Mavin CRM Sync User Document

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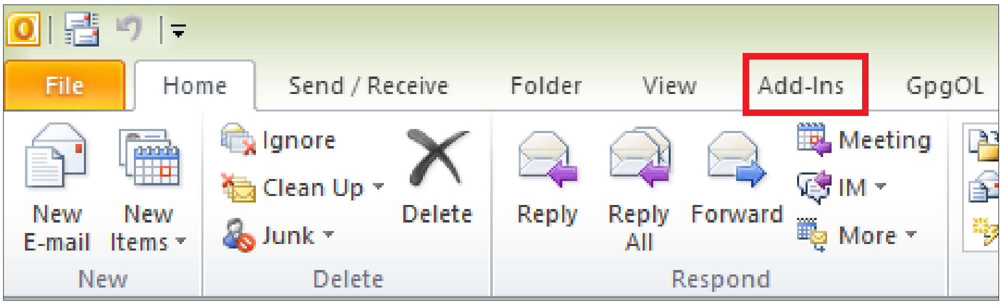
After Installing Mavin CRM Sync, user needs to configure account with CRM url, Username and Password of any particular user.

1. Configuring User Account:

To Configure/Set up an account in Mavin CRM Sync follow the steps:

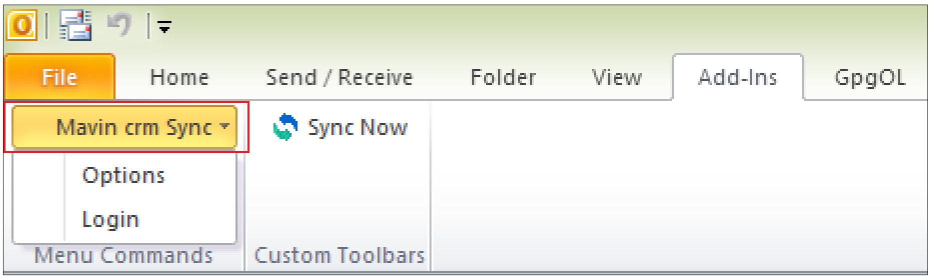
Step-1:

Open Outlook and click on Add-Ins menu available in menu bar. The corresponding screen shot is shown below



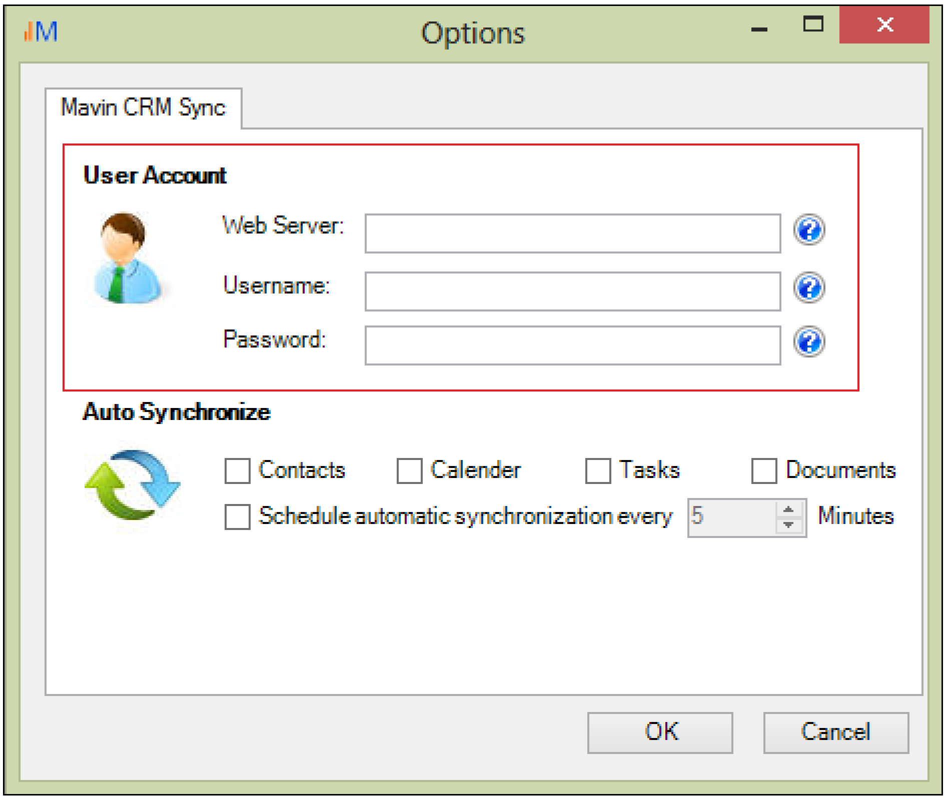
Step-2:

Clicking on Add-Ins menu will open the options available in that menu. Now click on "Mavin CRM Sync" drop down list and select "Options" item available in the populated list. As shown below

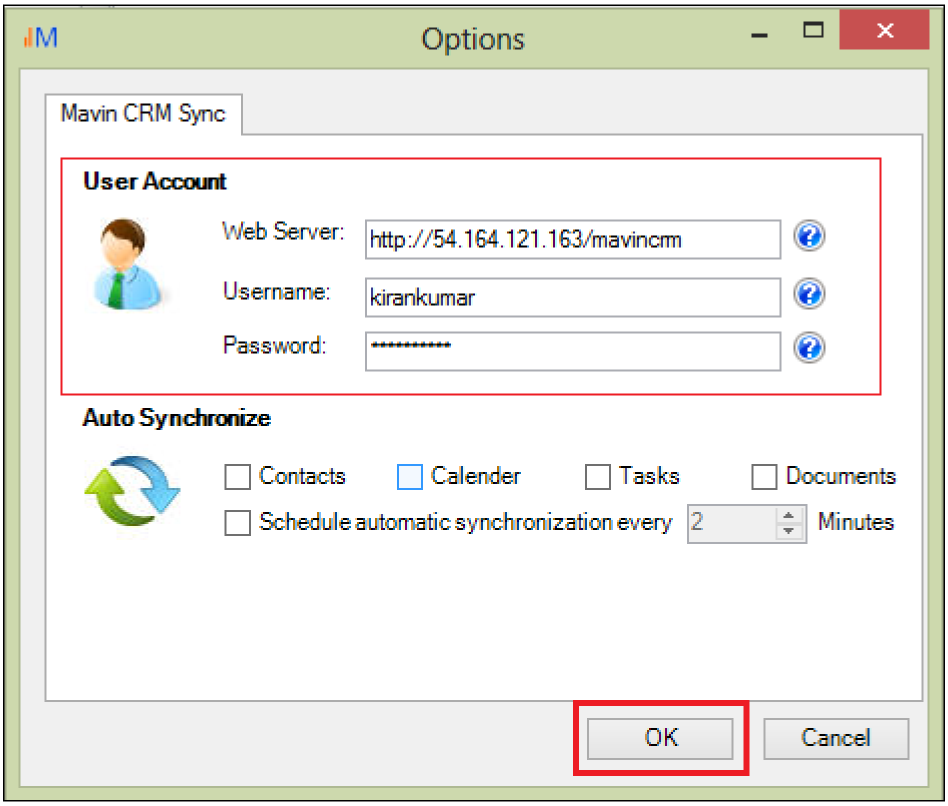


Step-3:

After clicking on "options" item available in drop down list it will opens a pop up window which allows us to enter the Account details as shown below



In this pop up window users can able to setup theirs account using User Account Section as shown below. To set up user account user needs to provide Web Server URL, Username and password of that particular CRM



After entering details clicking on OK button will validate user details and saves that account details.

2. Synchronizing:

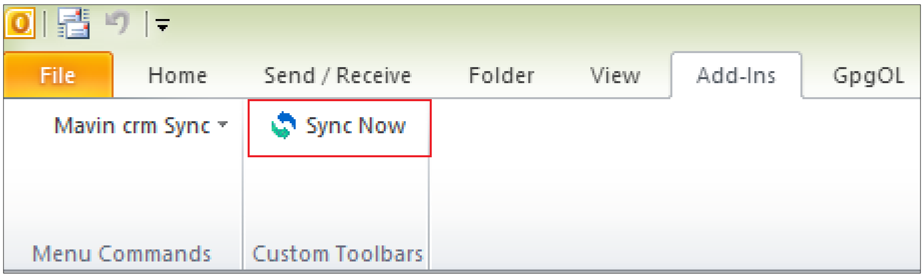
After configuring the Account user can able to synchronize the the application entities i.e, Contacts, Meetings/Appointments and Tasks in two ways those are

- Manual Synchronization
- Auto Synchronization

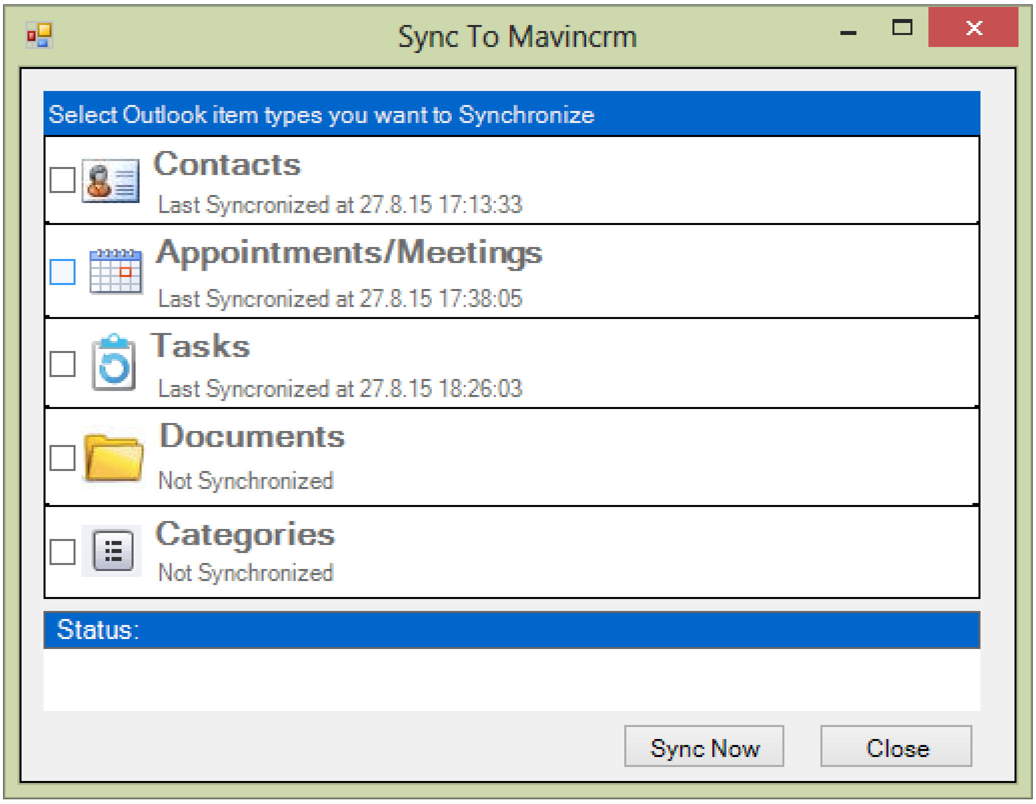
Manual Synchronization

I.) Synchronizing Contacts:

