



21CRM Exchange Contact Sync v3.0

System Administrator Guide

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Who Should Read This Guide

This guide is for CRM administrators and consultants. We assume that you have experience using:

- Sage CRM
- Microsoft SQL Server 2000+
- Microsoft Exchange Server

How this guide is organized

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration of Exchange Contact Sync.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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What is the “21CRM Exchange Contact Sync”?

The Exchange Contact Synchronizer is a Windows service that will synchronize your CRM contacts with an Exchange public contacts folder on your Exchange Server.

Installation

Prerequisites

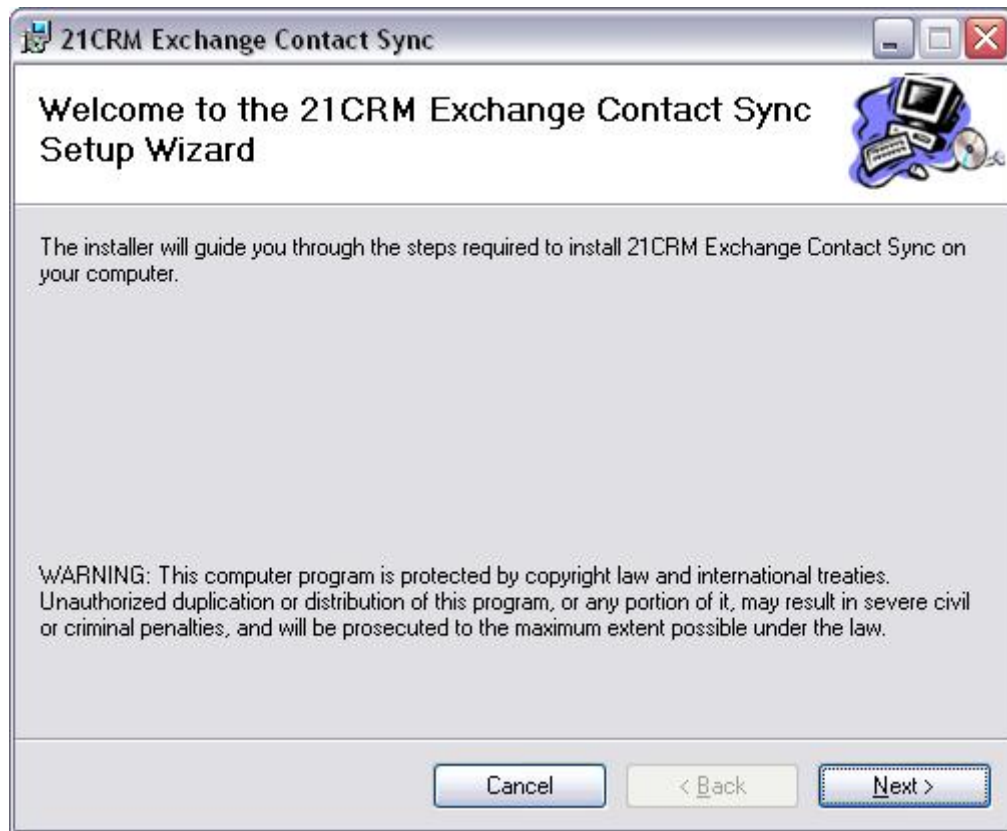
- Working installation of Sage CRM
- SQL Server 2000+
- Exchange Server 2000+
- Outlook 2000SR2 + (installed on the target machine)
- Administrator Privileges
- SQL User Account With Administrator Privileges
- .NET Framework Version 1.1

Exchange Contact Sync must be installed on the machine running the CRM Web Server.

Note: Prior to beginning this installation, you should ensure a **Public Contacts Folder** exists on your exchange server that will be the destination for CRM’s contact data. This folder can have any name you would like, and the user that you configure to run the Windows Service (see below) must have the ability to **ADD** and **EDIT** contacts in that folder.

Installation

The first step is to open “21CRMExchContactSync30Setup.exe”. This will open the following window:



To continue, simply click the Next button. This will display the following window:



This is the “End-User License Agreement” or EULA. In order to complete the installation, accept the agreement and then click Next to continue.

