Riva for Exchange and CRM

How Users Sync Data with Riva

This Guide

Welcome to the *How Users Sync Data with Riva* for the Riva Cloud (www.rivasync.com) and Riva On-Premise Server (www.rivacrmintegration.com) for Exchange and CRM synchronization.

Riva delivers transparent, server-side, bi-directional synchronization of contacts and leads, calendar items and tasks, and email between Microsoft Exchange (On-premise 2010, 2007 or 2003, and commercially hosted including Office 365, and other common service providers) AND industry leading CRMs including Salesforce, Microsoft Dynamics CRM, Oracle CRM On-Demand, Sugar, SageCRM, Saleslogix, NetSuite, GoldMine, info@hand, intellcrm and others.

This goal of this guide is to provide an overview of how a user can sync data between their CRM user account and their Exchange mailbox. Topics include:

- What is Riva – an initial introduction
- How Users Sync Data Using Riva – a quick look at Riva in Outlook

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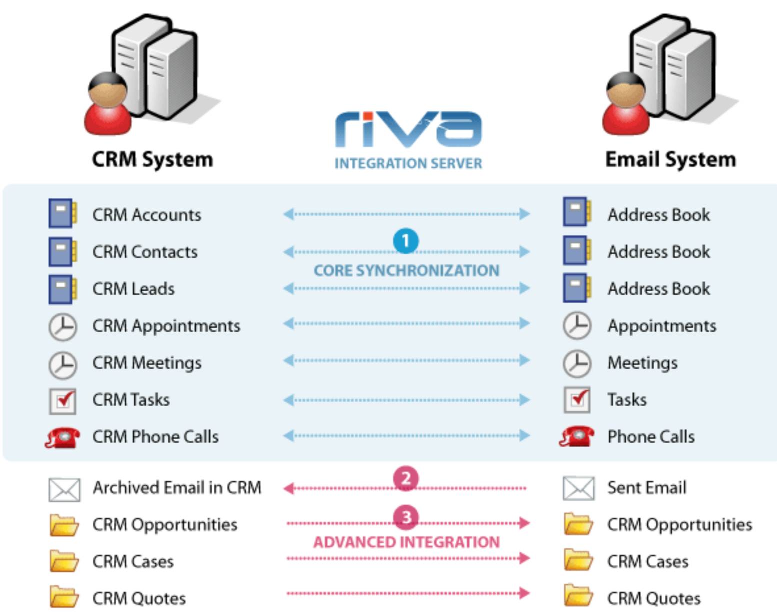
Server-side Exchange to CRM synchronization – NO plug-ins required

Riva from Omni is an advanced CRM data synchronization platform for Microsoft Exchange. Unlike standard Outlook CRM plug-ins for synchronizing data, Riva gets installed only once on a server. Users **do not** need to install any additional software or plug-in / add-in technology.

Riva integrates with all Microsoft Exchange clients, including: Outlook, Outlook Web Access, Outlook 2011 for Mac, Microsoft Entourage for Mac, the native Apple apps (Mail, iCal, Address Book) on your Mac computer, iPad and iPhone, Blackberry devices and Exchange ActiveSync mobile devices.

What gets synchronized

Riva delivers transparent, bi-directional synchronization of CRM address book data (accounts, contacts, leads) and calendar information (appointments, meetings, tasks, phone calls) with Outlook, Outlook Web Access, Outlook 2011 for Mac, Entourage and Mac Mail. You can decide whether you prefer to work in the CRM or Outlook. Riva will keep both systems synched and up to date (see #1 in the diagram below).



Riva automates the process of archiving email in Outlook to your CRM (see #2 in the diagram). Simply drag 'n drop emails to the "Create New Email" folder in Outlook and Riva will automatically archive the email against the appropriate account and contact(s). If these items do not exist, Riva will automatically create the account, contact(s) and assign the email to them. Learn more about Riva AssignTo Drop Folders.