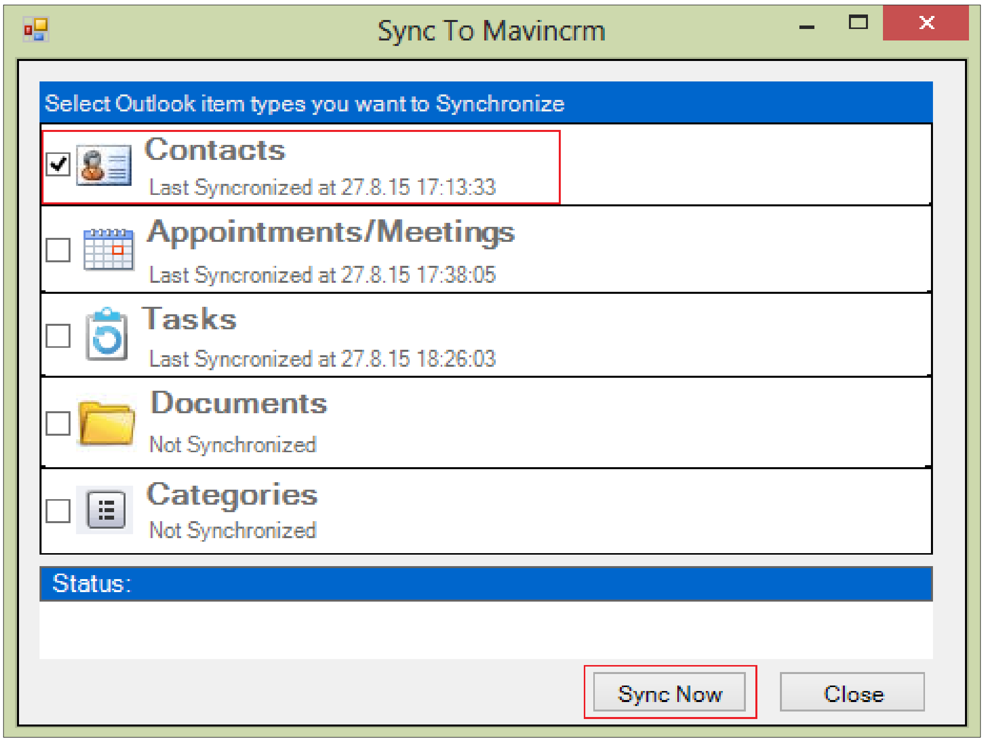
To Synchronize contacts open Outlook and click on "Sync Now" available in Add-ins page as shown



Clicking on Sync Now menu item will opens the pop up window which has options to sync contacts as shown below



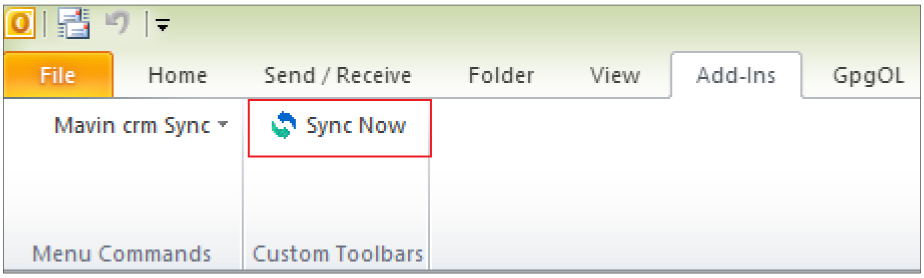
In that pop up window select Contacts by clicking on Contacts check box then click on Sync Now Button as shown below



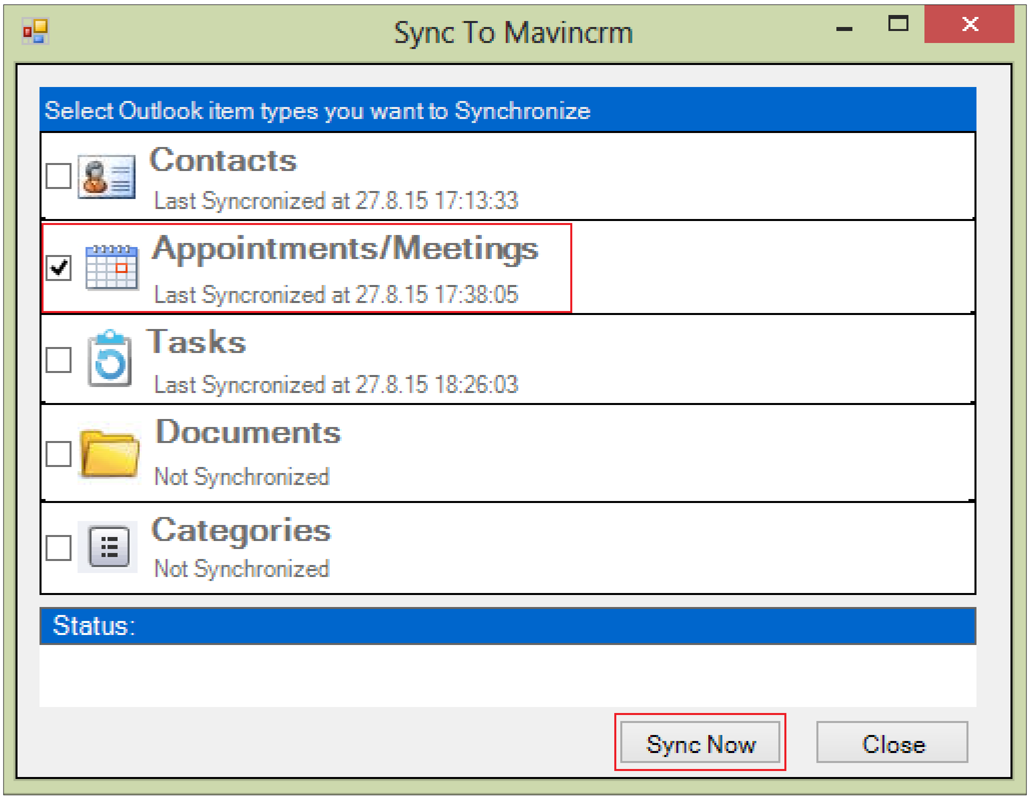
After clicking on Sync Now button it will synchronize all contacts available in outlook and CRM.

ii.) Synchronizing Appointments/Meetings:

To Synchronize Appointments/Meetings open Outlook and click on “Sync Now” available in Add-ins page as shown below



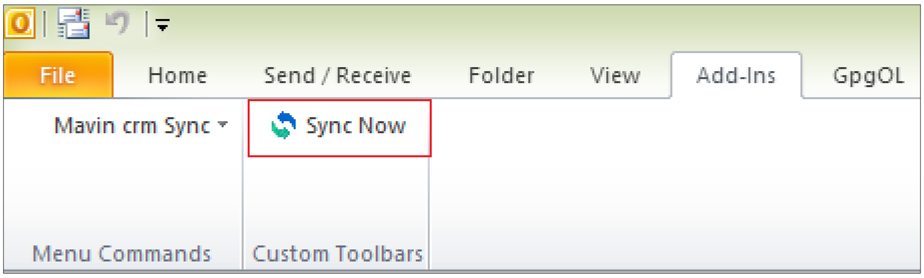
Clicking on Sync Now menu item will opens the pop up window which has options to sync Appointments/Meetings, In that pop up window select Appointments/Meetings by clicking on Appointments/Meetings check box then click on Sync Now Button as shown below



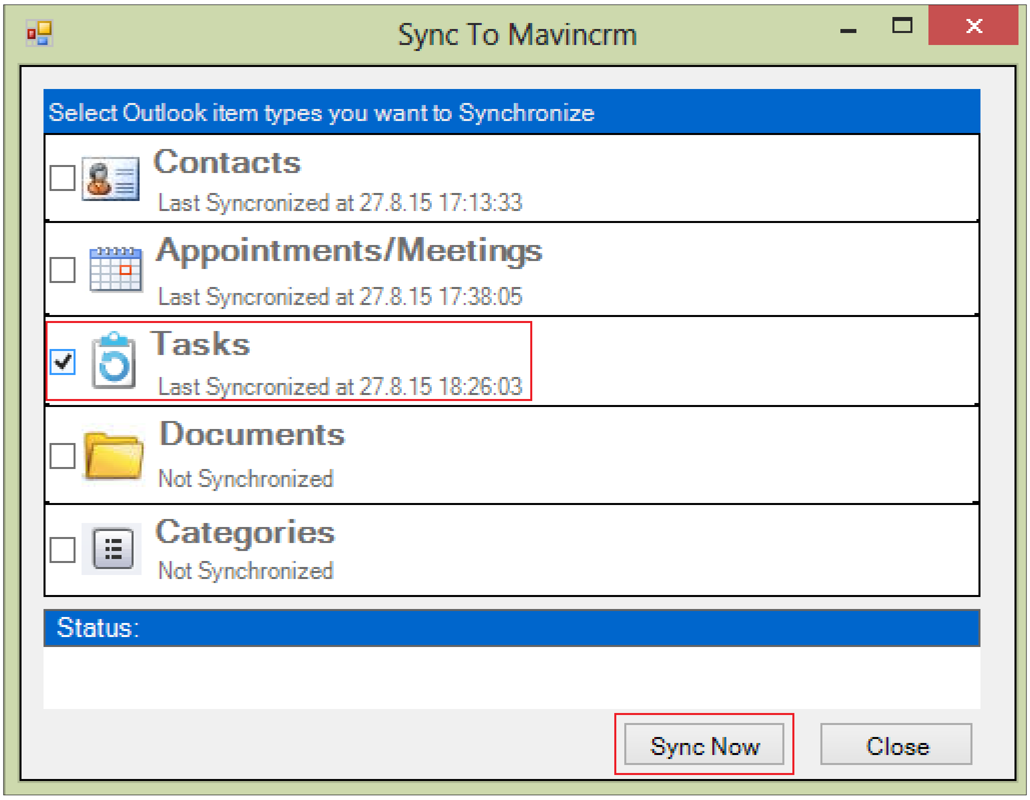
After clicking on Sync Now button it will synchronize all Appointments/Meetings available in outlook and CRM.

iii.) Synchronizing Tasks:

To Synchronize Tasks open Outlook and click on "Sync Now" available in Add-ins page as shown below



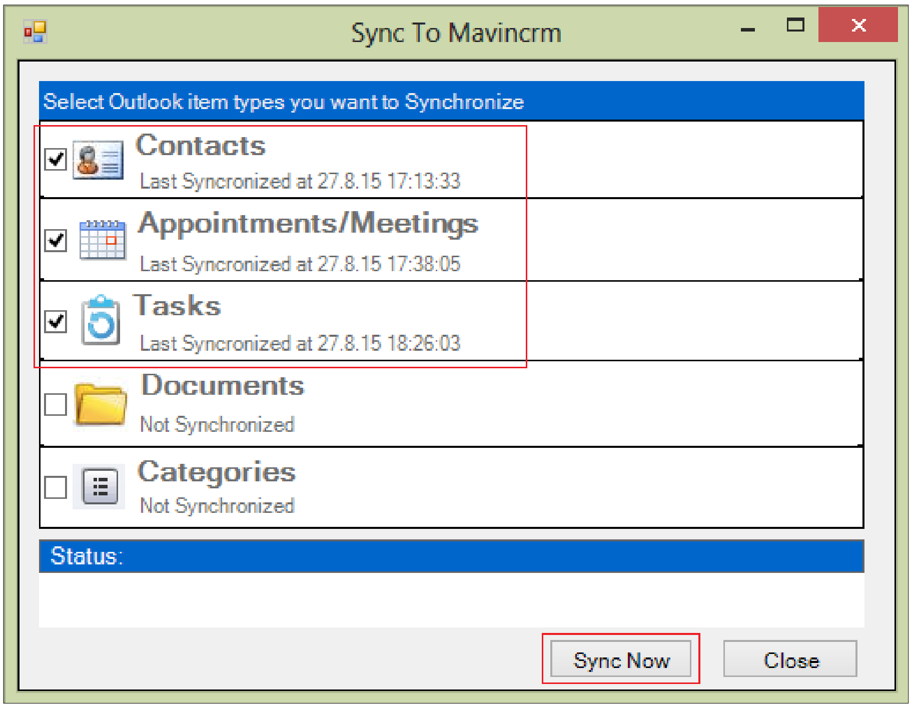
Clicking on Sync Now menu item will opens the pop up window which has options to sync Tasks, In that pop up window select Tasks by clicking on Tasks check box then click on Sync Now Button as shown below



After clicking on Sync Now button it will synchronize all Tasks available in outlook and CRM.

