error messages, either "Sorry, we had to restart because this add-in wasn't responding" or "A problem occurred while trying to reach this add-in" on a background of a yellow bar.
4. Trying to reach the tenant shows a proxy error ("Http failure response for https://proxy.connect.sugarapps.com/proxy: 503 OK") or a red error bar in the Add-In space.

Potential root causes:

1. Outlook administrators have disallowed add-ins.
2. Windows or Connect versions are not supported.
3. Connect Add-In is taking longer than expected to load, causing Windows to interrupt the loading. This can be due to a lack of computing resources on the user machine itself, the time it takes to load the metadata from Sugar, or the machine temporarily being unable to service the Add-In requests before the Windows time-out triggers.
4. Issue reaching various Connect servers, such as the sugarapps.com proxy server.

Potential resolutions:

1. Work with Outlook admins to configure Add-Ins.
2. Upgrade Windows and/or Connect to a supported version. Specifically, make sure to download the latest Connect version from the Windows app store.
3. In the case of suspected performance issues causing Windows to time-out the add-in, please capture as much information as possible around the environment of the machine (OS version, Outlook version, hardware in use, network bandwidth, etc.), and open a ticket with Support containing that information.

    4.   Wait for the resolution of Connect infrastructure issues.

4.   Check known issues: https://support.sugarcrm.com/Documentation/Plug-ins/Sugar_Connect/Sugar_Connect_Release_Notes/

Miscellaneous Connect troubleshooting

Things to check if there are various error messages, sync or data issues, or other connection/update issues:

- Check known SugarConnect issues (https://support.sugarcrm.com/Documentation/Plug-ins/Sugar_Connect/Sugar_Connect_Release_Notes/).
- Check whether the license has expired, or is otherwise mismatched
- Check tenant information for incorrect setups or other mismatches. Some examples:
    - The user is using Gmail, but the tenant shows O365 as the provider.
    - The user doesn't show up in the list of users in the tenant.
    - The Connect user isn't synced to a Sugar user.
- Check if using the "Reset Calendar/Contact synchronization" button in the Connect tenant fixes the sync issue. This is likely to work if the sync issue is tied to sync commands not continuing (i.e. the sync is "stuck").
- Check if the Certificate Chain is complete.
    - On the Sugar backend, the logs should show an entry with "certificate verify failed".
    - On the user side, certificates should show just the leaf certificate.
    - Note: this should be an unlikely scenario, as this would impact software other than just Connect.

Miscellaneous tips:

Make sure to familiarize yourself with the expected record sync functionality :

- https://support.sugarcrm.com/Documentation/Plug-ins/Sugar_Connect/Sugar_Connect_User_Guide_for_G_Suite/
- https://support.sugarcrm.com/Documentation/Plug-ins/Sugar_Connect/Sugar_Connect_User_Guide_for_Office_365/
- Notable calendar sync rules (https://support.sugarcrm.com/Documentation/Plug-ins/Sugar_Connect/Sugar_Connect_Portal_User_Guide/#Sync_Rules_for_Calendar_Events):
    - The calendar sync behavior differs between Gmail and O365.
    - Sync of recurring meetings is not supported.
    - Sync of meetings where the user is a guest is not supported.
    - The external calendar always wins when there are conflicts between the external calendar and the Sugar calendar

How to successfully troubleshoot Connect issues:
- Use Incognito window.
- Use the Network tab from Developer Tools.
- Check for network connectivity, error messages, and authentication messages.

How to check for Windows version:
- Search for "System Information" in the Windows search bar.
- Open "System Information".
- In the main "System Summary" pane, look for "Version".

Advanced Troubleshooting

Debugging Sugar Connect in Outlook for Mac:

- From a terminal window type: "defaults write com.microsoft.Outlook OfficeWebAddinDeveloperExtras -bool true"
  - o Restart outlook.
  - o Right-click on the Connect side panel.
  - o Inspect element.
  - o In the inspector, choose the debugger tab.
  - o Take a screenshot of the stack trace.
  - o Choose the console tab.
  - o Take a screenshot of the console.
  - o Share the screenshots with Support.
- From the web client
  - o Open outlook in Safari browser.
  - o Use developer tool inspect to see network log.
  - o Save that log as a .har file.
  - o Share that file with Support.

Debugging Sugar Connect in Outlook for Windows.

- Start Outlook and make sure that Sugar Connect loads, even if it loads incorrectly, such as a side panel with a white screen
- Start F12\IEChooser.exe
  - o For the 32-bit version of Office, use C:\Windows\System32\F12\IEChooser.exe
  - o For the 64-bit version of Office, use C:\Windows\SysWOW64\F12\IEChooser.exe
- When you launch IEChooser, a separate window named "Choose target to debug" displays the possible applications to debug. Select the application that you are interested in. If you are writing your own add-in, select the website where you have the add-in deployed, which might be a localhost URL.

Additional detail on the debugging: https://docs.microsoft.com/en-us/office/dev/add-ins/testing/debug-add-ins-using-f12-developer-tools-on -windows-10#when-the-add-in-is-running-in-internet-explorer