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The following window is then displayed:



Enter the company name and Product Key. If the Product Key field is left blank, the installation will complete, but the program will not function until a valid Product Key has been entered. You can enter the Product Key after installation, via CRM from the 21CRM Admin menu button.

Click on the Next button, and the following window is displayed:

21CRM Exchange Contact Sync

21CRM Exchange Contact Sync Installer

Please enter the information required to connect to your SQL Server in the textboxes provided below.

SQL Server Name:

CRM Database Name:

SQL User Name: (with admin rights)

SQL Password:

Cancel < Back Next >

Enter all the information required to connect to the SQL Server:

- SQL Server Name - the name of the SQL Server that contains the CRM database.
- CRM Database Name - the name of the database containing the CRM data; defaults to "CRM". You will need to change this if your CRM database has a different name.
- SQL User Name - the user name on the SQL Server that has access to the CRM database and is a member of the Database Creators group.
- SQL Password - the password associated with the above SQL Server user account.

After all the required information has been entered, click Next to display the following window:

21CRM Exchange Contact Sync

21CRM Exchange Contact Sync Installer

Please enter your preferences in the textboxes provided below. If the folder that you wish to store your contacts in does not exist, then it will be created. Interval is the time in minutes how often the synchronisation from CRM To Exchange should run.

Interval:
60

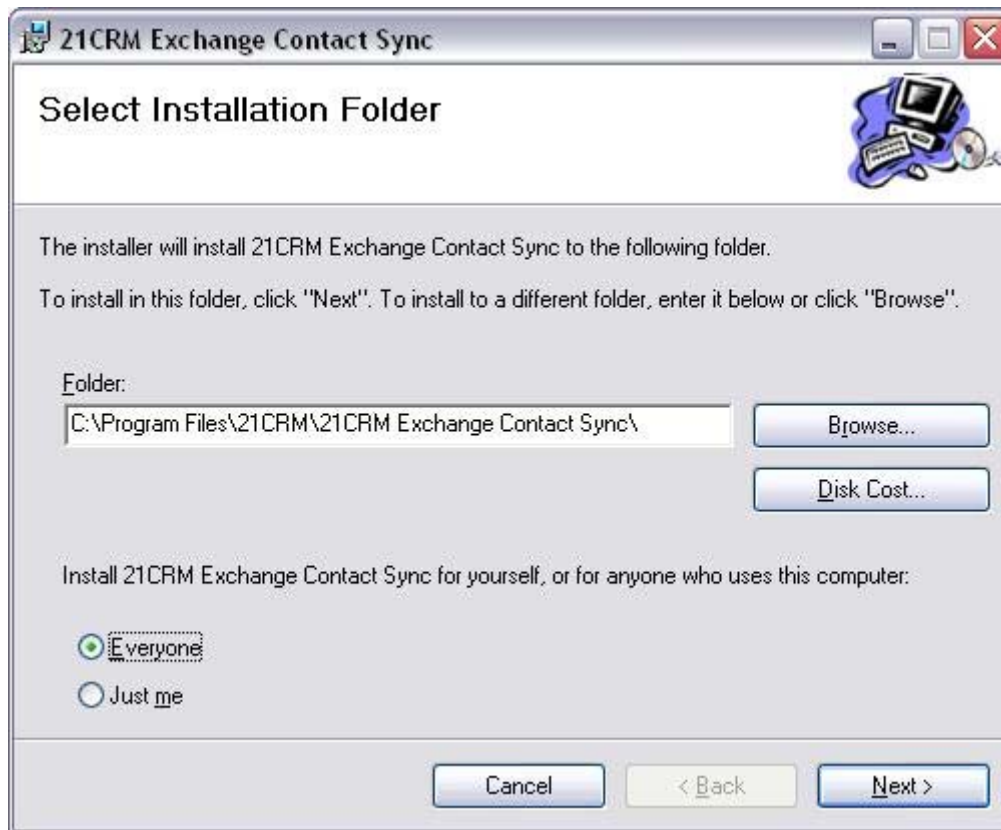
Exchange Public Contacts Folder Name:
CRM Contacts

Cancel < Back Next >

Enter basic configuration settings that will determine how the service runs.

