Exchange Synchronizer EWS for Visma CRM

Preparation

Contents

Welcome to the Exchange Synchronizer EWS for Visma CRM **3**
Introduction 3
Schematic Overview 3
Preparation Steps **4**
Exchange Synchronizer EWS for Visma CRM **6**
Mailbox permissions 6
Setting Impersonation on Hosted Exchange 6
Delegation 7
EWS Throttling 7
EWS and OAB 8
Installation & Configuration 8

Welcome to the Exchange Synchronizer EWS for Visma CRM

1

Introduction

The Exchange Synchronizer EWS for Visma CRM enables two way synchronization between Visma CRM and Microsoft Exchange.

You can read here about the synchronization directions :
http://kb.infobridge.com/hc/en-us/articles/205612352

Schematic Overview

Preparation Steps

2

1. Setting up a domain user to be the sync user – See:
   http://kb.infobridge.com/hc/en-us/articles/207323689

2. Set the domain user so it can run a Windows Service;

   Setting access rights for:

   Microsoft Exchange 2010 – See:
   http://kb.infobridge.com/hc/en-us/articles/207252235

   Outlook User – See:
   http://kb.infobridge.com/hc/en-us/articles/207252245

3. Make sure correct time zone is set – See:
   http://kb.infobridge.com/hc/en-us/articles/207323939

There is a lot of extra documentation available for the Exchange Synchronizer EWS for Visma CRM in our knowledgebase. Please have a look at these articles (see below) before you are going to install the Synchronizer.

Prepare Office 365
"Setting access rights for Office 365" see this article:
http://kb.infobridge.com/hc/en-us/articles/202816221

"Impersonate accounts in Exchange Online for Office 365…" see this article:
http://kb.infobridge.com/hc/en-us/articles/202832471

Prepare Hosted Exchange
"Configuring Hosted Exchange for Exchange Synchronizer" see this article:
http://kb.infobridge.com/hc/en-us/articles/202758632

Prepare On-Premise Exchange 2010
"Setup Domain users:
http://kb.infobridge.com/hc/en-us/articles/207323689

"Exchange 2010 On Premise setting Impersonation access" see this article:
http://kb.infobridge.com/hc/en-us/articles/202790811

"Exchange 2010 On Premise setting Delegation…" see this article:
http://kb.infobridge.com/hc/en-us/articles/202788531

Prepare Exchange 2013
"Setting Impersonation in Exchange 2013":
http://kb.infobridge.com/hc/en-us/articles/207220219

"Setting Delegation in Exchange 2013":
http://kb.infobridge.com/hc/en-us/articles/207220229

Exchange Synchronizer EWS for Visma CRM

3

When installing Exchange Synchronizer EWS for Visma CRM there are several preparations that have to be done:

1. Create an exchange mailbox (to be used in the Exchange Synchronizer EWS)
2. Create a domain user with admin rights that is allowed to log on to the server where the Exchange Synchronizer EWS is to be installed. The user must also be able to run services on the server.
3. Set the mailbox permissions so that the user has full mailbox access to all mailboxes that is to be synchronized with Visma (see delegation section)
4. **Disable EWS throttling (see EWS throttling section)**
   With this throttling feature, Exchange tracks the resources that each user consumes and enforces connection bandwidth limits. This feature however can impact the performance of the synchronizer as it increases the load on the Microsoft Exchange Server. The default throttling policy assigned to the exchange users can be too restrictive for the synchronizer user, causing numerous errors and problems that drastically decrease performance and possibly prevent access to some content.

   To prevent throttling issues you can disable it. Please see this article for a detailed description:
   http://kb.infobridge.com/hc/en-us/articles/207220779

5. Find URL for the Exchange Web Services (EWS) and the Offline Address Book (OAB)

There are several methods to set the correct Exchange rights needed to synchronize the Exchange calendar with the Visma CRM calendar, but our best practice is to use the “Impersonation” method.

