Domino Synchronizer for SuperOffice CRM

Getting Started

Two way synchronization between SuperOffice CRM and Lotus Domino

Contents

Welcome to the Domino Synchronizer for SuperOffice CRM **3**

Introduction 3

Before you begin 3

Admin settings for the Domino Synchronizer for SuperOffice CRM **4**

Overview 4

Save options explained 4

Sort and filter function user lists 4

Status 5

Dialing Prefix 5

Synchronization Direction 6

Technical Settings 6

Adding a new Lotus Notes Server 7

Follow-up filter settings 9

SuperOffice CRM Settings 10

External Settings 11

User Synchronization Settings 12

Options 14

Service Options 15

Domino Synchronizer GUI 16

Troubleshooting 16

Welcome to the Domino Synchronizer for SuperOffice CRM

1

Introduction

The InfoBridge Domino Synchronizer for SuperOffice CRM enables two way synchronization of SuperOffice with the IBM Domino environment.

The InfoBridge Domino Synchronizer for SuperOffice CRM will synchronize appointments, tasks, to do's, reminders and all day events.

For more information about the difference between the InfoBridge Synchronizer products please follow the link below.
http://kb.infobridge.com/hc/en-us/article_attachments/201705312/SuperOffice_Synchronizer_Overview.pdf

Before you begin

Make sure all the preparation and installation steps are performed as described in the preparation manual and the installation manual!

Admin settings for the Domino Synchronizer for SuperOffice CRM

3

Overview

In this chapter all the settings of the Domino Synchronizer admin will be explained.

Start the Domino Synchronizer Admin from the Windows Start menu and login with a SuperOffice user with user level 0 access rights.

Save options explained

Press this button	To do this
Apply this setting for all the users	the options you have set in the visible panel on the left will be saved for all the users.
Apply this setting for the selected user(s)	the options you have set in the visible panel on the left will be saved **only** for the selected users.
System setting for the selected user(s)	the options you have set in the visible panel on the left will be discarded and the default system settings for the visible panel will be used.

NOTE
When holding down the CTRL key while clicking on the users you can select individual users. When holding down the SHIFT key you can select a range of users.

Sort and filter function user lists

In the lists where you can choose a SuperOffice CRM user or mailbox you can do this:

A	No filtering applied for a user name, group or company
B	Use the filter to search for a user name, group or company
C	Sort the users by name, group or company

Status

This panel gives an overview of the status and registration information.

A	**Status Overview:** Status overview of the SuperOffice Synchronizer.
B	**Register:** With this button you can acquire new licenses or check your license details.

Dialing Prefix

In this panel you can set how phone numbers should be presented in Lotus Notes.

A	**Use prefix on phone numbers:** When this option is selected international phone numbers will contain the international dialing prefix. You have to set your own country so the program can determine which phone number is local and which phone number is international.
B	**Use prefix on national numbers as well:** When this option is selected the local phone numbers will also contain the international dial prefix. This is useful when the local contacts are synchronized to a mobile device. When the mobile device is used abroad, the local numbers can still be dialed.
C	**Remove leading 0 from numbers:** When this option is selected, the first 0 of a local phone number will be removed. Some countries like Italy are excluded.
D	**Own country:** Select your country from the dropdown list. This setting is being used to correctly build the dialing prefix.
E	**Purify phone numbers:** Select this option to clean the synchronized phone numbers in Lotus Notes. This option will remove characters like -. This makes it possible to directly call phone numbers from an Appointment on the mobile device. Otherwise phone numbers will not be recognized by the mobile device.

Synchronization Direction

In this panel you can set the synchronization direction.

A	**SuperOffice <-> External System:** Setting this option means the Synchronizer will synchronize appointments, tasks both ways.
B	**SuperOffice -> External System:** Setting this option means the Synchronizer will only synchronize SuperOffice additions, updates or deletions of appointments and tasks to Lotus Notes. Changes made in Lotus Notes will **not** be synchronized to SuperOffice.

Technical Settings

In this panel you can specify the Lotus Notes Domino Server URL for the Synchronizer.

A	**Lotus Notes Server Addresses:** Specify a Lotus Notes Domino server like **(DOMINOR7/INFOBRIDGE)**.
B	**SuperOffice Synchronizer Connector address:** Click Edit to set the Server address and the Server port ***Server address:*** Specify a DNS name of the SuperOffice server (e.g. SUPEROFFICE2003) or IP-Address of the SuperOffice server. ***Server port:*** this is the port that will be used for the communication between DOMINO and SuperOffice; (default port is 8040).
C	**Lotus Notes excluded databases:** Specify Lotus Notes databases that must be excluded from synchronization. This is a performance feature and only high-usage databases such as log.nsf should be added to the list. Click the **"Edit"** button to open the Lotus Notes database exclusion list. Click **"Add"** to fill in athe database you want to exclude (e.g. log.nsf).
D	**Events Optimizer Interval (minutes):** The Lotus Notes Synchronizer will detect instantly any changes made in SuperOffice. To keep the events from Lotus Notes

Domino as fast as possible this option will run an optimized function for events.