- Interval - how often, in minutes, the service should run. The default is 60 minutes. This can be changed at any time in the Settings.ini file located in the program directory.
- Exchange Public Contacts Folder Name - the folder on the “Exchange Server” in which all of the CRM Contacts will be stored. The default is “CRM Contacts”. If this folder doesn’t exist it will be created the first time the service runs.

Once all the required settings have been entered, press Next to continue to the next window:

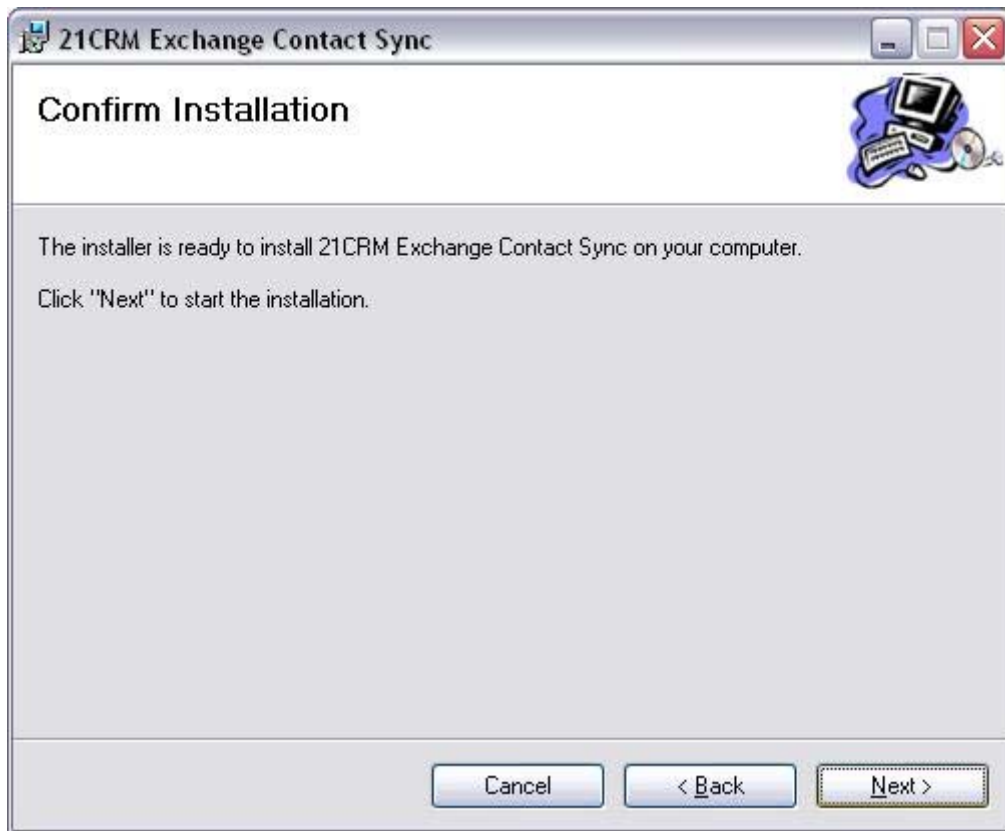


Choose where to install Exchange Contact Synchronizer on the local machine. The default is C:\Program Files\21CRM\21CRM Exchange Contact Sync\. This directory can be changed to any directory of your choice, by clicking the Browse button, but the default is recommended.

The Disk Cost button can be used to view the amount of space required to install Exchange Contact Sync and the amount of free space left on the selected drive.

In order for the service to run regardless of which user is logged in, install the service for "Everyone". For the service to run only when the user who is currently logged in is using the computer, select "Just Me".

Click the Next button to display the following window:



To begin installation, simply click the Next button.

