

RIVA SYNC AND INSIGHT EDITION V12.15.2020

End Users Guide to Riva





End User How-To Guide

While no one can replace your Riva administrator, this guide is designed help to answer some of the most frequently asked questions about getting started with Riva.

Ask your administrator to confirm the details of your Riva license, including which features and configurations are available to you. If you have additional questions, contact your Riva administrator or submit an internal help desk ticket.

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How-to: Create, update, and review Salesforce contacts, accounts, opportunities, or cases using Outlook

Creating Salesforce contacts and accounts from an email

In Outlook:

1. Select an email you want to synchronize to Salesforce
 - Drag and drop the email into the “Create New Email” folder, or
 - Categorize the email with the Salesforce category.¹
2. Riva will then track the email to Salesforce and create contacts (and accounts) for each of the senders or recipients that do not already exist in Salesforce.²
3. Riva will also place the relevant associations in Salesforce. You will see the tracked emails listed in the activity history panel in the appropriate Salesforce contacts and accounts.

Use Outlook to create opportunities, cases, contracts in Salesforce

In Outlook:

1. Select an email you want to synchronize to Salesforce
2. Drag and drop the email into the “Create New Opportunity” folder, the “Create New Case” folder, or the “Create New Contract” folder
3. Once Riva creates the opportunity, case, or contract in Salesforce, you will be able to access the new record from within Outlook by selecting the “opportunity”, “case”, or “contract” folder
4. You can view or edit the new opportunity, case, or contract by selecting the “review” and “edit” buttons within the record in Outlook

1. Your Riva administrator can provide the name of the category if it has been re-named.

2. The automatic creation of contacts and accounts that do not already exist in Salesforce will occur if your organization’s Riva policy has been configured accordingly. Please check with your company’s Riva administrator for more information.

Use Outlook to review existing opportunities, cases, contracts, or custom items in Salesforce

In Outlook:

1. Open the “opportunities”, “cases”, or “contracts” email folder
2. Locate or search for the item of interest
3. Select and open the item; you will see summary details exactly as they appear in Salesforce
4. Select “review” or “edit” to access the item record in Salesforce

Use Outlook to update opportunities, cases, contracts, or custom items in Salesforce

In Outlook:

1. Review the folder structure in Outlook and locate the “Assign To” folder for the Salesforce item you want to associate an email with.
2. From your Outlook inbox, or other email folder, select an email you want to track in Salesforce.
3. Drag and drop the email into the respective “Assign To” folder located under the cases, opportunities, or contracts folder.
4. Riva will automatically track the email in Salesforce, where the relevant associations are put in place. The email will be in the activity history listed next to the contact, account, and opportunity’s (case or contract) activity history.

How-to: Track Outlook Calendar Events and Tasks in Salesforce

Manual calendar event synchronization

In Outlook:

1. Open the calendar item you want to track to Salesforce
2. Categorize it with the Salesforce category³
3. Select save
 - Riva tracks the event or meeting to Salesforce. Depending on your company's Riva policy configuration, files attached to calendar items are also synchronized and made available in Salesforce
 - If an item error is discovered during synchronization, an error category will be added to the Outlook calendar event

Manual calendar event synchronization to specific Salesforce items with Riva Insight

In Outlook:

1. Open or create a calendar item
2. Add or edit the details as required
3. Select the "Track in CRM" button from the Riva Insight side panel
4. Use the "Link to" drop down to locate the Salesforce contact, account, or opportunity
5. Select "Track"
6. Values entered in CRM fields will also be synchronized to Salesforce

Manual task synchronization

In Outlook:

1. Open the calendar item you want to track to Salesforce

³ Your Riva administrator can provide the name of the category if it has been re-named.
www.rivaengine.com

2. Categorize it with the Salesforce category⁴
3. Select save

Automatic calendar eventsynchronization

Riva is connected directly to Salesforce and your company's email server and automatically synchronizes your meetings, appointments, and tasks between Outlook and Salesforce when they are created, updated, or deleted. Depending on your Riva configuration, this can take place uni-directionally (updates in Salesforce will synchronize over to your mailbox), or bi-directionally (updates in either system will synchronize over).

As Riva connects directly to the Salesforce and Microsoft servers, the synchronization processes run automatically and in the background. Updates made by meeting attendees are synchronized to all users and systems. Updates made to Salesforce calendar events are also synchronized to user's Outlook calendars.

Once a calendar item or update is tracked from Outlook to Salesforce, Riva assigns the "Salesforce" category to these items.

Existing and historic items are synchronized from Salesforce to your email calendar during the initial synchronization process (as determined by your Riva Administrator).

Riva automatically synchronizes:

- Meetings, appointments, tasks, and other calendar items
- Recurring events
- Multi-day events
- Meetings with multiple invitees
- Categories and custom categories
- Meeting notes
- Attachments
- Shared resource calendars
- Private appointments (details are not transferred while free/busy schedule is maintained)

⁴ Your Riva administrator can provide the name of the category if it has been re-named.