NOTE
It is possible to set the events optimizer to 0, however this is not recommended and could give a slight decrease in performance.

Adding a new Lotus Notes Server

A	**Add:** Click the '**Add**' button in the Technical settings.

The "**Lotus Notes Server settings**" dialog will open.

A	**Server name:** This is the name of the DOMINO server and the DOMINO Domain name (for example **DOMINOR7/INFOBRIDGE**)
B	**Server address:** This can be the DNS name of the DOMINO server **(DOMINO2003)** or the IP-Address of the DOMINO server.
C	**Server port:** This is the port that will be used for the communication between SuperOffice and DOMINO; **(default port is 80 - this must be the same port that is configured in Domino to use HTTP)**.

D	**Authentication:** This is the authentication protocol that is used on the Domino Server; You can choose "**None**", "**Basic**" or "**Session**". This authentication type must be the same as the authentication type on the Domino server. **NOTE** *Please refer to our knowledge base article when the Domino server uses* ***Session Authentication****:* http://kb.infobridge.com/hc/en-us/articles/203750512
E	**Username:** The user name that will be used during the authentication.
F	**Password:** The password that will be used during the authentication
G	**SoToDom servlet path:** This is the **outgoing** DOMINO URL for communication between Domino and SuperOffice **(default URL is /servlet/std).**
H	**DomToSo servlet path:** this is the **incoming** DOMINO URL for communication between Domino and SuperOffice **(default URL is /servlet/dts).**
I	**DomToSo hostname:** This is the hostname of the Domino server and should be *localhost* for most installations. Only in cases where session authentication is required this should be changed.
J	**Directory server:** Check this box if this Domino Server will be used as Directory server.
K	**Server logging level:** DTC **(Domino Transaction Capture)** 1 = Errors Only (recommended) 2 = Lite debug logging 3 = Full debug logging SoToDom **(SuperOffice to Domino):** 1 = Errors Only (recommended) 2 = Lite debug logging 3 = Full debug logging DomToSo **(Domino to SuperOffice):** 1 = Errors Only (recommended) 2 = Lite debug logging 3 = Full debug logging
L	**Full server address:** Filled in automatically

After the Lotus Notes server settings have been saved you can test the connection with the Test button. To see the technical settings you can use the Info button.

A	**Info:** Click the **"Info"** button to see the technical settings of your server and the Lotus Notes Synchronizer components.
B	**Test:** Click the **"Test"** button to test the connection with the Lotus Notes Domino Server.

Follow-up filter settings

In this panel you can select which SuperOffice activity types must be synchronized to Lotus Notes. You can set also the synchronization time frame.

A	**Number of days in the past:** Specify the number of days in the past to synchronize. (See the knowledge base article 'How the Synchronizer works with setting the date range' http://kb.infobridge.com/hc/en-us/articles/203750942).
B	**Number of days in the future:** Specify the number of days in the future to synchronize. (See the knowledge base article 'How the Synchronizer works with setting the date range' http://kb.infobridge.com/hc/en-us/articles/203750942).
C	**Activity Filter:** Check or uncheck the SuperOffice activity types which should be synchronized. Use the 'Select All' option to select all the activities, use the 'Deselect All' option to deselect all the activities.

NOTE

*When you specify certain activity types make **sure** that you also select the activity types which have been setup as the types for Lotus Notes appointments (See SuperOffice CRM Settings). Failing this, will result in appointments which are created in Lotus Notes and changed in SuperOffice that will not be synchronized.*

SuperOffice CRM Settings

In this panel you can set the specific SuperOffice options to synchronize appointments or tasks to Lotus Notes.

