



Customer Relationship
Management

CRM ConnectLive User Manual

Version 14.1

Notices

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Preface

For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	<code>Fixed-width</code> font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Bold Fixed-width	Bold Fixed-width font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
Bold Sans serif	Bold sans serif typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter -LOGF.
[]	Brackets enclose optional arguments.
{ a b c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation File > > Exit means: "Open the File menu and choose Exit ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).

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Introduction

CRM.connectLive is a plug-in for Microsoft Outlook available for Outlook 2010 and higher.

You can access update.CRM data directly from Microsoft Outlook and link e-mails and appointments to records in the database (if data is synchronized with CRM.connector).

You have direct access to a contact person's data and to child records as defined by your administrator. The default version displays contacts, opportunities or projects involving the contact person. Your administrator can add any info area that you need to access for your work.

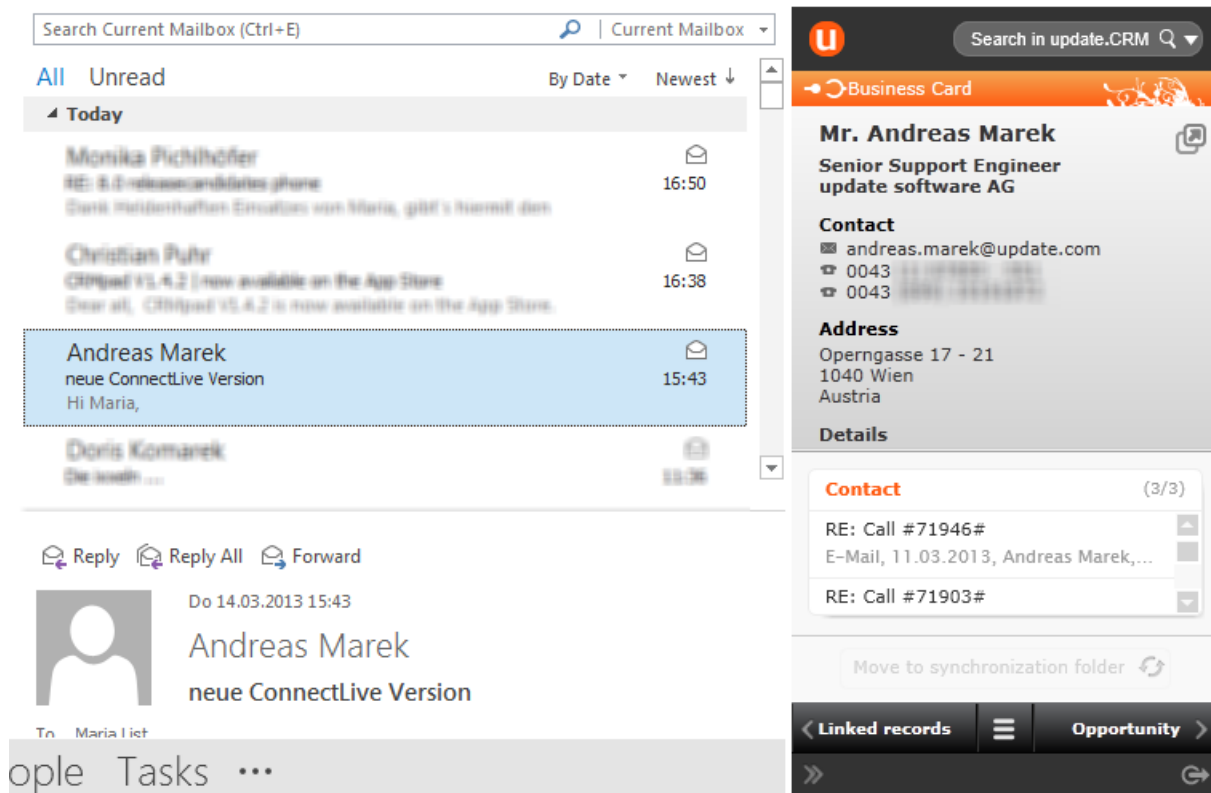
If you receive an e-mail, the update.CRM database is automatically searched for the sender's e-mail address. If found, the contact person's data such as name, company, address, phone number etc. is displayed. Your administrator defines which data is displayed.

The screenshots in this document may be different from the user interface of the version you are using. CRM.connectLive is configured by your administrator to meet the needs of your work environment. For example, different info areas may be available for you.

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User Interface

The CRM.connectLive plugin is displayed to the right of your mailbox.



