

PiSA sales Groupware Connector

Your appointments in sync with Outlook, Lotus Notes or Google G-Suite

The PiSA sales Groupware Connector automatically synchronizes appointments in the PiSA sales CRM to either the Microsoft Exchange server, the Lotus Domino server or to Google G-Suite.

Your sales, marketing and service staff can now organize their appointments either in the PiSA sales CRM or in the groupware clients Outlook and Lotus Notes or in the Google Calendar web interface without the need to manually transfer relevant appointment data to the respectively other application. This saves time and assures the automatic notification to all meeting participants once an appointment has been newly entered into the system or changes have been made to an existing appointment.

While the PiSA sales Groupware Connector keeps the data in both systems up to date, the PiSA sales calendar shows all synchronized appointments and other employee activities in the CRM system. The PiSA sales calendar allows you to see shared calendars and to check the availability status of your colleagues. Process information of all kind, involved persons, attached documents, etc. are directly retrievable from within the appointment entry. The separate treatment of private appointments will ensure your privacy remains well-guarded.

The system also offers you the option to import e-mails from a defined import folder (e.g. inquiries) automatically to the PiSA sales CRM. This feature is available to you in the recent Google G-Suite, from Microsoft Exchange Server 2007 and EWS Connector as well as from Lotus Notes Domino Server 7.0. Moreover, in the Google G-Suite and from Microsoft Exchange Server 2010 the automatic import of technical resources (e.g. rooms, devices or vehicles) into the PiSA sales CRM is possible.