The following window is displayed to inform you of the progress:



During installation, a window will open prompting you for a User Name and Password. This is the User Name and Password that Exchange Contact Synchronizer will use to log onto the exchange server.

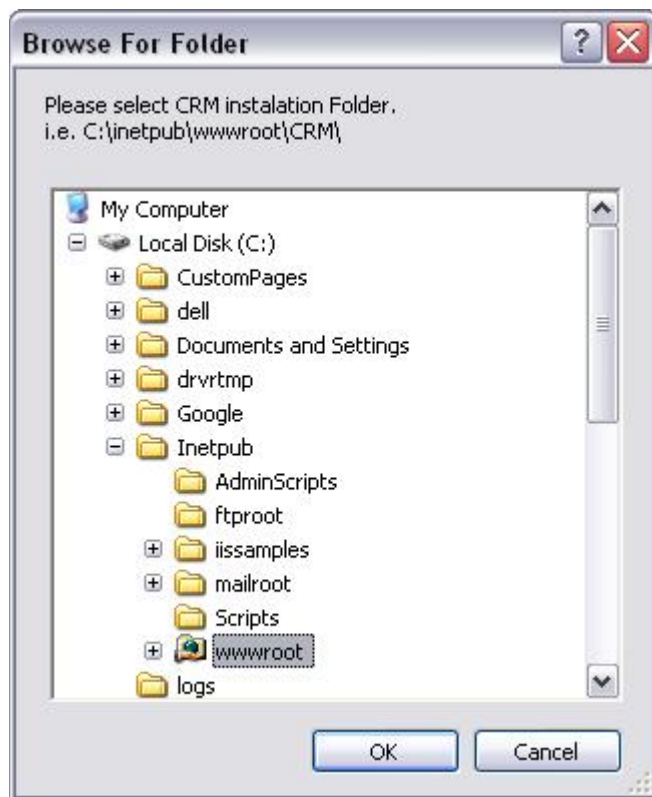


The Username must be a fully qualified domain name (i.e. domain\username), and must have a minimum of author rights to the Exchange public folder previously specified. This is the user that will actually create/update contacts in the folder.

Notes: Microsoft Outlook **MUST** be configured on this computer, and a user profile for this user **MUST** be setup and configured. You should be able to log onto this computer with this username/password, start Microsoft Outlook, and access the public folder specified.

This domain user **MUST** have ADD and EDIT rights on the public folder you specified in the “Exchange Public Contacts Folder Name” above. If the user does not have these rights, the application will not run successfully.

Click OK and the following window will display:



Select the installation path of CRM. Browse to the folder containing the CRM installation and click OK to continue.

A dialog box will appear with the following message:



21CRM Exchange Contact Sync v3.0 for Sage CRM

Select yes to launch the service, or No to add additional configuration settings. See Configuration section below.

If you chose No, the service can be started by typing in a command line:

net start "21CRM ContactSync"

or by visiting the Windows Service Control Panel and starting the service from there.

Click Close to finish the installation process.



Configuration

All configuration settings are stored in the Settings.ini file located in the program directory (Default "C:\Program Files\21CRM\21CRM Exchange Contact Sync\"). These settings include:

Server Settings

- Server Name – name of your SQL Server
- Database Name – name of the CRM database on the SQL Server
- User Name – SQL Server user name
- Password – associated with SQL account

Misc Settings

- Folder Name - the folder on the Exchange Server in which all of the CRM Contacts will be stored. The default is "CRM Contacts". If this folder doesn't exist it will be created the first time the service runs.
- Interval Time - how often, in minutes, the synchronization process should run.

Custom Phone Mappings

Custom phone mappings take a specified CRM phone type and link it to a phone type in Outlook. You can add your own custom mappings into the configuration file using the following format:

Phone:[CRM]=[Outlook]

The line must begin with "Phone:" to indicate that it is a custom phone mapping. The next value is the CRM Phone type (CarPhone) followed by "=" then the Outlook Phone Type (Car).

