

Mail sync webCRM

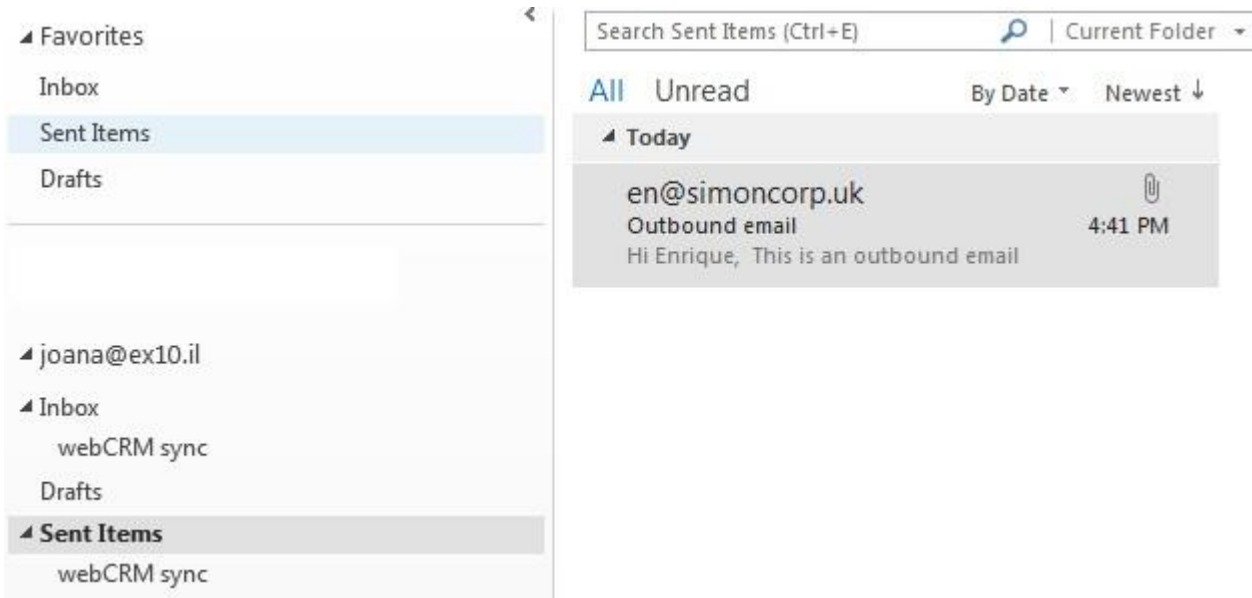
Synchronise outbound emails

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

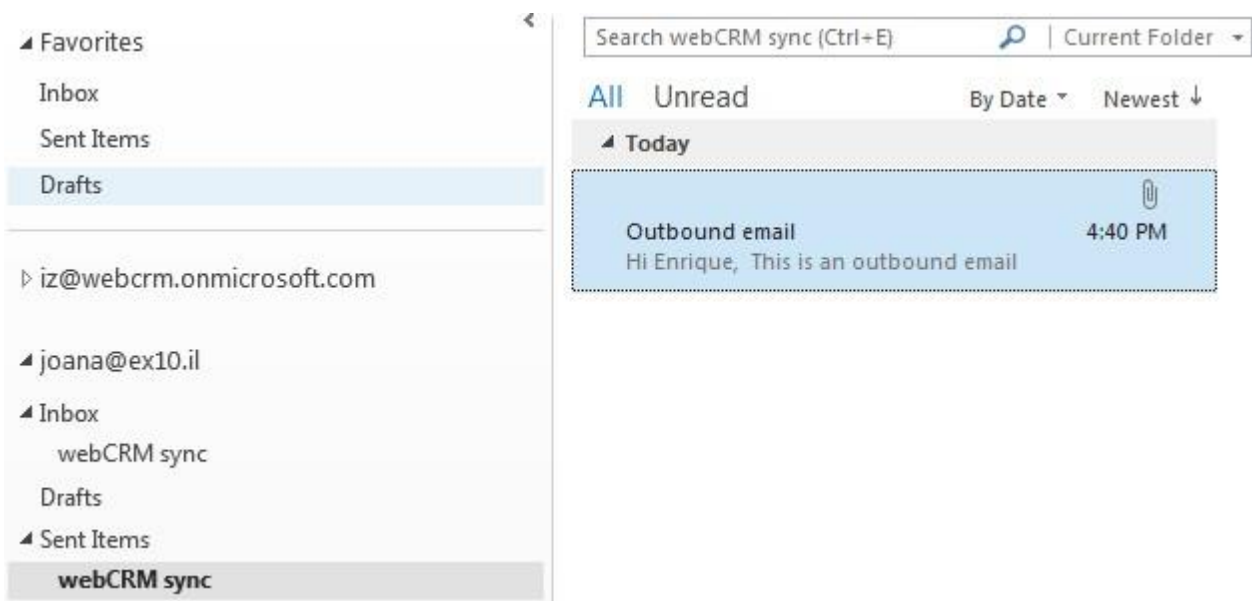
User Story 008 - Synchronise outbound email from MS Exchange to webCRM

