Commence Corporation

Mobile Link for Commence Cloud CRM

Version 9.0 Addendum Guide for Cloud CRM Sync

Commence Technical Support

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Commence Cloud CRM

Getting Started

This guide includes steps for configuring Mobile Link for Commence RM to synchronize with Commence Cloud CRM. If you have *never* synchronized your Commence data via Mobile Link, you will first need to prepare your Commence RM database.

- Configure these field mappings:
  - **Mobile Link and Outlook Calendar**
  - **Mobile Link and Outlook Contacts**
  - **Mobile Link and Outlook Tasks**
- Workgroup clients must also map a **Sync Condition** field. This ensures each user synchronizes only their data.

These configuration steps can be found in the **MobileLink.pdf** guide ***Chapter 2: Commence Database Changes***. Then continue with the steps in this guide.

What you need

To synchronize your Contacts, Calendar, and Tasks with Commence Cloud CRM you will need:

- **Commence *RM*** (9.0 or later) installed on your PC
- **Commence *Cloud CRM*** logins for each user
- **Mobile Link for Commence RM** (11001 or later) installed on your PC

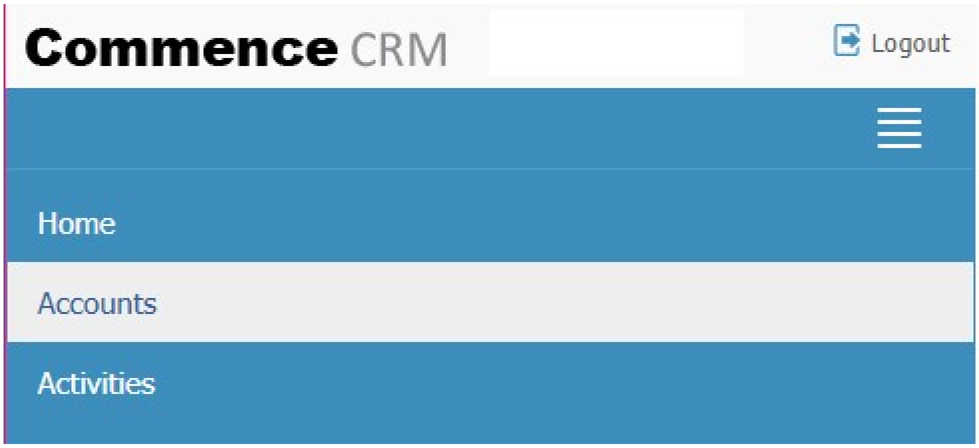
Preparing Commence Cloud CRM

Add Cloud CRM User Contacts

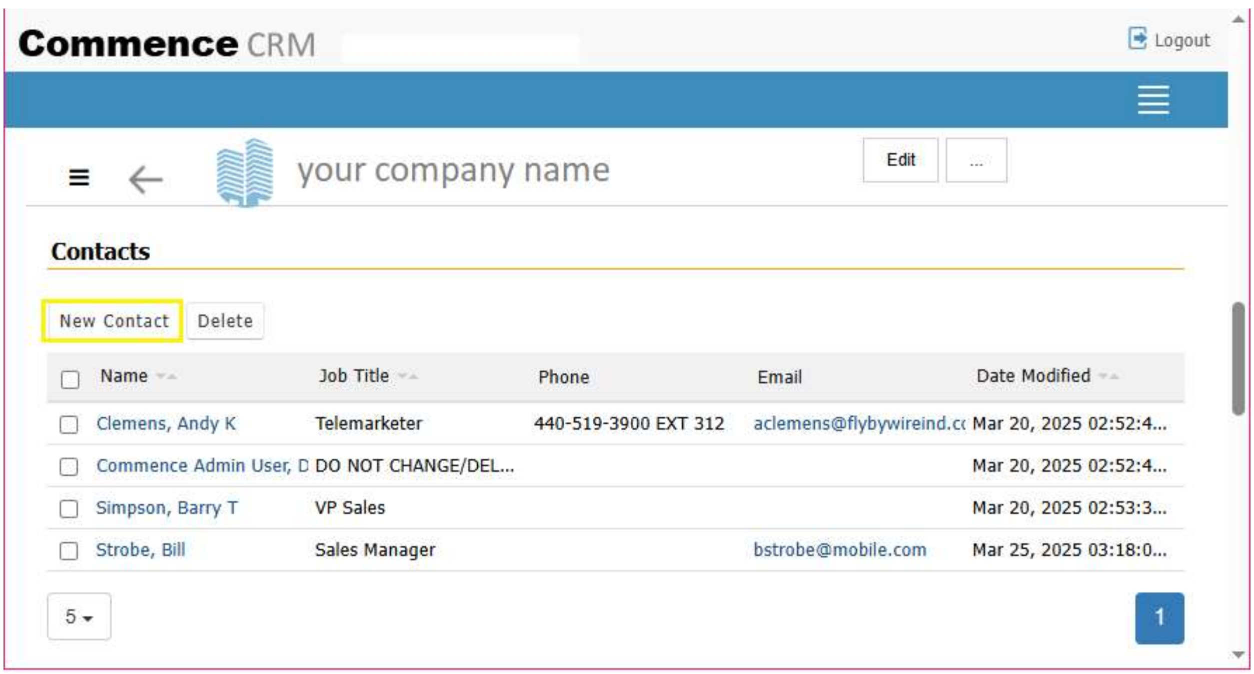
The Commence Cloud CRM administrator will:

- **Add a contact person** for each RM desktop user that will be synchronizing their data with Commence Cloud CRM.