How-to: Track Outlook Contacts and Leads to Salesforce

Manual contact/lead synchronization

In Outlook:

1. Go to the contacts page by selecting the People icon
2. In the People page, under My Contacts, select the Salesforce⁵ folder.
 - This folder contains all contacts that Riva has synchronized between Salesforce and your Outlook account
3. Create a new contact. The new contact must be created in the Salesforce* folder, moved to this folder, or categorized with the “Salesforce” tag
4. Riva will then synchronize this contact to Salesforce

Riva will synchronize any updates to the contacts, including deletions, between your Outlook account and Salesforce.

As Riva connects directly to the Salesforce and Microsoft servers, the synchronization process runs automatically in the background. All devices, including laptops, tablets, and smartphones, that are connected to your Microsoft Outlook Exchange account will automatically be updated by Riva. These updates will occur even if your email client is not open or the device is not powered on.

Automatic contact/lead synchronization

Riva is connected directly to Salesforce and your company’s email server and automatically synchronizes your contacts between Outlook and Salesforce, so the two sets of contacts are an identical match.

Once a contact or update is synchronized between Outlook and Salesforce, Riva automatically assigns the “Salesforce” category to the contact.

As Riva connects directly to the Salesforce and Microsoft servers, the synchronization process runs automatically in the background. All devices, including laptops, tablets and smartphones, that are connected to your Microsoft Outlook Exchange account will automatically be updated by Riva. These updates will occur even if your email client is not open or the device is not powered on.

5. Your organization’s Riva administrator may have configured contact sync to work from the default “Contacts” folder or given the Salesforce folder a different name.

Contact and lead synchronization configuration options

Your organization's Riva administrator may have configured various options for contact and lead synchronization.

These options include features such as:

- Setting the Salesforce contacts folder in Outlook to a name other than the default "Salesforce"
- Choosing the Salesforce category color
- Configure sync to the default Outlook contacts folder instead of the Salesforce folder
- Enable manual or automatic contact sync. Manual contact sync would require the Salesforce category to be applied to contacts, even if they are in the Salesforce folder
- Enabling sync of all contacts (or leads) you can view in Salesforce or only those owned by you
- Enable sync of contacts (or leads) to and from Salesforce or in one direction only (e.g. from Outlook to Salesforce), or both directions.
- Enabling automatic insertion of the 'link to the contact in Salesforce' in the contact's website field in Outlook

How-to: Track Email Threads as Conversations in Salesforce

Start a Conversation

In Outlook:

1. Select an email that represents the beginning of a discussion, sale inquiry, negotiation, or other business-related conversation:
2. Drag and drop the email into the “Create New Email” folder, or
3. Categorize the email with the Salesforce category⁶
4. Riva automatically tracks the email to Salesforce. Email attachments are also synchronized, depending on your organization’s Riva configuration
5. A respective conversation object is created in Salesforce by Riva, and the email is associated with that conversation object

When emails are dropped in the “Create New Email” folder, Riva synchronizes them to Salesforce as completed tasks (or emails) and automatically assigns them to respective contacts and accounts.

Automatic email synchronization

Riva will automatically track your Outlook inbox and/or sent items to Salesforce without the need to manually apply the Salesforce category. Once processed, Riva will assign the email with the “Processing Complete” category.

In Salesforce, we see the email is listed in a conversation item. All follow-up emails, both sent and received, including their attachments, are automatically added to the conversation item by Riva. Riva creates a clean snapshot from each email by removing previous replies (if they are present) before adding the new response details to the conversation.

Conversations can be filtered, sorted, and searched by name, account, opportunity, case, or contract.

6. Your Riva administrator can provide the name of the category if it has been re-named.

How-to: Riva Insight⁷ to gain a 360⁰ view of Salesforce in Outlook

View Salesforce items in Outlook in the Riva Insight side panel:

In Outlook:

1. Select an email or calendar event
2. The Riva Insight side panel will automatically display all the Salesforce information associated with the email or event selected:
 - Account information, contact information, associated contacts, opportunities, cases, contracts, and projects will be visible
 - Upcoming and historic events associated with the account or event will be visible
 - Quick links to Wikipedia, Google, Local Weather, and News searches associated to the account will be visible⁸

Track Outlook items against specific items in Salesforce using the Riva Insight side panel:

In Outlook:

1. Select the “Track in CRM” or “Track Email” buttons in the Riva Insight side panel
2. Select the appropriate Salesforce item (contact, account, opportunity, etc.)
 - E.g.: Contact
3. Search for the specific Salesforce item record in Salesforce by selecting the magnifying glass icon
 - E.g.: Evan Chow
4. Select track
5. The Outlook item will be synchronized to the specific item record chosen

7. Your organization’s Riva administrator will confirm if the Riva Insight panel is enabled. If you have additional questions, contact your Riva administration.

8. These items might have been configured by your Riva administrator to include those that are the most useful to your organization’s workflow.

Navigate to a Salesforce record directly from Outlook

In Outlook:

1. To navigate directly to a Salesforce item record from Outlook, select an email or calendar event
2. Refer to the Insight side panel, which will automatically display Salesforce items associated to the email or calendar event
3. Select the “View in CRM” button under the Salesforce item you wish to see