

Outreach Integration User Manual

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I. Installation and One Time Configuration

Note: The steps noted below are a one-time configuration done by a Sugar administrator to integrate Outreach with SugarCRM and allow for syncing of data.

Installation and deployment:

1. Download the plugin from Sugar Outfitter, a zip file will be downloaded
2. Public key will be received on successful download and payment
3. Navigate to SugarCRM Administration
4. Go to Module Loader
5. Upload the downloaded zip file
6. You will be prompted to enter the key received in the step 2
7. Validate the key from above step
8. Upon successful validation package will be installed

Upon installation, the Outreach Configurations page will be display.

Note: This page is also accessible by selecting “Validate Keys” in the Outreach section on the administration page

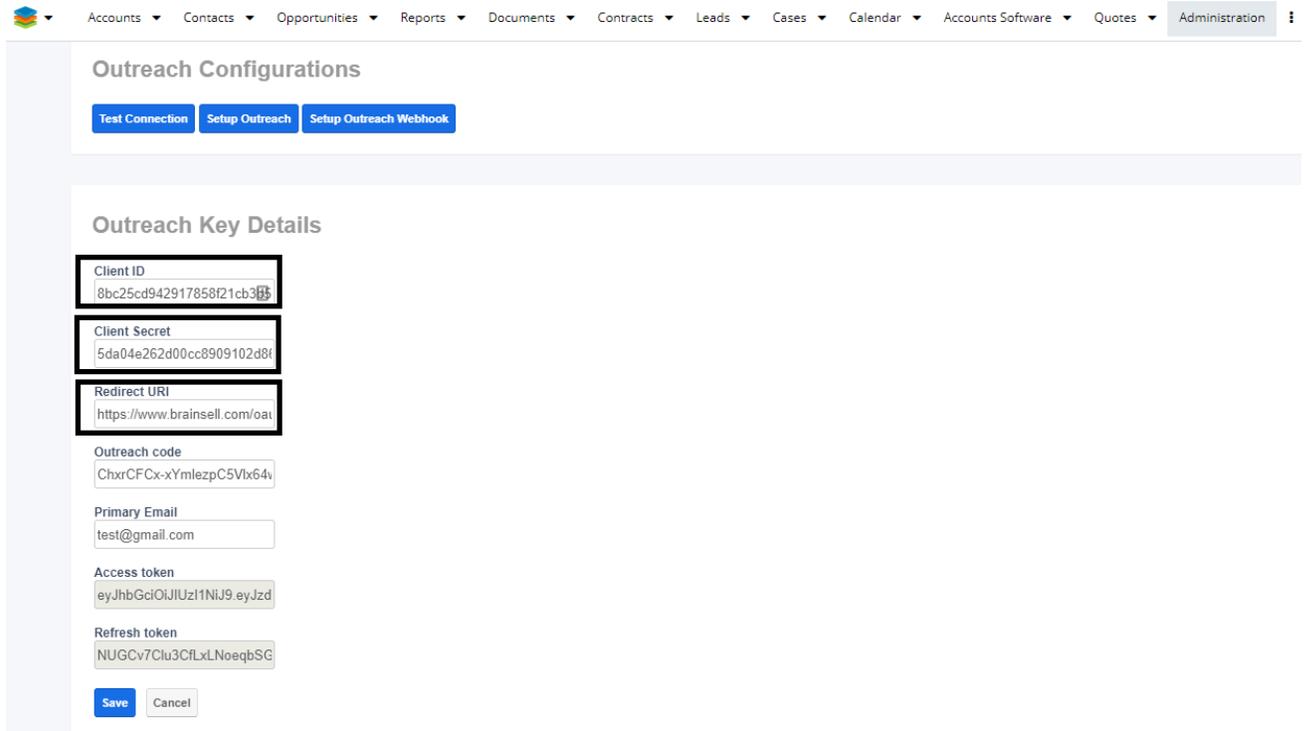
Configuration:

1. Enter the values in the “Outreach Key Details” section fields (see image below):

Client ID: Id provided by Outreach support.

Client Secret: Id provided by Outreach support.

Redirect URI: Enter as <https://www.<YourCompanyName>.com/oauth/outreach> if you haven't registered your company redirect URI use ours (https://www.brainsell.com/oauth/outreach)



2. Click the “Setup Outreach” button at the top of the page to open the Outreach login page in a new tab



3. Enter your Outreach username and password to login to Outreach and display the Authorization page will look like the following screenshot.

Authorization required

Authorize BrainSell to use your account?

