

Mail sync webCRM

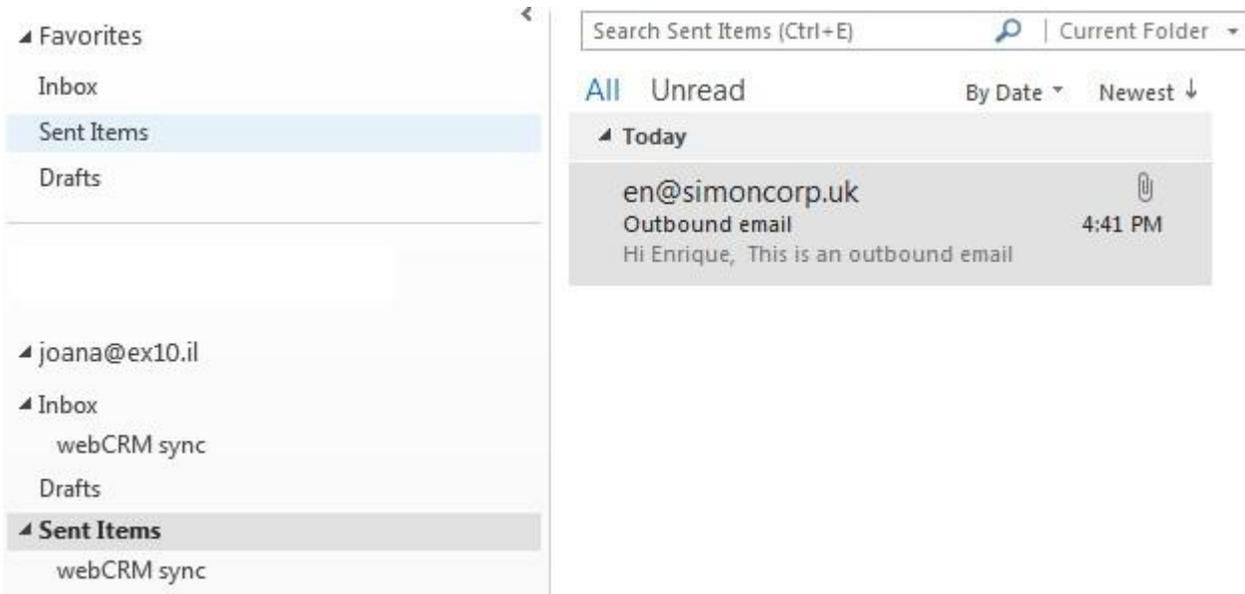
Synchronise outbound emails

Outbound emails can be synchronised from MS Exchange to webCRM and vice versa.

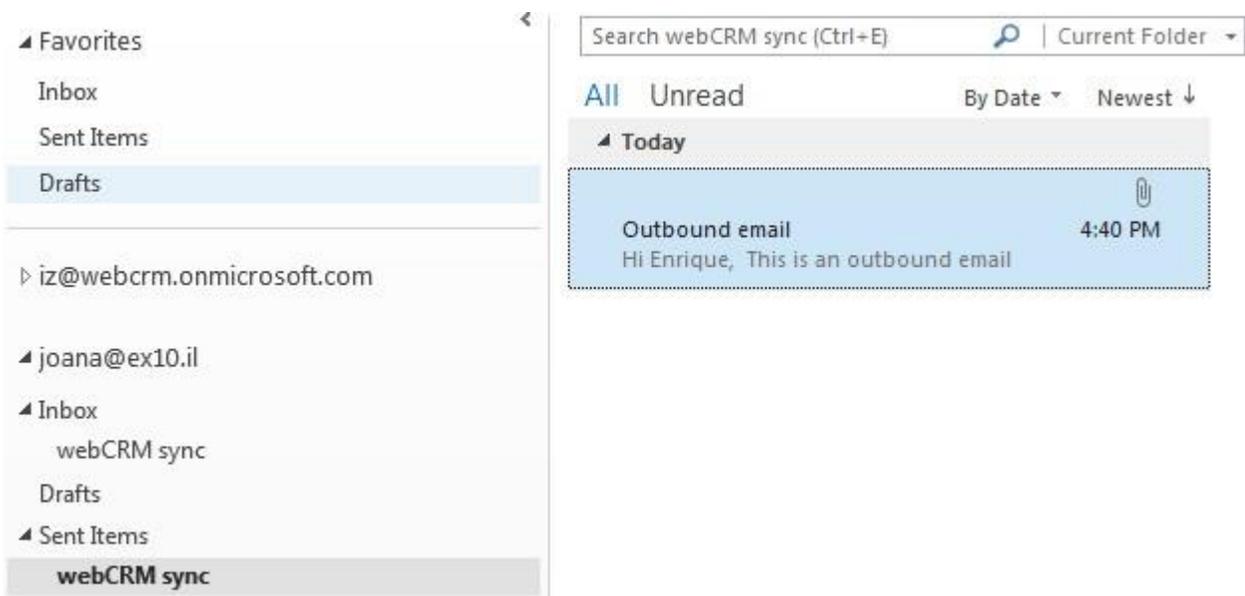
User Story 008 - Synchronise outbound email from MS Exchange to webCRM