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

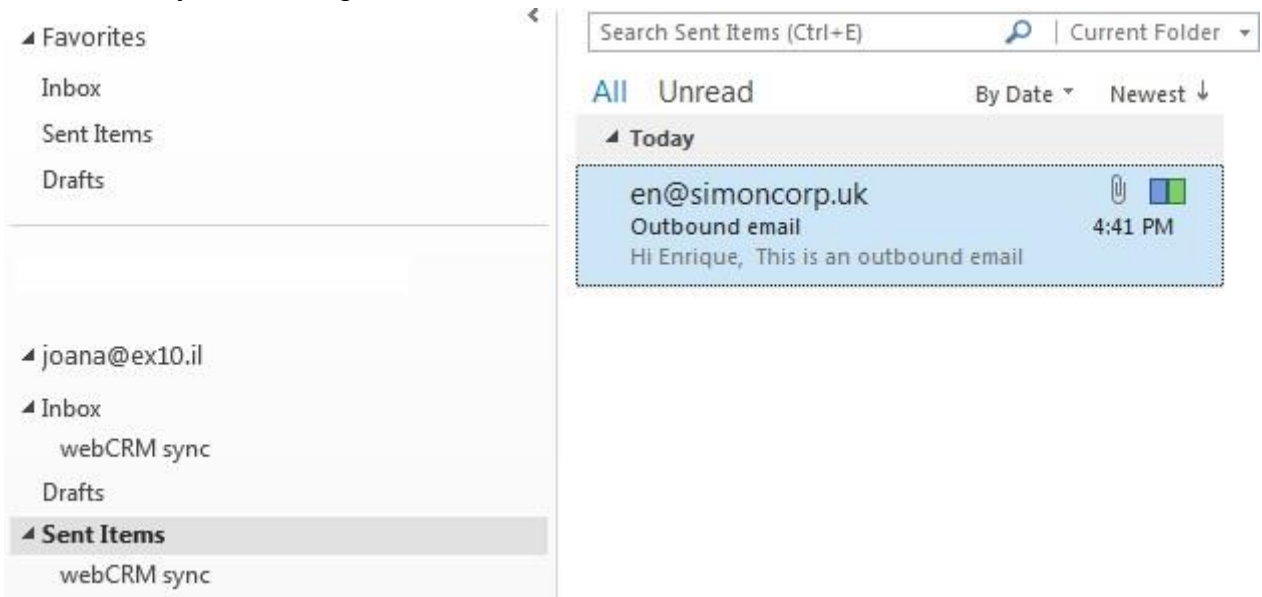
1. Select an email on Outlook from the 'Sent Items' folder.



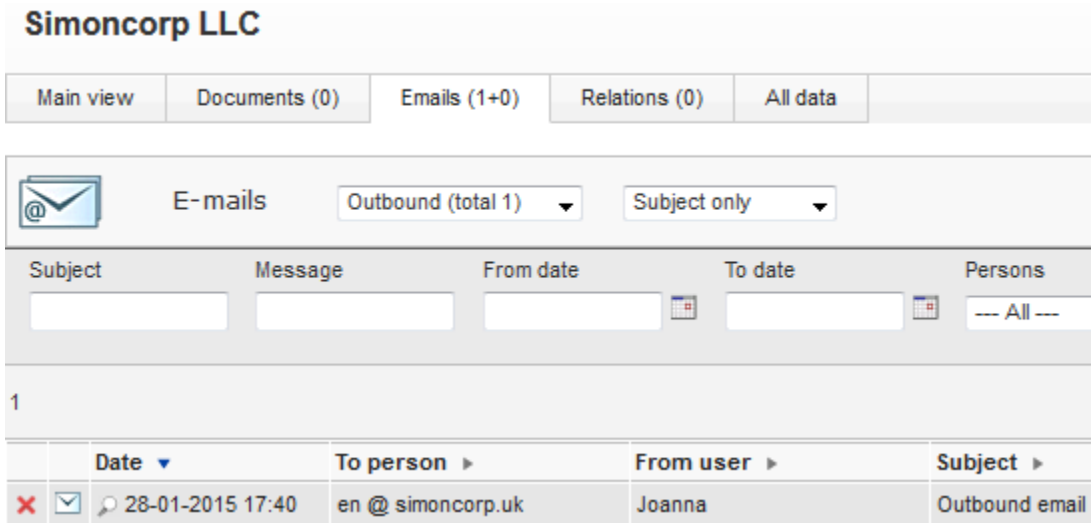
2. Move it to 'webCRM sync' sub-folder.



