Outlook Online Synchronizer for SuperOffice CRM

Installation

Two way synchronization between SuperOffice CRM and Microsoft Outlook

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Welcome to the Outlook Online Synchronizer for SuperOffice CRM

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Overview of the installation steps

The following section gives a short overview of all the installation steps, on the oncoming pages the installation steps are described in detail

VERY IMPORTANT
*You can only install this version of the Exchange Online Synchronizer as a **NEW** installation. If you update your existing Exchange Synchronizer version with this version you end up with duplicate appointments.*

General installation steps:

- Make sure that the '**Installation Prerequisites**' are met (see the preparation manual).
- Create a backup of the SuperOffice CRM database.
- Create a backup of the Microsoft Outlook Personal Folder file.
- Ensure that the SuperOffice CRM settings are correct.
- Install the Outlook Synchronizer.

Important

Only the first time after the Outlook Synchronizer is installed, SuperOffice must be started with the SuperOffice level 0 User, so the Outlook Synchronizer can create the tables in the SuperOffice database.

If the tables are not already created, the Outlook Synchronizer will give the option to create the tables. When the tables are created, the Outlook Synchronizer Admin will need to be restarted.

Now the individuals user settings must be made for each Synchronization user, start SuperOffice under the appropriate user name and start the Outlook Synchronizer Admin, the settings can now be made for the logged in SuperOffice user. Repeat this for all the Synchronizer users.

The specific user options can now be set, please see the Outlook Synchronizer User manual for more information.

Outlook Online Synchronizer for SuperOffice CRM

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Installation of the Outlook Online Synchronizer for SuperOffice CRM

The Exchange Synchronizer installer consists of two features which can be installed.

- The Outlook Synchronizer

Installing the Outlook Synchronizer

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

After installation the short cuts to register, administer and to run the Synchronizer will be added to the Windows start menu.

NOTE
The default installation folder is: C:\Program Files\InfoBridge\Outlook Synchronizer.

Time zone settings
Please read the following knowledge base article about the system date and time zone settings that are very crucial for the Outlook Synchronizer for SuperOffice CRM.
http://kb.infobridge.com/hc/en-us/articles/202730481

Optional Installation step for the Outlook Synchronizer

It is possible to automatically start and stop the Outlook Synchronizer when SuperOffice starts and SuperOffice stops. This is very convenient for users because they don't have to manually start or stop the Outlook Synchronizer.

These steps are not required and may be skipped, however it is recommended. You have to create the settings in the SuperOffice Admin to add the automatic start and stop function.

Please read the following knowledge base article about the optional installation step for the Outlook Synchronizer for SuperOffice CRM.

http://kb.infobridge.com/hc/en-us/articles/203513602

www.crmplaza.com/Apps/Outlook Online Synchronizer

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