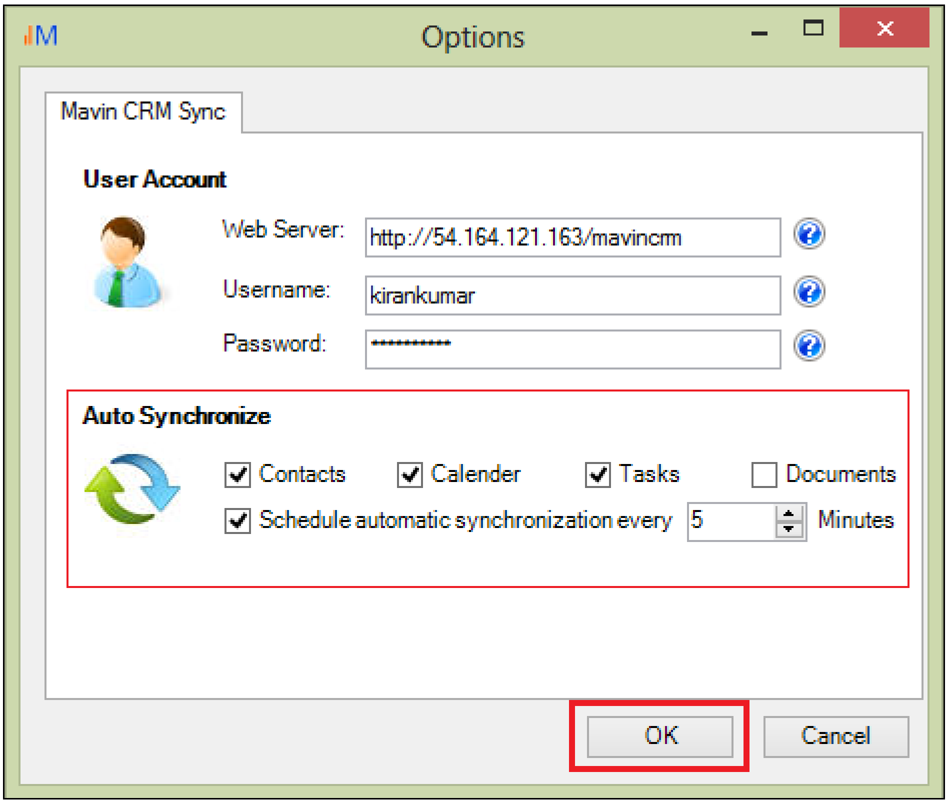
iv.) Synchronizing All Entities(Contacts, Tasks, Meetings) Together:

Users can able to synchronize all contacts, Meetings and Tasks at once by selecting all check boxes on the Sync To Mavin CRM pop up window as shown below



Auto Synchronization:

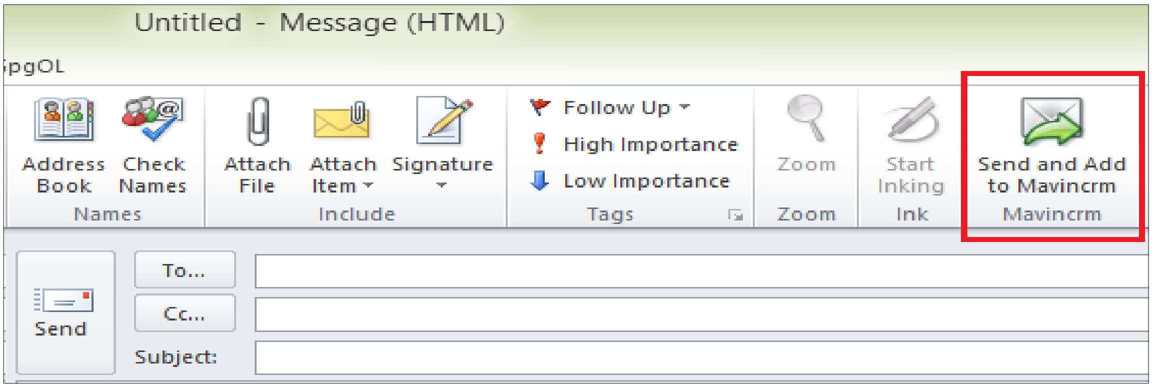
Synchronization can be configured to occur periodically with the help of Auto Synchronizations by enabling the “Schedule an automatic synchronization every N minutes” on the option tab as shown in below.



In this case, the items types (**contacts, calendar and tasks**) that are selected in the option tab will be automatically synchronized periodically in the background without any user intervention.

3. Email Integration:

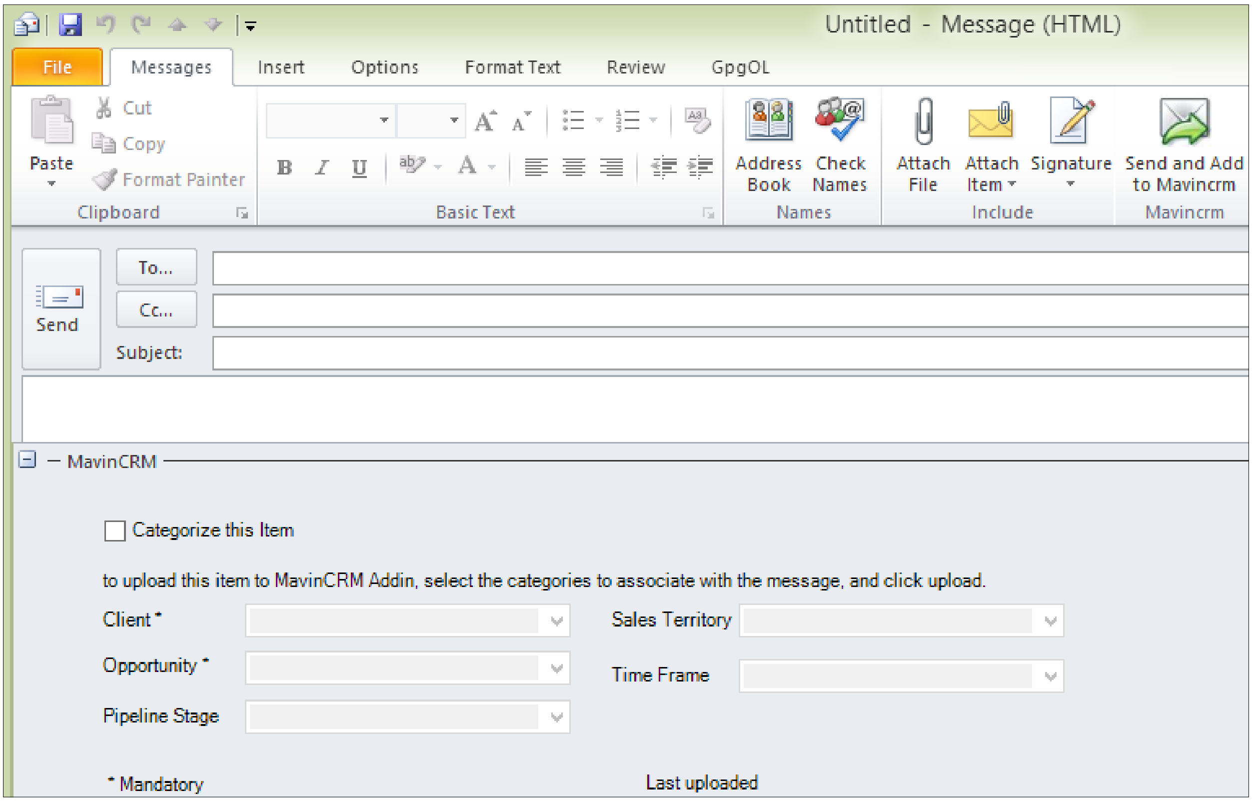
Mavin CRM Sync allows users to upload email from outlook to CRM application in order to maintain threads of email correspondence with customers and partners.
While sending an email user can able to integrate it with the crm by clicking on “**Send and Add to Mavin CRM**” available in the menu section as shown below



To Integrate New Email follow the steps:

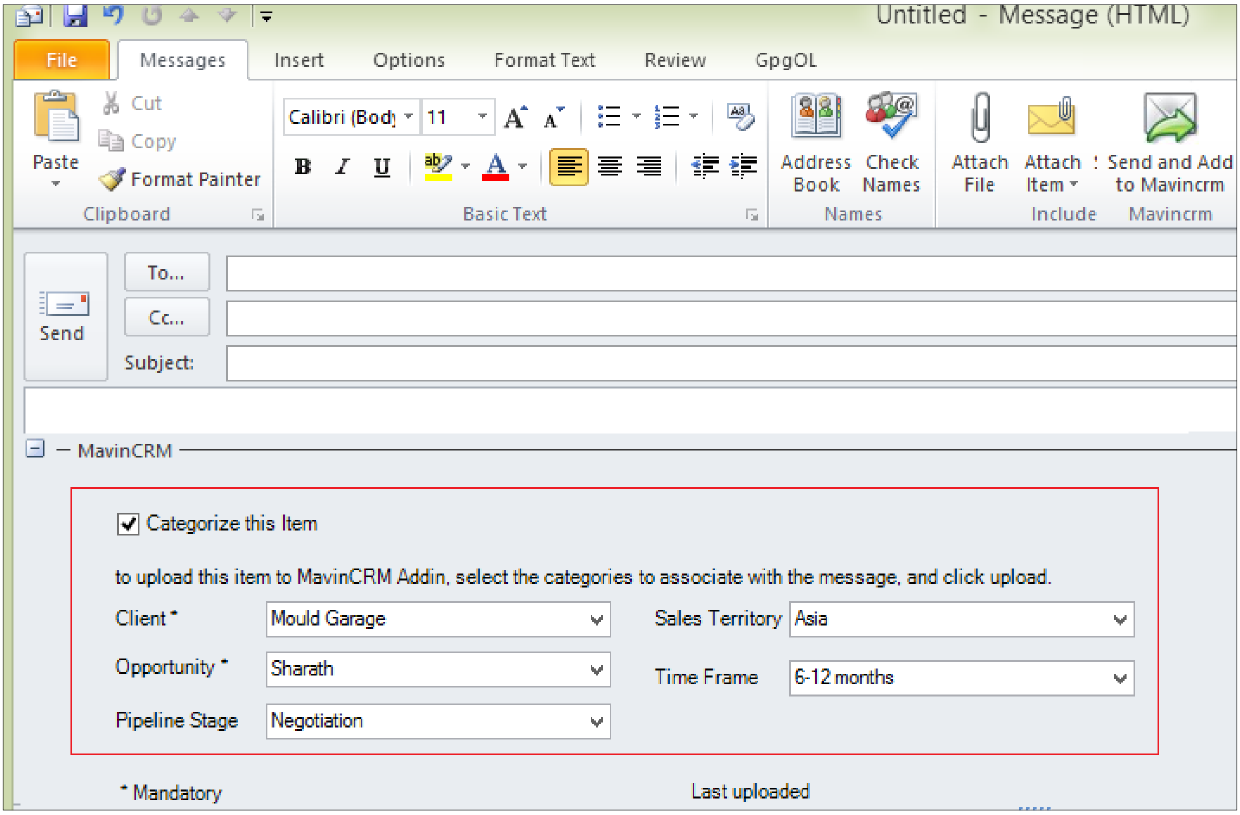
Step-1:

Click on New Email button available in the Outlook to create a mail and enter the To, Subject and message of the email(including attachments (if available)). After creating email click on “Categorize this item” check box available at the bottom of the page as shown below.



