Google Synchronizer for SuperOffice CRM

Configuration document

Two way synchronization between SuperOffice CRM and Google Apps

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Google Synchronizer for SuperOffice CRM

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Introduction

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

Synchronizer Admin

The Synchronizer Admin is used to create the Synchronizer tables that hold the configuration of the Synchronizer. The Synchronizer Admin is also used to setup the user configuration.

Synchronizer

The Synchronizer will synchronize the SuperOffice Calendar with the Google calendar. You can run the Google Synchronizer as a program or as a Windows Service.

Google Synchronizer admin settings

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Google Synchronizer Admin

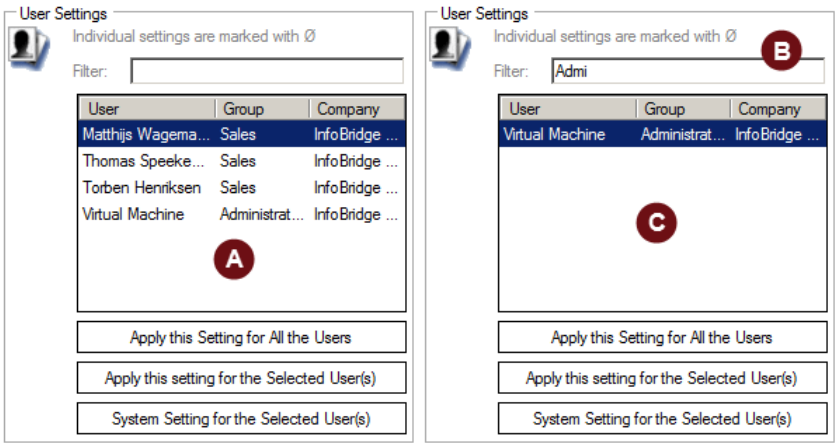
Start the Synchronizer Admin from the Windows Start menu and login with a SuperOffice user with user level 0 access rights.
This section describes in detail all the options you can set in the Synchronizer Admin.

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 **only** be saved 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.

Sort and filter function user lists

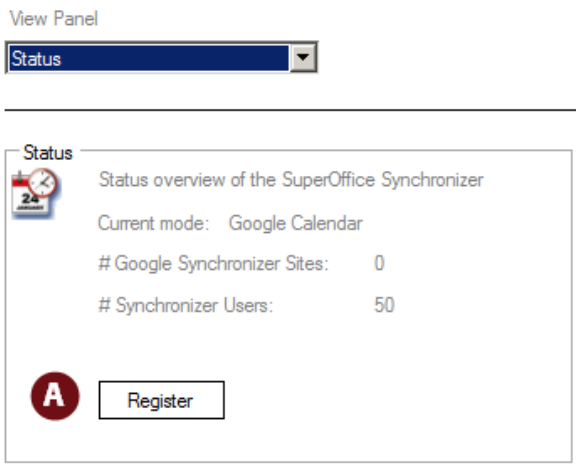
In every user list where you can choose a SuperOffice CRM user or a mailbox you can sort and filter users, groups and companies.



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

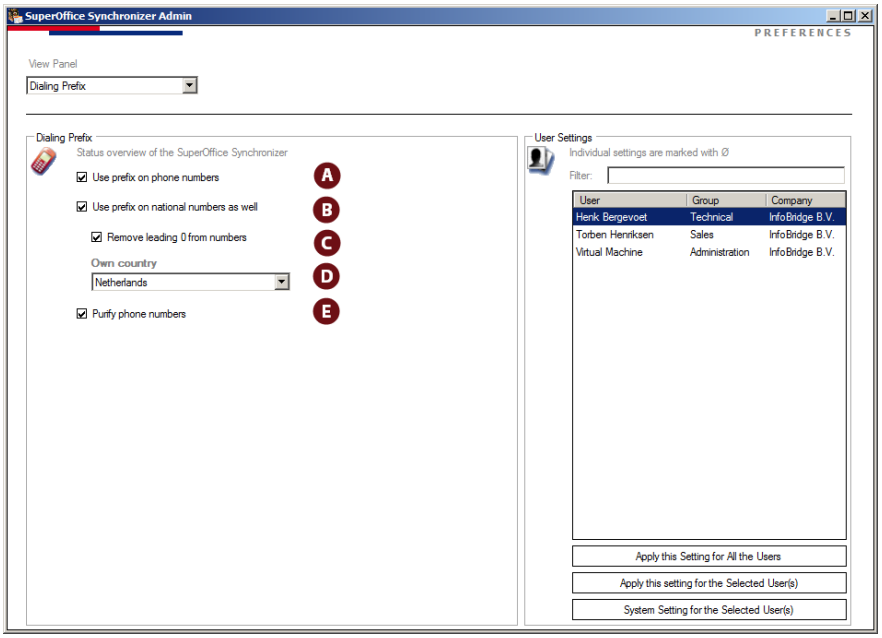
This panel gives an overview of the mode in which the synchronizer is running. You can also see the registration information.