To add a user contact, open the **Accounts** page from the main menu.



Your company will already be listed on the Accounts page. Open this account and click **New Contact** to add each Commence RM user. First and last name are mandatory. Additional details can be added later.



Cloud CRM – Regional Server Settings

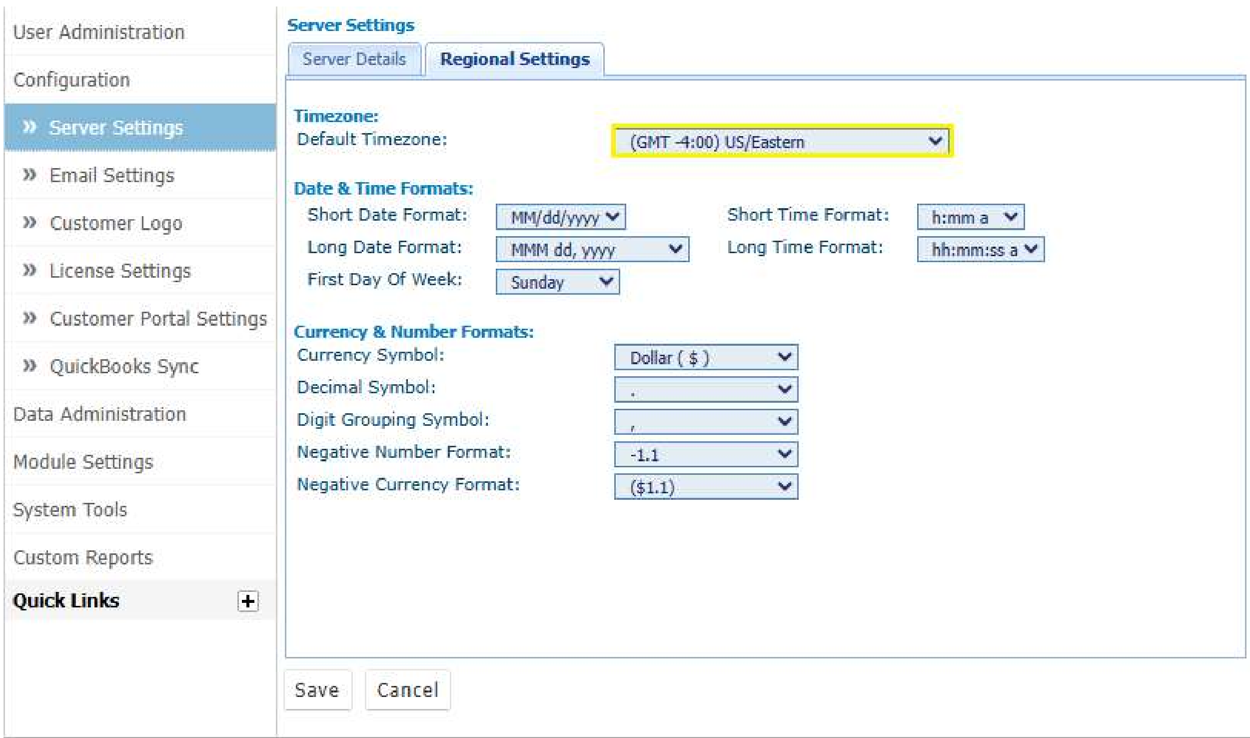
The Commence Cloud CRM administrator will:

- **Verify the server settings** are appropriate for your workgroup. These settings are found under *Quick Links – Administration – Configuration – Server Settings*.

Open the **Regional settings** tab and select your local time zone. Click Save.

This must be set before you sync your Calendar and Tasks. Regional settings will also roll down to each new user as you create new logins.

If there are any users in a different time zone, these users must adjust their personal preferences to match the regional settings on their local device. These settings are found under *Quick Links - Preferences* and can be updated by logging in with their Cloud CRM username and password.