To synchronise an outbound email from MS Exchange to webCRM, move it to 'webCRM sync' folder in Outlook:

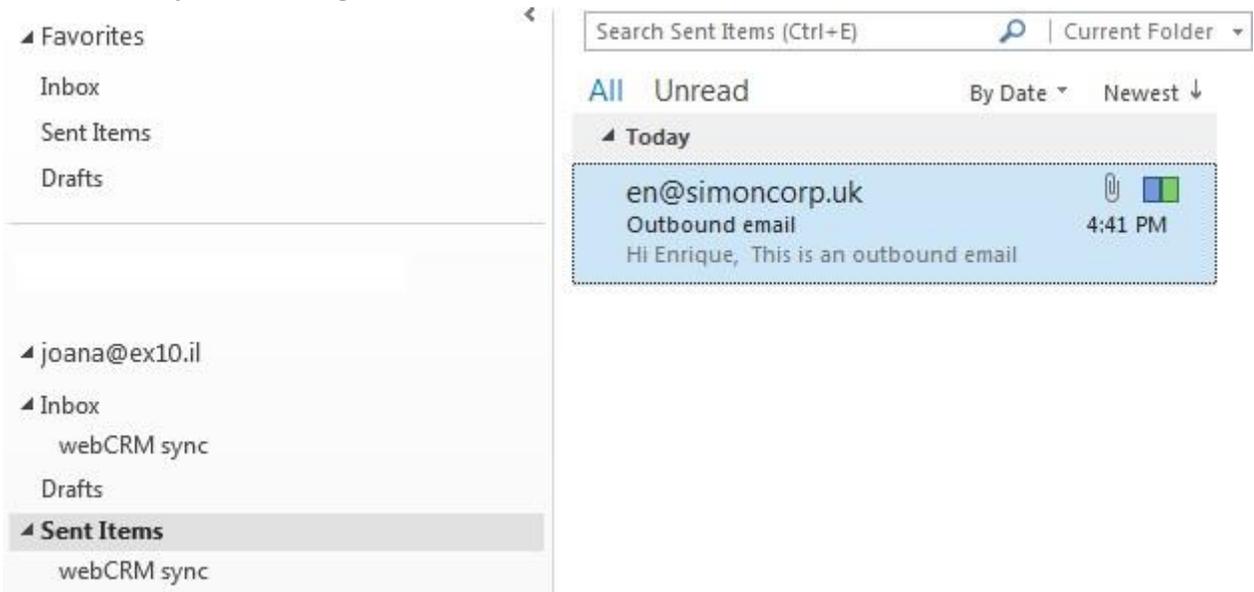
1. Select an email on Outlook from the 'Sent Items' folder.



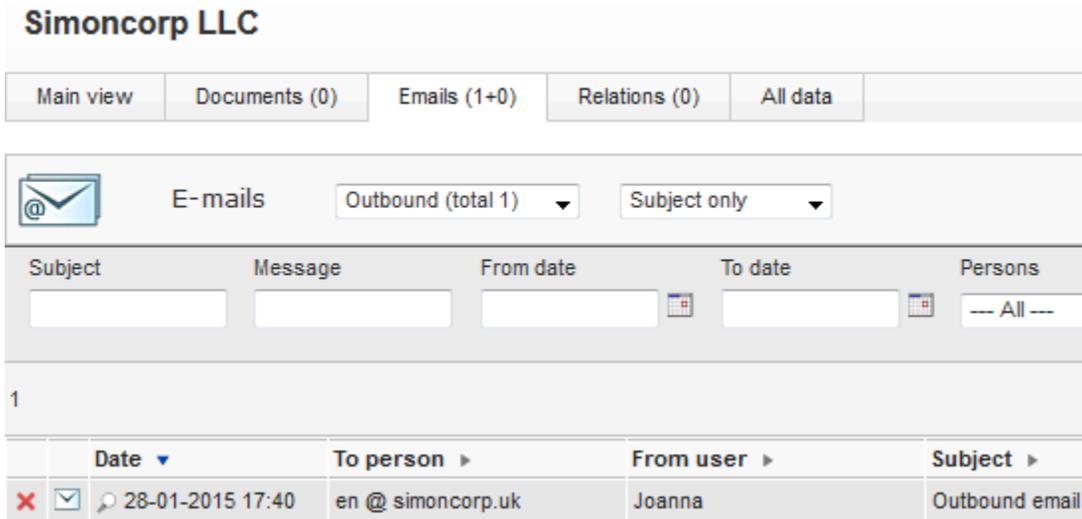
2. Move it to 'webCRM sync' sub-folder.