You can add as many custom mappings as needed, but the corresponding Outlook phone type must exist. Here is a complete list of all the possible Outlook phone types.

ASSISTANT	BUSINESS
BUSINESS2	BUSINESS FAX
CALL BACK	CAR
COMPANY	HOME
HOME2	HOME FAX
ISDN	MOBILE
OTHER	OTHER FAX
PAGER	PRIMARY
TELEX	TTY/TDD

The following mappings are installed by default.

Home = Home
Business = Business
Mobile = Mobile

Custom Email Mappings

Custom email mappings work essentially the same as phone mappings with a one major difference. Instead of using the “Phone” keyword you use the “EMAIL:” keyword followed by the CRM email type, preceded by the “=” sign then the corresponding Outlook type.

EMAIL:[CRM]=[Outlook]

There are only 3 email fields in Outlook and the “EMAIL” field is unavailable for custom mappings because it is reserved for a default email address. The options for custom email mappings are EMAIL2 and EMAIL3.

Custom Address Mappings

Custom address mappings work essentially the same way as both Phone and Email mappings, except they are defined by using the “Address:” keyword.

ADDRESS:[CRM]=[Outlook]

There are only 3 address types in Outlook (Home, Business and Other) by default Home and Business are mapped to their counterparts, but these can be changed to meet your specifications.

Custom Mappings

Custom mappings work essentially the same as all other mappings except that they are defined with the “Custom:” keyword. The major difference between custom mappings and all other mapping types is that Custom mappings access the CRM database and retrieve a value directly from either the Person or Company tables. Therefore, the value set in the Settings.ini file must correspond to the column name in the CRM database. Another difference is that the format is different than that of the other mappings. The format for Custom mappings is:

Custom:[OutlookField]=[CRMDatabaseField]

Custom mappings are case sensitive so,

Custom:Body=Comment

will map the Outlook Contact field “Body” to the “Comment” field on either the Person or Company tables in the CRM database.

On the other hand,

Custom:body=Comment

will not work, and the custom mapping will be ignored. The possible Outlook values are as follows (in the proper casing):

<ul style="list-style-type: none">• Account• Anniversary• AssistanName• AssistanTelephoneNumber• BillingInformation• Birthday• Body• Categories• Children• Companies• CompanyMainTelephoneNumber• ComputerNetworkName• Department• FTPSite	<ul style="list-style-type: none">• IMAddress• JobTitle• Language• Mileage• NetMeetingAlias• NetMeetingServer• PersonalHomePage• Profession• RadioTelephoneNumber• RefferedBy• Spouse• Suffix• WebPage• GovernmentIDNumber
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Uninstalling

To uninstall Exchange Contact Synchronizer open Add/Remove Programs from the Control Panel. Select Exchange Contact Sync and click Remove.

Troubleshooting

Failed Installation

If for some reason the installation fails to complete, during re-installation an error will be displayed stating that the service is already installed. To complete the installation:

- Open the registry editor
- From a command prompt type “regedit”
- Browse to
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services
- There will be a key named “21CRM_ContactSync”. Delete this key and its sub-keys
- Reboot the machine.
- Restart the installation process.

Exchange Sync Log

Contact Sync maintains a log of all synchronization activities. This log is located in the “ExchangeSyncLog” table in the CRM SQL Database.

Each creation or update of a record in CRM is logged here. You can use this log to identify issues with synch, or to ensure it is running.

In the event you need to “start over” you will need to delete ALL of the records in this table EXCEPT the first record (record ID 1). Exchange Sync uses the last datetime of the most recent record entered into this table to determine when it last ran, and what updates have occurred since then. If you do not purge this table, exchange sync will not detect any changes, and will not repopulate your public folder.

Known Issues & Troubleshooting

At this time there are no known issues with the 21CRM Exchange Contact Synchronization software.

If you experience any issues, please report them to us contacting your software provider, or, if you are a 21CRM Systems partner, by logging into our online self-service support portal at <http://www.21crmsystems.com> and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

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Email: support@21crmsystems.com

Online: <http://www.21crmsystems.com>

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