OUTLOOK ADDIN FOR SYNCHRONIZATION WITH RAYNET CRM ACTIVITIES - USING

User Guide

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Version	Date	Author	Description
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TABLE OF CONTENT

1 Description

This Outlook Add-In was created to link activities between RayNet CRM (CRM) and Microsoft Outlook (Outlook). CRM side linking relate to events, meetings, phone calls and tasks, where the owner is Add-In user. You can also add new activity from Outlook to your CRM, event, meeting or task. Linked activities can be synchronized, either manually or automatically. Synchronizing activities from within 20 days back to 180 days after synchronization time.

2 Installation

The user shuts down Outlook, runs the setup.exe add-in, and follows the wizard's instructions. After installation, the new VITSOL tab appears in the menu.

3 Configuration
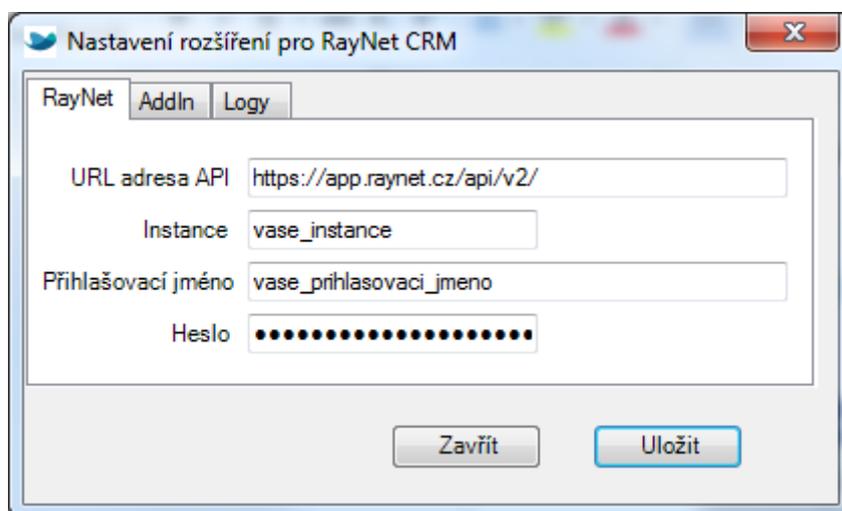
In order to use the add-in, it is necessary to set up a connection to the CRM after installation. URL CRM is preset and you probably will not need to change it. Instance is name of your CRM instance you want to link to Outlook and you have permissions to make changes. If you do not know what your instance name is, you can easily find it in the internet browser's CRM user interface in the address bar (for example at https://app.raynet.cz/pepa3/?view=ListView[PhoneCall] address is the instance name pepa3).

The login name is the name you use to sign in to the CRM user interface and the password or API key is a combination of characters that you know only yourself.

These four entries are mandatory to make connection to CRM.

On the second tab (AddIn), it is possible to enable or disable automatic synchronization of used lists of values and activities. After the installation is automatic synchronization disabled.

It is also possible to set the synchronization interval in minutes. The minimum is 20 minutes due to the limited number of queries to instance per day.

4   Form to Link Outlook activity to CRM

This action can only be used in the Calendar view for events, appointments, and phone calls in the Calendar folder, or Tasks view for tasks in the Tasks folder (not for TODO items). It can be activated by using the context menu of the selected activity (e.g. right-clicking the calendar event and selecting Event Link or Task with RayNet CRM).
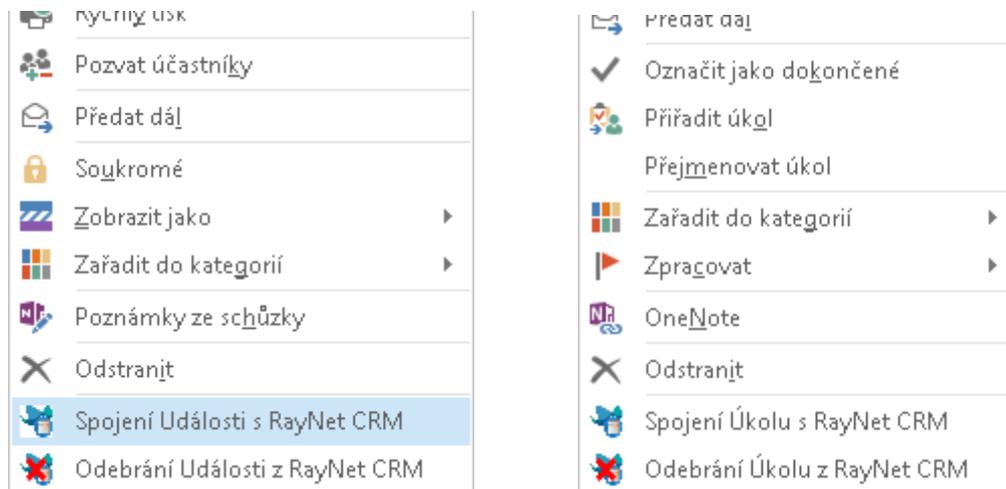
Recurring activities can not be linked. The appropriate link form is then displayed.