Cloud CRM – MobileLink Synchronization Settings

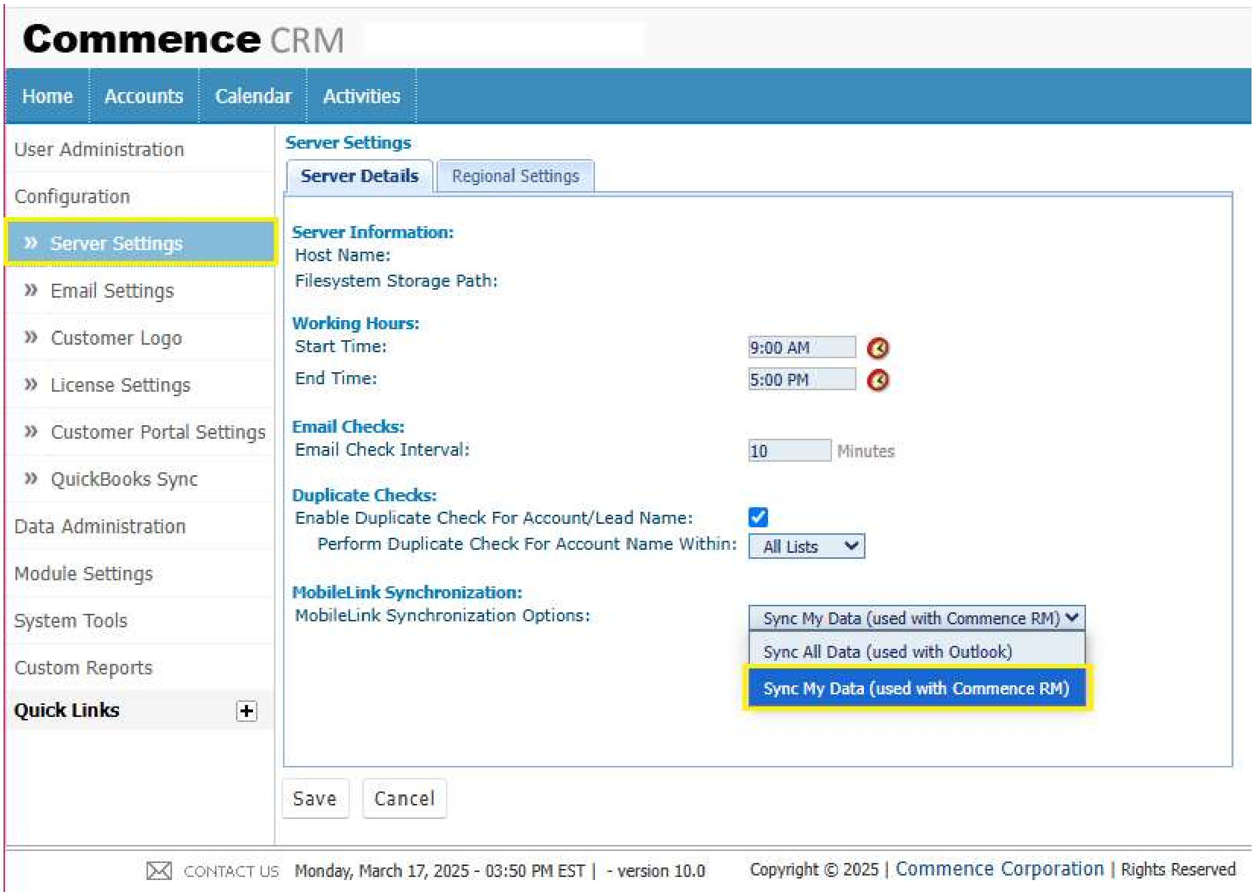
The Commence Cloud CRM administrator will:

- **Verify the server settings** are appropriate for your workgroup. These settings are found under *Quick Links – Administration – Configuration – Server Settings*.

Open the **Server details** tab. Under the *MobileLink Synchronization* heading, select "**Sync My Data (used with Commence RM)**".

** This is the recommended setting for all Commence RM workgroups and must be set before your first sync.

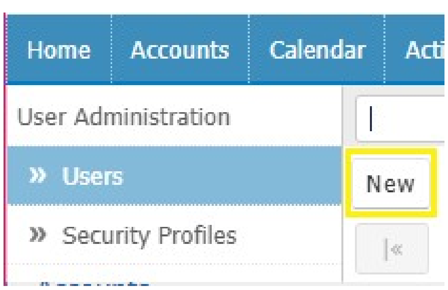
This setting prevents data duplication and ensures *each user in the workgroup is only synchronizing their own data back to the Commence RM Workgroup*, not all the data that is visible to them in the shared CRM database.



Cloud CRM User Logins and Security Profiles

The Commence Cloud CRM administrator will:

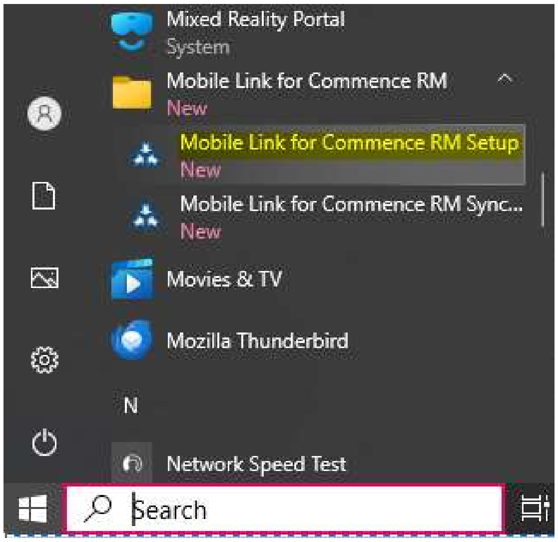
- **Add a user login** for each RM desktop user. User logins are managed under *Quick Links – Administration –Users*. Usernames must be 6 characters minimum. Passwords cannot be blank.



