



# Riva Sync Policy Options



Riva can run on-premise or from the cloud (Riva Live).

START HERE

**Riva Integration Server** gets installed on a Windows Server, VM or Desktop (requires Microsoft .NET Framework 4). Supported systems include:

- Windows Server 2008 / 2008 R2
- Windows Server 2003 / 2003 R2
- Windows 7 Desktop
- Windows XP Desktop

**TIP:** Riva can be installed on a stand-alone server or an existing CRM or Exchange 2010 / 2007 system. Riva for Exchange 2003 cannot run on the same server as Exchange.

## RIVA SET-UP AND CONFIGURATION



Use the Riva Connection Wizard to **create your Exchange and CRM connections**. The Exchange connection account must have full **impersonation / delegate access** to the accounts being managed. The CRM account must have **administrator access**.



Configure one or more **Riva Sync Policies**. These policies control the synchronization options. A policy can be assigned to an individual user, multiple users or groups of users.



Use the **Riva Event Monitor** to view real-time synchronization updates during each sync interval.



**Request a Riva licence file** within the Riva Administration interface. Go to the "Policies" tab, right-click the Exchange CRM Synchronization policy and select "Request Licence."

## RIVA SYNC POLICY OPTIONS

### General

- Policy name and description
- Select CRM connection
- Select Exchange user account(s) or distribution group to be synchronized.

### Tasks

- Set category name for tasks.
- Set whether Riva will sync all new tasks or only those with the CRM category.
- Configure whether Riva will sync only tasks that are marked as uncompleted.

### Sync Start Time

- Define sync start date (items modified or created after this date will be synchronized).

### Other

- Set name for Riva parent folder in email clients.
- Select checkbox for other CRM items that will be synchronized (e.g., quotes, opportunities, cases, projects,...).

### Scheduling

- Set how often synchronization will occur during peak and off-peak times.
- Set peak times and blackout times (when you do not want Riva to run).

### SmartConvert

- Enable / disable SmartConvert.
- Set name for SmartConvert parent folder.
- Configure whether CC or BCC contacts will be automatically created in CRM.
- Configure whether Riva will assign converted item to account of matched contacts.
- Configure whether Riva requires at least one contact match to be converted.
- Configure whether Riva will match against leads if no contacts are found.
- Configure domain exclusions for contact creation (e.g., @hotmail.com, @gmail.com, @yahoo.com).

### Address Book

- Set CRM address book name and category name.
- Set whether Riva will sync all new items or only those with the CRM category.
- Configure whether Riva will use the default address book or create a new one.
- Configure whether Riva will sync contacts and/or leads.
- Configure whether Riva will sync CRM contacts based on visibility, ownership or custom filters.

### AssignTo

- Enable / disable AssignTo.
- Set name for AssignTo parent folder.
- Set AssignTo category name.
- Configure number of AssignTo folders that will be created.
- Limit age of items for which folders will be created.
- Sort AssignTo folders by date modified or alphabetically.

### Calendar

- Set CRM category name for calendar items.
- Set whether Riva will sync all new items or only those with the CRM category.
- Configure whether Riva will sync recurring appointments.
- Configure whether Riva will sync appointments and/or phone calls.

### Connection Options

- Configure number of concurrent execution threads.
- Configure connection methods (user impersonation, use current account,...).

Visit [www.rivacrmintegration.com](http://www.rivacrmintegration.com) for more information or contact Omni at +1.780.423.4200 or sales@omni-ts.com.