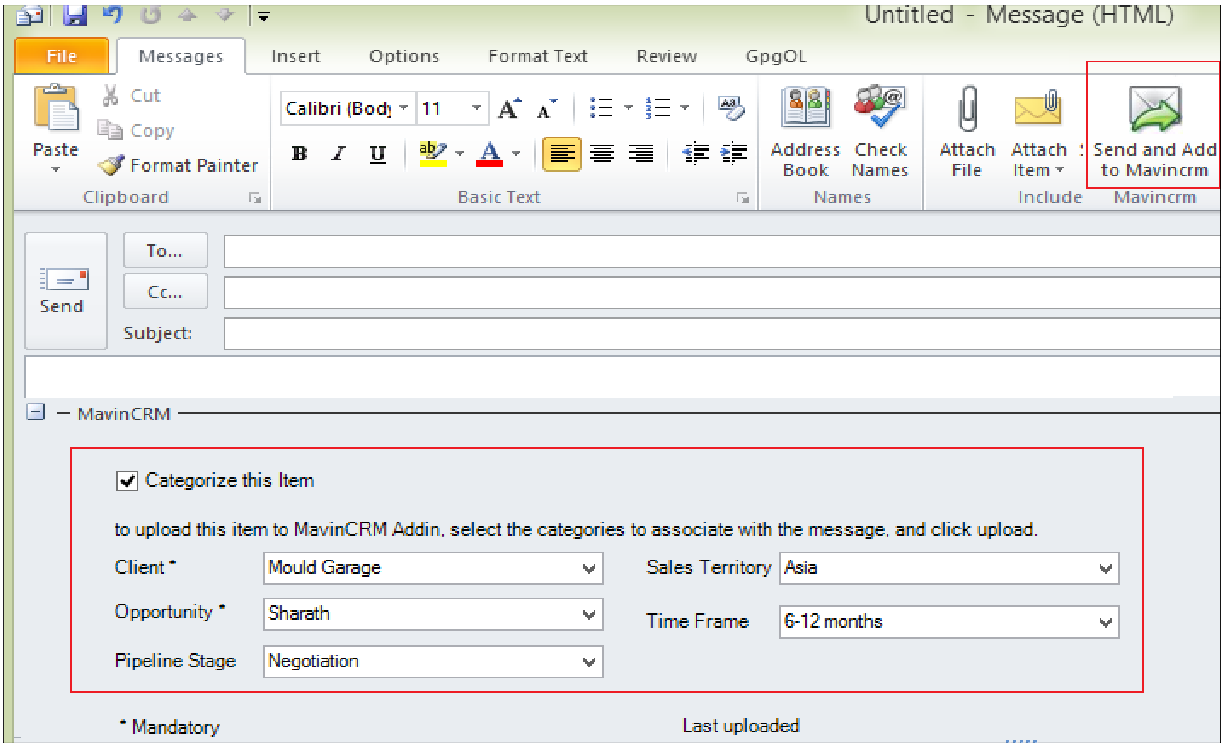
Step-2:

After selecting the Categorize this Item check box it will enable Client, Oppertunity, Sales Territory, Pipeline Stage, Time Frame dropdown lists then select the corresponding options from Client, Opportunity, Sales Territory, Pipeline Stage, Time Frame dropdown lists as shown below



Step-3:

After Selecting the corresponding options clicking on “Send and Add to Mavin CRM” (as shown below) will send the mail to all recipients and synchronize it to the CRM inbox of that particular user.

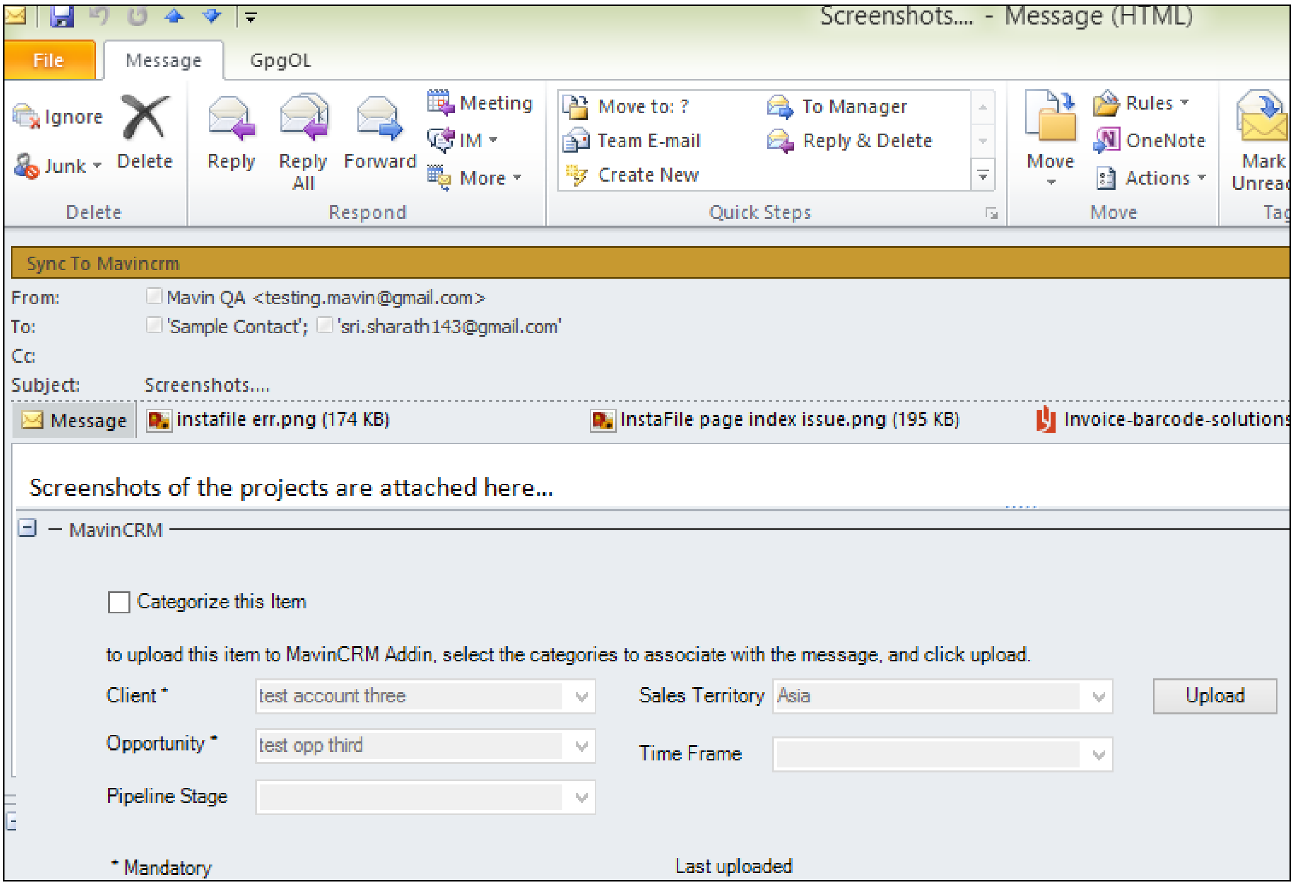


Update Conversation:

With the help of the Mavin CRM Sync user can able to update already sent(Synced with CRM) email with the CRM account from Outlook.

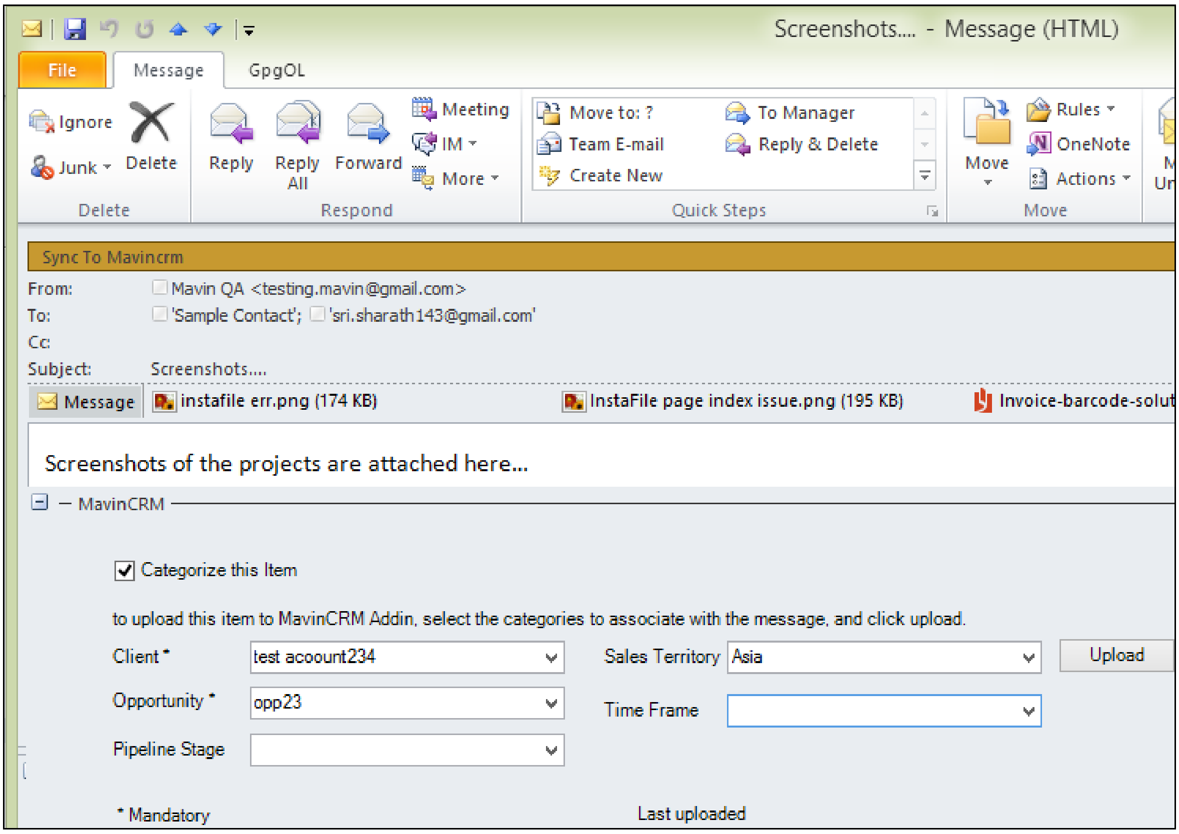
Step-1:

Open Outlook and open "Sent Mails" and double click on mail which have been synced with CRM while sending. Then it will open the mail and allow us to edit opportunity, client, Sales Territory, Pipeline, etc.. as shown below



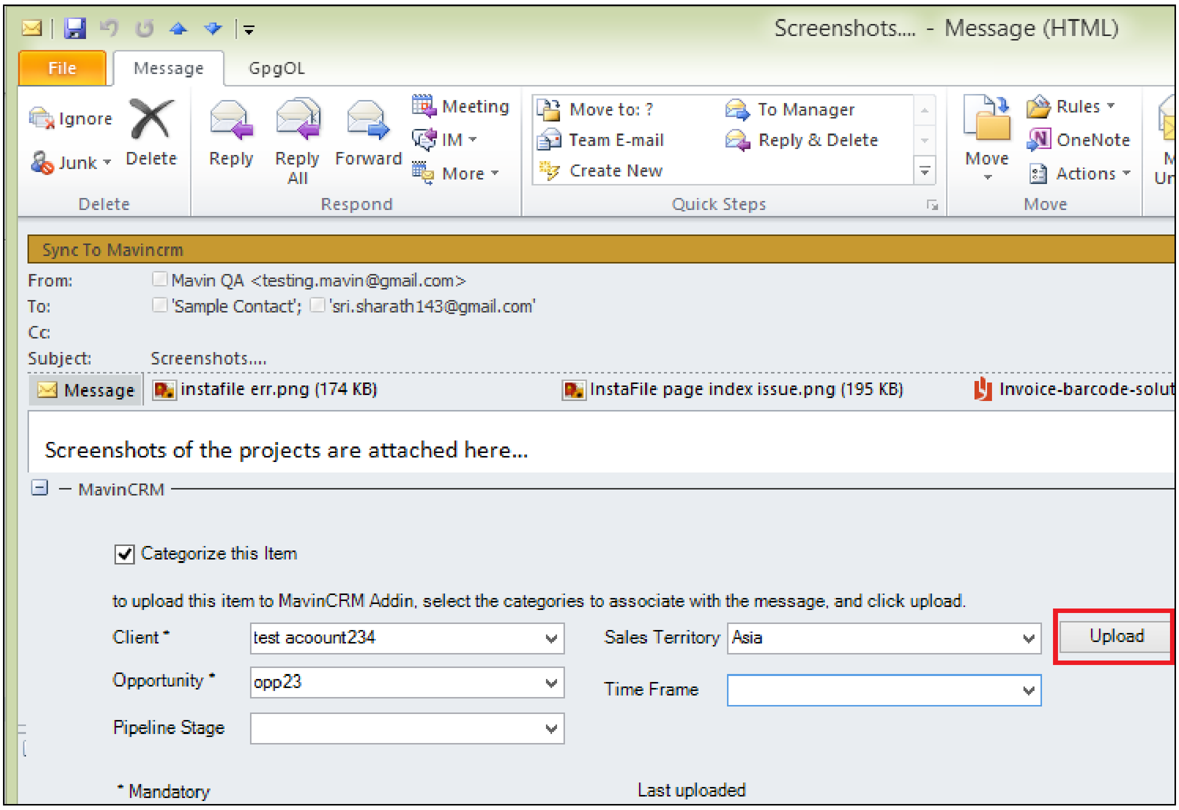
Step-2:

Now click on "Categorize this Item" checkbox to edit or modify already existing values of client, opportunity, sales territory, etc. After clicking on that checkbox it will enable all available fields to modify them as shown below



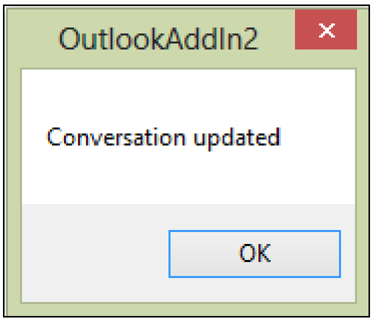
Step-3:

Now after selecting the desired values click on Upload button available in the same form as shown below



Step-4:

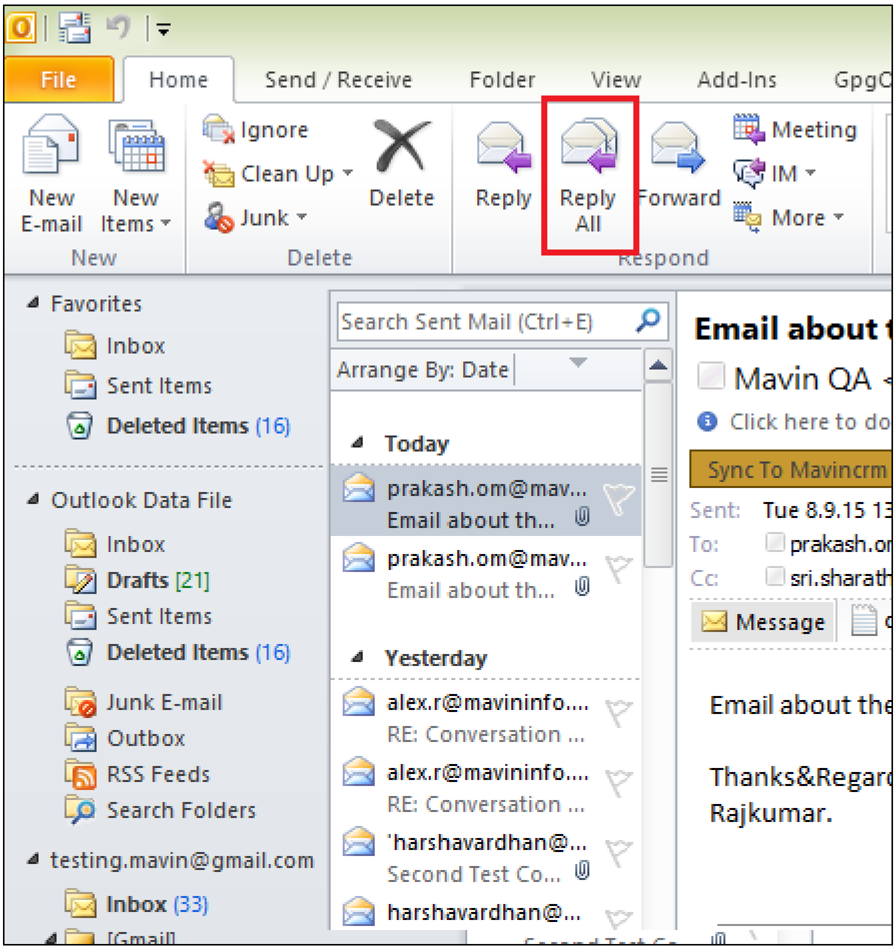
After clicking on that button it will update that particular conversation details in the CRM and display message that Conversation has been updated successfully as shown below



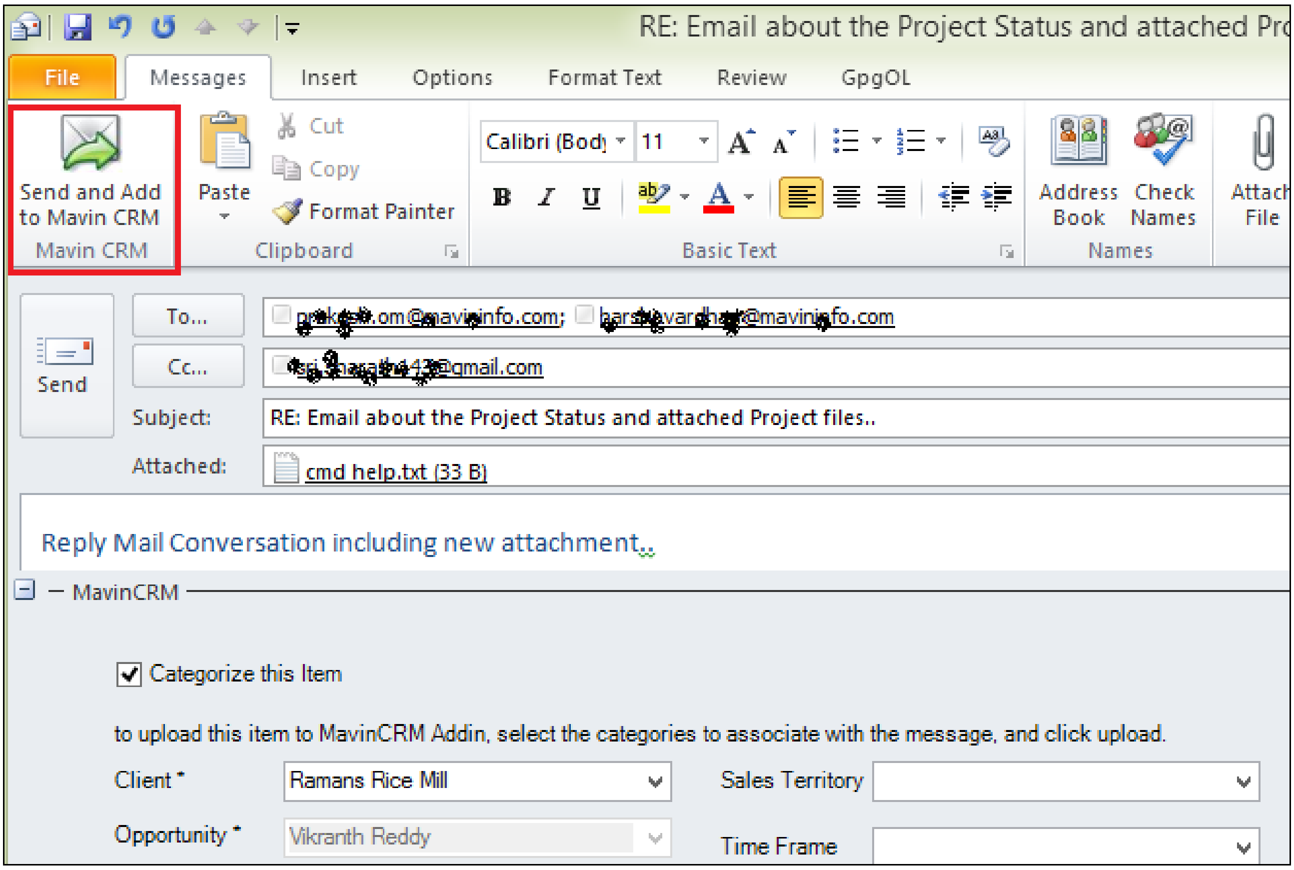
In this way user can able to integrate their email and update conversations.