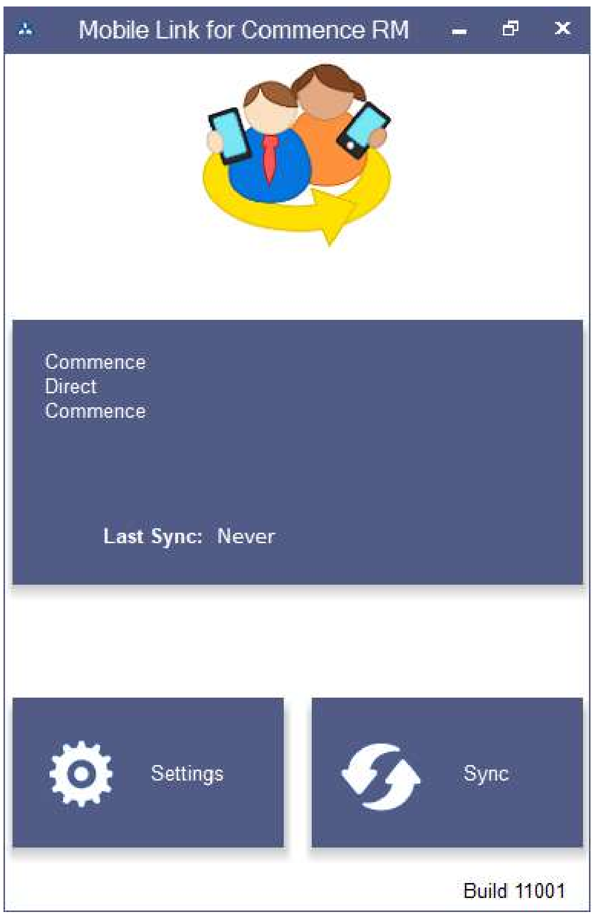
- **Configure Workgroup permissions** as needed. The default permissions are public, which allows users to view and modify publicly available data. Limited permissions can be configured if needed; contact the websupport team for more information.

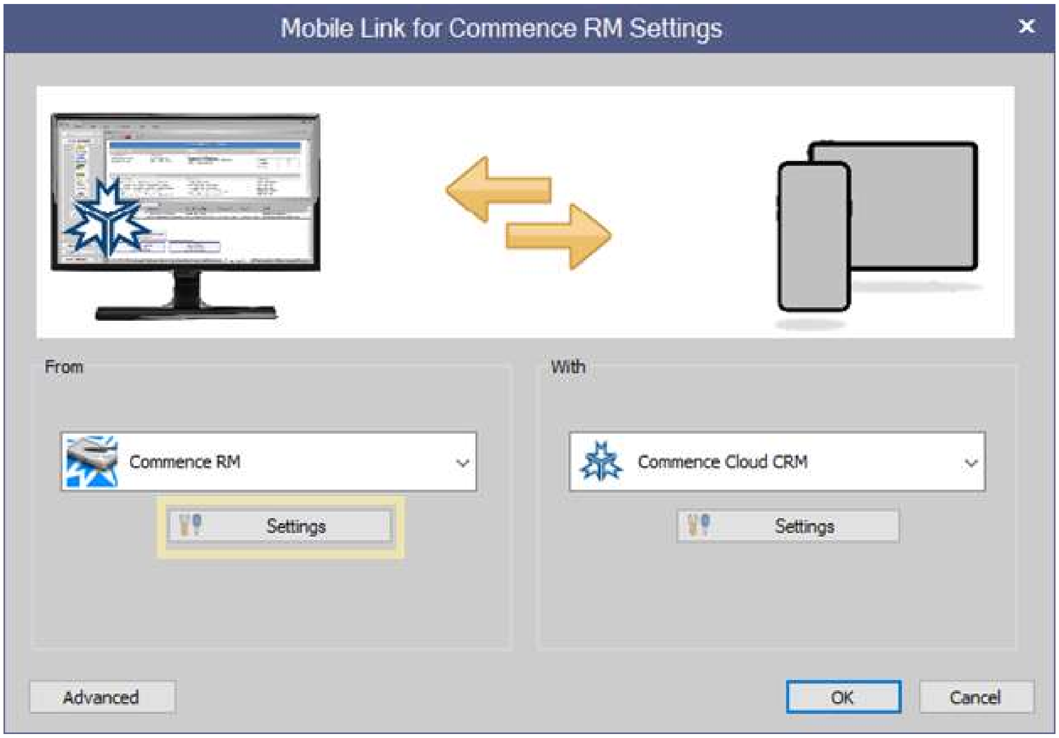
Configuring Mobile Link

- Double click on the **Mobile Link for Commence RM** shortcut on your desktop. If you don't see a shortcut, open the Windows Start menu and select **Mobile Link for Commence RM Setup**.