In this form, it is necessary to enter the Business Case or the Client. Clicking the "..." button opens the appropriate list of values that has at the top, a field for contextual constraint of the list and a check box to limit the list to active items.
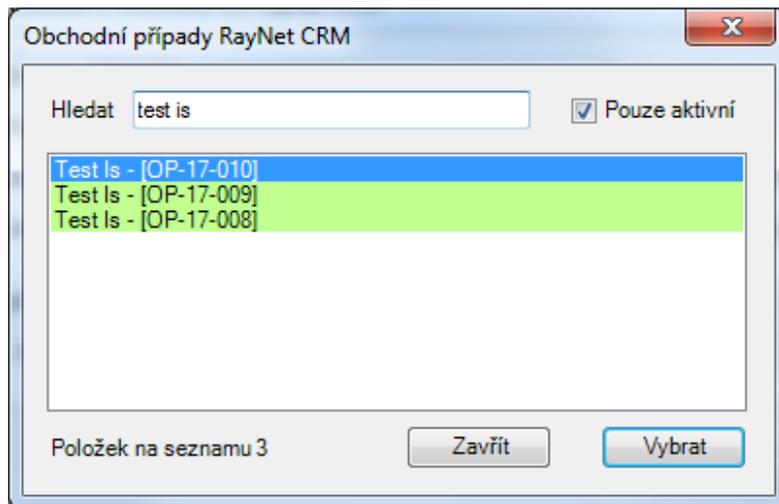
Clicking on a list item and then pressing Select will associate the selected item with the activity. The Close button closes the list without making a change.

By clicking on the X button in the link form, you can clear the previously entered value.

Press Send to send activity to CRM. The Close button closes the form without making changes or sending activity to CRM.

5 Synchronization

Synchronization can be started one time manually or at regular intervals automatically. You can manually launch it by clicking the Start synchronization button on the VITSOL tab in the ribbon as shown in the picture.
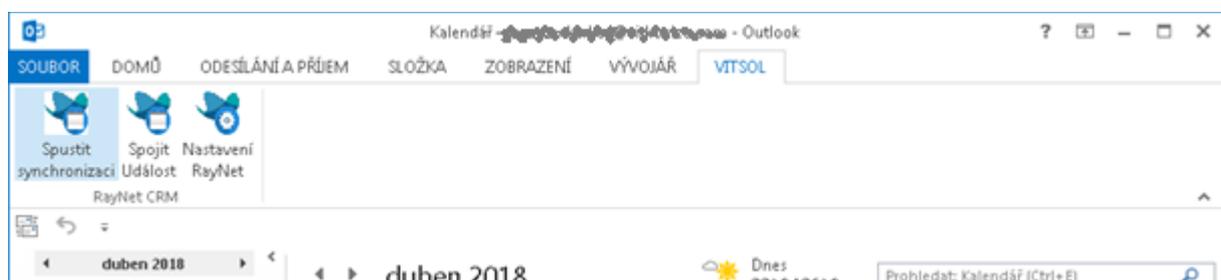
Automatic synchronization can be set in the Add-In configuration, which opens by pressing the RayNet Setup button on the VITSOL tab.
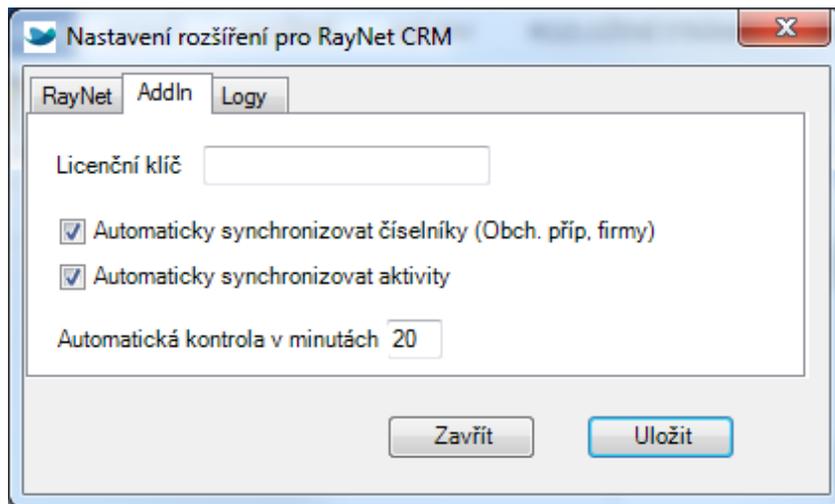
Because the Add-In does not hold any activity or code information, a full list is loaded at the first request after running Outlook. For next requests or when the auto-checkout timeout expires, only the data that has been changed since the last load was loaded. Only CRM-based or CRM-related activities in Outlook are synchronized within the 20 day back and 180 days ahead. Older or newer activities (even if they are linked) are not synchronized. Another condition for synchronization or linking activities is the Add-In's user must be the owner of an activity in the CRM.