Reply To the Conversation:

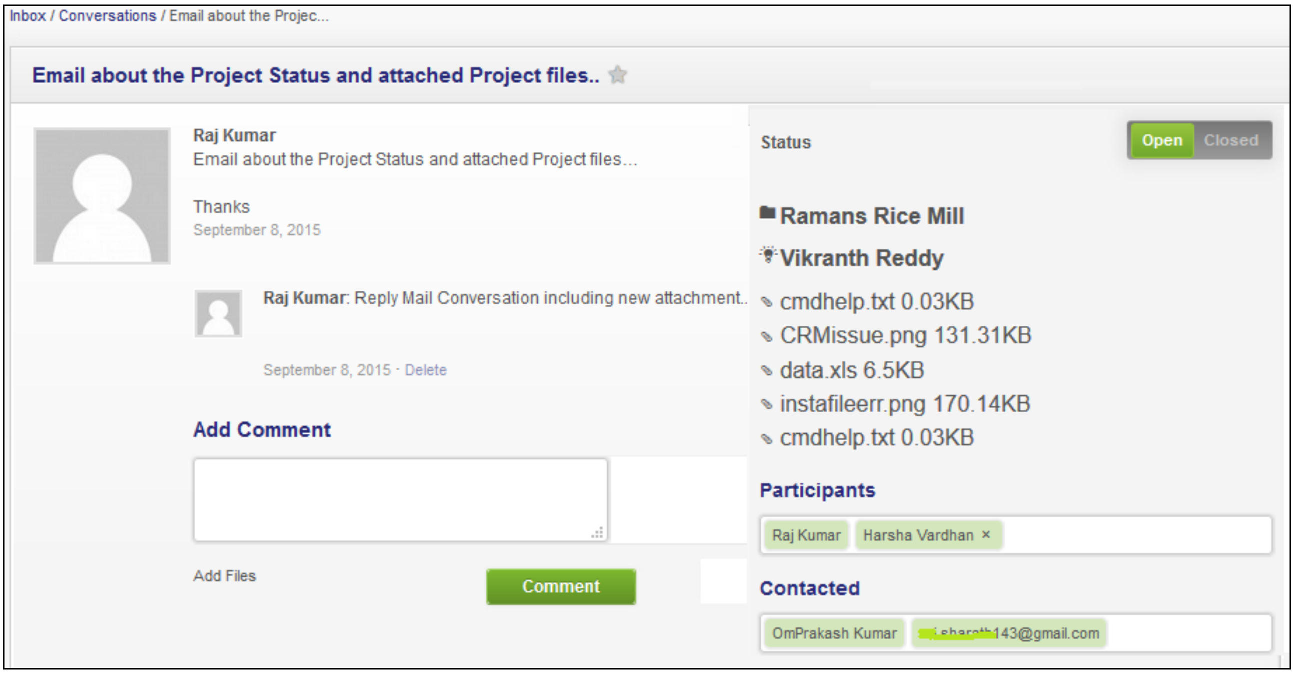
Open Sent Mail in Outlook and double click on any mail which is already synced with the CRM then click on Reply All button available in the outlook as shown below.



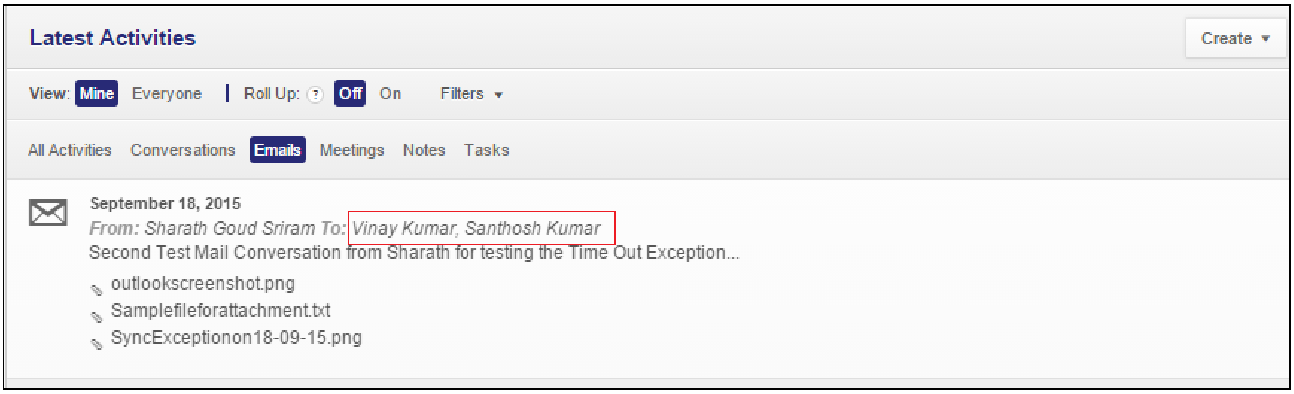
Now after composing the reply mail click on “Send And Add to Mavin CRM” button available at the menu bar of the outlook as shown below.



Clicking on that button will create reply email and add it to the previous conversation as reply as shown below



If the entered email id is already exist in the contact list then it will add that conversation to the Latest Activities section of that particular contact as shown below



4. Application Driven Categories:

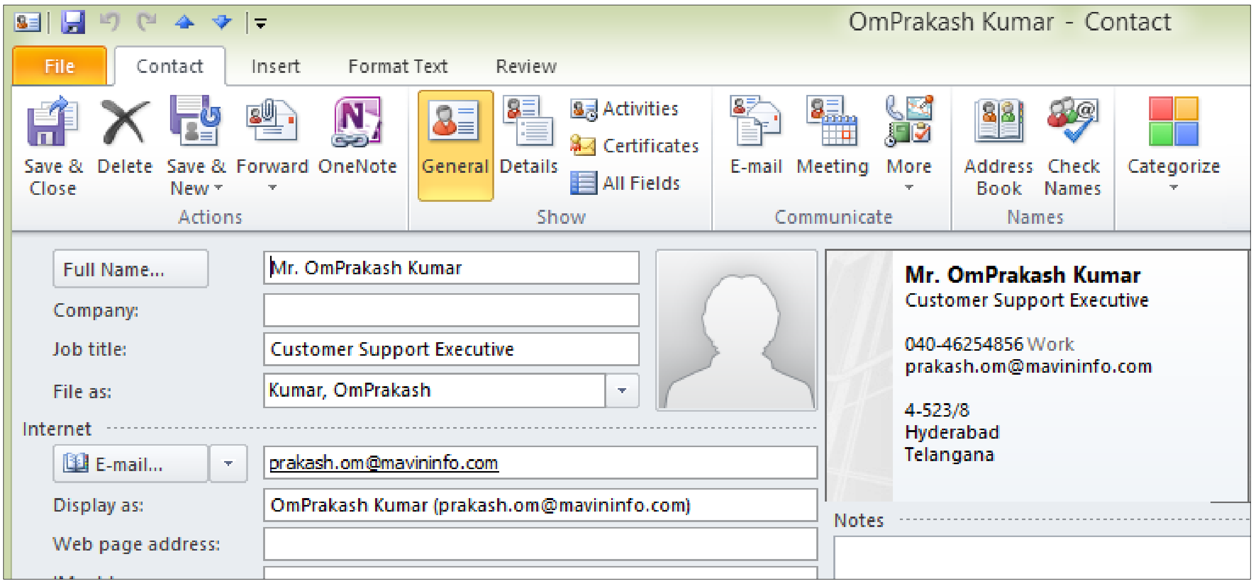
Mavin CRM Sync enables CRM applications to define a set of application-specific objects (categories), push them to the client and allow Outlook users to associate them with Outlook items (contacts, calendar events, tasks and email) and documents.

By categorizing data to application-driven categories, users essentially define the business context under which synchronization takes place. It provides the Web application with business attributes and the information it needs to archive and synchronize these items.

Adding Contacts to the categories:

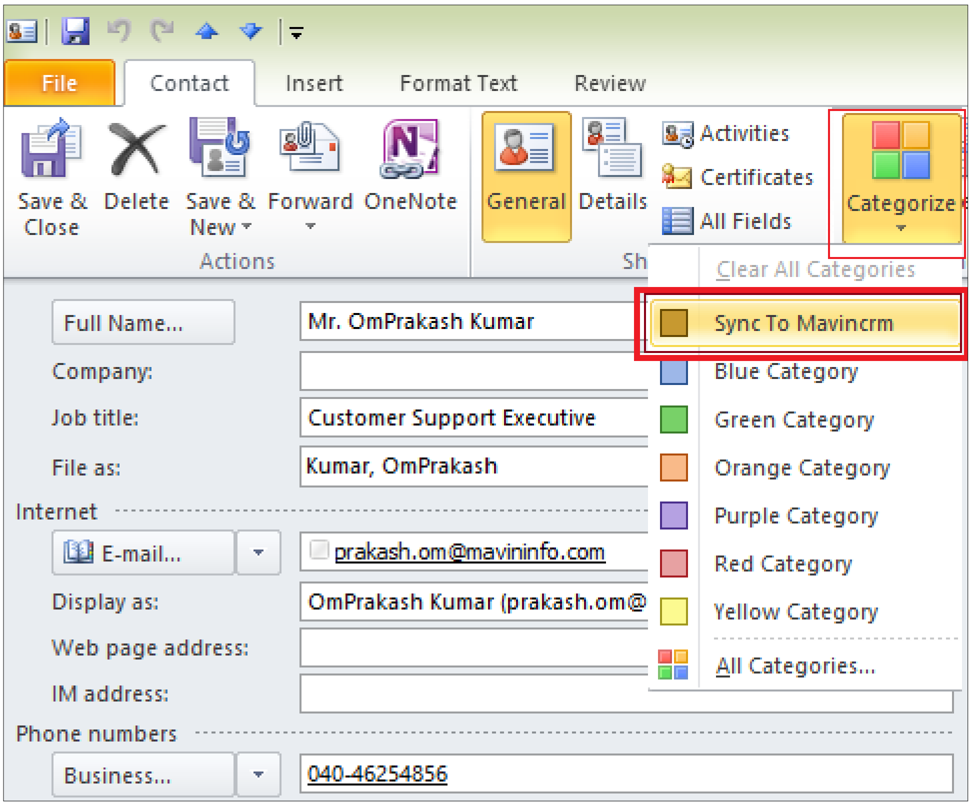
Step-1:

Open Contacts in the outlookand double click on any contact, then it will open the contact edit screen as shown below



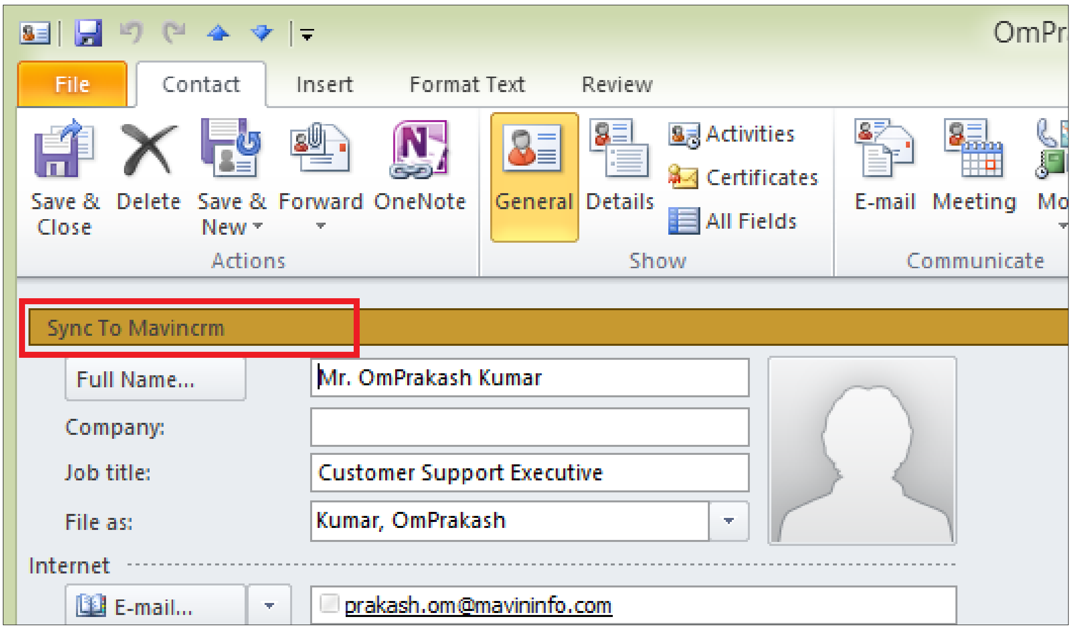
Step-2:

Click on “Categorize” available in the menu bar and select the “Sync To Mavin CRM” available in the populated list. As shown below



Step-3:

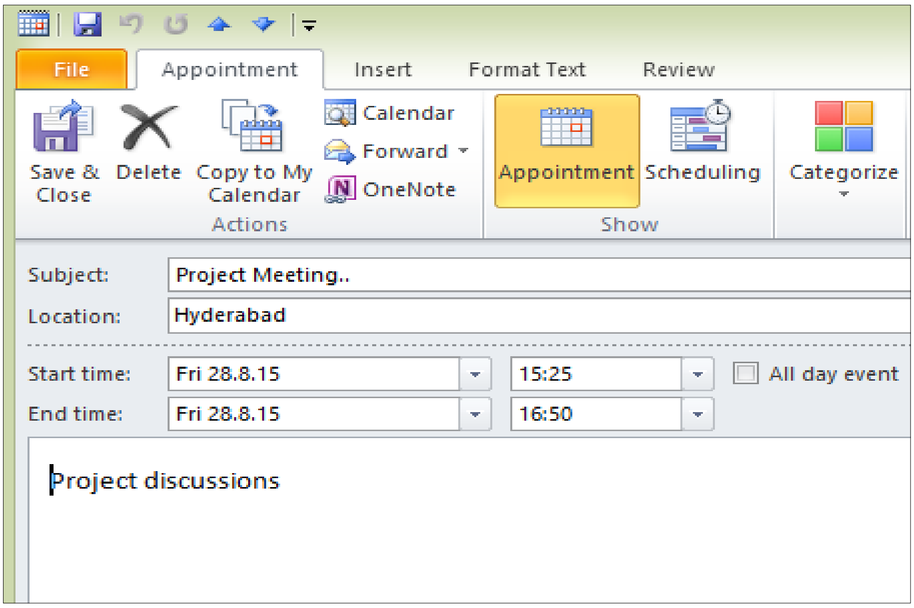
Clicking on “Sync To Mavin CRM” will add that particular contact to the Categories, and display message on that caontact as shown below.



Adding Appointments to the Categories:

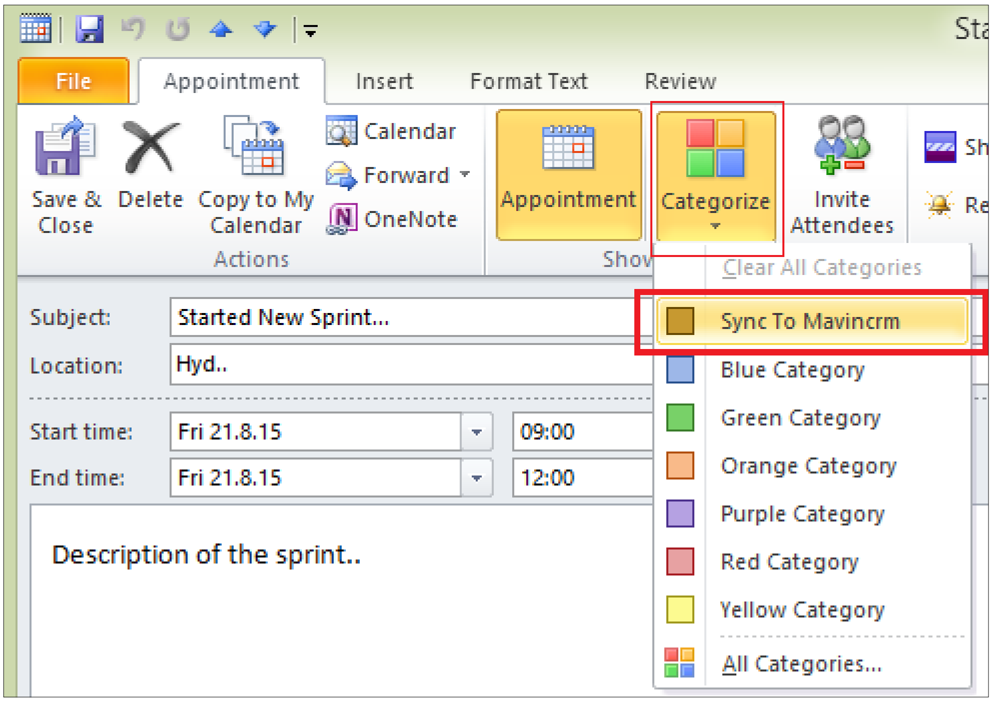
Step-1:

Open Appointments/Meeting in the outlook and double click on any Appointment/Meeting, then it will open the Meeting edit screen as shown below.



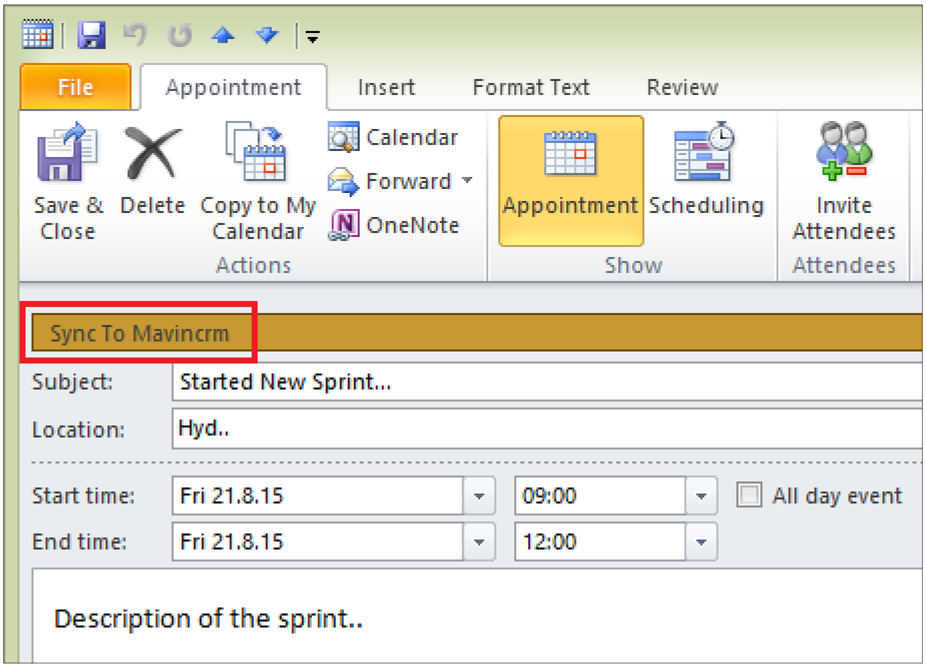
Step-2:

Click on "Categorize" available in the menu bar and select the "Sync To Mavin CRM" available in the populated list. As shown below

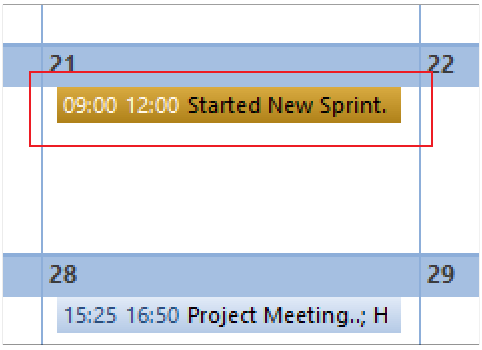


Step-3:

Clicking on "Sync To Mavin CRM" will add that particular Appointment/Meeting to the Categories, and display message on that Appointment page as shown below.



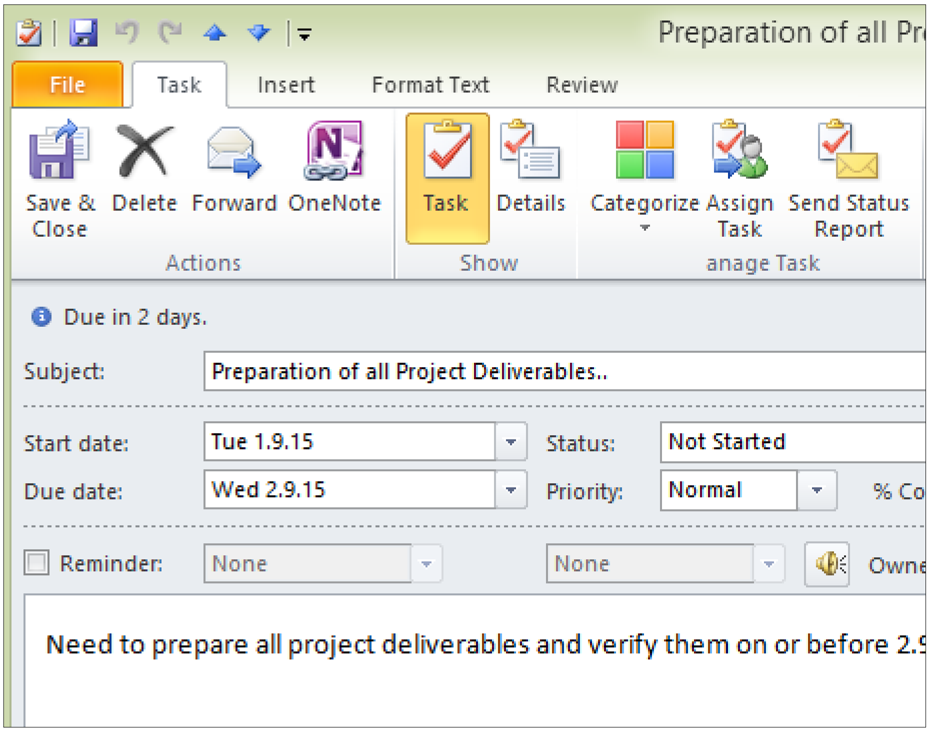
Appointments Added to the Categories are displayed in different color in the calender as shown below



Adding Tasks to the Categories:

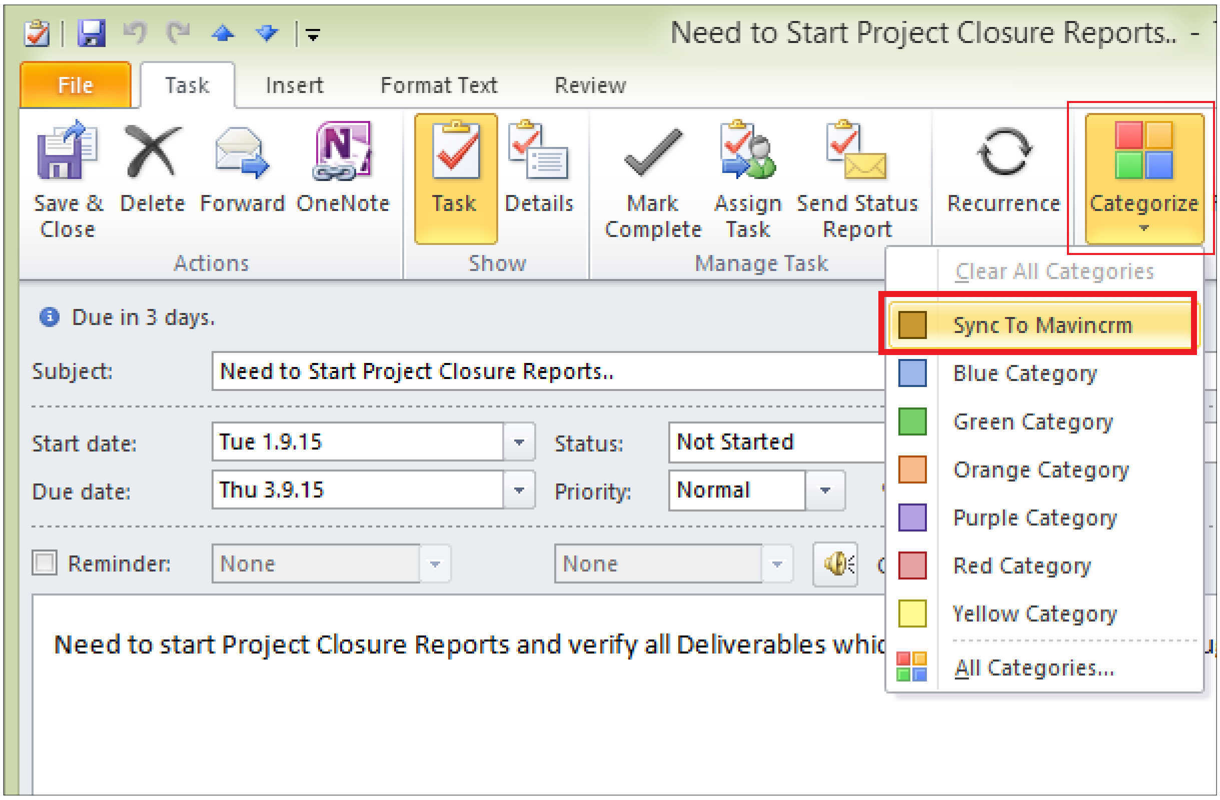
Step-1:

Open Tasks in the outlook and double click on any Task, then it will open the Tasks edit screen as shown below.



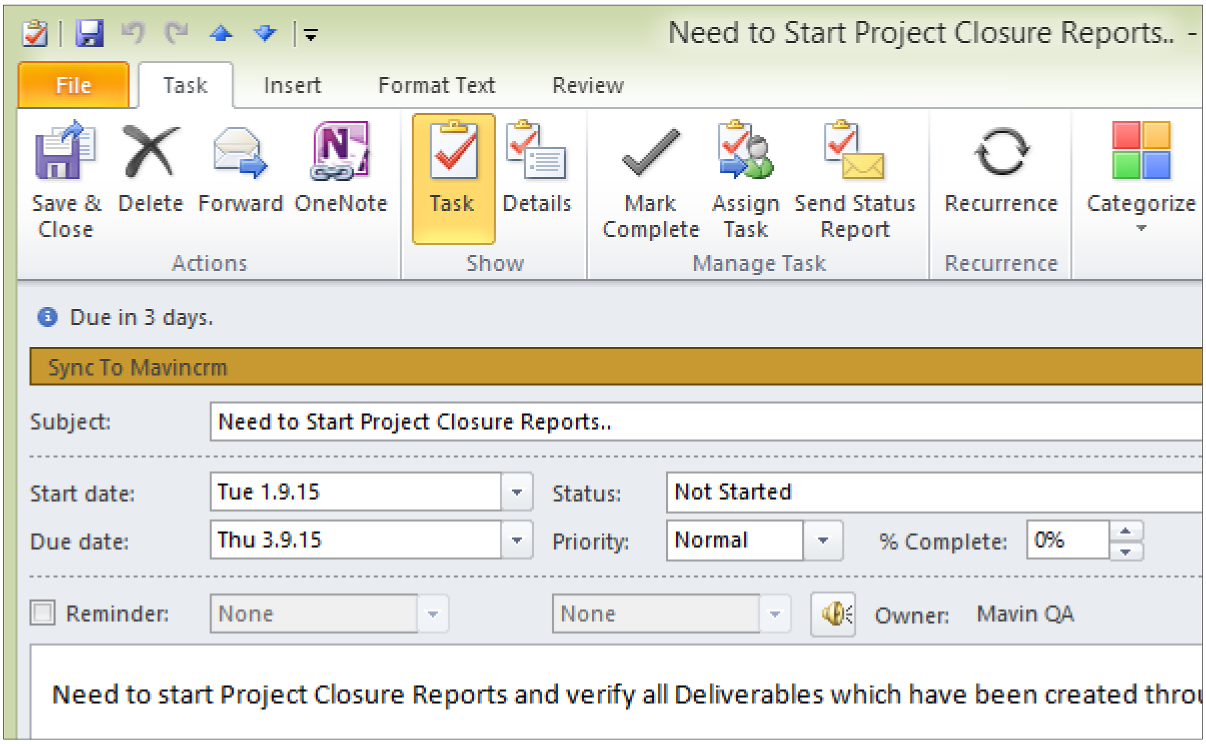
Step-2:

Click on “Categorize” available in the menu bar and select the “Sync To Mavin CRM” available in the populated list. As shown below

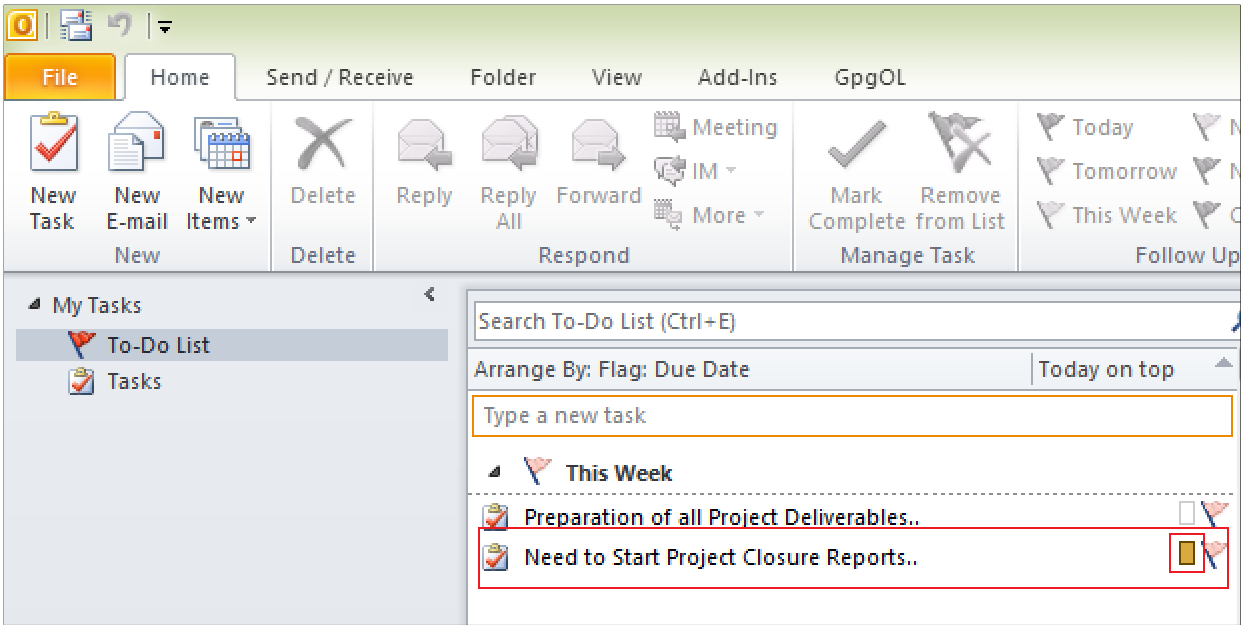


Step-3:

Clicking on "Sync To Mavin CRM" will add that particular Task to the Categories, and display message on that Tasks page as shown below.

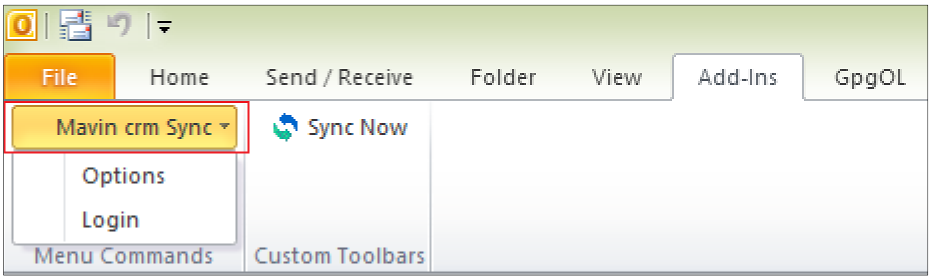


Tasks Added to the Categories are displayed in Tasks list as shown below

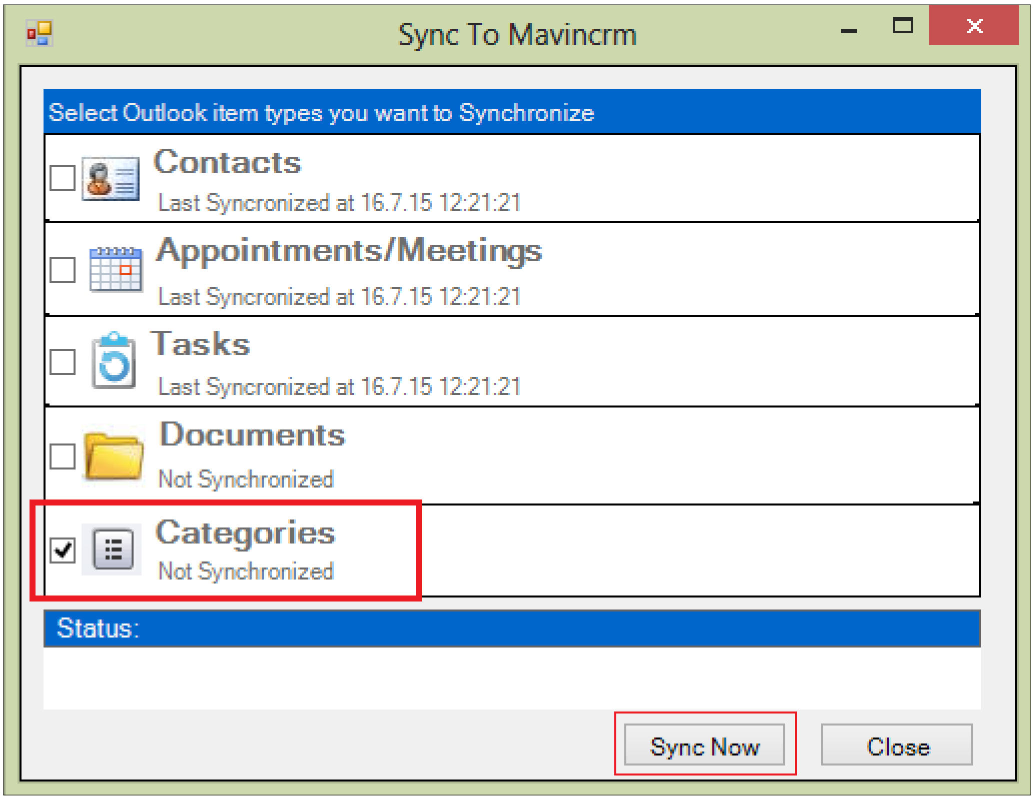


5. Synchronizing Categories:

After adding all required items to the categories click on "**Mavin CRM Sync**" available in Addins Menu and select **Options** as shown below.



Then it will open the options window in which we can able to select "Categories" to sync by clicking on the corresponding checkbox and clicking on Synchronize now button as shown below



In this way user can able to sync Categorized items to the CRM.