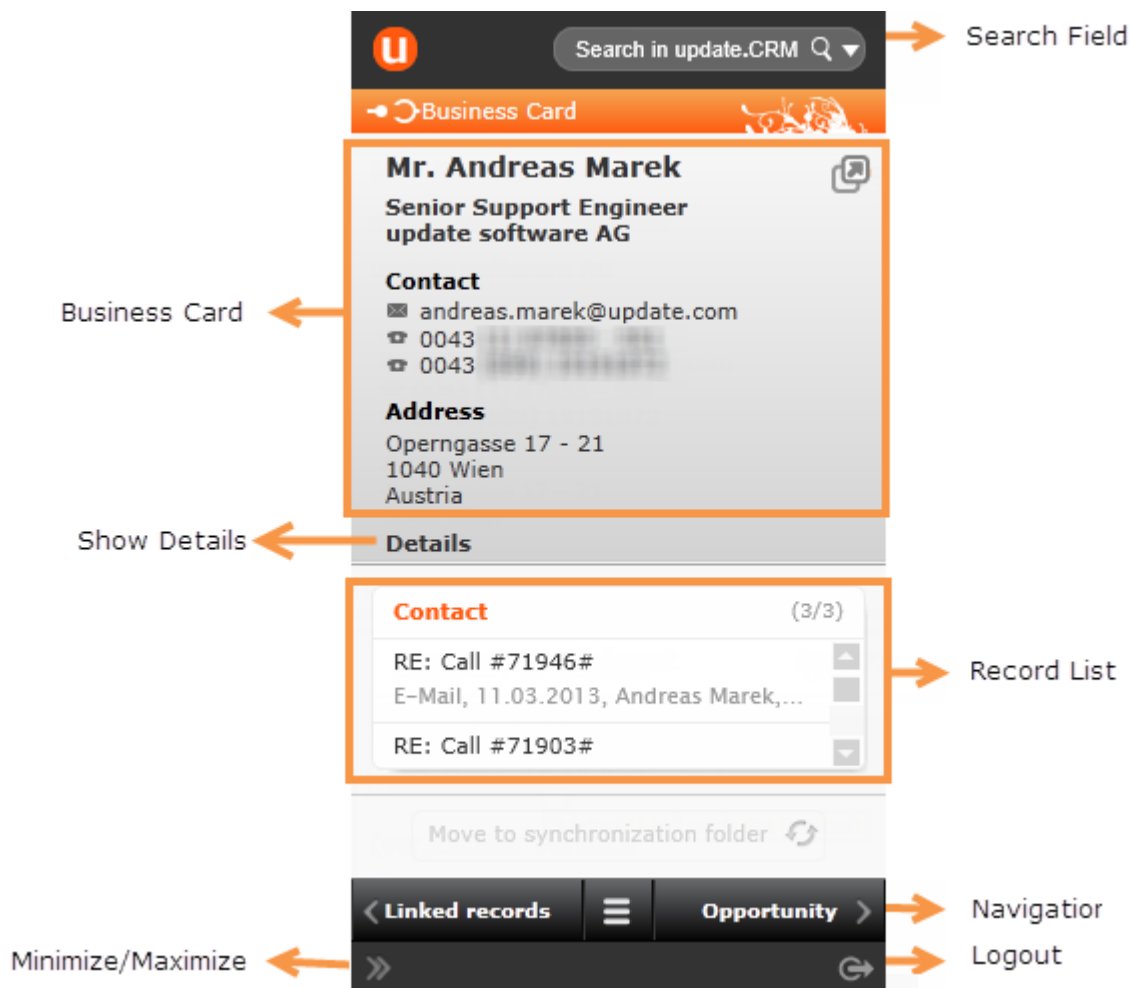
Note: Customers using Microsoft Office 2016 or Microsoft Office 365 may face display issues with CRM.ConnectLive due to some changes introduced by Microsoft that dynamically scales the application window to adjust for when you move Office apps back and forth between high and low DPI monitors. As a consequence, CRM.ConnectLive interface is shown in a separate window.

Follow these steps to solve the display problem:

1. In Outlook go to **File > Options > General** tab.
2. Select **Optimize for compatibility** radio button.

Restart Outlook for the changes to take effect.

The CRM.ConnectLive user interface consists of the following areas:



- Search field, see [Searching for Data](#) on page 10
- Business card, see [Viewing a Contact Person's Data](#) on page 12
- Details, see [Viewing a Contact Person's Data](#) on page 12
- Record list, see [Viewing Related Data](#) on page 14
- Menu and navigation bar, see [Navigating through Info Areas](#)
- Logout and Minimize/Maximize, see [Minimize Maximize CRM.connectLive](#) on page 17 , [Logging Out](#).

