Exchange Synchronizer EWS for Visma CRM

Installation

Two way calendar synchronization between Visma CRM and Microsoft Exchange Server

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Welcome to the Exchange Synchronizer EWS for Visma CRM

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Introduction

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

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

Schematic overview

Before you begin

System requirements
Before you start with the installation please read the following knowledge base article about the system requirements:

http://kb.infobridge.com/hc/en-us/articles/207998265

Exchange Synchronizer EWS for Visma CRM

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Overview of the installation steps

The following sections gives a short overview of all the installation steps. On the oncoming pages the installation steps are described in detail.

General installation steps

1. Make sure that the “Installation Preparations” are met;
2. Create a backup of the Exchange database;
3. Create a new domain user with an mailbox:
    a. Set the correct access rights on the mailboxes in Exchange.
4. Install the Exchange Synchronizer EWS for Visma CRM;
5. Configure the Exchange Synchronizer EWS for Visma CRM;

Exchange Synchronizer EWS for Visma CRM Installation

Ensure you are logged in as the ‘sync user’ before starting the installation.

Double-click on setup file to start the Exchange Synchronizer EWS for Visma CRM Installation.

1. The welcome screen in the installer is shown:
   - Click on the “Next” button to continue with the installation;
   - Click on the “Cancel” button to cancel the installation;
2. Read the InfoBridge "License Agreement" and select "I accept the terms in the license agreement" when you agree with the terms, press “Next >” to continue the installation;
3. Change the default installation if necessary and press “Next >” to continue the installation;
4. Enter the credentials for the user who can start the service needed for the Synchronizer. This must be the previously created ‘sync user’. Press “Next >” to continue the installation;

   Problems resolving the Domain? Please see this Knowledge Base article: http://kb.infobridge.com/hc/en-us/articles/207284059
5. Press “Install” to install the files needed for the Exchange Synchronizer EWS for Visma CRM;
6. Press “Finish” to complete the installation of the Exchange Synchronizer EWS for Visma CRM.

Exchange Synchronizer EWS for Visma CRM Configuration Wizard

After a successful installation you can start the Exchange Synchronizer EWS Visma CRM Configurator from the setup or from the Windows start menu:

Start -> Programs -> InfoBridge -> Exchange Synchronizer EWS for Visma CRM -> Configurator

IMPORTANT
It is necessary that you are logged in as the 'sync user' to complete the first time installation.

The "Exchange Synchronizer EWS for Visma CRM" wizard is shown:

Visma CRM Connection settings

The first screen in the wizard is used to enter the connection settings towards Visma CRM:

A **Synchronizer Client Name:** Visma CRM company database name. This can be found in the login screen of Visma CRM.

B **User Name:** The Visma CRM user name to login to the system. This must be an admin user in Visma CRM.

To check this, open Visma CRM and go to “Tools->Administrator functions…”:

Check if the user you will enter is in the “Administrator” access group.

Leave the username field empty if Active Directory is used to log into Visma CRM. Note that the ‘sync user’ will need a Visma User account if Active Directory is used to log in.

C **Password:** Visma user password. Leave this field empty if Active Directory is used to log into Visma CRM.

D **BAPI Key:** The BAPI key from Visma. The BAPI can be found in Visma CRM under view -> license information, or contact your Visma CRM administrator for this information.

License information

Enter the license information for your Exchange Synchronizer installation:

A	**Customer Number**: The *license* customer number, supplied by Visma or your reseller.
B	**Activation Key**: The activation key, supplied by Visma or your reseller.
C	**License Type**: The type of the license, either Standard or Enterprise.

NOTE
An internet connection is required to verify your license during the setup and on (re)start of the service.

Exchange mail profile

Enter the connection details to use for the connection towards the Exchange Server:

A	The e-mail address of the SyncUser who has rightss to all mailboxes
B	Enter the Password of the SyncUser
C	Tick this checkbox when you use Impersonation. Leave empty when you use Delegation. For more information on the differences see the following Knowledge Base article: http://kb.infobridge.com/hc/en-us/articles/203781212
D	The Exchange Web Service Url field. Leave this field empty to automatically detect it using autodiscover. See this article on how to retrieve the correct EWS Url: http://kb.infobridge.com/hc/en-us/articles/207283049
E	The Offline Address Book Url field. Leave this field empty to automatically detect it using autodiscover. See this article on how to retrieve the correct OAB Url: http://kb.infobridge.com/hc/en-us/articles/207283049

Exchange e-mail aliasing lookup method

Choose the correct lookup method

A	**Disable E-mail address alias support:** Disabling e-mail address alias support is not recommended as it might cause unpredicable behaviour when users have multiple Exchange SMTP e-mail addresses. Only use this option when instructed to do so by InfoBridge or Visma support.
B	**Use Active Directory:** This option is recommended for Exchange On-Premise users.
C	**Exchange Remote Management:** Recommended for Hosted Exchange. Or On-Premise when the Active Directory (see B) does not work. When the option 'Exchange Remote Management Interface' for alias resolving is used another component needs to be installed on the synchronizer server: Windows Management Framework 3.0 It can be downloaded here: http://www.microsoft.com/en-us/download/details.aspx?id=34595 **NOTE**: The server requires a reboot after installation of the component.
D	**Office 365 Windows Active Directory:** Use this option when you use Office 365 or Exchange Online.