This application will be able to

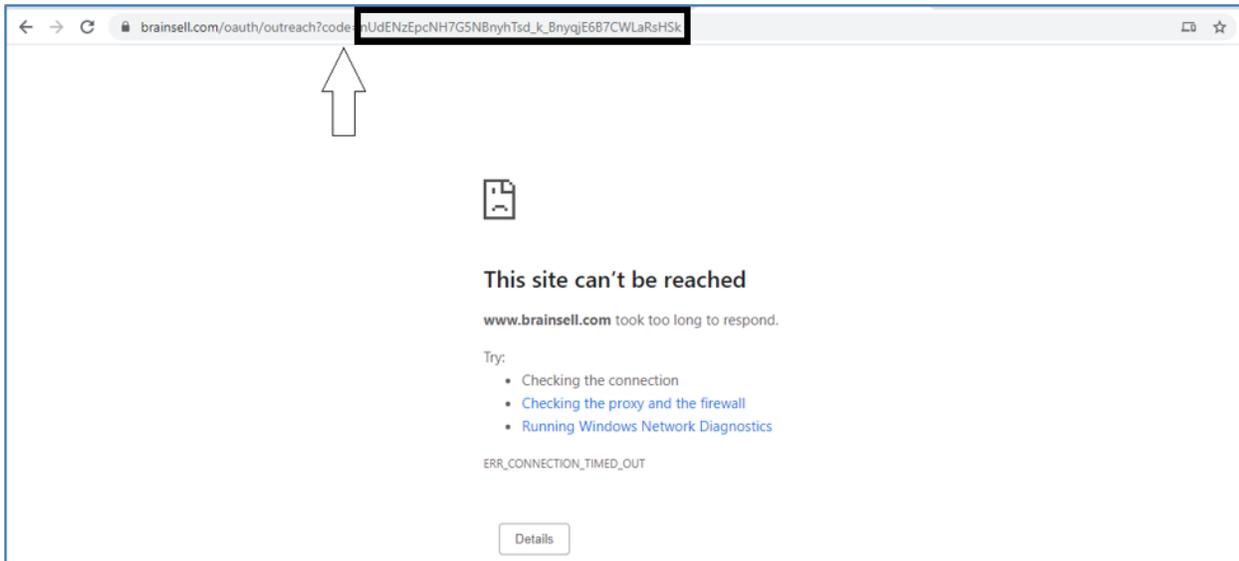
- Profile
- All Operations On Recipients
- All Operations On Mailboxes
- All Operations On Opportunity Stages
- Read Opportunity Stages
- All Operations On Stages
- Read Stages
- All Operations On Mailings
- Read Mailings
- Write Mailings
- Delete Mailings
- All Operations On Task Priorities
- Read Task Priorities
- All Operations On Tasks
- Read Tasks
- Write Tasks
- Delete Tasks
- All Operations On Call Purposes
- Read Call Purposes
- All Operations On Call Dispositions
- Read Call Dispositions
- All Operations On Calls
- Read Calls
- Write Calls
- Delete Calls
- All Operations On Accounts
- Read Accounts
- Write Accounts
- Delete Accounts
- All Operations On Prospects
- Write Prospects
- Read Prospects
- Delete Prospects
- Write Webhooks
- All Operations On Webhooks
- Read Webhooks
- Delete Webhooks
- All Operations On Opportunities
- Write Opportunities
- Read Opportunities
- Delete Opportunities
- Write Users
- All Operations On Users
- Read Users
- Delete Users
- Write Opportunity Stages
- All Operations On Profiles
- Delete Opportunity Stages
- All Operations On Phone Numbers

Authorize

Deny

4. Scroll to the bottom of the page and click on the “Authorize” button. You will be redirected to a page in a new tab, like the screenshot below.

Note: Do not close this browser tab as you will navigate back here after getting your code in the next step.



5. Copy the code at the end of the URL, as highlighted in the above image.

NOTE: Make sure '=' is not copied.

Outreach code: Switch to the previous tab in your browser (Step 3) and paste the copied code into the “Outreach Code” field in the “Outreach Key Details” section page.

Enter your email in the **Primary Email** field.