3

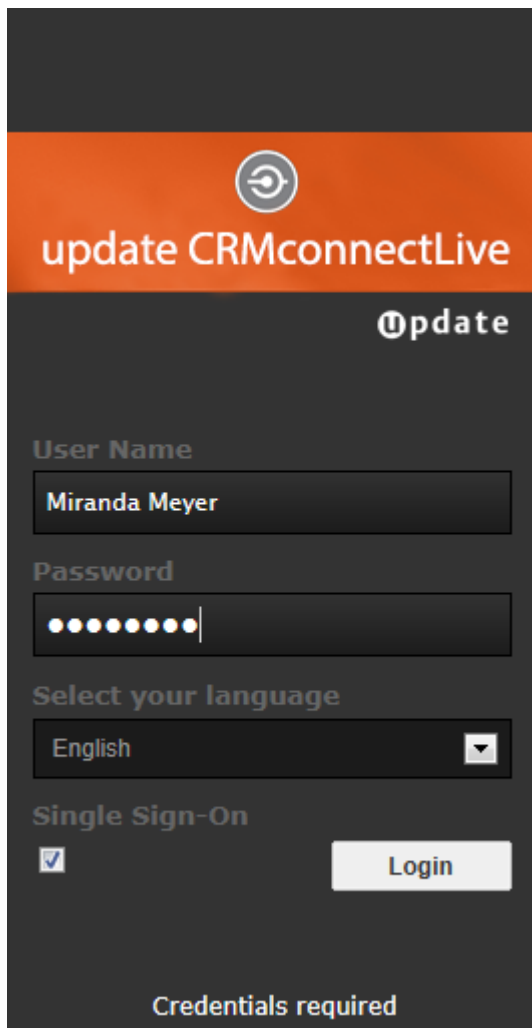
Working with CRM.connectLive

Your administrator defines what data is displayed in CRM.connectLive.

Logging In

Learn how to login to ConnectLive.

If your administrator has not defined Single Sign-on then your Windows credentials are used, you must enter your user name and password. If more than one language is available, you can select the desired one.

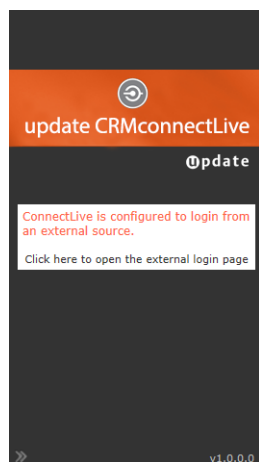


The image shows a login interface for CRM.connectLive. It features a dark grey background with an orange header bar at the top. The header bar contains a circular icon with a stylized 'C' and the text 'update CRMconnectLive'. Below the header bar, the word 'Update' is displayed in a light grey font. The main form area is dark grey and contains the following elements: a 'User Name' label above a text input field containing 'Miranda Meyer'; a 'Password' label above a password input field with ten dots; a 'Select your language' label above a dropdown menu showing 'English'; a 'Single Sign-On' label above a checked checkbox; and a 'Login' button. At the bottom of the form, the text 'Credentials required' is displayed.

Log-in Using an External Authentication Provider

If your administrator has configured an external authentication provider, then ConnectLive redirects you to that authentication server. For example, if your administrator has configured Microsoft Azure as the external authenticator then you are redirected to *microsoftonline.com*.

On such systems, you are first presented with the following login panel.



Click the link to the external source to display the external login page in the same panel. Upon authentication, the external server re-directs you back to ConnectLive. The external authentication server returns cookies that are retained by ConnectLive and used for subsequent logins. Once the cookies expire you have to login again.

Logging Out

Click on  to exit the application.

Searching for Data

You can search for data in the Aurea.CRM database.

Your administrator defines which info areas and fields are available. However, depending on the data volume searching can be time consuming. You can, therefore, narrow the info areas that are actually searched.

To search for data:

1. Enter your search criteria in the search field:



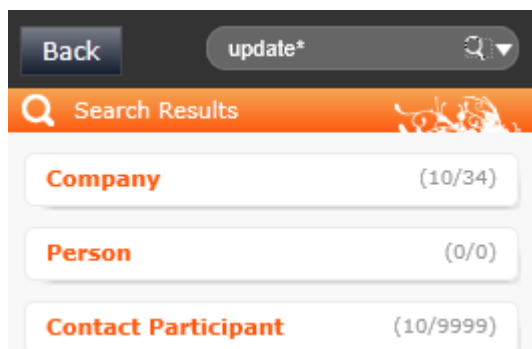
2. Click on  to display a list of the available info areas.