A	**Register:** With this button you can acquire new licenses or check your activation details

Dialing Prefix

In this panel you can set how phone numbers should be stored in Google.

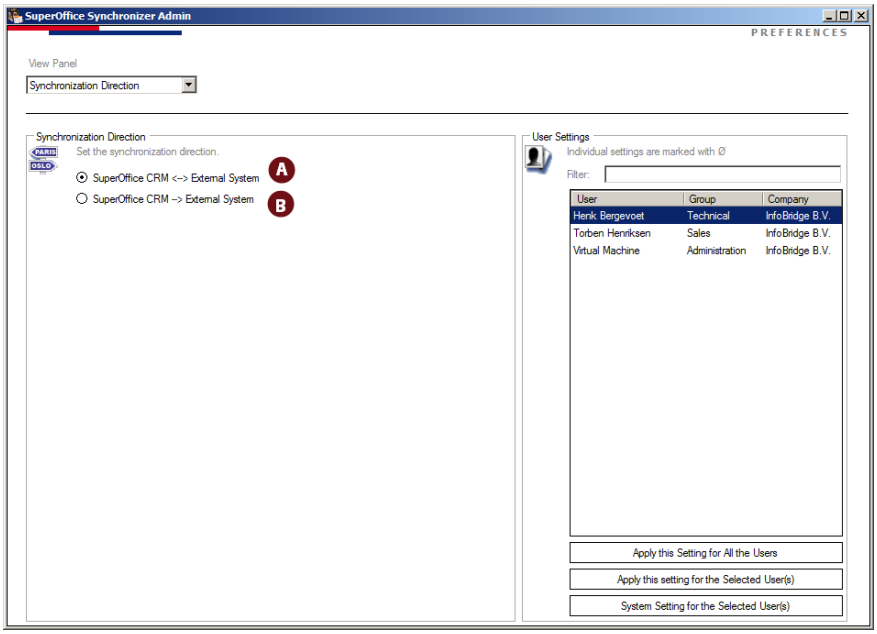


A	**Use prefix on phone numbers:** When this option is selected international phone numbers will contain the international dialing prefix. You have to set your own country code so the program can determine which phone number is local and which phone number is international.
B	**Use prefix on national numbers as well:** When this option is selected the local phone numbers will also contain the international dialing 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 used to correctly build the dialing prefix.

E	**Purify phone numbers:** Select this option to clean the synchronized phone numbers in Google, 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

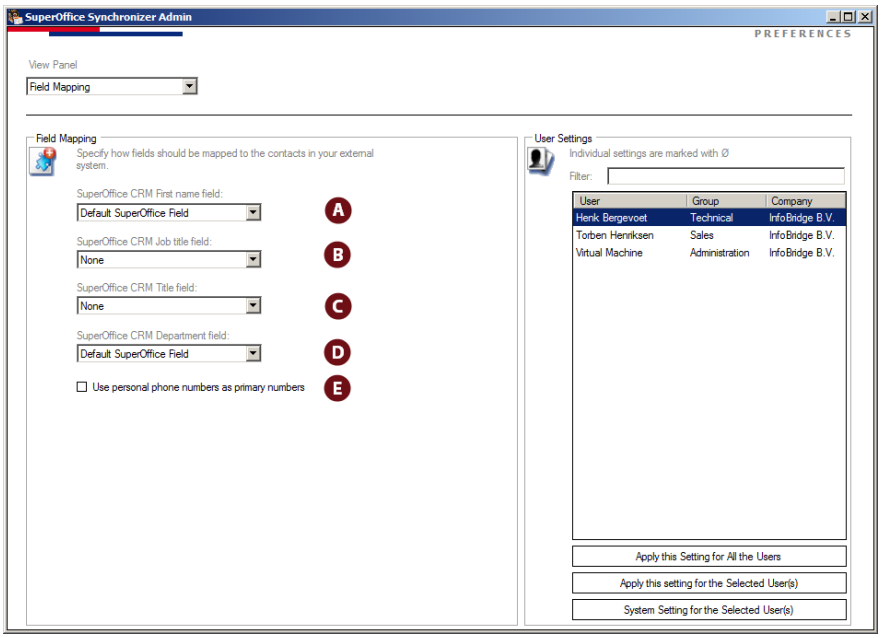
In this panel you can set the synchronization direction.