A	**Default SuperOffice CRM Follow-up type for normal External appointment:** Select the task type which should be used for a normal Lotus Notes appointment.
B	**Default SuperOffice CRM Follow-up for All Day External appointment:** Select the task type which should be used for an All Day Lotus Notes appointment.
C	**Default SuperOffice CRM Task for External task:** Select the task type which should be used for a Lotus Notes task.
D	**Use External Category as Follow-up/Task type, when no match is found use the default:** When you make an appointment in Notes you can add a category. When the category exists in SuperOffice the category will be added to the appointment in SuperOffice after synchronization. When the category does not exists the default category will be used instead.
E	***External Subject line: <Company> <Department> <Person> <Phone Number> <Task Type>:*** If this option is checked, the company, department, person, phone number and the task type will be placed in the Lotus Notes subject line.
F	***External Subject Line: <250 Characters of App. Or Task Text>:*** If this option is checked, the SuperOffice appointment or task description is placed for a maximum of 250 characters in the subject line in Lotus Notes.
G	***External Subject Line: <Task Type> <First line of App. Or task>:*** If this option is checked, the SuperOffice task type and the first line of the appointment or task description are placed in the subject line of Lotus Notes.

NOTE
The first line of the appointment is determined by the first carriage return which is encountered in the description.

H	***External Subject Line:*** If this option is checked, you can build your own Lotus Notes subject line by using SuperOffice template variables.
I	***Set Address in Appointment and Task:*** If this option is checked, the address information of the SuperOffice appointment/task will be placed in the body of the Lotus Notes appointment/task.
J	***Set Invited Participants in Appointment and Task:*** If this option is checked, participant information from a SuperOffice group appointment is Synchronized to Lotus Notes.
K	***Set Task type as first item in external subject:*** If this option is checked, the task type will be set as first item description in the Lotus Notes subject line.
L	***Set Project name in Appointment and Task:*** If this option is checked, the

	project name will be added in the Lotus Notes subject line.
M	***Do not Synchronize SuperOffice Alarm:*** If this option is checked, the alarm set on SuperOffice appointments/tasks will not be synchronized to Lotus Notes.

External Settings

In this panel you can set how synchronized items should be displayed in Outlook.

A	**Default External Appointment Category:** Specify the desired Lotus Notes category name which should be used for SuperOffice appointments. Check "**Use SuperOffice Value**" if the SuperOffice appointment type must be used as the category description.
B	**Default External Task Category:** Specify the desired Lotus Notes category name which should be used for SuperOffice tasks. Check "use SuperOffice Value" if the SuperOffice task type must be used as the category description.
C	**Set default company for new Appointments & Tasks:** If this option is selected, a new appointment or task from Lotus Notes will be linked to the selected SuperOffice Company.
D	**Do not synchronize all-day events:** If this option is selected, appointments created in Lotus Notes as an All-Day event will not be synchronized.
E	**Skip External/SuperOffice Recurring Appointments:** When this option is selected, recurring appointments from Lotus Notes and SuperOffice will not be synchronized.
F	**Skip External Appointments, incl. recurring ones, where time is marked Free:** When this option is selected, Lotus Notes appointments including recurring Lotus Notes appointments where the time in the Lotus Notes appointment is marked as "**Free**" will not be synchronized.
G	**Skip External Tasks:** When this option is selected, Lotus Notes tasks will not be synchronized.
H	**Mark External Deletions as completed in SuperOffice CRM:** When this option is selected, deletions made in Lotus Notes will mark appointments and tasks as completed in SuperOffice. However Lotus Notes appointments/tasks deleted on the same day as they are created or appointments/tasks deleted in the future **will be** deleted.

NOTE

When this option is selected, the option 'Do not synchronize Completed SuperOffice appointments & tasks' will be automatically selected.

I	**Do not synchronize Completed SuperOffice CRM appointments & tasks:** When this option is selected, new or changed SuperOffice appointments/tasks

	where the completed check is set, will not be synchronized to Lotus Notes.
J	**Do not Synchronize External Alarm:** If this option is checked, the alarm set on Lotus Notes appointments/tasks will not be synchronized to SuperOffice.
K	**Do not Synchronize Private Appointments & Tasks:** If this option is checked, appointments and tasks marked as private in Lotus Notes will not be synchronized

User Synchronization Settings

In this panel you can setup the users that must be synchronized.

A	**Load External Users:** A dialog will open. Enter the name or part of the name to search for the correct user(s). The External Mailbox name list will be populated with all matches of your search criteria.
B	**SuperOffice CRM associate:** Select the SuperOffice associate(s) you want to link up to their External mailbox name.
C	**Options Diary, Task:** The synchronization items Diary and Task can be set for the synchronization users.
D	**Lotus Notes Server:** When using multiple Lotus Notes servers, choose the correct server.
E	**Auto Link User:** When this option is used, the SuperOffice users will be automatically linked with the Lotus Notes Domino mail file. To use this option, select the SuperOffice associate(s) and click the 'Auto Link Users' button.