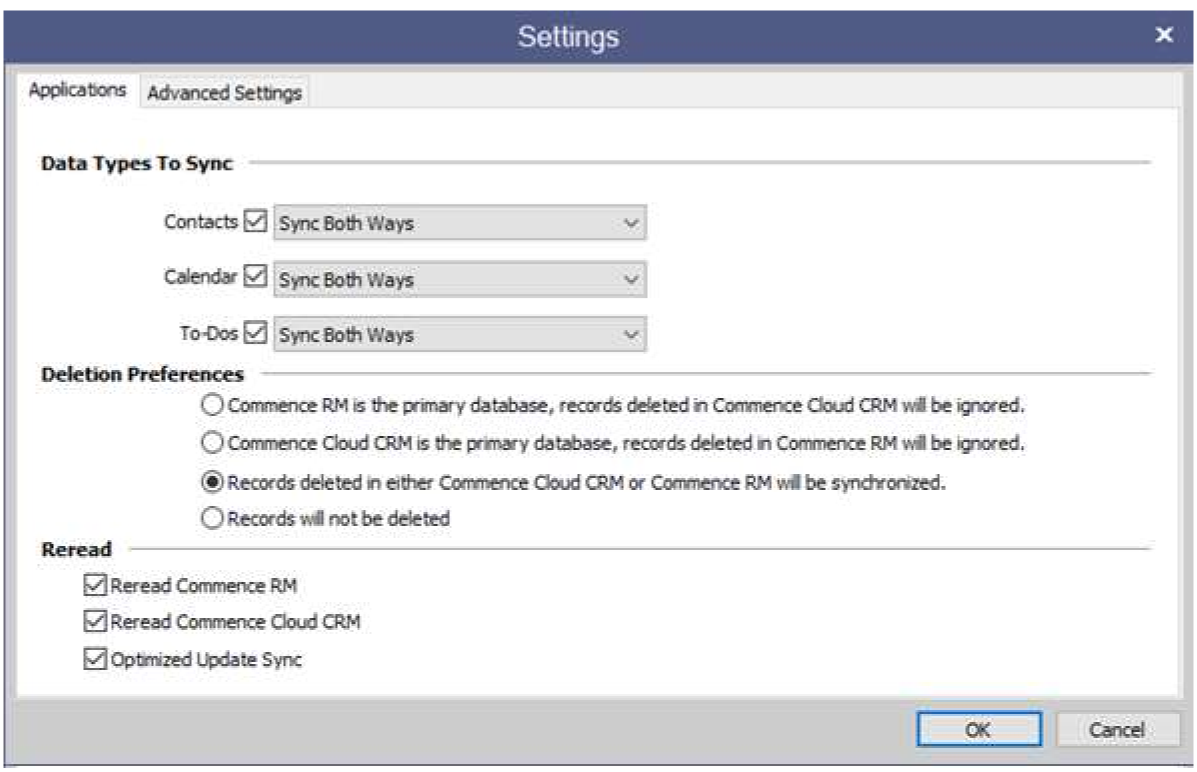
- Select the **Settings** button on the main screen.





- On the left side, **Commence RM** will be selected in the **From** box.
- On the right side, use the down arrow to select **Commence Cloud CRM**.
- Click the **Settings** button directly under Commence RM.

Commence RM - Applications (Data Types to Sync)



- **Data Types to Sync**- place a check in the box next to each category of information you want to synchronize.

Note: For each data type you select there must be a corresponding field mapping in your Commence database under *Edit - Preferences - Other Apps*.

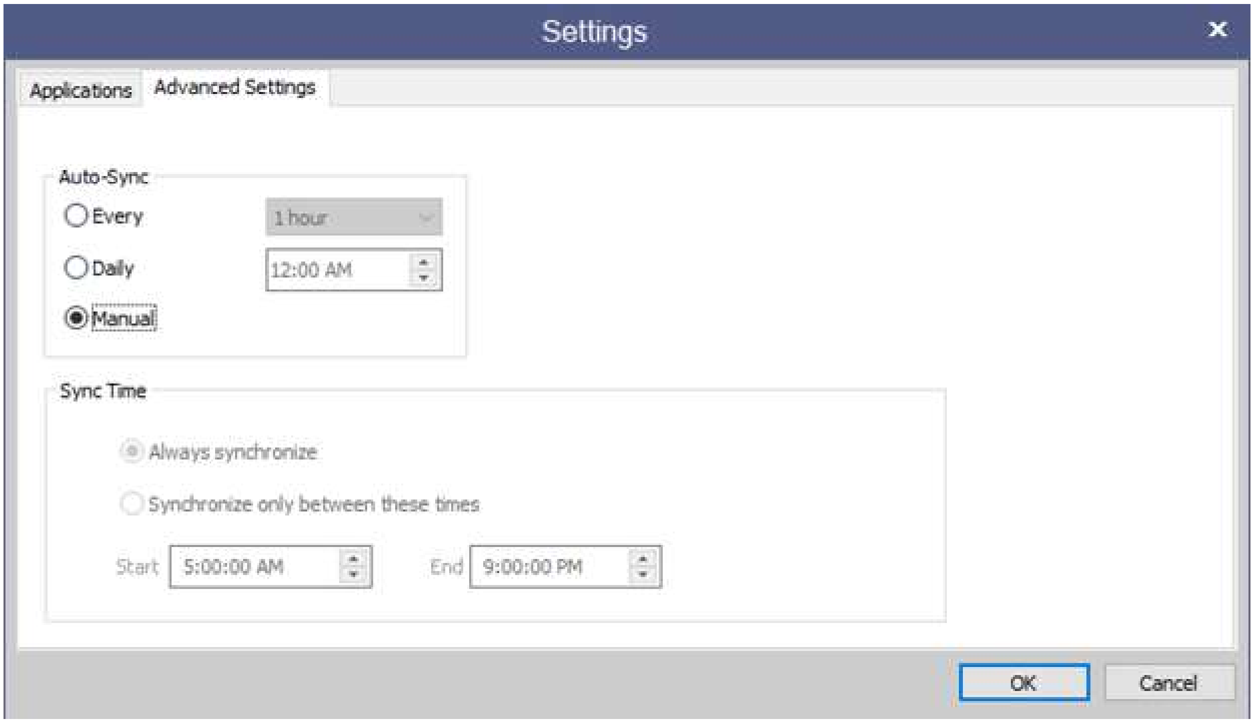
- Use the down arrow to select the direction you want the records to sync. The records can sync
    - both directions between Commence RM and Commence Cloud CRM,
    - or from Commence RM to Commence Cloud CRM only
    - or from the Commence Cloud CRM to Commence RM only.
- **Deletion Preferences** allow you to set where the Mobile Link sync can delete records.
- **Reread** - If you select a reread option, this is applied only for the next sync.

