Domino Synchronizer for SuperOffice CRM

Installation SuperOffice part

Two way synchronization between SuperOffice CRM and Lotus Domino

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Welcome to the Domino Synchronizer for SuperOffice CRM

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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

Overview of the installation steps

The installation consists out of two parts. The Domino part of the Synchronizer and the SuperOffice part.
In this manual we install the SuperOffice part of the Synchronizer. All installation steps are described in this manual.

General installation steps:

System requirements
Before you start with the installation please read the following knowledge base article about the system requirements for the Domino Synchronizer.
http://kb.infobridge.com/hc/en-us/articles/203630871

Time zone settings
Please read the following knowledge base article about the system date and time zone settings that are very crucial for the Exchange Synchronizer for SuperOffice CRM.
http://kb.infobridge.com/hc/en-us/articles/203746982

Installing the Domino Synchronizer (SuperOffice Part)

SuperOffice part of the Domino Synchronizer

This is the second part of the installation process for the Domino Synchronizer for SuperOffice CRM.

To install Domino Synchronizer for SuperOffice CRM (SuperOffice part) you'll need to run the SetupDominoSynchronizer_SuperOffice file, double-click on the file to start the installation procedure.

Follow the steps of the installation procedure to install Domino Synchronizer (SuperOffice Part).
When the installer is started you see the welcome screen of the Lotus Notes Domino Synchronizer – SuperOffice.

- Click on the "**Next**" button.
- Select the option "I accept the terms in the license agreement".

When you accept the license agreement you can press the “**Next**” button to continue the installation. The installation will ask you for the location where the Domino Synchronizer for SuperOffice CRM must be installed. Change the folder if needed.

- Click on the “**Next**” button.

NOTE
The Domino Synchronizer for SuperOffice CRM installer (SuperOffice part) consists of two features which can be installed.
- *The Domino Synchronizer for SuperOffice.*
- *The Windows Service.*

- Select or deselect the components you want to install (they are enabled for installation by default).
- Click on the “**Next**” button.
- Click on the “**Install**” button.
- Select the option “**Launch InfoBridge KeyManager**” to register your copy of the Lotus Notes Synchronizer.

Registration Domino Synchronizer for SuperOffice CRM

Before you can use the Domino Synchronizer for SuperOffice CRM you must have a valid license key. Read the knowledge base article below for more instructions:
http://kb.infobridge.com/hc/en-us/articles/202708231

SuperOffice 7.x settings for the Domino Synchronizer

We have to set some specific options in SuperOffice for the Domino Synchronizer for SuperOffice`CRM to work properly.

Travel and Satellite configuration

Start the SuperOffice Administration.

A	**Replication**: Select the ‘Replication’ panel
B	**Travel and satellite configurations are possible (transaction logging is active)**: Check this option.

NOTE

*Even when the SuperOffice CRM travel is not used, the option '**Travel and satellite configurations are possible**' must be checked! The InfoBridge Domino Synchronizer is using the travel transaction option to detect changes in the SuperOffice CRM database.*

Check the 'Table Admin' in the SuperOffice Administration

A	**Status**: Select the 'Status' panel
B	**Table admin: Local database user**: Fill in a username with DBA rights.
C	**Database password**: Fill in the password.

NOTE

*In most cases the default SuperOffice CRM user has a username with **CRM5** and the password **CRM5MYD.** Or the user name is **CRM7** and the password **CRM7MYD.** This user will have enough rights to create the tables.*

Add new list items to SuperOffice CRM

It is important to distinguish Lotus Notes appointments or tasks from SuperOffice appointments. This can be easily accomplished by adding some new list items to SuperOffice.

A	**Lists**: Select the 'Lists' panel.
B	**Follow-up - Type**: Double Click on **'Follow-up - Type'**; The Follow-up – Type list is shown.
C	**Items**: Add the following list items; ▪ Add the task item **'Notes Appointment'**, Type is Appointment. ▪ Add the task item **'Notes All-Day Appointment'**, Type is Appointment. • Don't forget to check the 'All-day' option. ▪ Add the task item **'Notes Task'**, Type is Task.
D	**Save**: Save the changes you have made.

Check the users panel in SuperOffice Admin

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 Domino.
The email address can be quickly checked by using the following two methods.

Method 1: Check each individual user by double clicking the user out of the '**Users**' panel of the SuperOffice Admin.

Method 2: Check the email addresses using SuperOffice.

- Start SuperOffice CRM.

- Select the ‘Contacts’ tab and look for missing e-mail addresses.
- Double click the contact person where the e-mail address is missing.
- Enter the correct e-mail address for the contact person.
- Click ‘Save’.
- Repeat this for all contact persons where the e-mail addresses are missing.

www.crmplaza.com/Apps/Domino Synchronizer

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