- If the email is successfully synchronised it is marked with 'webCRM sync' and 'Synced' categories.



- If the email is sent to a contact, which was previously synchronised to webCRM, the synchronised email will be available under corresponding Organisation on webCRM.



FAQ: Is it possible to set all emails, or all emails to a specific contact, to automatically sync?

A: The rule of thumb is - to synchronise an outbound email from MS Exchange to webCRM you need to move it to 'webCRM sync' folder in Outlook. It can be done:

- Manually
- Using Outlook plugin for Exchange

User Story 009 - Synchronise outbound email from webCRM to MS Exchange

To synchronise an outbound email from webCRM to MS Exchange, perform next task:

1. Create an outbound email on webCRM.

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Main view Documents (0) Emails (1+6) Relations (0) All data

E-mails Outbound (total 1) Subject only

| Subject | Message | From date | To date | Persons |
|---------|---------|-----------|---------|-----------|
| | | | | -- All -- |

1

| Date | To person | From user | Subject |
|------------------|---------------|---------------|-------------------|
| 29-01-2015 17:05 | Andrew Nelson | Iurii Zhuppan | Email from webCRM |

2. If the outbound email is successfully synchronised it will be marked with the "webCRM sync" and "Synced" categories on MS Exchange.

Search Sent Items (Ctrl+E) | Current Folder

All Unread By Date Newest

Today

Andrew Nelson <nelson.and...>
Email from webCRM
Email from webCRM
4:06 PM

Favorites
Inbox
Sent Items
Drafts

iz@webcrm.onmicrosoft.com

Inbox
webCRM sync
Drafts

Sent Items

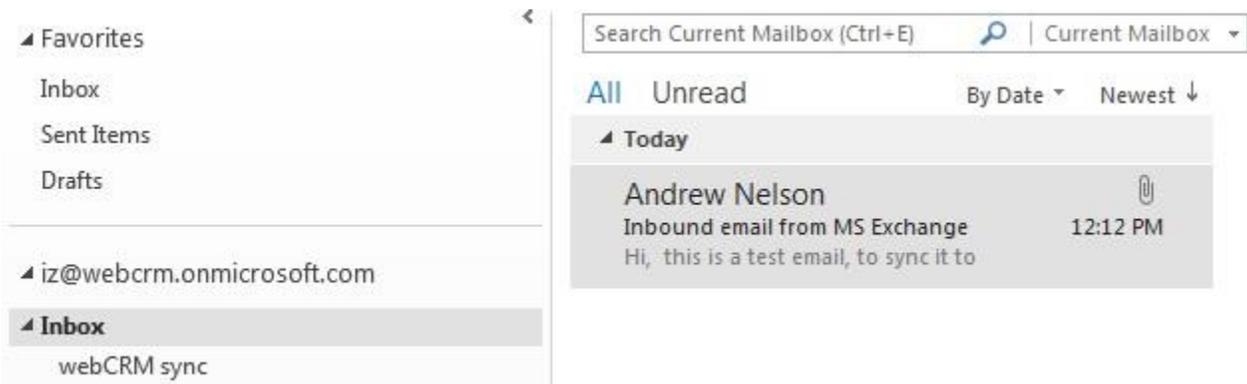
Synchronise inbound emails

Outbound emails can be synchronised only from MS Exchange to webCRM.