- ☐ Select All
- ☒ Company
- ☒ Person
- ☒ Contact Participant
- ☐ Opportunity
- ☐ Call

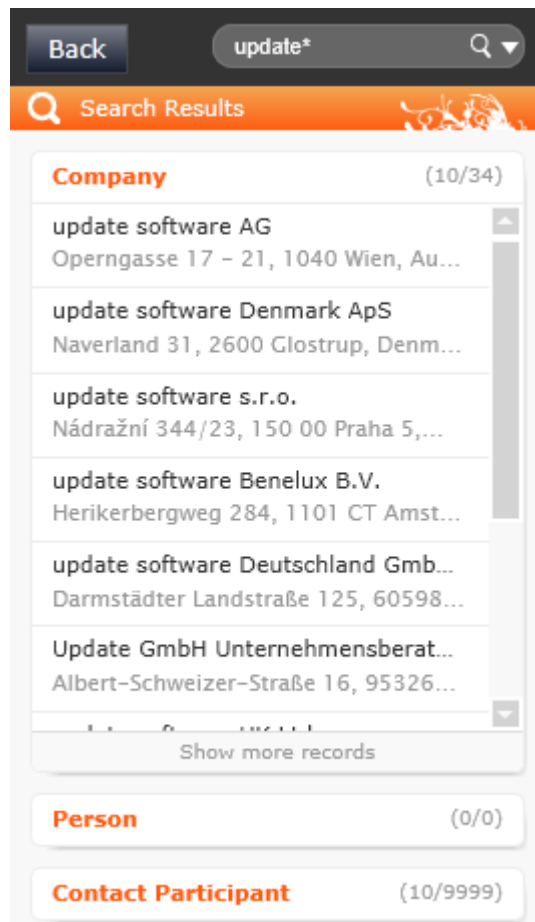
3. Define which info areas are searched for the entered criteria.

4. Click on  or hit the Enter key.

The search result is displayed:



5. Click on the desired info area to display the result list:

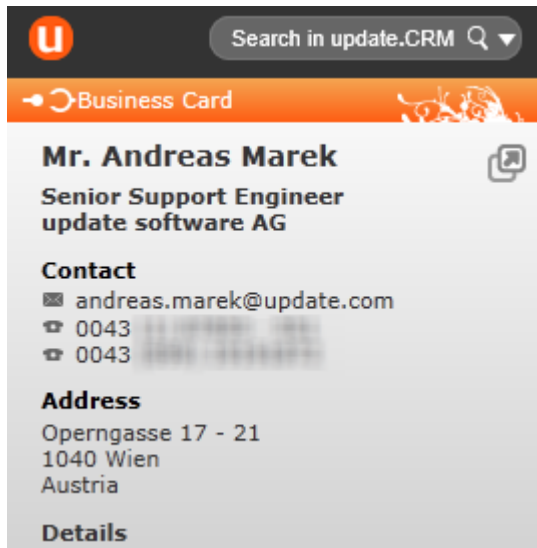


6. Click on **Back** to return to the business card.

Viewing a Contact Person's Data

When you receive an e-mail, the sender's e-mail address is automatically searched for in the Aurea.CRM database.

If a match is found, the update logo in the left upper corner turns orange (if no record is found, it is displayed in gray). The contact person's data is displayed in the business card:



You can:

- Click on  to open the record in update.CRM.
- Move your mouse over the e-mail address. When the e-mail address is highlighted, you can click on it to open the e-mail client.
- Click on **Details** to display further information about the contact person.

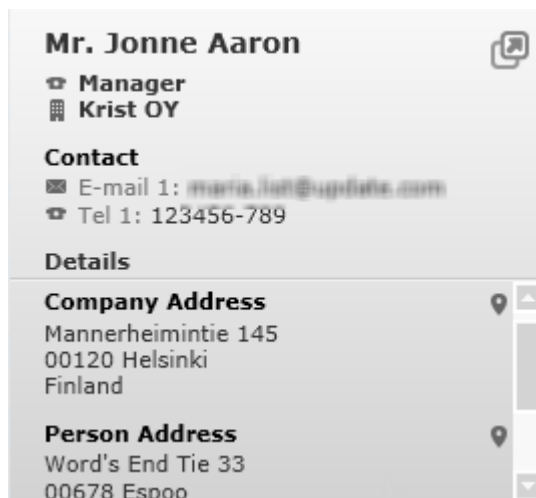
Your administrator defines which data is displayed in the business card and in the details.

Viewing Address in Map

Your administrator can define that you can open the contact person's address in a map:

To open the map:

1. Switch to the desired contact person's data and show the **Details**:



2. Click on  (**Show location on map**).

Google maps is opened in your browser.

Viewing Related Data

Learn how to view data related to contact person on business cards.

Data related to the contact person is shown below the business card, what data you can access is defined by your administrator. The standard version includes the following info areas:

- Contacts
- Opportunities
- Properties

If the sender is a participant in these info areas, the records are listed:

Contact	(3/3)
RE: Call #71946# E-Mail, 11.03.2013, Andreas Marek,...	
RE: Call #71903# E-Mail, 05.03.2013, Andreas Marek,...	
Call #71529# E-Mail, 21.02.2013, Andreas Marek,...	