Riva goes beyond basic CRM contact and calendar synchronization in Outlook and synchs CRM opportunities, cases and quotes (see #3 in the diagram). Imagine being able to review your CRM opportunities and support cases in Outlook, Outlook Web Access or your mobile device in connected or disconnected modes

Common questions

Here are some common questions that customers often ask:

1. **What software needs to be installed for each user?**
   Absolutely nothing. Riva is a server-to-server data sync solution and does not make use of any Riva “client” application or any Outlook “snap-in” or “plug-in” technology. Riva prepares the user’s Exchange mailbox for Riva during the first sync cycle. Users can work in their native client applications that they are used to working with. Since Riva does not use Outlook plug-ins, you can sync data from Outlook, Outlook 2011 for mac, OWA, and mobile devices that can sync to Exchange.

2. **How does Riva sync data between a CRM user account and an Exchange mailbox?**
   The Riva sync policy defines which users will be synchronized. Riva creates a matched association between the CRM user account and corresponding Exchange mailbox, using the configured email address as the key identifier. Riva will poll the CRM and Exchange systems and copy the data changes between corresponding data items in each system.

3. **Is Riva a real-time sync solution**?
   No. Riva polls the target systems using a sync schedule defined in the sync policy. Real-time solutions usually require more expensive hardware and network bandwidth capacity as additional users are added. Riva can be scaled out to support additional users without requiring expensive upgrades for dedicated resources.

4. **Is Riva secure?**
   Yes. Riva uses standard SSL encryption to protect username and password credentials and transmission of data.

How users sync data using Riva

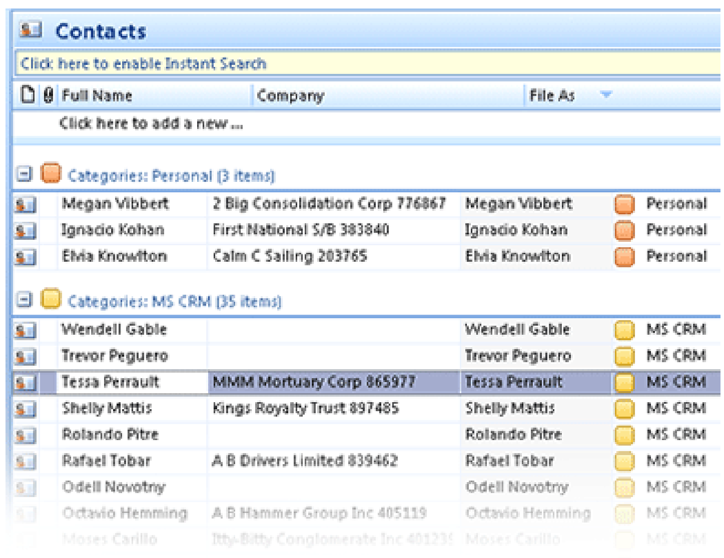
Riva differs from most Outlook plug-in technologies by being client software agnostic. Riva syncs CRM data to normal locations in the Exchange mailbox and provides “email drop folders” in the user’s mailbox to place email to be synced from Exchange to the CRM. Usually, if a user modifies a Riva-synced contact, calendar item or task in the CRM or Exchange, Riva will sync those changes to the matched item in the other system.

This design approach allows Riva to be a sole sync solution for a multitude of user client apps and devices:

- Windows and Mac users running Microsoft Outlook.
- Mac, iPad and iPhone users using the Mail, Address Book and iCal native Apple apps.
- Riva supports mobile users running Windows smartphones, or Android smartphones and tablets syncing data using Active Sync.

When Riva performs an initial sync for a target user, it prepares the user's Exchange mailbox. The user may notice subtle changes, but will work with data in Outlook and Riva will keep data synced with corresponding data in the CRM.

Contacts and Leads



Riva delivers transparent, bi-directional synchronization of CRM accounts, contacts and leads (optional). This is just a fancy way to say that whether you add or update a contact in your CRM or in your email client, Riva will automatically sync the changes.