Outreach Configurations

Test Connection

Setup Outreach

Setup Outreach Webhook

Outreach Key Details

Client ID

8bc25cd942917858f21cb385

Client Secret

5da04e262d00cc8909102d8f

Redirect URI

https://www.brainsell.com/oat

Outreach code

ChxrCFCx-xYmlezpC5Vlx64v

Primary Email

test@gmail.com

Access token

eyJhbGciOiJIUzI1NiJ9.eyJzd

Refresh token

NUGCv7Clu3CfLxLNoeqbSG

Save

Cancel

6. Click "Save"

Upon successful connection to Outreach **Access token** and **Refresh token** fields will be auto populated as shown in the screenshot below.

Accounts ▾ Contacts ▾ Opportunities ▾ Reports ▾

Outreach Configurations

[Test Connection](#) [Setup Outreach](#) [Setup Outreach Webhook](#)

Outreach Key Details

Client ID
8bc25cd942917858f21cb385

Client Secret
5da04e262d00cc8909102d8f

Redirect URI
https://www.brainsell.com/oat

Outreach code
ChxrCFCx-xYmlezpC5Vlx64v

Primary Email
test@gmail.com

Access token
eyJhbGciOiJIUzI1NiJ9.eyJzd

Refresh token
NUGCv7Clu3CfLxLNoeqbSG

[Save](#) [Cancel](#)

Congratulations! You have successfully connected SugarCRM to Outreach account.

Outreach Webhook Details

This last step in the initial connection process allows for the syncing of data from Outreach to SugarCRM. Whenever information in Outreach is added or updated, SugarCRM is notified and updated via a webhook.

1. Navigate to the Outreach section on the SugarCRM Administration page
2. Click on the “Validate Keys” link
3. Click on the “Setup Outreach Webhook” button



Outreach Configurations

Test Connection

Setup Outreach

Setup Outreach Webhook

Outreach Key Details

Client ID

8bc25cd942917858f21cb385

Client Secret

5da04e262d00cc8909102d8f

Redirect URI

https://www.brainsell.com/oat

Outreach code

ChxrCFCx-xYmlezpC5Vlx64v

Primary Email

test@gmail.com

Access token

eyJhbGciOiJIUzI1NiJ9.eyJzd

Refresh token

NUGCv7Clu3CfLxLNoeqbSG

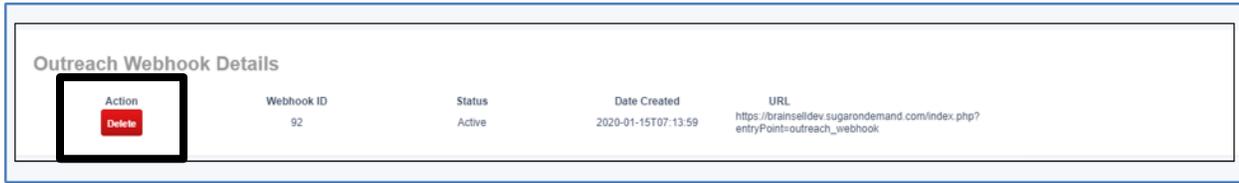
Save

Cancel

4. Scroll down to see the Outreach Webhook Details section. If the Webhook ID field is populated, setup is complete.

Outreach Webhook Details				
Action	Webhook ID	Status	Date Created	URL
Delete	92	Active	2020-01-15T07:13:59	https://brainselldev.sugarondemand.com/index.php?entryPoint=outreach_webhook

If you want to manage records in Outreach and not have them sync to SugarCRM, you can disable the webhook by clicking the “Delete” button.



Action	Webhook ID	Status	Date Created	URL
Delete	92	Active	2020-01-15T07:13:59	https://brainselldev.sugarondemand.com/index.php?entryPoint=outreach_webhook

2. Build Field Mapping

After the successful connection between SugarCRM and Outreach, the SugarCRM administrator needs to map which SugarCRM fields in each module will sync with Outreach.

1. Navigate to the SugarCRM Administration panel
2. In the Outreach section click on the “Configure Sync Fields” link to display the field configuration page.



The configuration page will display all available fields for mapping by module.

3. **Module:** Select the module from the dropdown field on the top left, to see the available fields in that module to map.
Sync Enabled?: Select “Yes” in the dropdown if you want to sync records in the selected module.
Outreach Fields: The list of Outreach fields available for mapping with SugarCRM fields in the selected module are listed. If there are fields in the SugarCRM module that do not exist in Outreach, you may be able to map them to a custom field.
SugarCRM Fields: Select the SugarCRM field in that module from the SugarCRM dropdown list that corresponds to the Outreach field you wish to sync with.
Sync Direction: This provides the option, by field, to select whether to sync from Sugar to Outreach, from Outreach to Sugar, or bidirectionally.

