

# Bulk Email Upload



## The Business Need

The purpose of this assignment is to upload emails from Microsoft Outlook to Microsoft CRM. Companies create Project Entity basically for project managers to track their emails against projects in the system instead of another entity. Normally email history will be stored in a separate folder (Jobs) in outlook. Our client required an extremely versatile software solution that allows them greater flexibility to upload all emails in a public folder of Microsoft Outlook to a particular entity in Microsoft CRM. Content's in the email such as From, To, CC, BCC, Subject, attachments should also be copied to CRM.

## The Evaluation Process

Client evaluated many software solution providers. While each solution had some advantages, but client's requirement was not met. Cost of installation and ongoing monthly fees proved prohibitive with other solution. Client was presented with a solution that met its needs. Among other companies, client found that ZSL was a perfect match for their requirements. ZSL had advantages with high availability solutions. Client recognised our solution and believed that would provide a thorough assessment of their environment and give them peace-of-mind about its long-term reliability – which other solutions couldn't provide.

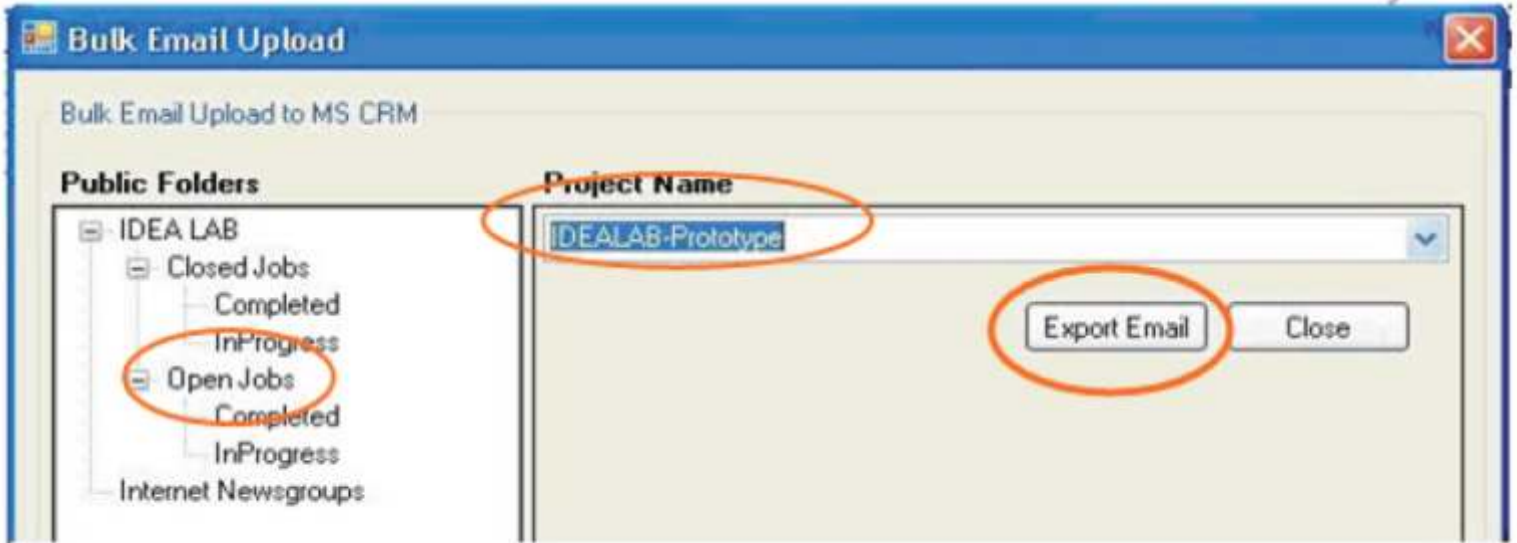
## The Results

- Our bulk email upload helps user to upload emails directly to CRM with attachments and allows tracking & viewing project related email communication within CRM
- Saves time to transfer email directly from Microsoft Outlook into Microsoft Dynamics CRM.

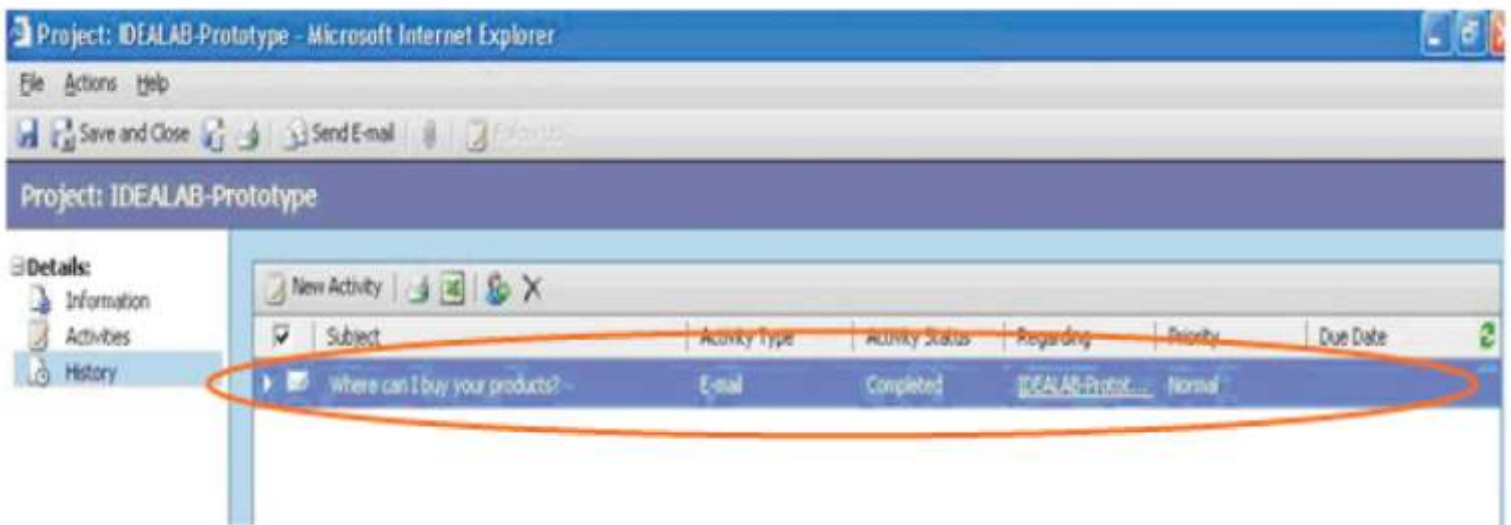
## The Solution

ZSL is able to quickly deliver a highly customized, industry-specific, flexible application that provides the capabilities required by the client. Bulk email upload is designed and developed to provide a complete solution for integration between Outlook & CRM operations. It optimizes and automates many difficult tasks. A separate application is created to export all the emails from outlook to CRM. Once the email gets exported, with the help of CRM Web services, exported emails will be inserted into CRM entity. Using 'Bulk Email upload' mechanism, emails can be transferred from Outlook to a CRM entity.

Select any one public folder and choose the project name in CRM



Email will be transferred to the CRM



ZSL's bulk email upload for Microsoft CRM is a Microsoft CRM compatible component that allows the user to upload bulk emails and associate every archived email against projects in the CRM system.

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