A	**SuperOffice <-> External System:** Setting this option means the Synchronizer will synchronize appointments and tasks both ways. Contacts are synchronized only from SuperOffice CRM to the Google contact section.
B	**SuperOffice -> External System:** Setting this option means the Synchronizer will synchronize SuperOffice appointments, tasks and contacts to Google. Changes made in Google will **not** be synchronized to SuperOffice.

Field Mapping

In this panel you can set which fields are being used when adding contact person information to Google.

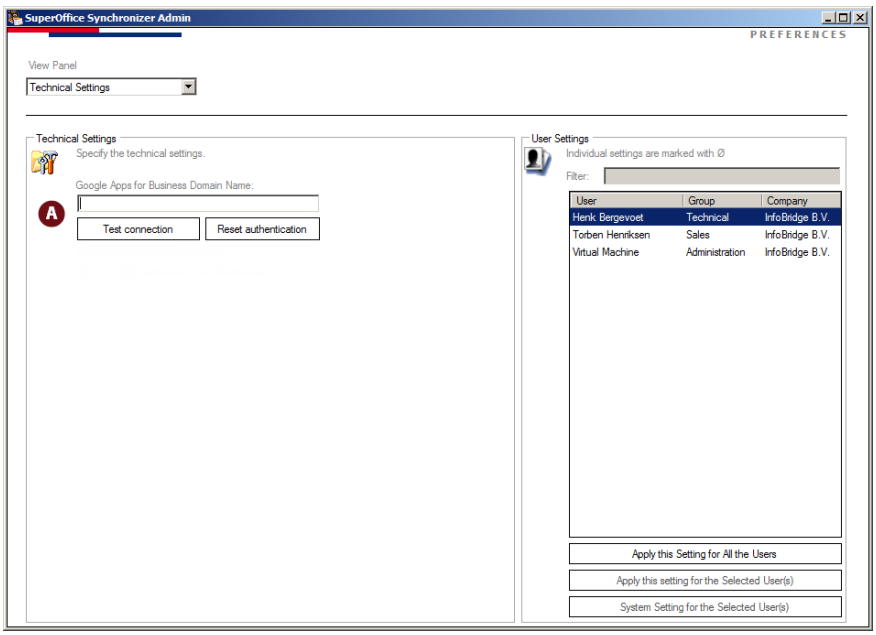


A	**SuperOffice CRM First name Field:** Select the field from the dropdown list that is being used as first name field in the SuperOffice. User defined fields of the contact card are available.
B	**SuperOffice CRM Job Title:** Select the field from the dropdown list that is being used as job name field in SuperOffice. User defined fields of the contact card are available.
C	**SuperOffice CRM Title field:** Select the field from the dropdown list that is being used as title field in SuperOffice. User defined field of the contact person card are available.
D	**SuperOffice CRM Department field:** Select the field from the dropdown list that is being used as department field in SuperOffice CRM.
E	**Use the personal phone numbers as primary numbers:** When this option is set all personal phone numbers, like direct phone and direct fax will be used as primary numbers in Google instead of the normal numbers like, business phone number and business fax numbers. This option is very useful for mobile devices.

Technical Settings

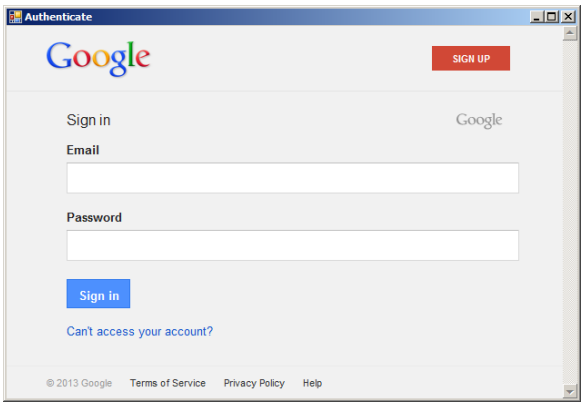
In this panel you can set the connection towards Google.
When the Google Synchronizer is used in a Google Apps for Work environment, rights have to be granted on the domain. This will allow the Synchronizer to access the contacts, tasks and appointments of the linked users without the need of the credentials 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

NOTE
As of version 3.2.130 it is also possible to manage the authentication per user. This is done in the User Synchronization Settings panel with the help of the Google Token Authentication Manager.
When you use the Google TokenAuthentication Manager you can skip the Technical Settings panel. More information can be found in this knowledge base article:
http://kb.infobridge.com/hc/en-us/articles/203631052