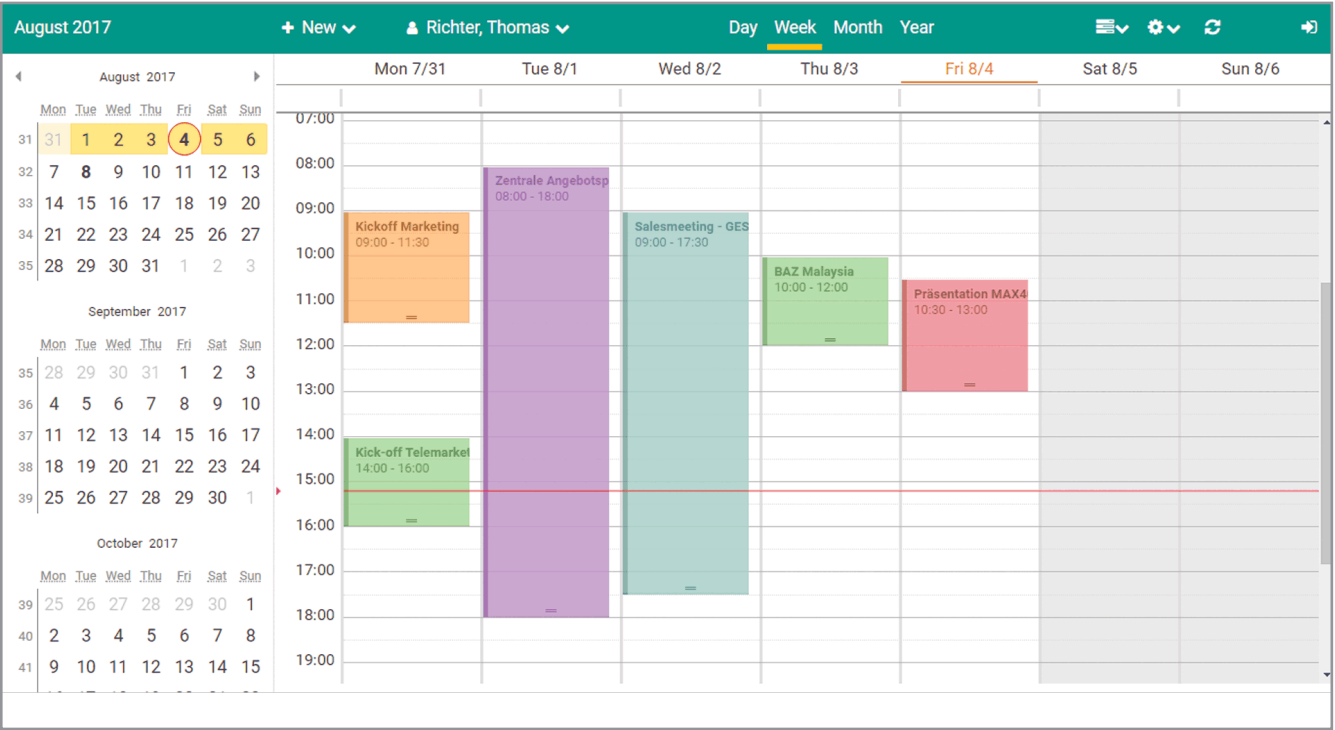
The benefits at a glance

- ✓ fully automatic calendar cross-checks
- ✓ single-source administration of appointments stored in separate applications (eradicates work duplication)
- ✓ automatic participant notification ensures that your employ-ees all remain constantly updated
- ✓ the calendars of non-CRM users can be synchronized as well with the PiSA sales CRM so that CRM users will be able to link those appointments with other CRM processes (sales, marketing or service)
- ✓ during the generation of appointments in Outlook or Lotus Notes you can select participants and attachments directly from the PiSA sales CRM via an add-in
- ✓ keeps field and office staff constantly updated: appointments, reports on meetings, etc., noted offline will be immediately entered into the PiSA sales CRM upon synchronization with the groupware server, making this information available to all participants
- ✓ effective privacy protection due to a sophisticated access management
- ✓ planning of resources will be massively simplified analog to appointment planning
- ✓ the automatic import of e-mails for example in lead man-agement contexts reduces your efforts significantly

Automatic appointment synchronization

- ✓ automatic checking of groupware appointments against PiSA sales appointments
- ✓ appointments may be entered either in the Outlook, Lotus Notes or G-Suite standard calendar or in the PiSA sales calendar; every appointment entered in one of these systems will be automatically created, accordingly modified or cancelled in the respectively other application

- ✓ this system coupling extends to all key appointment data, e.g. type of appointment, place, date and time, notes/visit report, appointment category (Google does not support categories), participants, participant status, and linked files such as contacts and file attachments
- ✓ automatic appointment-data distribution to concerned parties
- ✓ automatic participant notification
- ✓ status-specific synchronization (e.g. completed appointments may be excluded from synchronization)
- ✓ configurable timeframe (e.g. synchronization of all non-completed appointments within the period of, say, -7 to +90 days)
- ✓ working-hour models are taken into account (e.g. for the synchronization of appointments during working hours; whereby you would still be able to manually synchronize any appointments scheduled outside of working hours)
- ✓ upon export from the PiSA sales CRM, process and contact allocations to a groupware appointment will be kept stored to ensure that important information contained only in the PiSA sales CRM is not lost
- ✓ simple configuration of the Connector via a user’s personal settings



Calendar in the PiSA sales CRM

Treatment of private appointments

The separate treatment of private appointments secures privacy protection for your employees. The PiSA sales calendar only displays the start and end dates/times of those appointments flagged as private (this basic information is required to enable availability checks). All other information on these appointments is not viewable, not even to the administrator.

A service function is optionally selectable in the PiSA sales CRM to automatically delete all past private appointments.

Convenient creation of appointments in Outlook or Lotus Notes

The PiSA sales modular linking concept means your employees will not need to forfeit features offered by the client-side link when using the PiSA sales Groupware Connector. For appointment processing in groupware clients, for example, you will still have the functions for direct selection of participants and documents from the PiSA sales CRM at your disposal.

The benefits, obviously, are that it makes it unnecessary to check contact data for redundant content, since your sales staff will only be shown the relevant customer entries from which to select, depending on their access authority as defined in your CRM system.

Automatic import of resources

- ✓ import of room and device resources
- ✓ import of resources from different Groupware servers (e.g. one per branch office)
- ✓ usage of resources at appointments

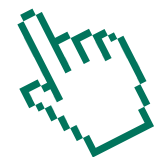
Automatic import of e-mails

- ✓ automatic import of e-mails from defined folders
- ✓ filtered e-mails that have to be imported can be moved into the import folder automatically (e.g. one per branch office)
- ✓ e-mails that have to be imported can be moved manually into the import folder



We will be pleased to
advise you!

www.pisasales.de/en



PiSA sales GmbH
Fredericiastraße 17-19
D-14050 Berlin

Tel: +49 (0)30 810 700-0
Fax: +49 (0)30 810 700-99
info@pisasales.de
www.pisasales.de/en

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