**EMAIL SYNCHRONISATION AND CRM**

# What is Email Synchronisation ?

Email synchronisation is a method of passing information between Priority and Outlook/Gmail

# Benefits of Email Synchronisation

- Email synchronisation can be adopted to improve visibility of contact with Customers/Vendors across a business

- Ensure appointments are maintained and updated in both Priority and external email programme

# Features of Email Synchronisation

## OUTLOOK

- Synchronising emails as tasks
  - Sync Emails as closed/open tasks against contact
  - Sync Emails as closed/open tasks against a document
- Syncing Calendar
  - Synchronising appointments from Outlook to Priority
  - Synchronising appointments from Priority to Outlook
- Syncing emails as service calls
  - Opening new service call
  - Updating active service calls
- Syncing contacts
  - Synchronising contacts from Priority into Outlook
  - Synchronising contacts from Outlook into Priority

## GMAIL

- Synchronising emails as tasks
  - Sync Emails as closed tasks against contact
- Syncing Calendar
  - Synchronising appointments from Gmail to Priority
  - Synchronising appointments from Priority to Gmail
- Syncing contacts
  - Synchronising contacts from Priority into Gmail
  - Synchronising contacts from Gmail into Priority

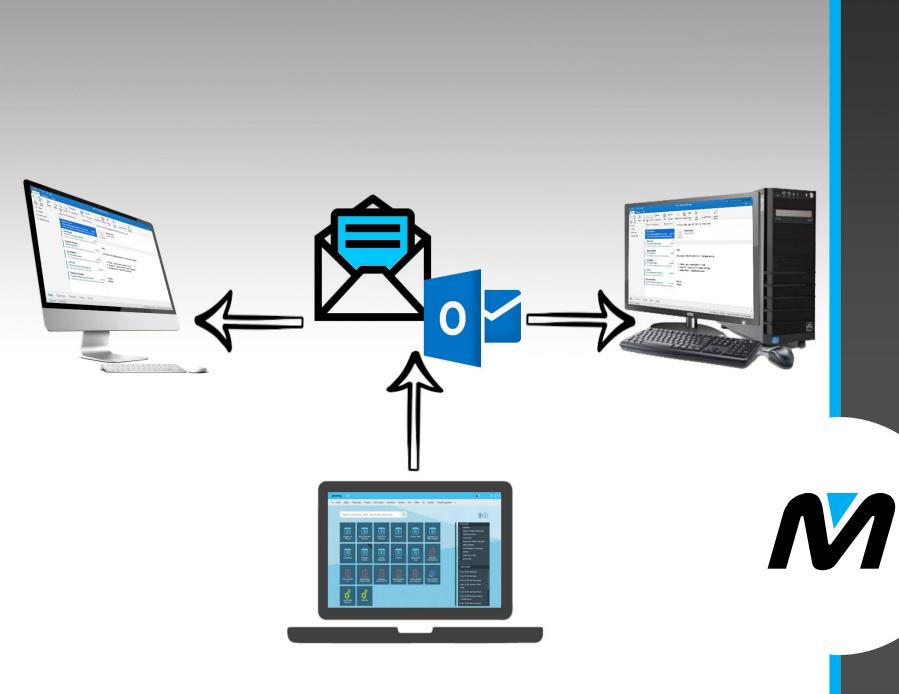**MEDATECH**

# BI On Outlook

- Display BI Reports in outlook
  - Allows for Data Manipulation from within Outlook
- Display Dashboards in Outlook

# Compatibility

- For full functionality in Outlook Microsoft Office 2007 or higher is required
- Can be used with Priority rich or client

# Demonstration

- Exporting contacts from Priority into Outlook
- Syncing an email to create a task/ contact for a specific customer
- Syncing an email in response to a document sent from Priority
- Syncing Gmail calendar
- BI on Outlook