- 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...> 4:06 PM X

Email from webCRM

Email from webCRM

Favorites

- Inbox
- Sent Items
- Drafts

iz@webcrm.onmicrosoft.com

- Inbox
 - webCRM sync
 - Drafts
- Sent Items

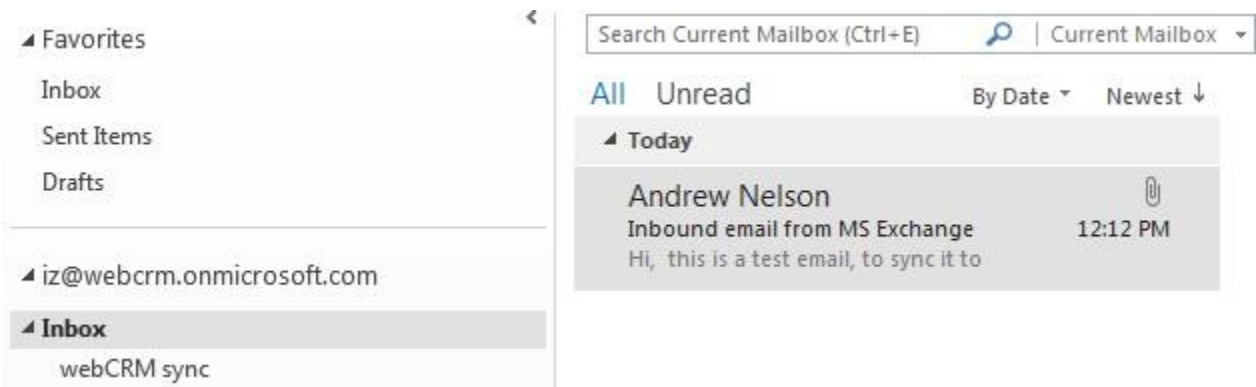
Synchronise inbound emails

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

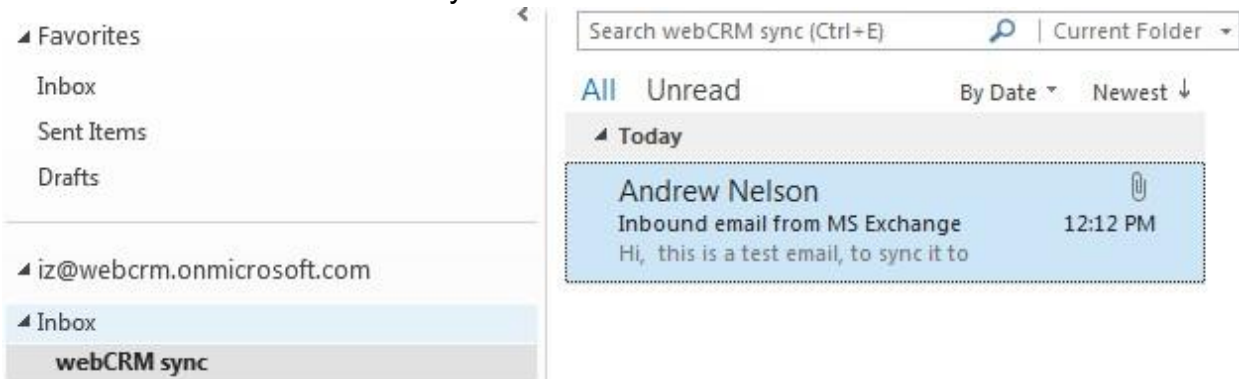
User Story 010 - Synchronise inbound email from MS Exchange to webCRM

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

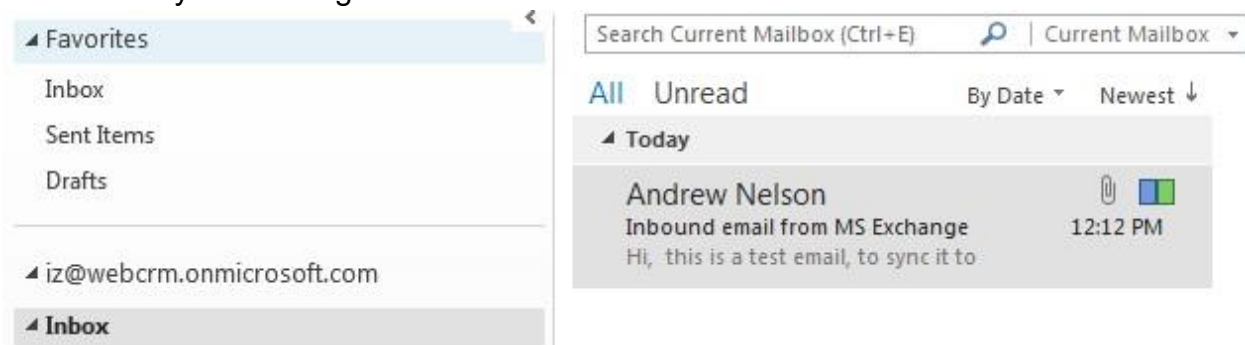
1. Select an email on Outlook from the 'Inbox' folder.



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)
Emails (1+2)
Relations (0)
All data

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

Subject	Message	From date	To date	Persons
				--- 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.