



Microsoft Outlook Connector

With the Microsoft Outlook Connector module, your staff can collaborate and share information regarding constituents and relationship building activities. Critical emails sent or received by one staff member are seldom circulated to other staff involved with the constituent, but with Microsoft Outlook Connector, you can save your communications to the Andar/360 database and have it shared with all staff in your organization.

CENTRAL REPOSITORY

With Microsoft Outlook Connector, Andar/360 becomes a central repository of all communications with donors and key stakeholders. Any staff member authorized to the communication tab of an account in Andar/360 can view all emails sent/received to/from that account.

ACCURATE RELATIONSHIP MANAGEMENT

Microsoft Outlook Connector eliminates the need to manage contacts in an ad-hoc basis Outlook. By controlling contact information through Andar/360 you can ensure that enterprise data policies are enforced.

AUTOMATIC UPLOADS

Emails and calendar appointments can be automatically uploaded from Outlook directly into Andar/360's communication log.

COMMUNICATION LOG LINKAGE

Sender, recipient, cc'd, and bcc'd email addresses are used to automatically link all parties involved to the communication log entry.

UPDATE BY FOLDER OR CATEGORY

You decide which email to upload into Andar/360 by selecting specific Outlook folders, categories, levels of importance, and/or degree of sensitivity. You also decide how often Andar/360 should check Outlook for updates, and specify if you want Outlook folders to be private or public.

CONTROLLED ACCESS

Communication logs can also be automatically restricted to specific groups of staff based on your configuration settings.

EMAIL ATTACHMENTS

You can upload different types of email attachments to communication logs to keep a record of documentation that's been shared back and forth between you and the constituent.

DOWNLOAD CONTACTS

Andar/360 individual and organization accounts are downloaded into Outlook along with their complete Andar/360 profile. Contacts are linked to employers and other organizations within Outlook.

SYNCHRONIZED WITH ANDAR PLANS

Andar/360 plans are bi-directionally synchronized with Outlook tasks. You decide which plans to synchronize into which Outlook task folder.

CONNECT WITH EXCHANGE SERVER OR OFFICE 365

Microsoft Outlook Connector can also be configured to connect directly with your Exchange Server or Office 365, and you can have direct synchronization between contacts and appointments.

DEFAULT EMAIL ADDRESS

An email address can be created for Andar/360 so that all emails forwarded or copied to this email address will also be uploaded into the Andar/360 database.



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