Users can quickly determine which contacts Riva is syncing by listing contacts by category.

Riva even provides a different category for leads. Users can create a contact in Outlook, categorize it as a CRM Lead and Riva will create a new lead in the CRM.

CRM contacts are protected. If a user removes a Riva-synced contact from their Outlook address book, Riva **does not** sync the removal of that contact to the CRM, so that action does not affect any others users being synced by Riva. If a contact is removed in the CRM, that contact will be removed from the user's Outlook address book. If the Exchange address book is being synced to mobile devices using Active Sync or Blackberry Enterprise Server, the modification of contacts is automatically extended to those mobile devices.

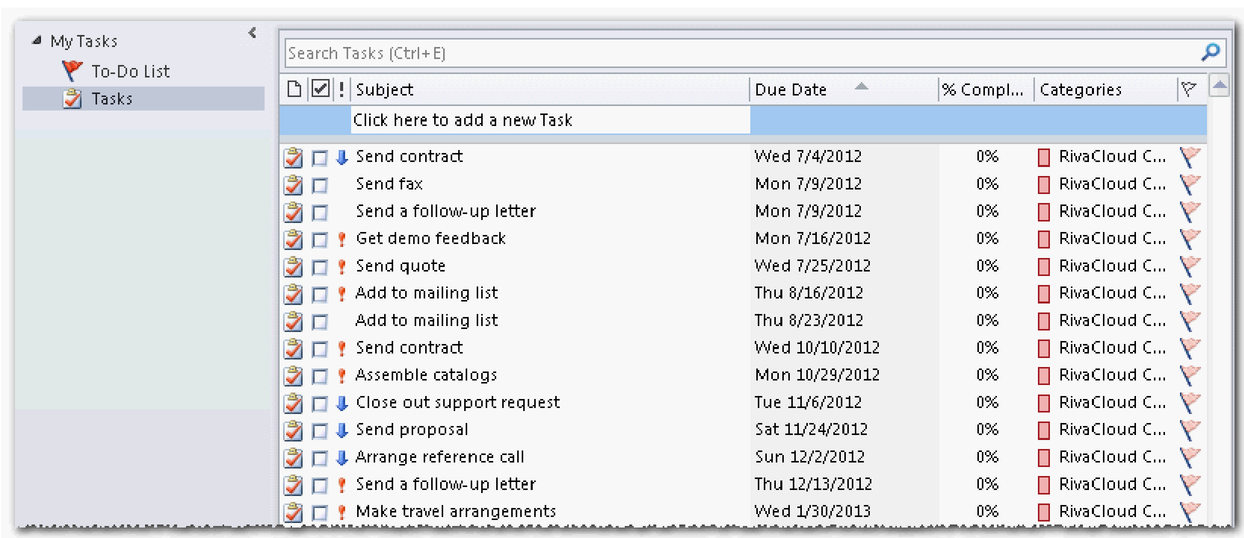
Calendars

Riva syncs CRM appointments and phone calls (if supported by the CRM) to the user's primary Outlook calendar. Riva synced calendar items will be categorized and appear as colour-coded items in Outlook calendars.

Changes to calendar items will be synced bi-directionally. That includes removing calendar items in Outlook, which will remove the calendar item in the CRM for the organizer.

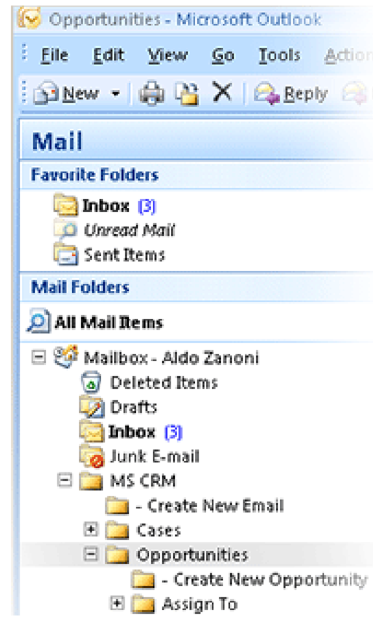
If the Exchange calendar is being synced to mobile devices using Active Sync or Blackberry Enterprise Server, the modification of appointments is automatically extended to those mobile devices.