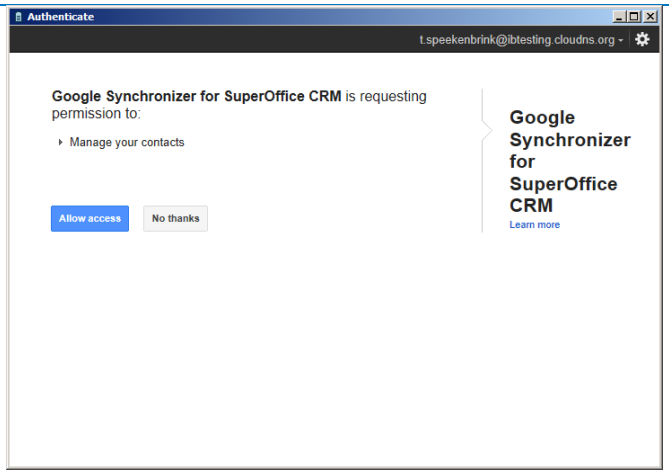


A **Google Apps for Work Domain Name:** Fill in the 'Google Apps for Work Domain Name' for example '**ibtesting.cloudns.org**'.

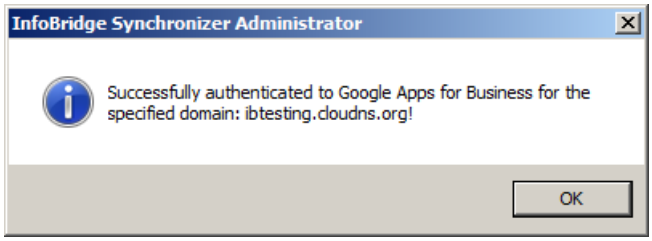
- Press the '**Test connection**' button.
- The '**Sign in**' pop-up is shown.



- Provide your Google e-mail address and password and press '**Sign in**'.
- The '**Authentication**' pop-up is shown.

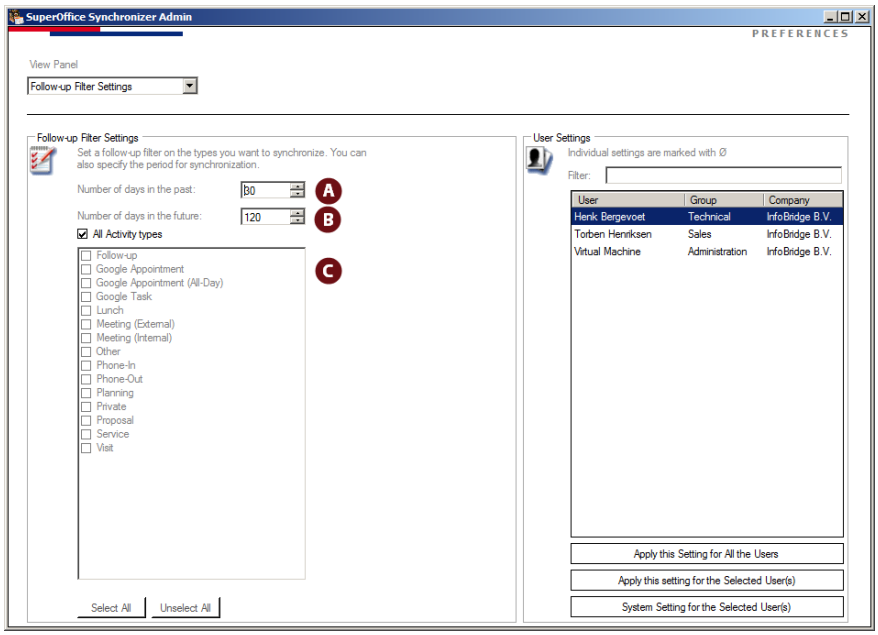


- Press '**Allow Access**' to authenticate the Google Synchronizer to manage your appointments, contacts and tasks.
- When the authentication is successful you see the following message.



Follow-up filter settings

In this panel you can select which SuperOffice task or appointment types are being synchronized to Google. You can also set the synchronization timeframe.