Reread Commence RM - This setting will force Mobile Link to resend all **your** records from Commence RM to your Commence Cloud CRM. This option will not create duplicates in Commence Cloud.

Reread Commence Cloud CRM - This setting will force Mobile Link to resend all **your** records from Commence Cloud CRM to Commence RM. This option will not create duplicates in Commence.

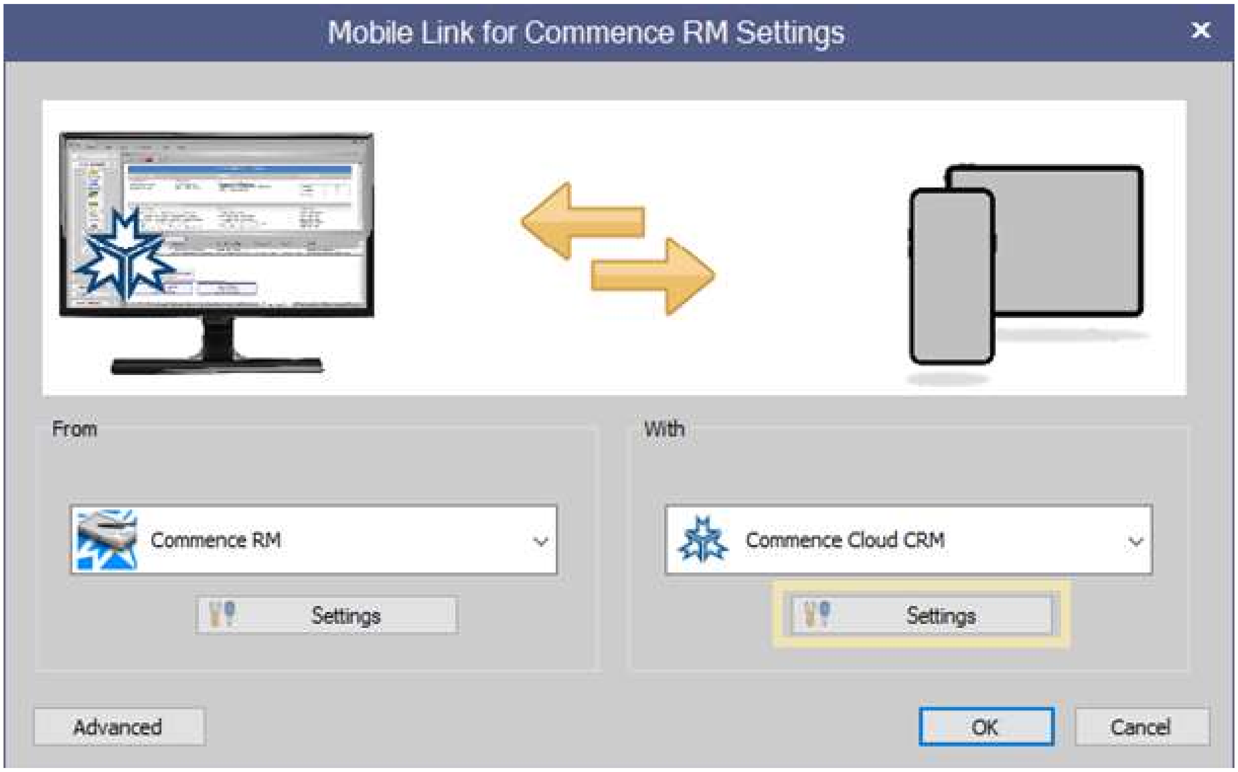
Optimized Update Sync- This option will speed up the sync by scanning for updates only.

Commence RM - **Advanced Settings** (Auto-Sync Frequency)



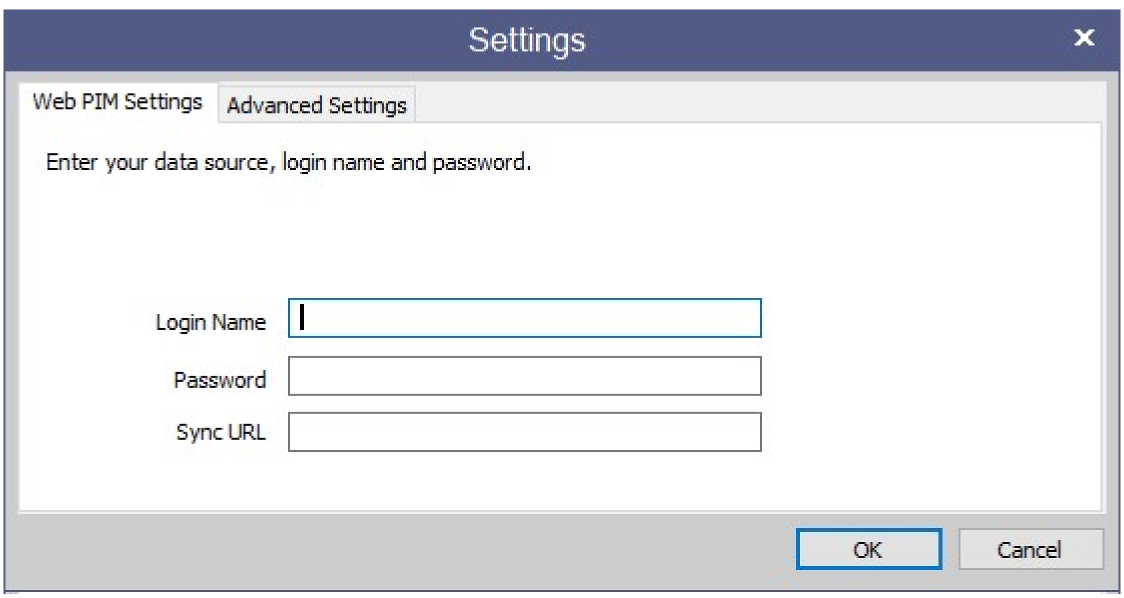
- **Auto Sync**- by default Mobile Link is configured to sync only when the user selects the Sync button. In the Auto Sync section, you can configure Mobile Link to sync at a specific time of day or have the application wait until you select the **Sync** button.
- **Sync Time** – governs the time of day the auto sync will run; either always or only between these times of day.
- Click **Ok** button to return to the main settings screen.