Tasks



CRM tasks are synced to the user's task list and will appear as categorized task items. If the user creates a task linked to an contact, account, opportunity, case or other CRM module, Riva will sync those tasks to Exchange into the user's task list. If the user marks a task as completed in Outlook, that change will sync to the CRM. If the Exchange task list is being synced to mobile devices using Active Sync or Blackberry Enterprise Server, the modification of tasks is automatically extended to those mobile devices.

Archiving Email



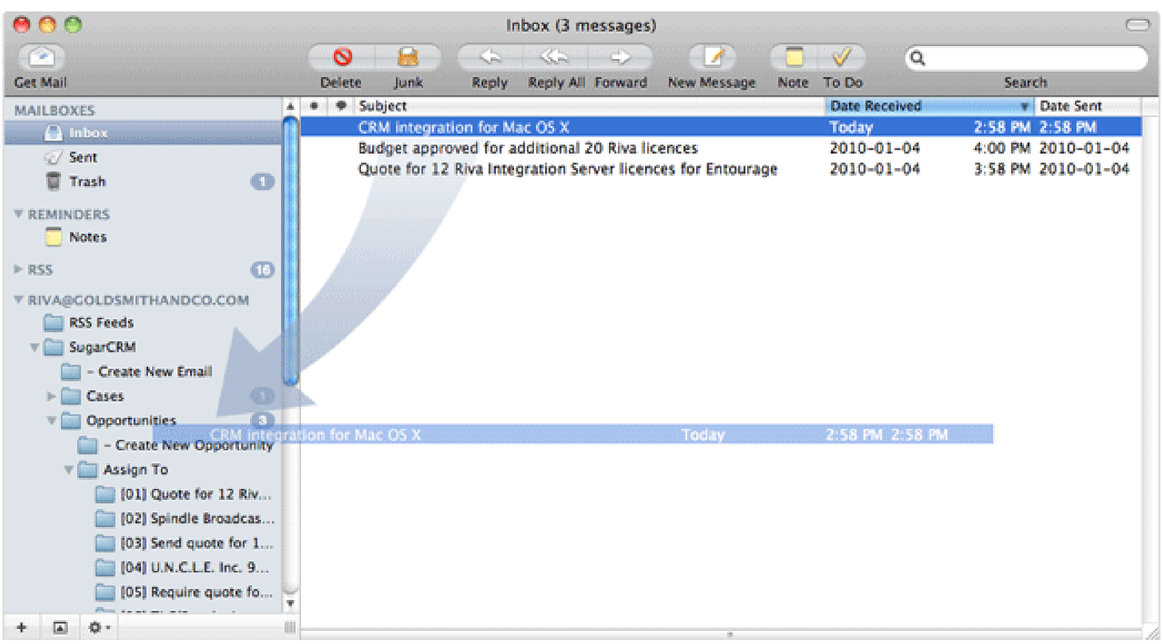
As part of the initial sync cycle, Riva will build a folder structure in the user's mailbox that is used by the user to archive email.

The user can drag n' drop an email from any folder into the **– Create New Email** drop folder and Riva will use **SmartConvert** to examine the email, match the addressees to CRM contacts, create a copy of that email in the CRM and link it to the activity history of the matching contacts and accounts.

If a contact cannot be matched, Riva can create a new contact and matching account. How Riva processes emails and creates contacts and accounts is controlled in the Riva sync policy by the Riva administrator.