Outreach Configurations

Module: Accounts ▼

Sync Enabled? Yes ▼

Sync Direction	Outreach Fields	Map With	SugarCRM Fields
Bidirectional ▼	companyType	Map With	Type ▼
▼	custom1	Map With	-none- ▼
▼	custom10	Map With	-none- ▼
▼	custom100	Map With	-none- ▼
▼	custom11	Map With	-none- ▼
▼	custom12	Map With	-none- ▼
▼	custom13	Map With	-none- ▼
▼	custom14	Map With	-none- ▼
▼	custom15	Map With	-none- ▼
▼	custom16	Map With	-none- ▼
▼	custom17	Map With	-none- ▼
▼	custom18	Map With	-none- ▼

4. Click on the “Save” button to save the mapping.

Call Module Mapping for Status

Outreach only has two status options for Calls – Answered and Not Answered, whereas SugarCRM has three out of the box status options – Scheduled, Held and Cancelled.

Below is the mapping of “Status” field between SugarCRM and Outreach

Sugar CRM	Outreach
Held	Answered
Cancelled	Not Answered
Scheduled	When a Call action is created from Sequence

II. Sync Filters

Sync filters are used to select criteria for which records in a module should be synced to Outreach.

This functionality is available for the following modules:

- Leads
- Accounts
- Contacts
- Opportunities
- Calls
- Tasks

Leads Sync Filter

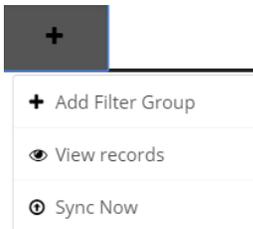
The Leads filter allows the user to create a default setting for which SugarCRM Lead records will sync to Outreach.

This filter can be configured in the admin panel, or by an Outreach user in the “Outreach Filter” module

1. Navigate to Administration panel, or the Outreach Filter module
2. Scroll down to the “Outreach” Section
3. Click on the “Leads Inbound Filter” to display the filter configuration window.



1. Click the On and Off toggle button to enable filters to be set and used.
2. Click the “+” sign on left to display a dropdown menu with the following three 3 options



- a. **Add Filter Group:** Selecting this option displays a “Select” field.



- i. Choose the field you want to filter on from the dropdown list to display the filter criteria fields.
- ii. Click the “+” sign to the far right of this row to add another filter to the group.

For example, the filter in the below screenshot notes that only Leads with a Status = In Process AND Date Created = last 7 days will be synced with Outreach.



To add an OR filter, select Add Filter Group from the initial menu to add a new group. In this example only Leads with a Status = In Process AND Date Created = last 7 days OR a Follow-Up Date = next 7 days will be synced with Outreach.



To remove a filter click the “-” sign to the right of the relevant row.

To remove a group, click the “-” sign above the filter on the left

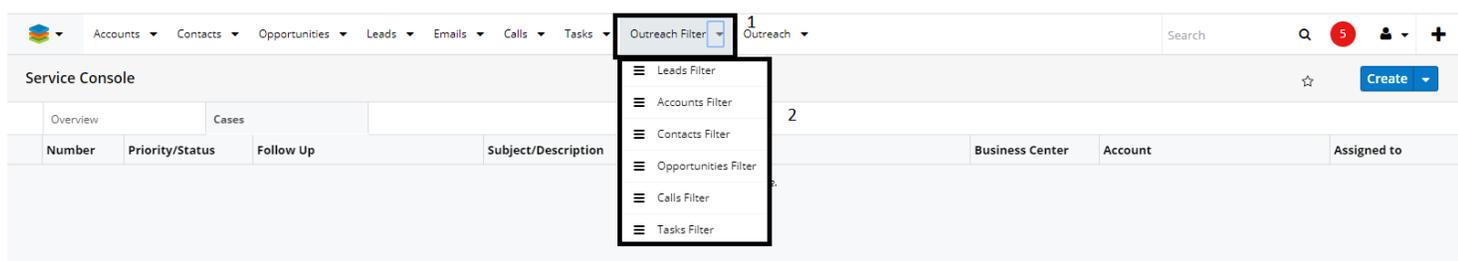
- b. **View Records:** Click the “+” sign on left and select View Records to see a list of all records that meet the filter requirements.
- c. **Sync Now:** Click the “+” sign on left and select Sync Now to sync all qualified records with Outreach.

3. Click the “Save” button to save your filter, and the “Close” button to close the panel.

Accessibility of Filters

The filters are accessible from module tabs as “Outreach Filter”. Only System Administrators and regular users with Outreach Role assigned will be able to access the filters.

