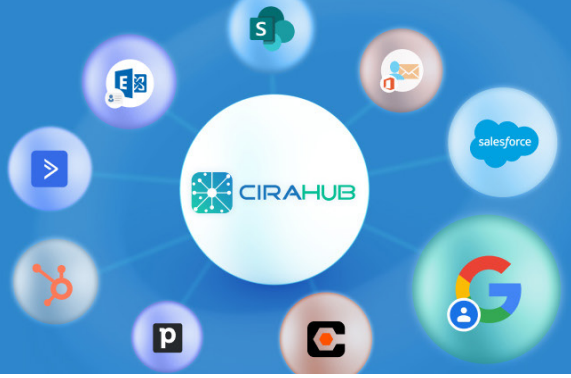
CIRAHUB

CiraHub CRM Sync



CiraHub CRM Sync Overview

CiraHub's Multi-Way CRM Sync allows for the synchronization of data from CRMs with different applications. This enables users to seamlessly sync leads and contacts between CRMs to better manage their customer relationships while simplifying account management processes. CiraHub's Multi-Way CRM Sync allows organizations to sync data between a variety of CRM applications, including Salesforce, Procore, Pipedrive, HubSpot and ActiveCampaign.

Multi-Way CRM Sync

Multi-Way CRM Sync enables users to synchronize multiple applications with CRMs in order to share data between each platform. Users can automatically sync or merge CRMs with one another, or with other contact lists. This platform allows a single admin to merge, edit, and sync multiple contact lists from different sources. Whenever a new record is created in one source, the data is instantly updated in all other sources. Organizations can access all their new leads and contacts in one place by syncing their CRM data with CiraHub. This allows organizations to avoid the time-consuming process of manually updating contacts in each of their CRM applications. With Multi-Way CRM Sync users can sync or merge contacts from various CRMs in many different combinations as well as between tenants.

Users can Multi-Way sync CRMs with the following applications:

- Public Folders
- User Mailboxes
- Google Contacts
- Exchange Server Mailboxes
- Salesforce
- HubSpot
- Pipedrive
- Procore
- ActiveCampaign

CiraHub CRM Sync Features

Field Mapping. Field mapping allows users to customize, map, and synchronize desired data. This feature can be especially helpful when looking to filter out and sync specific data to different individuals within an organization. When transferring data between different platforms oftentimes there will be inconsistencies with how the data is labeled. Users can specify which fields of data records should be considered as well as how they should be mapped to one another with Field mapping.

Contact Filtering. Contact Filtering settings in CiraHub allow users to create and sync items in their spoke based on specific criteria. Users can categorize data in the Hub and sync data from the endpoint to the hub database and back. For example, customers may want to allow certain users to sync all contacts while allowing others to only sync contacts relevant to their team.

CiraHub CRM Sync Features

Automatic Sync. With CiraHub users can automatically sync an unlimited number of shared contacts and calendars in Office 365, on-Premise Exchange servers, and Public Folders.

CRM Data Migration. CiraHub ensures that their contact and leads from each CRM application is integrated into CiraHub according to their custom settings when the automatic sync is initiated.

CRM Sync Setup

Setting up a multi-way sync with CiraHub requires little expertise and minimal IT intervention. CiraHub functions on a "Hub" and "Spoke" system, where the "Hub" acts as a central repository of all the data that will be synced to and from it, and the "Spokes" function as the data sources. A user simply needs to login to the CiraHub dashboard, create an initial "Hub" and attach their "Spokes." From there, users have the option to enable one or two-way sync within each spoke; this allows them to determine if the data from the spoke will be read only, or if data will be synced back as well. Finally, once configuration has been completed, users simply hit the "Sync Now" button, to keep all enabled data sources (Spokes) in constant sync with one another. Spokes can be easily removed, additional ones created – the modularity allows for extreme control to suit a user's needs.