



Mindtree

*Welcome to possible*

## Facilitating sales force integration with exchange

### Business challenge

The sales team uses leading CRM application in addition to leading mail server for managing their calendar, email, leads and opportunities. These two applications are mutually exclusive products from two different enterprises. This makes it difficult for a user to sync the data between these applications.

Some of the problems the customer faced were:

- Impossibility in syncing the data between the exchange and sales force account from the server side.
- Mac, iPad and iPhone users comprise the strength of the sales team. It is impossible to sync the data from Apple machines to the exchange as there is no plug-in for Mac.
- The sales team is on the move most of the time. Hence, the latency and dependency for synchronizing the data is often a big hurdle in their day-to-day work.

### Our solution

The biggest pain point was the inability of Mac clients to sync the data. So Mindtree had to find a solution which was not client dependent. We proposed the product that met all the requirements of the customer and helped sales force administrators implement the following solution:

### About Mindtree

Mindtree is a global information technology solutions company with revenues of over USD 430 million. Our team of 12,000+ experts engineer meaningful technology solutions to help businesses and societies flourish. We enable our customers to achieve competitive advantage through flexible and global delivery models, agile methodologies and expert frameworks.

### Business impact

- Demonstrated independent ownership to take an end-to-end project.
- Resulted in effective high yield, for the sales team at the customer's end.

### Riva integration server

- Server-side, transparent integration and data synchronization between sales force and Microsoft exchange.
- To install once at the server level. Then the administrators control and manage the app from the server for all users.
- To create / update sales force contact and lead records from within Outlook.
- To synchronize calendar events (appointments, phone calls, tasks and notes) and address books (contacts, leads and accounts) transparently, at scheduled intervals.
- A subfolder is created within top level folders within the exchange mailbox named 'Salesforce'. This has all the items from 'Salesforce' synchronized to the exchange mailbox.