When you click on “Outreach Filter” in the SugarCRM navigation panel, Leads filter will be opened. In order to access other filters, click the dropdown arrow to the right of left the Outreach Filter module name to display a menu with the other available modules, as shown in the below (2).



Notes for Filters

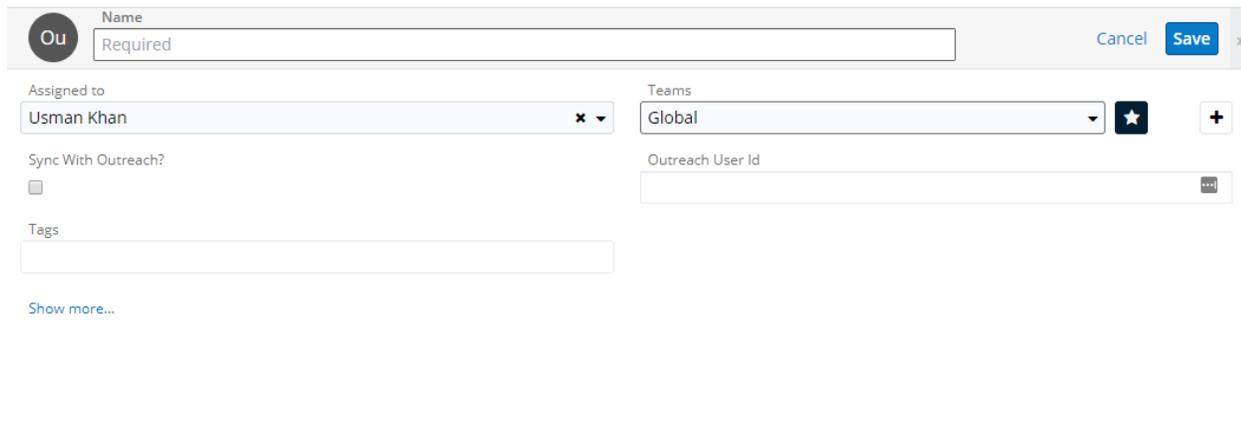
- The process for setting filters on all module is the same as shown in the Leads Inbound Filter section, above.
- Filters for all modules have a default setting of “Off”.
- Only Leads filter is available from Administration panel. When you click on “Leads Inbound Filter” other filters will be accessible as well from top bar menu under the “Outreach Filter” module.
- Associated records that do not meet the related filter requirements to sync, will not sync .
For example: A Contact is created which meets the filter criteria, but its related Account does not, then the Contact will be synced but not the Account. In order to sync the related Account, fix the record and click on “Send to Outreach” button and they will be linked in Outreach.

Outreach User Configuration

The integration app provides the ability to configure which user(s) have access to view Outreach functionality in SugarCRM and/or sync SugarCRM data within Outreach.

NOTE: This module is only available to SugarCRM administrators

1. Navigate to the Outreach module in SugarCRM to display the list of authorized users.
2. Click “Create” to add a new user and complete the fields as follows:



The screenshot shows a form for creating a new Outreach user. At the top, there is a 'Name' field with a 'Required' label and a 'Cancel' button. Below this, there are two columns of fields. The left column includes 'Assigned to' (set to 'Usman Khan'), 'Sync With Outreach?' (checkbox), and 'Tags'. The right column includes 'Teams' (set to 'Global'), 'Outreach User Id', and a 'Show more...' link.

Name: Name of SugarCRM licensed user

Assigned To: Defaults to the user creating the record

Outreach User Id: Select Outreach user corresponding to the user in Sugar CRM. Any sync operation will be done by that user in Outreach.

Sync with Outreach: Select the checkbox to authorize Sugar user access to sync with Outreach

III. Limitations of Outreach API

The Outreach API has a few limitations. This means that there is some information in Outreach that will not be available in SugarCRM.

Emails

Following information will not be available in Sugar for Emails object:

- Emails archived from Outreach will not display the From or To fields – this includes CC and BCC.

Calls

Following information will not be available in Sugar for Calls object:

- Calls created in Outreach cannot be scheduled for a set time
- Call status in Outreach cannot be customized.

Meetings

Currently, there is no API so meetings module cannot be synced.

Lead/Prospect

“Company Name” field in Outreach prospect cannot be filled from “Account Name” text field in SugarCRM with API.

Custom Fields in Outreach

Custom fields can only be created for Prospects, Accounts, and Opportunities in Outreach.