Server-Side Synchronization vs Outlook Addin: Choose the Right Thing

GrinMark ships two lines of products that may seem competing to each other since they have overlap in functionality: Outlook Addin for CRM and GrinMark Exchange to CRM Synchronizer. The former is client side software while the latter works at server side. Simplest explanation is historical reasons. Outlook Addin was first and later was superseded with more sophisticated and modern server side synchronization.

From Outlook to Exchange

It is true that server side synchronization is more modern and we recommend our existing customers to consider migration. However we never marked Outlook Addin as deprecated and keep its support and development. In this paper I'll try to describe underlying reasons why each of products may still be needed. Let's look at benefits and pitfalls of each approach. First is Outlook Addin.

GrinMark MS Office Addin

Pros.

- Single button for all. "<>Sugar" button acts as a gateway between Microsoft Outlook (Word, Excel) and SugarCRM. This button stands for all kinds of archiving. Want archive an incoming email? Select it in Outlook and press "<>Sugar". Email archiving dialog helps to you fulfill the functions: find appropriate archiving destinations, or create new entries in CRM (say, create new Lead or Opportunity) and attach an Email to it. Need to track a meeting? Same "<>Sugar" button synchronizes an appointment, a contact or a task if corresponding item is selected in Outlook.
- Fill a word template document based on data from SugarCRM. Document archiving tool used for that.
- Archive any file through "Send to SugarCRM" context menu.
- Multiple languages are supported. Addin is shipped with 7 languages (Dutch, English, French, German, Polish, Russian, Spanish).
- Customization is possible. One can define more archiving destinations (such as archiving to custom modules). Customizations may be deployed to SugarCRM server.

Cons.
The problems below are actually unavoidable drawbacks of any Outlook Addin.

- Client side software should be deployed to each target PC separately. It is hard for maintenance. New versions of MS Office, replaced laptops all require additional support efforts.
- Once user has several working environments Addin needs to be installed and configured in each of them.
- Outlook receives special attention by all kind of protection software. Addins are always considered as potential source of threat by such software. Sometimes Addin is disabled or unloaded as a result of antivirus database update or software upgrade.
- This problem is common for desktop software which gets updated frequently. So something that was working yesterday may stop working today. Usually this may be resolved but requires attention from System Administrators and may cause headache to small companies or individuals who have no permanent IT staff on board.
- Office Addins are for Windows. So people are restricted to keep using desktop version of Windows while functionality is restricted. Addin is not available for Mac, Linux or mobile devices.

GrinMark Synchronizer

Now let's look at GrinMark Synchronizer (AESync for SugarCRM, DXSync for MS Dynamics and SFSync for salesforce.com).

Pros.

- Server side software. Everything is configured and managed in one place. All information, log files, history is at the same place. Adding or changing user(s) is easy.
- Seamless operation. User is free in software choice. Organization may have diverse equipment: Windows, Macs, Linux boxes, tablets and smartphones. Mailbox stay integrated even if one checks his email using web client or phone.
- Non-stop and non-blocking operation. What happens if Exchange is available and CRM is temporarily down or inaccessible? This may be a problem for client-side solutions, but server side will let you keep working with Exchange and later will get all in sync with CRM. So no data is lost. No need to wait for CRM to become accessible to be able to send and archive an email.
- User may define one archiving destination in CRM for each email. Email will be archived to this item and, maybe, to some more destinations found by auto-detection rules.
- Synchronization process may be controlled and monitored. History, journals, logs, notifications - whole set of features to enable visibility of operation. For example, it is possible to set up schedule for synchronization intensity to reduce CRM server load at peak periods.
- Master category list deployment allows setting category colors for all users, so all archived and synchronized items are explicitly marked with required color.
- Easy to setup set of standard scenarios: Synchronize Contacts, Accounts, Leads, Meetings, Calls; List Opportunities, Cases; Archive email to a Contact, a Lead, an Account, a Case, an Opportunity).
- Configurability of standard scenarios. One may define Exchange folders, categories, filtering criteria, one way/two way sync and more.
- Possibility to configure additional scenarios. Such as Listing of Projects, Quotes, custom modules and "Archive To" folders for these modules. Some scenarios are already available from http://www.grinmark.com/ site, others may be developed.
- Customization services are available (support for custom fields and custom modules).
- Cloud and on-premises version. Organization may use our cloud-based synchronization facilities or host the synchronizer internally.
- Users who familiar with email will keep working in email. User feels more comfortable in preferred environment. Server-side thing tries to let user do his work, focus on communication with clients. Synchronizer keeps CRM valid and up to date in the background. This way there is much less chances that some email is lost or forgotten or some chunk of communication thread is missing from the CRM.

Cons.

- Microsoft Exchange Server is a must-have pre-requisite.
- Requires Windows skills to set up local on-premises version. This is only required when synchronizer hosted internally, not an issue for on-demand (cloud) customers.
- Some Exchange management skills are required to set up permissions.
- User may define only one explicit archiving destination for email.

Outline

As we can see each approach has its pros and cons. We can outline the key differences in the following two statements.

Addin is a client-side software. User selects an email, presses "<>Sugar" button and chooses archiving destinations. It should be installed and configured for each user.

GrinMark Synchronizer is a server-side product. It is more automatic and has zero setup cost for end-users. However its flexibility for the purpose of archiving is more limited. From one hand archiving destinations are more limited and sometimes defined automatically (automatic detection of matching Leads/Contacts/Accounts). From the other hand it works same way on a mobile device, Mac or any other client because all is done on the server side.

Company Information

GrinMark provides synchronization solutions to customers all over the world since 2006. Our products integrate Exchange with world leading CRM systems. Our solution is configurable, customizable and has flexible deployment options. Benefits of GrinMark Synchronizer include: well-thought synchronization technology, shared between several GrinMark products, multiple profile and multiple servers support (to facilitate work with large deployments) and attractable pricing. We have many customers all over the world using our products, including small, mid-size and large organizations. GrinMark Synchronizer provides outstanding capabilities for monitoring and tracking of synchronization process thus making problem resolution and administration as intuitive and friendly as possible.

Links

Contact us at sales@grinmark.com or support@grinmark.com
Web Site: http://www.grinmark.com
Product Trials: http://www.grinmark.com/requesttrialform.html
On-premises vs On-demand: http://www.grinmark.com/products/aesync/on-premise-vs-on-demand.html

Supported Systems

Supported CRM Servers

- SugarCRM 6.0 and above
- Microsoft Dynamics CRM 2011, 2013
- Microsoft Dynamics CRM Online
- Salesforce

Supported Exchange Servers

- Microsoft Exchange Server 2007
- Microsoft Exchange Server 2010
- Microsoft Exchange Server 2013
- Microsoft Exchange Server Online, Office 365

What is Synchronized Out-of-the-box

- Contacts, Accounts, Leads
- Meetings, Calls, Tasks
- Cases, Opportunities
- Emails