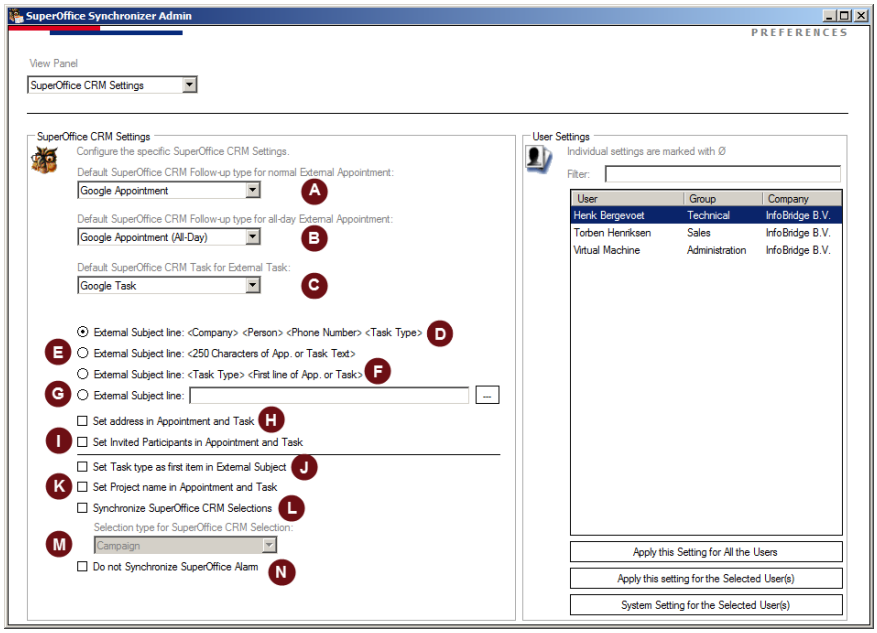
A	**Number of days in the past:** Specify the number of days in the past to synchronize. (See the knowledge base article 'How the Synchronizer works when setting the date range' http://kb.infobridge.com/hc/en-us/articles/203750942).
B	**Number of days in the future:** Specify the number of days in the future to synchronize. (See the knowledge base article 'How the Synchronizer works when 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 Google appointments (See SuperOffice CRM Settings). Failing this, will result in appointments created in Google and changed in SuperOffice which will not be synchronized.

SuperOffice CRM Settings

In this panel you can set the specific SuperOffice options to synchronize appointments, tasks or contacts to Google.



A	**Default SuperOffice CRM Follow-up type for normal External appointment:** Select the task type which should be used for a normal Google appointment.
B	**Default SuperOffice CRM Follow-up for All Day External appointment:** Select the task type which should be used for an All Day Google appointment.
C	**Default SuperOffice CRM Task for External task:** Select the task type which should be used for a Google task.
D	**External Subject line: <Company> <Person> <Phone Number> <Task Type>:** If this option is checked, the company, person, phone number and the task type will be placed in the Google appointment subject line.
E	**External Subject Line: <250 Characters of App. Or Task Text>:** If this option is checked, the SuperOffice CRM appointment or task description is placed for a maximum of 250 characters in the subject line in Google.
F	**External Subject Line: <Task Type> <First line of App. Or task>:** If this option is checked, the SuperOffice CRM task type and the first line of the appointment or task description is placed in the subject line of Google. The first line of the appointment is determined by the first carriage return which is encountered in the description.
G	**External Subject Line:** If this option is checked, you can build your own Google subject line by using SuperOffice template variables.
H	**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 Google appointment/task.
I	**Set Invited Participants in Appointment and Task:** If this option is checked, participant information from a SuperOffice CRM group appointment is Synchronized to Google.

J	**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 Google subject line.
K	**Set Project name in Appointment and Task:** If this option is checked, the project name will be added in the Google subject line.
L	**Synchronize SuperOffice CRM selections:** When this option is selected all the contacts in a SuperOffice selection with the specified selection type will be synchronized to Google.

