7 Reasons Why You Should Choose GrinMark Synchronizer

Let's assume you have tired of entering same data over and over again into your CRM and Email systems. Contacts, Meetings, Tasks, Emails and other stuff are needed in both of them. You use Outlook for communication and CRM for structuring your customer data. Let's also assume you reached the point of frustration where you started to seek for CRM and Exchange synchronization solutions. In this case the article is for you.

GrinMark Synchronizer

GrinMark solutions are designed to synchronize data between leading CRM systems and Microsoft Exchange. It can be done either on-premises or in the cloud.

The Reasons

So, what is so good about choosing GrinMark Synchronizer? There are several reasons.

Reason 1: Synchronization and More

Binding and Auto Creation

Simple synchronization of records in CRM and Exchange is a good thing but obviously it is not enough. Records in CRM have relationships. E.g. Contact is connected to Account, Email is related to Case, Opportunity or Lead. That is why such features as automatic binding of records and auto creation of records are important. Let's look at some examples.

- When a Contact is synchronized from Exchange to CRM then Synchronizer finds corresponding Account and sets relationship.
- When Email is archived from Exchange to CRM then Synchronizer automatically attaches it to Contacts, Leads or Accounts with addresses on the recipients list.
- If Email recipient is not a known Contact or Account then new Lead is created.
- If Email is archived to Case or Opportunity then corresponding relationship is automatically set in CRM.

Filtering

Selection of records to synchronize is also a very important matter. You can decide to exclude private Meetings or Contacts from Exchange to CRM synchronization. You can choose if you want all CRM Contacts or Meetings visible to user to be synchronized or just assigned to this user. More complex record selection criteria can be defined using CRM Filters based on SQL queries.

Merging

Imagine you already have data in your CRM and Exchange systems and just decided to go with synchronization solution. You expect that similar records from both systems (e.g. Contacts with the same first, last name and email address) will be bound together and no duplicates will be created. This is what GrinMark Synchronizer can do out-of-the-box.

Categories

Exchange categories are a powerful mechanism to label records. Based on categories GrinMark Synchronizer can select or ignore records. Also categories can be automatically assigned. In some cases it is convenient to map Exchange categories to CRM custom fields. Such scenario is also supported.

Reason 2: Fault Tolerance

Imagine that Exchange or CRM server became unavailable for some period of time (because of network problems or provider maintenance). E.g. Exchange Server Online (Office365) throws errors from time-to time. This should not affect synchronization. GrinMark Synchronizer handles such situations and continues when the connection is available again.

Reason 3: Awareness

How to know if something got broken during synchronization? There are some usual cases.

- CRM or Exchange server is permanently unavailable.
- Password was reset for connecting CRM or Exchange account (e.g. old password just expired).

In this case the administrator must be notified in timely manner. GrinMark Synchronizer is able to deliver notifications to Synchronizer Manager (desktop UI) and via email to a specified list of recipients.

Reason 4: History

When you have lots of unsynchronized data it is desirable to be able to monitor the progress of initial synchronization. This can be achieved using Synchronizer Journal. One can see what records were synchronized/created or merged and in what direction. This information can be filtered in various ways.

Reason 5: Troubleshooting

When you do initial configuration or customization work something can go not the way you expect. In this case you can use Synchronizer Journal and enhanced log files. This helps to nail down the problem very quickly.

Reason 6: Scheduler

To reduce server load one can set a flexible synchronization schedule. Different frequency can be configured for work and after work hours. You can choose frequency from seconds to hours.

Reason 7: Architecture

In some cases, especially in big organizations, there are custom requirements which are very specific to a particular organization. For example

- synchronization of custom fields,
- specific logic of merging data,
- custom actions are needed when records are synchronized.

GrinMark Synchronizer has configurable and customizable architecture which helps to meet virtually any needs.

Conclusion

On of ideas behind this article was to outline some peculiar properties of CRM and Exchange synchronization process. These are things you should be aware when planning to deploy a synchronization solution. The purpose of this article is to show that you can definitely choose and rely on GrinMark Synchronization solution.

Company Information

GrinMark provides synchronization solutions to customers all over the world since 2006. Our products integrate Exchange with world leading CRM systems. Our solution is configurable, customizable and has flexible deployment options. Benefits of GrinMark Synchronizer include: well-thought synchronization technology, shared between several GrinMark products, multiple profile and multiple servers support (to facilitate work with large deployments) and attractable pricing. We have many customers all over the world using our products, including small, mid-size and large organizations. GrinMark Synchronizer provides outstanding capabilities for monitoring and tracking of synchronization process thus making problem resolution and administration as intuitive and friendly as possible.

Links

Contact us at sales@grinmark.com or support@grinmark.com
Web Site: http://www.grinmark.com
Product Trials: http://www.grinmark.com/requesttrialform.html
On-premises vs On-demand: http://www.grinmark.com/products/aesync/on-premise-vs-on-demand.html

Supported Systems

Supported CRM Servers

- SugarCRM 6.0 and above
- Microsoft Dynamics CRM 2011, Microsoft Dynamics CRM 2013
- Salesforce

Supported Exchange Servers

- Microsoft Exchange Server 2007
- Microsoft Exchange Server 2010
- Microsoft Exchange Server 2013
- Microsoft Exchange Server Online, Office 365

What is Synchronized Out-of-the-box

- Contacts, Accounts, Leads
- Meetings, Calls, Tasks
- Cases, Opportunities
- Emails