Navigating through Info Areas

There are several ways you can switch from one info area to another:

-  (Menu):
Click on this button. The available info areas are listed. Then click on the desired entry.
- Previous and Next buttons:
Click on  (Previous) or  (Next) to switch to the previous or next info area. The name of the info area is also displayed:



Previous/Next bar:

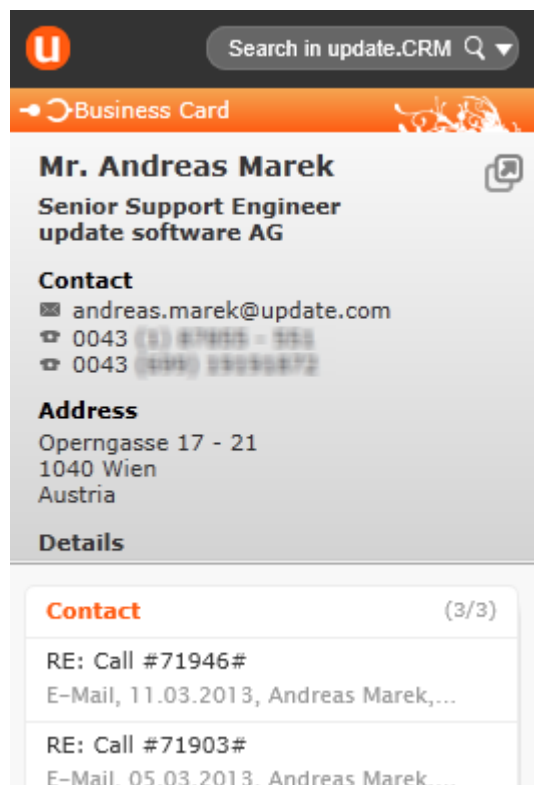
Move the cursor to the left (previous) or to the right (next) side until a gray bar is displayed.

Showing Details of a Record

You can open the details of a record in update.CRM web or in CRM.connectLive.

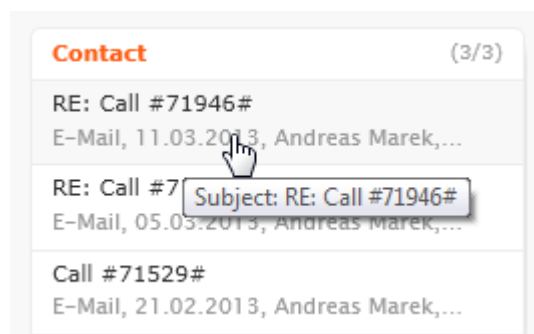
To display record details, e. g. for a contact:

1. Move the mouse over the first line of the record (bold formatted). The color changes to orange indicating the link to the record in the database:

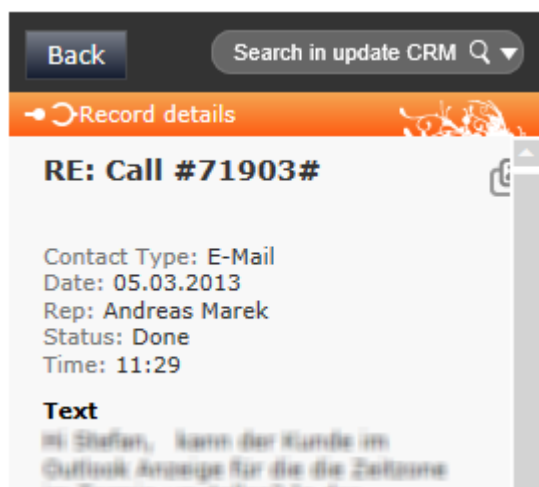


The field's entire content is displayed as tooltip.

2. Click on the link to open the record in update.CRM web.
3. You can also click on the second (gray) line.



The details of the record are displayed in CRM.connectLive:



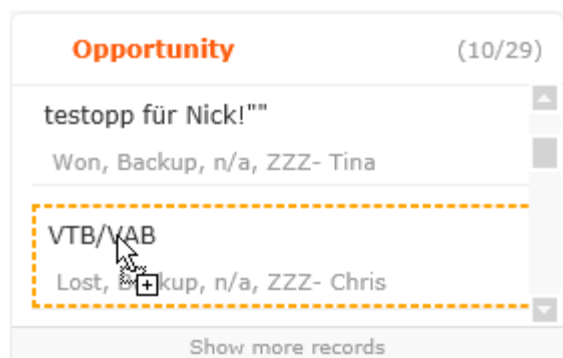
- Click on **Back** to return to the business card or click on  to open the record in Aurea.CRM web.

Linking an Item With a Record

Your administrator can define that you can link e-mails or appointments to records in the database using drag & drop.