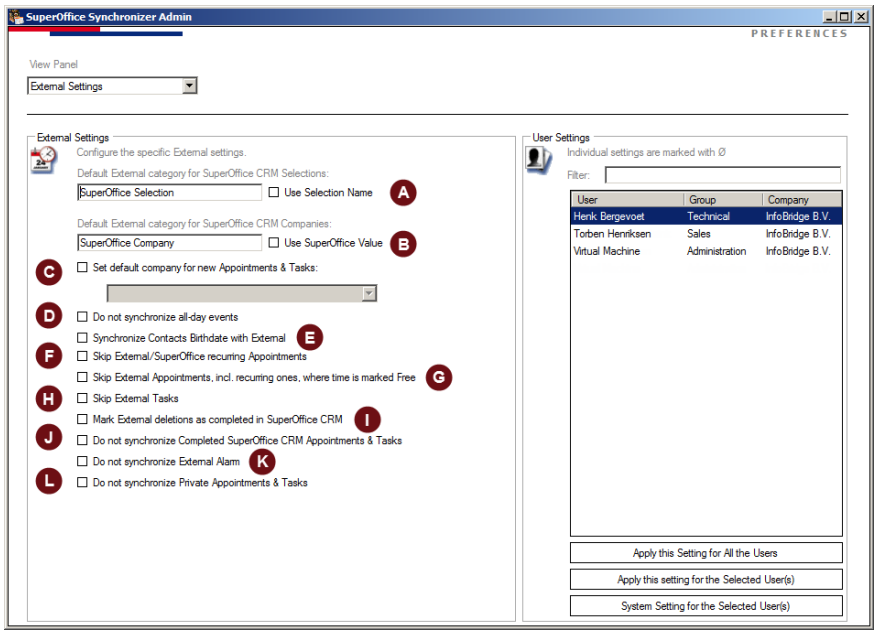
NOTE

*Make sure that the SuperOffice selection which needs to be synchronized is the selection type as set in the dropdown list, also make sure that the SuperOffice selection is of the type **static,** and the correct **owner** and **visible for** of the selection is specified in SuperOffice.*

M	**Selection type for SuperOffice CRM Selection:** Specify the correct selection type by choosing the selection type from the list.
N	**Do not Synchronize SuperOffice Alarm:** If this option is checked, the alarm set on SuperOffice CRM appointments or tasks will not be synchronized to Google.

External Settings

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

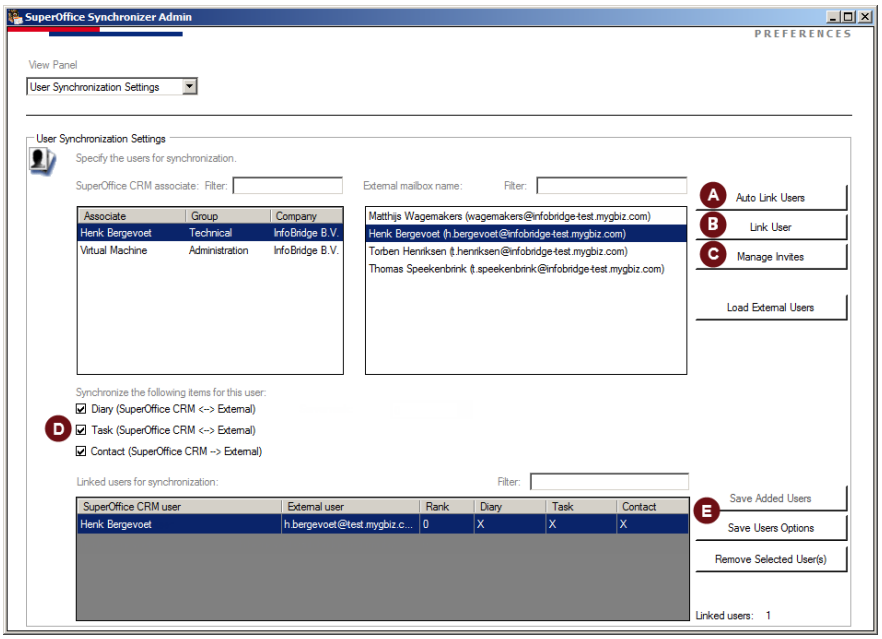


A	**Default External category for SuperOffice CRM Selections:** Specify the desired Google category name which should be used for SuperOffice selections. Check “use SuperOffice Value” if the SuperOffice selection type must be used as the category description.
B	**Default External category for SuperOffice CRM companies:** Specify the desired Google category name which should be used for SuperOffice contacts. Check “use SuperOffice Value” if the SuperOffice contact category name 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 Google will be linked to the selected SuperOffice company.

D	**Do not synchronize All-Day events:** If this option is selected, appointments created in Google as an all-day event will not be synchronized to SuperOffice.
E	**Synchronize contacts birthday with External:** If this option is selected the birthday of the SuperOffice contact person will be synchronized to Google.
F	**Skip External/SuperOffice Recurring Appointments:** When this option is selected, recurring appointments from Google and SuperOffice will not be synchronized.
G	**Skip External Appointments, incl. recurring ones, where time is marked free:** When this option is selected, Google appointments including recurring Google appointments where the time in the Google appointment is marked as available will not be synchronized.
H	**Skip External Tasks:** When this option is selected, Google tasks will not be synchronized.
I	**Mark External Deletions as completed in SuperOffice CRM:** When this option is selected, deletions made in Google will mark appointments and tasks as completed in SuperOffice. However Google 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.*
J	**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 Google.
K	**Do not Synchronize External Alarm:** If this option is checked, the alarm set on Google appointments/tasks will not be synchronized to SuperOffice.
L	**Do not Synchronize Private Appointments & Tasks:** If this option is checked, appointments and tasks marked as private in Google will not be synchronized.

