Google Synchronizer for SuperOffice CRM

Technical document

Two way synchronization between SuperOffice CRM and Google Apps

Contents

Welcome to the Google Synchronizer for SuperOffice CRM **3**
Overview 3
System Requirements 3
Registration 3
Time zone settings 3
Remote Travel and Satellite 3
Preparation- Google Synchronizer for SuperOffice CRM **4**
The SuperOffice Settings 4
The Replication panel in SuperOffice Admin 4
The Table admin in SuperOffice Admin 5
The Users panel in SuperOffice Admin 5
Add new list items to SuperOffice CRM 6
Creating new follow-up items 6
Creating a new selection type 6
Installation - Google Synchronizer for SuperOffice CRM **7**
Installing the Google Synchronizer for SuperOffice CRM 7
Starting the Google Synchronizer Admin 8
Synchronizer tables 8

Welcome to the Google Synchronizer for SuperOffice CRM 1

Overview

Google Synchronizer enables two way synchronization of SuperOffice CRM and the Google Apps environment.
The Google Synchronizer will synchronize appointments, contacts, tasks and SuperOffice selections.

For more information about the differences between the Synchronizer products please follow the link below.
http://kb.infobridge.com/hc/en-us/articles/203717032

System Requirements
Before you start with the installation please read the following knowledge base article about the system requirements for the Google Synchronizer for SuperOffice CRM.
http://kb.infobridge.com/hc/en-us/articles/203709221

Registration
Registration is done over the internet. Therefore a working internet connection is required.
Please read the following knowledge base article about the registration process.
http://kb.infobridge.com/hc/en-us/articles/203821791

Time zone settings
Please read the following knowledge base article about the system date and time zone settings that are very crucial for the Google Synchronizer.
http://kb.infobridge.com/hc/en-us/articles/204767542

Remote Travel and Satellite
The setup application creates several tables in the SuperOffice CRM central database. The new tables are replicated to Travel or Satellite databases. This means that after the installation the first time when the down files are generated, the down files will hold information about the newly created tables.

Preparation- Google Synchronizer for SuperOffice CRM

2

The SuperOffice Settings

The Google Synchronizer requires extra tables inside the SuperOffice database. The creation of these tables is an automated process; however certain settings should be checked before attempting to create the tables using the Synchronizer Admin.

The Replication panel in SuperOffice Admin

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(transaction logging is active)**' must be checked! The Google Synchronizer is using the travel transaction option to detect changes in the SuperOffice CRM database.*

The Table admin in SuperOffice Admin

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

NOTE

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

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 in SuperOffice is being used to link the user in the Google Synchronizer.

Add new list items to SuperOffice CRM

It is important to distinguish Google appointments or tasks from SuperOffice CRM appointments. This can easily be accomplished by adding some new list items to SuperOffice.
If the option is being used to synchronize SuperOffice selections it is recommended to create a separate selection type. More on synchronizing selections can be found in the Configuration Manual.

Creating new follow-up items

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 list item **'Google Appointment'**; Type is Appointment. ▪ Add the list item **'Google Appointment (All-Day)'**; Type is Appointment. Tick the checkbox for the All-Day option. ▪ Add the list item **'Google Task'**, Type is Task.
D	**Save**: Save the changes you have made.

Creating a new selection type

A	**Lists**: Select the 'Lists' panel.
B	**Selection - Type**: Double Click on **'Selection - Type'**; The Selection - Type list is shown.
C	**Items**: Add the following list item: **'Google Selection'**
D	**Save**: Save the changes you have made.

Installation - Google Synchronizer for SuperOffice CRM

3

Installing the Google Synchronizer for SuperOffice CRM

The Google Synchronizer installer consists of two features which can be installed;

- The application Google Synchronizer.
- The Windows Service for the Google Synchronizer.

To install the Google Synchronizer run the corresponding installation application and follow the directions given by the installer.

NOTE
The personal version of the Google Synchronizer for SuperOffice CRM can be installed in two different ways; 'Google Apps for Work mode' or 'Regular mode'.
See this Knowledge Base article for more information:
http://kb.infobridge.com/hc/en-us/articles/205777101

When the Google Synchronizer is used in a Google Apps for Work environment, rights have to be granted on the domain. This will allow the Synchronizer to access the contacts, tasks and appointments of the linked users without the need of the credentials of each user.
See this Knowledge Base article on how to grant rights on Google Apps for Work:
http://kb.infobridge.com/hc/en-us/articles/203709241

As of version 3.2.130 it is also possible to manage the authentication per user. This is done in the User Synchronization settings with the help of the Google Token Authentication Manager. More information on this can be found in the Configuration Document. We also have this Knowledge Base article on this subject:
http://kb.infobridge.com/hc/en-us/articles/203631052

After installation the shortcuts to administer and to run the Synchronizer will be added to the Windows start menu.

NOTE
The default installation folder is: C:\Program Files\InfoBridge\Google Synchronizer for SuperOffice.

NOTE
The logfile.txt and journal files are saved in the roaming folder of the user profile

You can find these files here:
"C:\Users\[USER PROFILE]\AppData\Roaming\InfoBridge SuperOffice Google Synchronizer".

Starting the Google Synchronizer Admin

Start the Synchronizer Admin. Use a SuperOffice CRM user with user level 0 rights to login.

Synchronizer tables
If the synchronizer tables are not already created, the Synchronizer Admin will give you the option to create the synchronizer tables. After the tables are created the Synchronizer Admin has to be restarted.

Now the individual or global user settings can be set. Please see the User Manual for more information.

www.crmplaza.com/Apps/Google Synchronizer

©2013 InfoBridge Software, All rights reserved.

InfoBridge Software, CRMPlaza.com are registered trademarks of InfoBridge Software B.V.

home page	:	www.infobridge.com
knowledge base	:	http://kb.infobridge.com
support e-mail	:	support@infobridge.com
support phone	:	+31 (0)88 - 2762444