Creating Opportunities & Cases

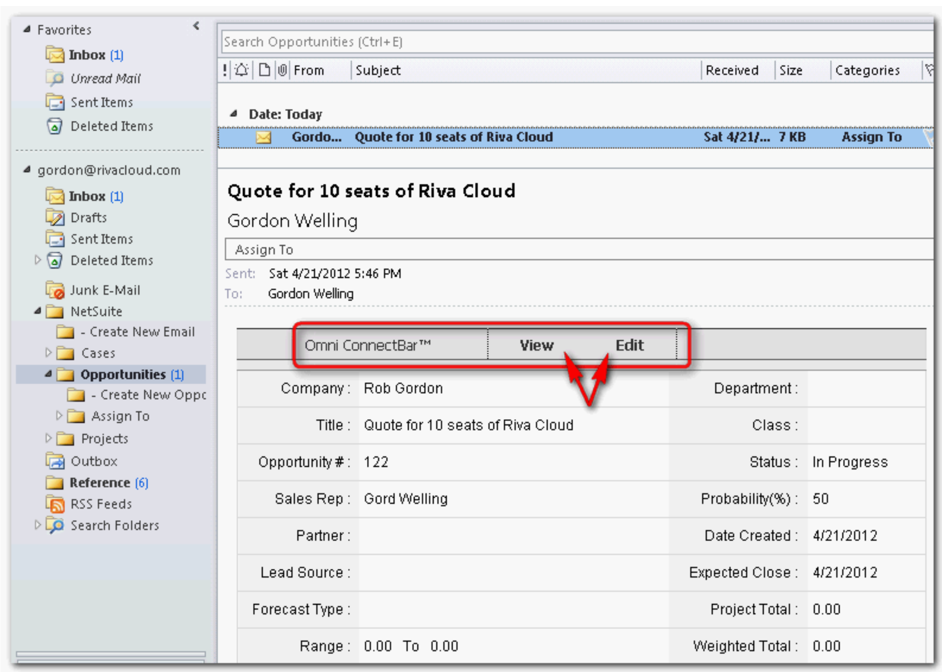
The user can use the same **SmartConvert** technology to create a new opportunity or case using an email as the source object.



By using drag n' drop to place an email into a **– Create New Opportunity** or **– Create New Case** drop folder, Riva will process that email, locate matching contacts and linked accounts, create a new opportunity or case using the email subject as the name for that opportunity or case, archive the email and link it to the activity history of the opportunity or case in addition to the matching contacts and accounts. The Riva sync policy includes processing options to handle:

- Which email addressees to match to CRM contacts and leads.
- How to handle cases when Riva cannot find a matching contact in the CRM for an email addressee. Riva can be configured to:
  - create a new contact and matching account (customer),
  - create a new lead, or
  - skip creating new contacts, accounts and leads.