User Synchronization Settings

In this panel you can link the users for synchronization.
Use the **'Load External Users**' button to retrieve the available Google mailboxes. For extra security measures you will have to sign in with your Google account to allow access.



A	**Auto Link User:** When this option is used, the SuperOffice users will be automatically linked with the Google mailboxes. To use this option click the button '**Load External Users**' first so the list of available mailboxes is populated, select the SuperOffice associates and click the button 'Auto Link Users'.

NOTE
The automatic linking will only work when the email address is available in SuperOffice on the contact person card; the primary entered email addresses has to match with the email address in Google.

B	**Link User:** When this option is used, linking can be done for individual users. To use this option, click the button '**Load External Users**' first so the list of available mailboxes is populated. Select the SuperOffice associate and select the appropriate mailbox and click the button 'Link User'.
C	**Manage Invites:** Click on this button to open the Google Token Authentication manager. More information can be found in this Knowledge Base article: http://kb.infobridge.com/hc/en-us/articles/203631052
D	**Options Diary, Task, Contact:** By selecting or unselecting one of these options, the synchronization options can be set for the synchronization users.

E **Save added Users:** Use this option to save new added users to the SuperOffice database

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 until you press the 'Save Added users' button!

TIP

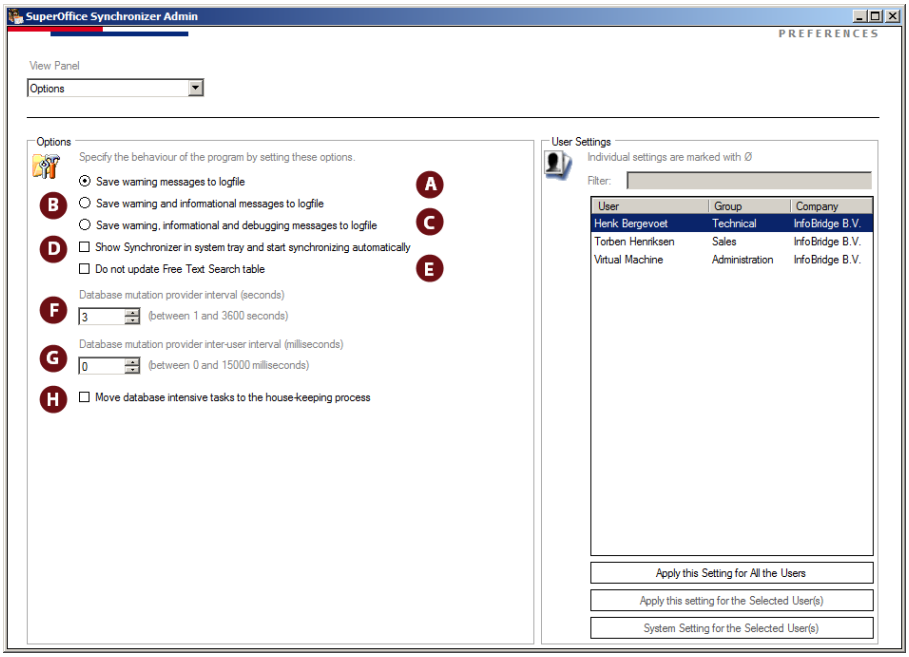
If you want to temporarily disable a user for synchronization, but you do not want to delete him/her because that will clear all synchronization history of that user, select the user from the synchronization user list, uncheck all the synchronization options and click the 'Save Users Option' button.

WARNING

*When **saved** users are removed and re-added again, **duplicate** appointments, tasks and contacts will occur.*
Deleting users will clear the history table for the selected users; therefore the synchronization history is lost.

Options

In this panel you can set some general options.