To link an item with a record:

- Switch to the desired info area, e. g. **Opportunity**.
- Drag the e-mail or appointment to the CRM.connectLive area and drop it on the desired record:

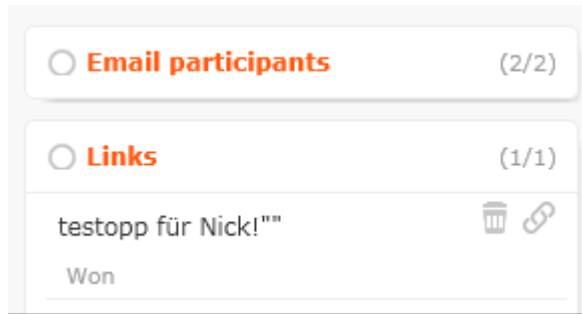


- If you want e-mails to be synchronized (by CRM.connector) you must move the e-mails to your synchronization folder. By default, this folder is called "CRM" and is located under your inbox. To move an e-mail to this folder click on the **Move to synchronization folder** button.

The link between the e-mail's or appointment's contact record and the target record (e. g. an opportunity, as in the screenshot) is automatically created in update.CRM when the mailbox/calendar is synchronized with CRM.connector.

4. Click on  to display all linked records.

All participants and links found in the update.CRM database are listed:



5. If the item has not yet been synchronized, click on  to remove the link. Once synchronized, this button is no longer available and the  icon's color is changed to orange (indicating that the link cannot be removed).

Minimize Maximize CRM.connectLive

You can minimize/maximize the CRM.connectLive plug-in in the status bar.

Click on  to minimize the plug-in.



Click on  to display the business card.

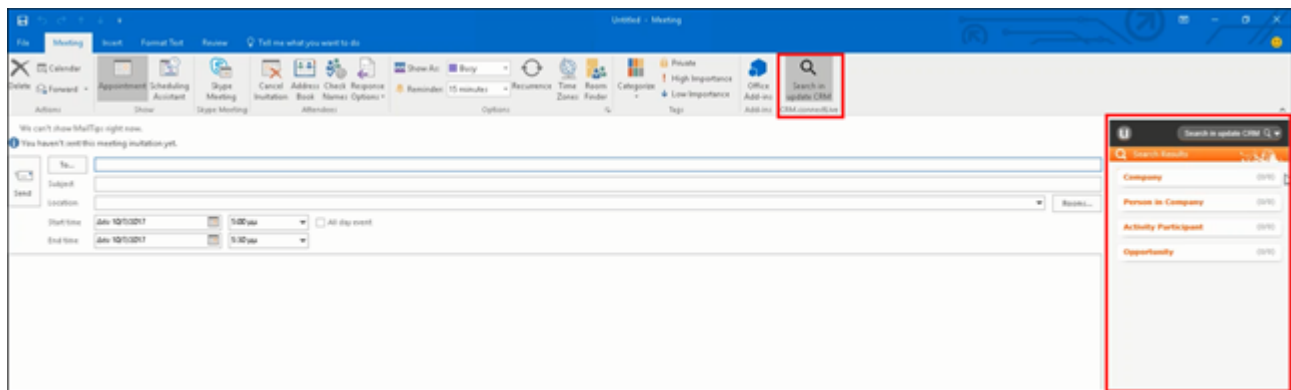
4

ConnectLive Plugin for Outlook Appointments

CRM.ConnectLive plugin for Outlook is available in the **Meeting** tab of Outlook.

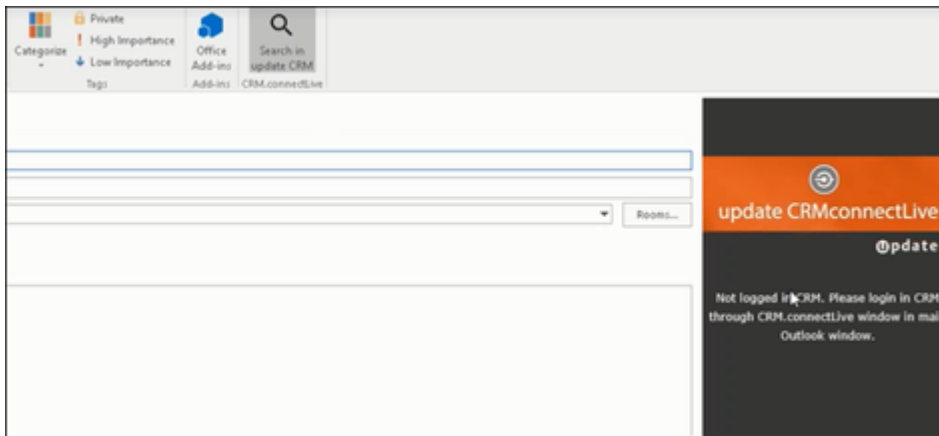
It allows you to search and add the CRM contacts to the appointments and meeting you create in Outlook.

The following screenshot shows the **Search in Update.CRM** button for CRM.connectLive. On clicking, the button turns grey and the CRM.connectLive plugin window is visible on the right. You can toggle the button to make the ConnectLive window to appear or collapse.