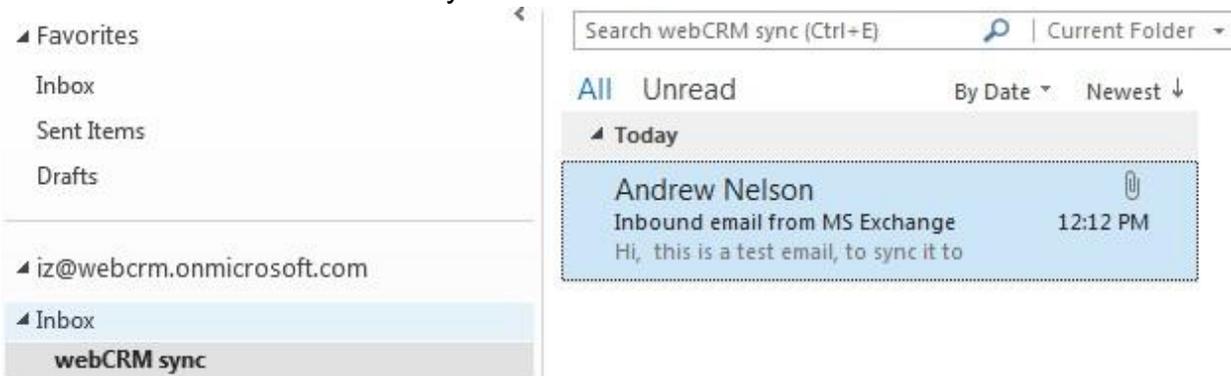
User Story 010 - Synchronise inbound email from MS Exchange to webCRM

To synchronise an inbound email from MS Exchange to webCRM, move it to 'webCRM sync' folder in Outlook:

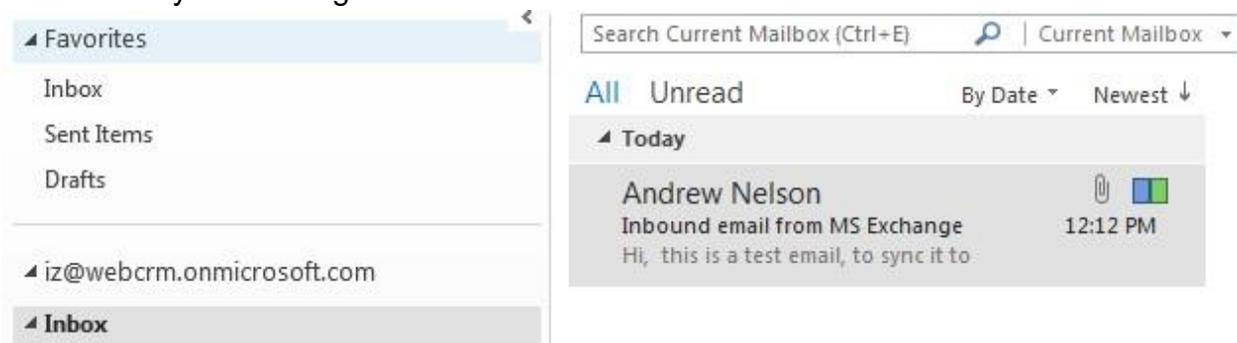
1. Select an email on Outlook from the 'Inbox' folder.



2. Move it to 'webCRM sync' sub-folder.



3. If the email is successfully synchronised it is marked with 'webCRM sync' and 'Synced' categories.



4. If the email is sent by a contact, which was previously synchronised to webCRM, the synchronised email will be available under corresponding Organisation on
5. webCRM.

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| | | | | |
|-----------|---------------|---------------|---------------|----------|
| Main view | Documents (0) | E-mails (1+2) | Relations (0) | All data |
|-----------|---------------|---------------|---------------|----------|

| | | | |
|---|---------|---------------------|----------------|
|  | E-mails | Inbound (total 2) ▼ | Subject only ▼ |
|---|---------|---------------------|----------------|

| | | | | |
|----------------------|----------------------|--|--|---------------|
| Subject | Message | From date | To date | Persons |
| <input type="text"/> | <input type="text"/> | <input type="text"/>  | <input type="text"/>  | --- All --- ▼ |

| | |
|---|-------------------------|
| 1 | --- Select report --- ▼ |
|---|-------------------------|

| | Date ▼ | From person ▶ | To user ▶ | Subject ▶ |
|---|--|---------------|---------------|--------------------------------|
|   |  29-01-2015 13:08 | Andrew Nelson | Iurii Zhuppan | Inbound email from MS Exchange |

FAQ: Is it possible to set all emails or all emails from a specific contact, to automatically sync?

- A:** The rule of thumb is - to synchronise an inbound email from MS Exchange to webCRM you need to move it to 'webCRM sync' folder in Outlook. It can be done:
- Manually
 - Using Outlook plugin for Exchange
 - Using Outlook rule, which is an action that Microsoft Outlook runs automatically on incoming messages, based on conditions that you have specified.