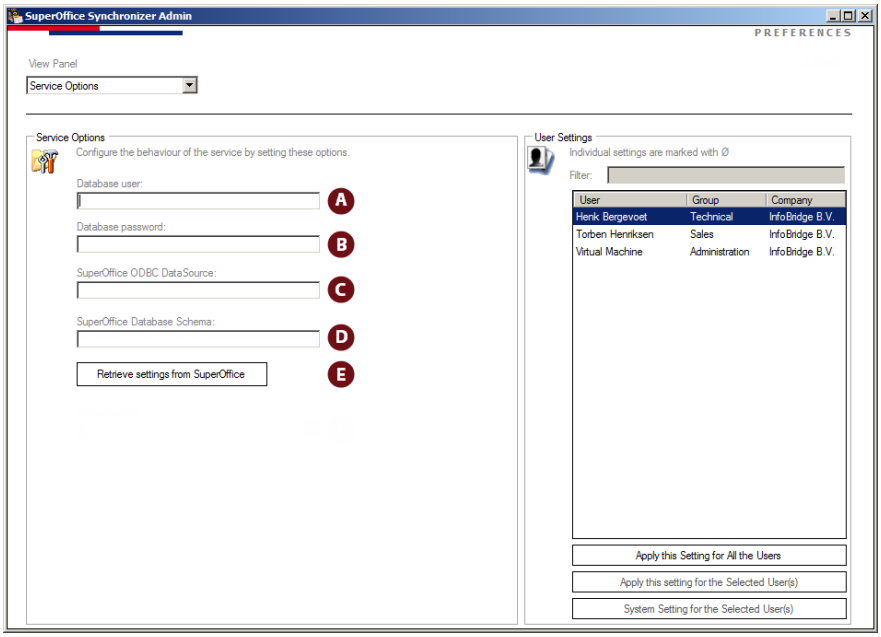
A **Save warning messages to logfile:** Only warning messages and important notifications are saved in the log file

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. **NOTE** *Extensive logging will slow down the synchronization process and increase the size of the normal log file* See the knowledge base article for more information about logging 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 synchronizer will automatically start minimized and the synchronization process will start automatically. An icon of the Synchronizer will be added to the system tray
E	**Do not update Free Text Search table:** If this option is checked and you do not use the Free Text search capability of SuperOffice, this option will disable the free text search update
F	**Database mutation provider interval (seconds):** Specify the interval which the Synchronizer should use to check the SuperOffice database for changes
G	**Database mutation provider inter-user interval (milliseconds):** Specify the interval in between the synchronization of contacts per user. This option is for Synchronizer installations were a lot of contacts 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 which is needed to run the Google Synchronizer as a Windows Service.



A	**Database User:** This user should be the table admin user ('crm5' or 'crm7').
B	**Database Password:** The correct password belonging to the table admin user.
C	**SuperOffice ODBC Data Source:** The ODBC name of the SuperOffice database.

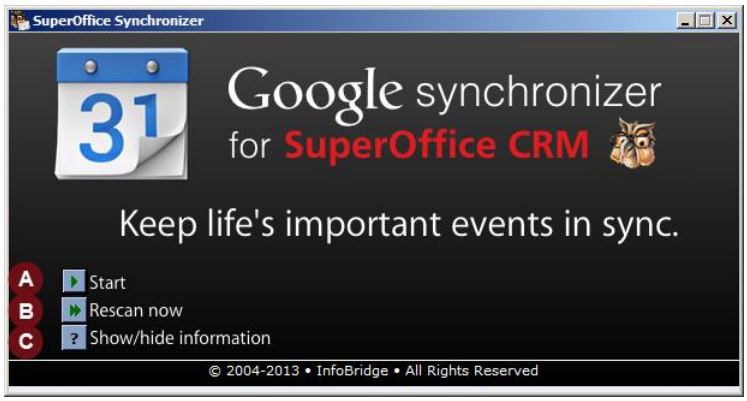
NOTE

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

D	**SuperOffice Database Schema:** 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.

Synchronizer GUI

This is the main screen of the 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.
C	**Show/Hide Info:** When this button is clicked, extra information about the synchronization process is displayed.

Supported Parameters

The Synchronizer supports the following parameters.

This parameter	Will do this
/P	Start the Google Synchronizer in **Personal mode**. Use this option when you use Google Apps for Work.
/P /GP	Start the Google Synchronizer in **Personal mode** Use this option if you do **not** use Google Apps for Work but regular Gmail.
/E	Start the Google Synchronizer in **Server mode**. Use this option when you use Google Apps for Work.
/INFO	Enables the logging functionality '***Save warning and informational messages to logfile***'. See the section **Options** for more information about logging
/DEBUG	Enables the logging functionality '***Save warning, informational and debugging messages to logfile***'. See the section **Options** for more information about logging
/STOP	Shut-down the currently running Google Synchronizer. This parameter is only used in combination with the Google Synchronizer and the automatic start/stop function of SuperOffice. Please see the installation manual for more information

> **NOTE**
> *Do not put any " characters around the parameters!*

www.crmplaza.com/Apps/Google Synchronizer

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