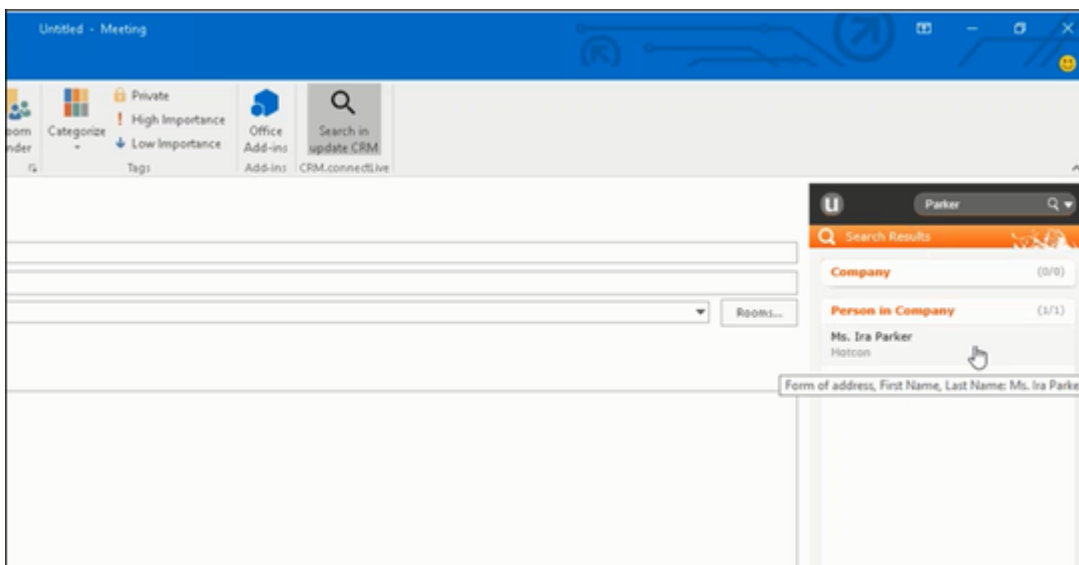


The infoareas that will be available is configured by your administrator according to your business needs. Please contact your CRM administrator if you need other infoareas to be added. In the sample screenshot above, the configured infoareas are Company, Person in Company, Activity Participant, and Opportunity.

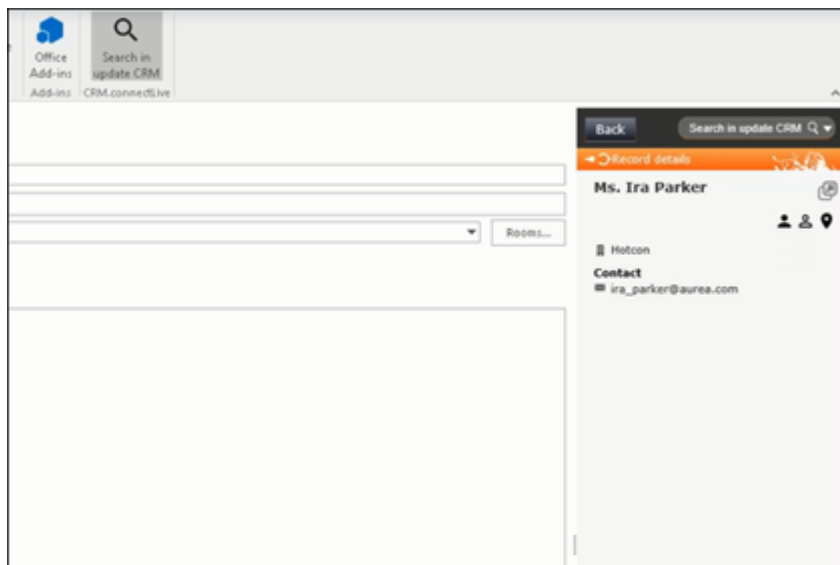
Logging in to the ConnectLive Plugin for meetings and appointments is done from the main Outlook window. For more information, see [Logging In](#) on page 9 and [Logging Out](#). The following screenshot shows the ConnectLive plugin window for appointment requesting you to login from the main Outlook window.



Searching for contacts is similar to that described in [Searching for Data](#) on page 10. The CRM ConnectLive plugin available in the main Outlook window and in the Meeting and Appointment tab share the same search configuration. The following screenshot shows a search result record in the ConnectLive window for appointments and meetings.



Opening the contact's record displays the contact's details as described in viewing a Contact Person Details. The following screenshot shows the contact details displayed in the connectLive window for meetings.