Commence Cloud CRM **Settings**



- Click the **Settings** button under the Commence Cloud CRM option on the right.

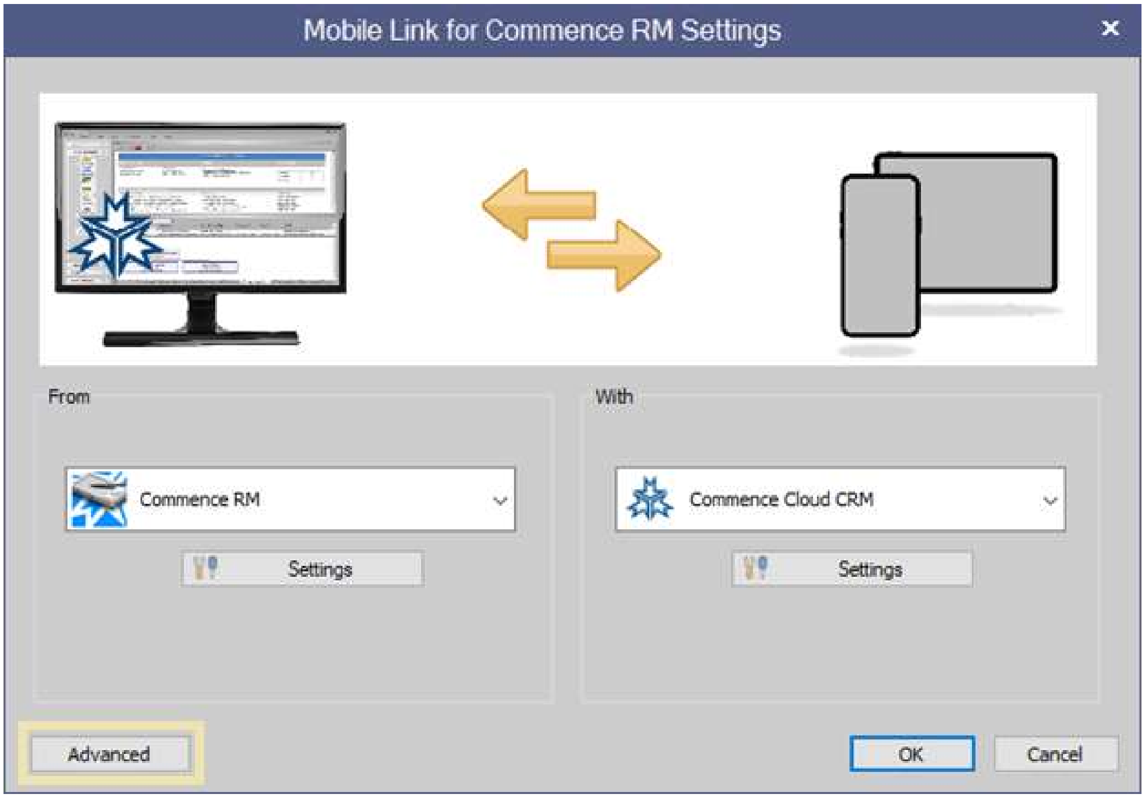
Commence Cloud CRM – **Web PIM Settings**



Commence Cloud CRM - **Advanced Settings**

- Will automatically adjust to reflect the same Auto-Sync options you selected for Commence RM Advanced Settings.
- Click **Ok** button to return to the main screen.

