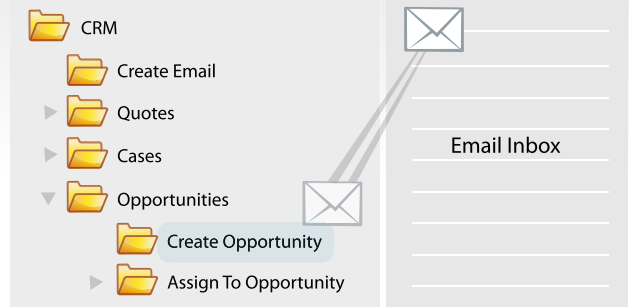




Riva SmartConvert and AssignTo Folders

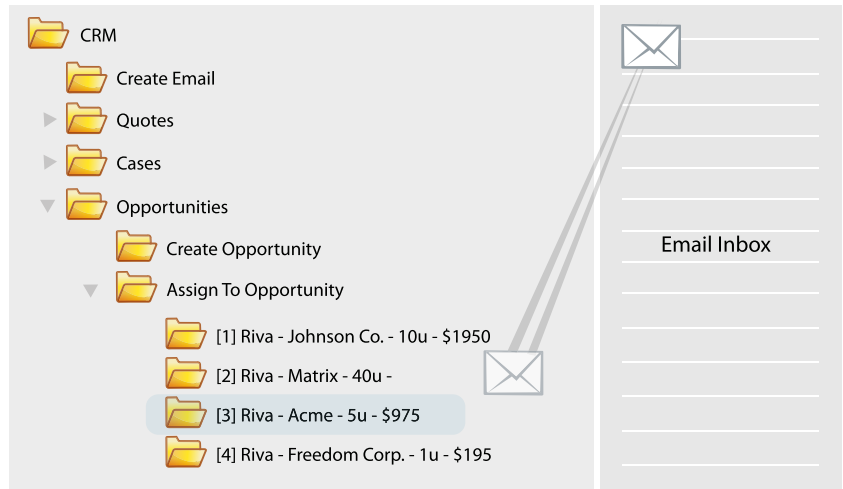
Riva SmartConvert Folders

Reduce the amount of time you spend manually entering data into your CRM system. Riva SmartConvert Folders automate the creation of CRM opportunities, cases and quotes. Simply copy-and-drag an email into the appropriate SmartConvert Folder in your Exchange email client – and Riva will work its magic!



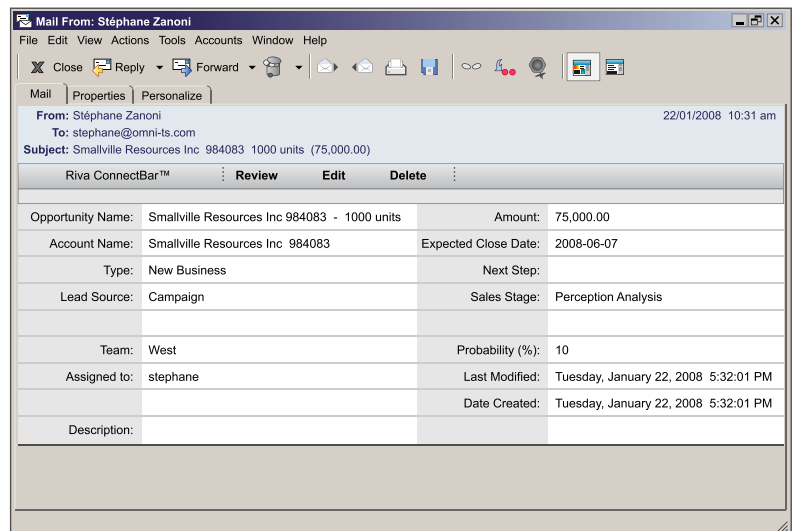
Riva AssignTo Folders

Use Riva AssignTo Folders to automatically archive emails against CRM accounts, contacts, opportunities, cases and quotes. Copy emails to the “Create Email” folder to automatically create the related account and contacts in your CRM system (if they do not already exist) and to archive the email against each. Assign emails to CRM opportunities (as shown in the screenshot) to archive emails against opportunities. The same process applies to cases and quotes.



Riva ConnectBar

When you click on an opportunity in your mail client, you will see an email summary view of all the CRM opportunity (e.g., opportunity name, lead source, amount, next step, expected close date, probability, etc.). Riva ConnectBar allows you to edit, review or delete CRM opportunities without any manual searching.



Visit www.rivacrmintegration.com for more information or contact Omni at +1.780.423.4200 or sales@omni-ts.com.