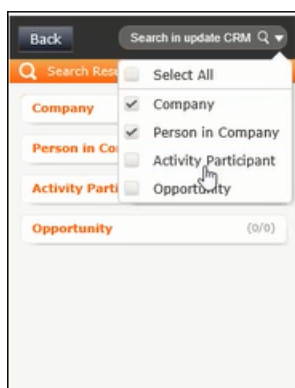
In this window the contact details also has three extra buttons that conform to the three ways in which a contact can participate in an Outlook appointment or meeting, as listed below:

- - Mandatory Participant
- - Optional Participant
- - Resource Participant

Click the corresponding button to add the contact to the meeting in the desired way.

Note: These buttons will be displayed only if the contact person has the email field defined in his contact details.

You activate or deactivate the search in specific infoareas by checking or unchecking the checkbox for an infoarea in the drop-down list as shown in the screenshot below:



Linking CRM Contacts to Outlook Appointments

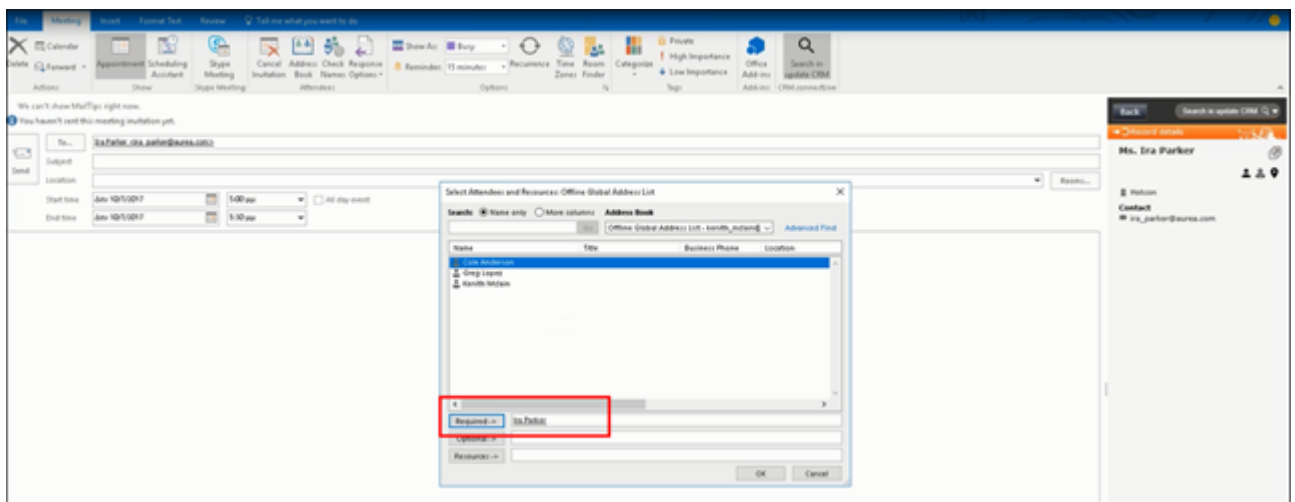
Learn how to link CRM contacts to outlook appointments.

To link a CRM Contact to Outlook Appointments:

1. Login to the CRM.ConnectLive plugin. For more information, see [Logging In](#) on page 9.
2. Open the **Appointment** tab.
 1. Open the CRM.ConnectLive window and search for the required contact by entering the search criteria.
 2. Open the desired record from the search results.
 3. Add the contact as a mandatory, optional, or resource attendee.

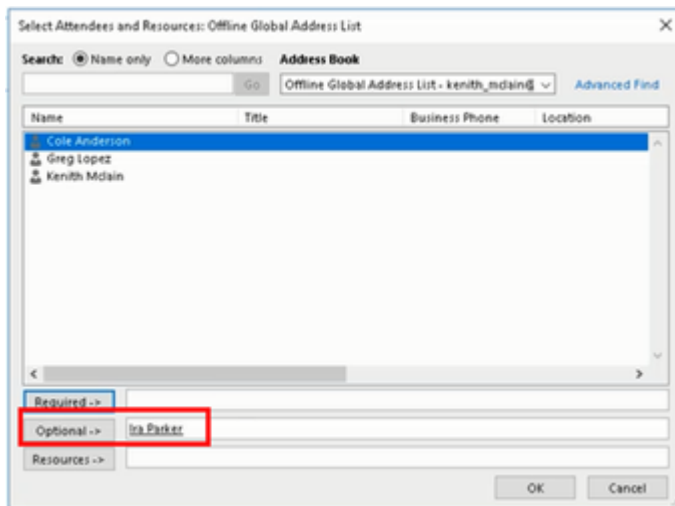
To add a mandatory attendee:

- a. Click  (Mandatory button).
- b. The CRM contact is added as a mandatory attendee, as shown in the Details View screenshot below.



To add an Optional attendee:

- a. Click  (Optional button).
- b. The CRM contact is added as an optional attendee, as shown in the Details View screenshot below.



To add a Resource attendee:

- Click  (Resources button).
- The CRM contact is added as Resources attendee, as shown in the Details View screenshot below.