Mobile Link for Commence RM - Advanced Settings

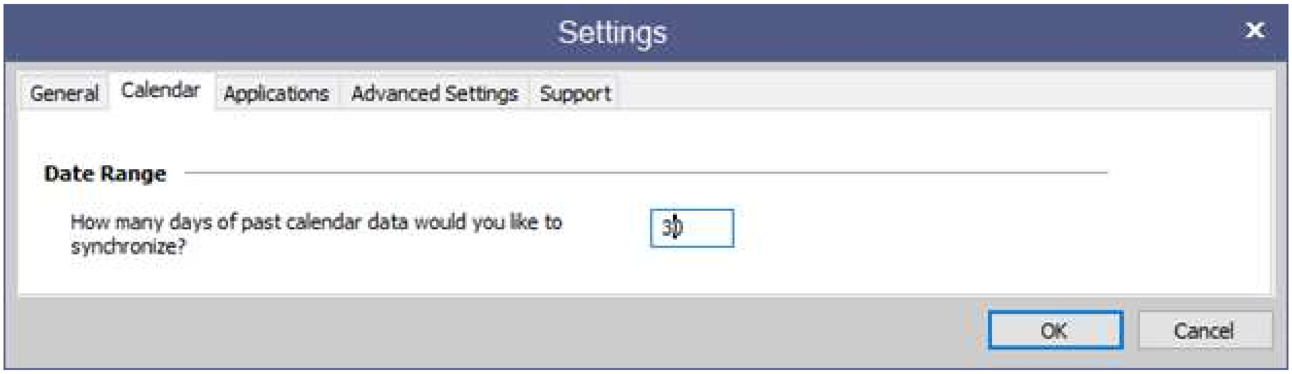


- Next click the **Advanced** button in the lower left corner of the main settings screen.

General Settings

- **Personal Category** – *Not applicable for Commence Cloud CRM*. This setting is specific to Outlook and governs whether you want all records assigned to the category Personal to sync from Outlook to Commence RM.

Calendar Settings



- **Date Range-** Mobile Link will synchronize today's and all future calendar events by default. This option will allow you to synchronize events from the past. Enter the number of days past you would like to have Mobile Link sync your past events.

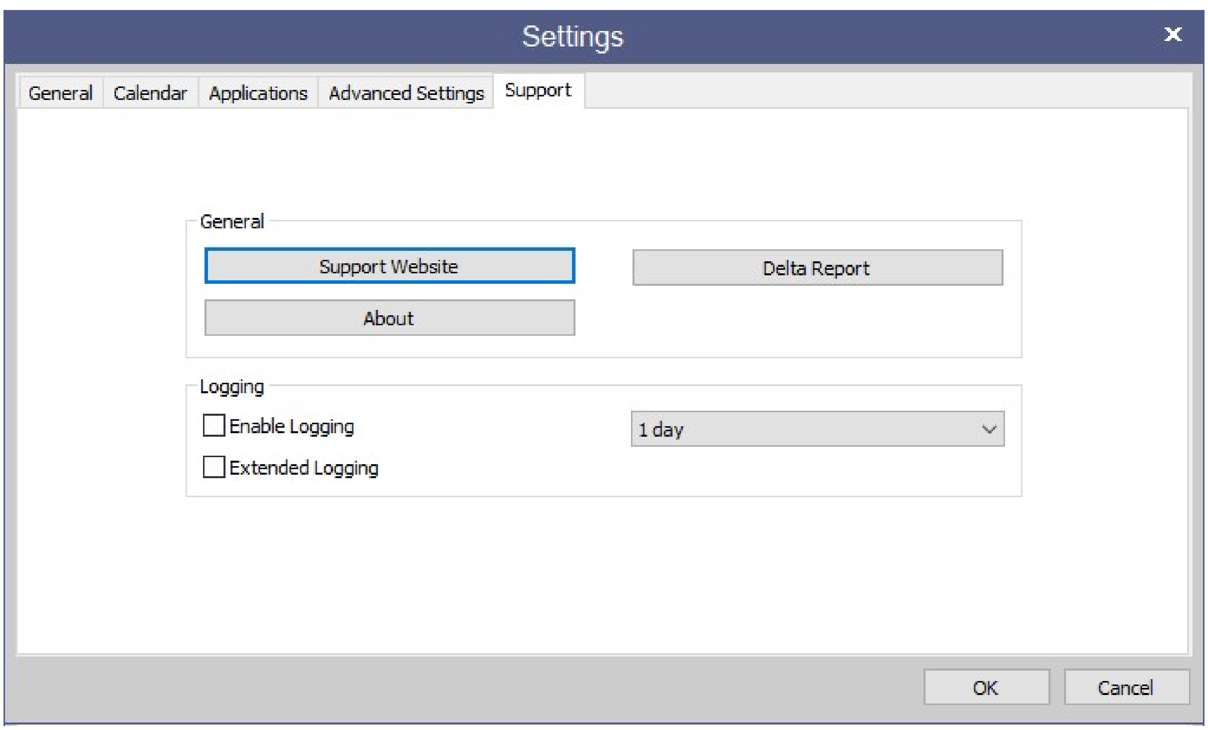
Applications Settings

- Will reflect the setting you configured under the Commence RM settings.

Advanced Settings

- Will reflect the settings you configured for the Mobile Link auto sync option.

Support Settings



General

Support Website – A future site for detailed information about Mobile Link.

About – Opens screen with details of version and build number for your installed Mobile Link software.

Logging

Enable Logging – This setting is responsible for writing general details about each synchronization to the mobilelinklog.log file. Use the down arrow to select the number of days you wish Mobile Link to write to the log. This feature should only be selected if you are having issues with synchronization.

Extended Logging – This setting will enable the logging feature for as long as the checkbox is selected. This should only be selected if you are having issues with the synchronization as it will cause the mobilelinklog.log file size to increase.

- Click **Ok** button to close Advanced Settings.
- Click the **Ok** button to return to the Mobile Link home screen.

How to sync with Commence Cloud CRM

- On the *Mobile Link for Commence RM* Home Screen, select the **Sync** button to initiate the synchronization between Commence RM and Commence Cloud CRM.