Completing the wizard

The last step is to verify the settings and finish the configuration.

Press finish to complete the wizard.

Exchange Synchronizer EWS for Visma CRM Client

The configuration client is used to link Visma CRM and Exchange Users and to control advanced settings. The initial connection wizard can also be started from this client.

Link users

Linking users is done the main screen of the Configurator:

A	**Visma CRM User:** Here you can select the Visma account. You can pick a user from the list or search for it by name, id or email address using the search field
B	**Exchange User:** Here you can select the Exchange mailbox. You can pick a user from the list or search for it by name, id or email address using the search field
C	**Link:** Press the link button to link the selected users. The user will be placed in the list of 'Linked synchronization users'

Temporarily disabling users

You can temporarily disable users using the ‘Synchronization enabled’ checkbox:

If the checkbox is not checked there will be no synchronization from Visma CRM to Outlook and the other way around for the specified user.

Removing users

Users can be removed from the synchronization by right clicking the user in the list and selecting ‘Unlink selected users(s)’:

Advanced options

In the advanced options additional settings can be made:

A	**Priority mapping**: In Visma CRM you can add custom priorities. With this option you can map the Exchange priorities to the Visma CRM priorities.
B	**Housekeeping**: Here you can set the time to start the housekeeping once a day. Default recommended time is 2:00 AM. Disable housekeeping run on startup When this option is checked the housekeeping run will *only* run at night and not at startup. By default this option is turned off.
C	**Logging level:** *Warning messages* If this option is checked only warning messages and important notifications are saved in the log file. *Informational and Warning messages* If this option is checked warning messages and extra informational messages are saved in the logfile. (This will give a summary of the synchronization process like which events are being handled and queue handling). *Debugging, Informational and Warning messages* If this option is checked warning messages, informational and extensive debugging messages are saved in the logfile. Please mind that this option is an highly extensive logging of the complete synchronization process. This option should only be activated if instructed by InfoBridge.

NOTE
Extensive logging can slow down synchronization and will greatly increase log file sizes

Save and Exit

To store and apply your changes, press the **“Save and exit”** button:

In the dialog, choose the option for ‘Apply changes’ to apply the changes and restart the Synchronizer service automatically.

Configuration Files

The configuration settings are stored in “Configuration files”.

For Windows 2003 these files are stored in the following location:
C:\Documents and Settings\<Synchronizer User>\Local Settings\Application Data\InfoBridge Visma CRM Exchange Synchronizer EWS

For Windows 2008 and up these are stored in:
C:\Users\<Synchronizer User>\AppData\Local\InfoBridge Visma CRM Exchange Synchronizer EWS

Name	Size	Type	Date Modified	Attributes
ICS		File Folder	2/14/2011 11:34 AM	
id_mapper.db3	59 KB	DB3 File	2/14/2011 11:44 AM	A
journal.db3	101 KB	DB3 File	2/14/2011 1:01 PM	A
logfile.dal.txt	910 KB	Text Document	2/14/2011 1:05 PM	A
logfile.service.txt	856 KB	Text Document	2/14/2011 1:05 PM	A
logfile.txt	1,443 KB	Text Document	2/14/2011 1:05 PM	A
user_mapping.xml	1 KB	XML Document	2/14/2011 12:24 PM	A
Visma.CRM.DAL.WCF.Host.exe.config	3 KB	XML Configuration File	2/14/2011 11:02 AM	A
Visma.CRM.DAL.WCF.Host.vshost.exe.config	3 KB	XML Configuration File	11/21/2010 6:23 PM	A
Visma.Crm.Synchronizer.Configurator.exe.config	2 KB	XML Configuration File	2/14/2011 12:24 PM	A
Visma.Crm.Synchronizer.Engine.exe.config	4 KB	XML Configuration File	2/14/2011 11:02 AM	A
Visma.Crm.Synchronizer.Service.Console.exe.config	2 KB	XML Configuration File	2/14/2011 12:24 PM	A
Visma.Crm.Synchronizer.Service.exe.config	2 KB	XML Configuration File	2/14/2011 12:24 PM	A

13 objects | 3.30 MB | My Computer

ICS
ICS stands for Incremental Change Synchronization. In this folder all ICS files are stored from the users.

Id_mapper
This .db3 file contains all the appointment id’s linked for every user between Visma and Exchange.

WARNING
Never remove the id_mapper and user_mapping files, deleting these files will clear the synchronization history for all users. All users will have to be relinked, and duplicate appointments will occur.

Journal
This .db3 file contains informaton related to the ICS files.

.config files
In the config files all information regarding the setting are stored.

.txt files
All text files are logfile. You can check the logfile if any problems my occur.

user_mapping
This files contains the mapping between the Visma user account and the Exchange user account.

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

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