Riva ConnectBar – Open items in the CRM from Outlook



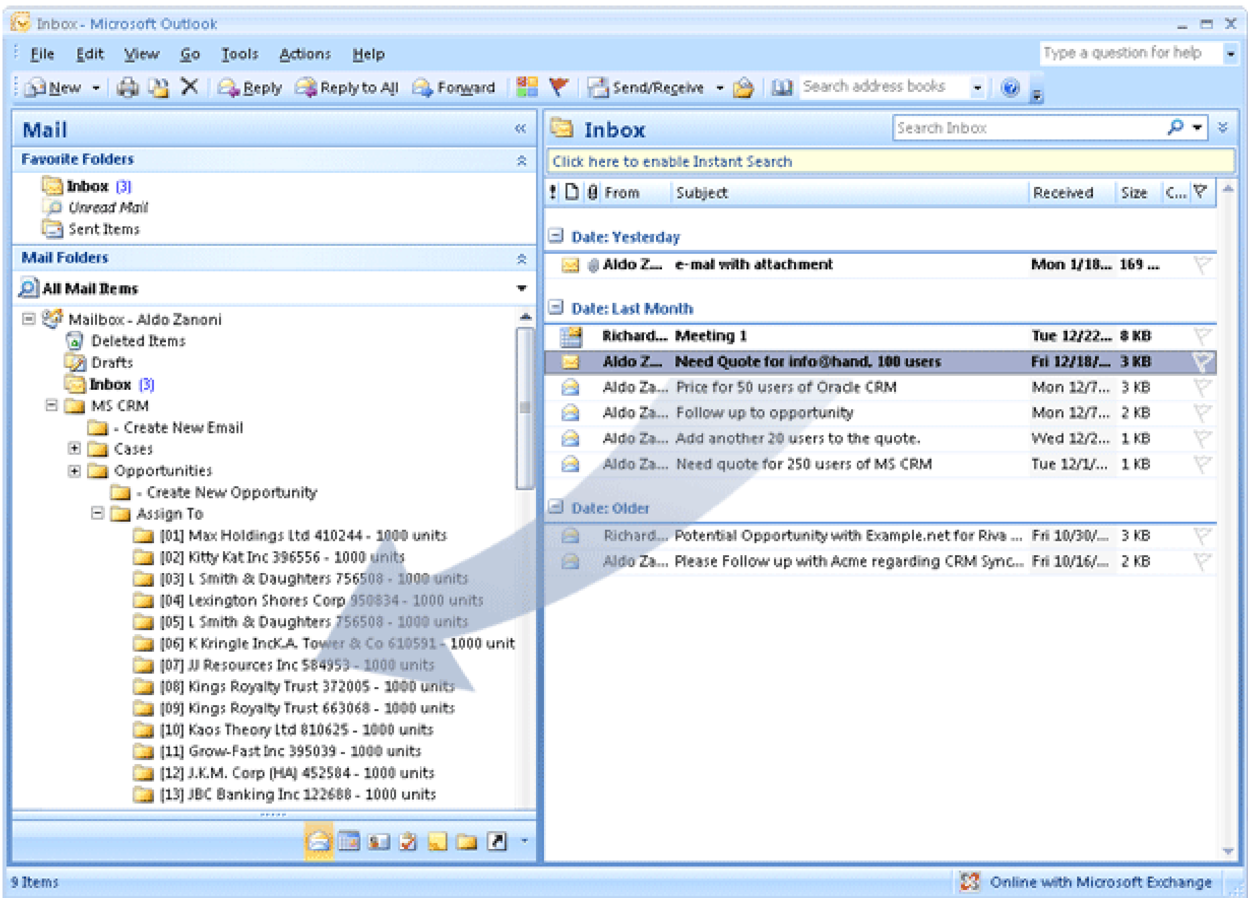
Riva will sync a summary email for each open opportunity assigned to the user into the "**Opportunities**" folder.

Case summary emails are synced to the "**Cases**" folder. If a user syncs an email to create a new opportunity or case, Riva will generate a summary email back to the corresponding Opportunities" or "Cases" folder during the same sync cycle.

Users can view or open a Riva generated summary email and click on the "Review" or "Edit" button in the **Riva ConnectBar** and the corresponding item will open in the CRM in the selected review or edit mode.

Archiving Email to Existing Opportunities & Cases

The Riva **AssignTo** feature creates a unique drop folder for the most current and active opportunities and cases. Each unique drop folder is named for the name of the contact or opportunity. Users can drag n' drop emails into an opportunity or case drop folder and Riva will use SmartConvert to archive the email to the opportunity or case in the CRM, linking it to matched contacts and accounts.



Depending on the supported CRM, Riva can be configured by the administrator to provide drop folders for projects, quotes and service calls (for Microsoft Dynamics CRM).

Syncing Data with Mobile Devices

Riva supports native Apple apps, iPads and iPhones, Android mobile phones and tablets, BlackBerry smartphones and tablets, and Windows smartphones.

Online Video Tutorials

There are online video tutorials available at http://www.rivacrmintegration.com/integration/videos/. If your CRM is not listed, we suggest viewing the SugarCRM videos as they are the most generic video series available.