TIP

The automatic linking will only work when the mail file is available in the list External Mailbox Name.
Also make sure that the SuperOffice users have a valid email address stored in the SuperOffice contact person card. The email address of SuperOffice is being used to link the user to Lotus Notes.

Link User: When this option is used, linking can be done for individual users. To use this option, click the 'Load External Users' button first so the list of available mail files is populated. Select the SuperOffice associate and select the appropriate mail file and click the 'Link User' button.

F **Save Added Users:** Use this option to save new added users to the synchronization list.

> **NOTE**
> *Adding users with the button 'Auto Link Users' and the 'Link User' button, only adds the synchronization users to the list, they are not automatically saved. To save the users you press the 'Save Added users' button!*

Save Users Options: Use this option to save changes made to the selected linked user(s), e.g.: The task option needs to be unchecked.

> **TIP**
> *If you want to temporarily disable a user for synchronization, but you do not want to delete the user, because you would loose the synchronization history, select the user from the synchronization user list and uncheck all the synchronization options (See C) and click the 'Save Users Options' button*

Remove Selected User(s): Use this option to delete one or more users. Deleting users will clear the history table for the selected users; therefore the synchronization history is lost.

Resync user: From the selected user(s) all Domino appointments and tasks, within the synchronization range, will be retrieved. Any missing appointment or task will be synchronized.

G **Linked users for synchronization:** Here you will find the linked users for synchronization.

Options

In this panel you can set some general options.

A	**Save warning messages to logfile:** Only warning messages and important notifications are saved in the log file.
B	**Save warning and informational messages to logfile:** Warning messages and extra informational messages are saved in the log file. (This will give a summary of the synchronization process like which events are being handled, queue handling).
C	**Save warning, informational and debugging messages to logfile:** If this option is checked warning messages, informational and extensive debugging messages are saved in the log file. Please mind that this option is a highly extensive logging of the complete synchronization process. This option should only be activated if instructed by InfoBridge. See this knowledgebase article for more information: http://kb.infobridge.com/hc/en-us/articles/202681022
D	**Show Synchronizer in system tray and start synchronizing automatically:** If this option is checked, the Domino Synchronizer will automatically open minimized in the system tray. The synchronization process will start automatically. An icon of the Domino Synchronizer will be added to the system tray.
E	**Do not update Free Text Search table:** This option will disable the free text search update.
F	**Database mutation provider interval (seconds):** Specify the interval which the Notes Synchronizer should use to check the SuperOffice database for changes.
G	**Database mutation provider inter-user interval (miliseconds):** Specify the interval in between the synchronization per user. This option is for Synchronizer installations were a lot of items are being synchronized.
H	**Move database intensive tasks to the house-keeping process:** If this option is checked, time consuming tasks (e.g. synchronization of contacts) are moved to the house-keeping process which runs at night

Service Options

In this panel you can set the information that's needed to run the Domino Synchronizer as a Windows Service.

A	**SuperOffice Username:** This user should be a SuperOffice user with user level 0 rights.
B	**SuperOffice Password:** The correct password belonging to the table admin user.
C	**SuperOffice ODBC Data Source:** Type the ODBC name of the SuperOffice database.

TIP

The correct Data source name can be found in the superoffice.ini file located in the installation directory of SuperOffice.

D	**SuperOffice Database Schema:** Type the database prefix. In most cases this prefix is: **CRM5** or **CRM7**.
E	**Retrieve settings from SuperOffice:** When using this button the required information is automatically retrieved from SuperOffice. Make sure that SuperOffice is started with the correct user which should have user "level 0 access rights" and the "DB Authentication Only" option set.

Domino Synchronizer GUI

This is the main screen of the Domino Synchronizer.

A	***Start:*** Use this button to start the Synchronization process. **NOTE** *If the option in the Synchronizer Admin 'Show Synchronizer in system tray and start synchronizing automatically' is checked, pressing the start button is not needed, because this option starts the synchronization process automatically.*
B	***Rescan now:*** Use this button, to start the event optimizer. **NOTE** *When the timer is set in the 'Technical Settings' panel you will see a countdown timer. As soon as the timer reaches 0, it will automatically run the event optimizer; please see the 'Technical Settings' panel for more information.*
C	***Show/Hide Info:*** When this button is clicked, extra information about the synchronization process is displayed.

Troubleshooting

NOTE

See also the knowledge base article '**Synchronization Rules**' for more information http://kb.infobridge.com/hc/en-us/articles/203812311

For more information or technical questions you can visit the InfoBridge online Knowledge Base at http://kb.infobridge.com

www.crmplaza.com/Apps/Domino Synchronizer

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