Mailbox permissions

There are several methods to set the correct Exchange rights needed to synchronize the Exchange calendar with the Visma calendar, but our best practice is to use the “Impersonation” method.

First Exchange requires that you apply two rights to be able to get Exchange Impersonation working:

1. Open Exchange Management Shell on the Exchange Server and type the following command:
2. **ms-Exch-EPI-Impersonation** – This right is applied to the Client Access Server and grants the Service Account permission to function as an Exchange Impersonation account on that CAS
3. **ms-Exch-EPI-May-Impersonate** – This right is applied on either a user-by-user basis for each of the users that require impersonation to be enabled, or it can be applied on a mailbox database

Setting Impersonation on Hosted Exchange

To make sure we have the right setting for the Client Access Server, type the following command (replacing CAS-Server-Name with your own CAS server name and Service-Account with the name of your own Service Account):

(Note that those cmdlets are typed on a single line. The examples above have been word wrapped)

- **Add-ADPermission -Identity (Get-ExchangeServer -Identity CAS-Server-Name).DistinguishedName -User (Get-User -Identity "Service-Account").Identity -extendedRight ms-Exch-EPI-Impersonation**
- **Add-ADPermission -Identity (Get-ExchangeServer -Identity MailServerCAS1).DistinguishedName -User (Get-User -Identity " Service-Account ").Identity -extendedRight ms-Exch-EPI-Impersonation**

It is possible is to set the permissions on all users in a mailbox database for which we want to enable Exchange Impersonation. Again, from the command line, use the Add-ADPermission cmdlet:

- **Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.DistinguishedName -User Service-Account -ExtendedRights ms-Exch-EPI-May-Impersonate}**

Delegation

When security policies dictate that full access permissions can only be granted to specific mailboxes, use the Add-MailboxPermission. This is an Exchange permission that is restricted to mailboxes only. This permission is not inheritable, so it cannot be assigned to Storage Servers, Storage Groups, or Storage Databases.
A Windows Powershell script can be used in EMS to apply this permission when a mailbox is created, or to bulk assign the permission to multiple mailboxes.

In the Exchange Management Shell run the following command to grant full access permissions for a single mailbox:

- **Add-MailboxPermission -Identity "targetmailbox" -User "Trusted User" -AccessRights FullAccess**
- **Add-MailboxPermission -Identity "jdoe" -User "DOMAIN\syncuser" -AccessRights FullAccess**

To confirm that what permissions are assigned to a mailbox:

- **Get-MailboxPermission -Identity "targetmailbox" | Format-List**
- **Get-MailboxPermission -Identity “jdoe” | Format-List**

EWS Throttling

EWS throttling can also result in synchronization errors, so we are better off creating a policy that disables throttling. Run the following PowerShell command to create this policy:

- **New-ThrottlingPolicy IBSyncPolicy**
- **Set-ThrottlingPolicy IBSyncPolicy -EWSMaxConcurrency $null -EWSPercentTimeInAD $null -EWSPercentTimeInCAS $null -EWSPercentTimeInMailboxRPC $null -EWSMaxSubscriptions $null -EWSFastSearchTimeoutInSeconds $null -EWSFindCountLimit $null -CPUStartPercent $null**
- **Set-Mailbox "syncuser" -ThrottlingPolicy IBSyncPolicy**

EWS and OAB

In the Exchange Synchronizer EWS for Visma CRM we use the EWS and the OAB to access the exchange server. (This information should be provided by the Customer's technical resources)
If this information isn't provided, you can find this on the IIS on the Exchange Server. Also see this kb article to retrieve the correct url's: http://kb.infobridge.com/hc/en-us/articles/207283049

The URL's might look something like this:
https://outlook.customer.com/EWS/exchange.asmx
https://outlook.customer.com/oab/0c1a313f-272f-473b-addf-5221c64e60ff

Installation & Configuration

Please use the Installation manual.

http://www.vismaplaza.com/Apps/Exchange-Synchronizer-EWS-for-Visma-CRM

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