Outlook Online Synchronizer for SuperOffice CRM

Preparation

Two way synchronization between SuperOffice CRM and Microsoft Outlook

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Welcome to the Outlook Online Synchronizer for SuperOffice CRM 1

Overview

Outlook Synchronizer enables two way synchronization of SuperOffice with the Microsoft Exchange environment.
The Outlook Synchronizer will synchronize appointments, contacts, tasks and SuperOffice selections. To ensure maximum data security certain elements of SuperOffice will be only synchronized one way.

For more information about the difference between the Synchronizer products please follow this link http://kb.infobridge.com/Attachment58.aspx?AttachmentType=1

IMPORTANT
The Exchange Synchronizer is a different product then the Outlook Synchronizer.

IMPORTANT
*For the Outlook Online Synchronizer **EWS(Exchange Web Services)** is required.*

Before you Begin

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.*

Before you start with the installation please read the following knowledge base article about the system requirements for the Outlook Synchronizer for SuperOffice CRM.
http://kb.infobridge.com/hc/en-us/articles/203576901

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

NOTE
The settings of the Outlook Synchronizer for CRM Online are stored in a database in the local roaming user folder on the computer.

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

Remote Travel and Satellite

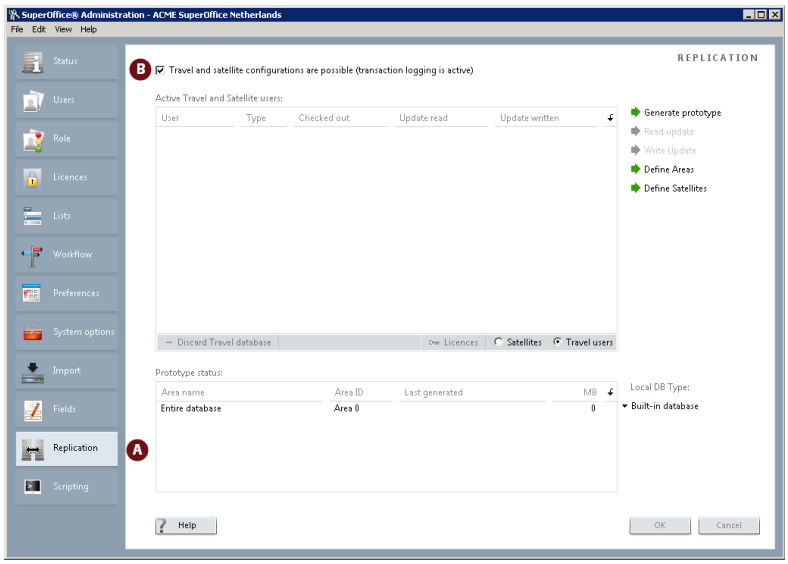
The setup application creates several tables in the SuperOffice CRM central database. The new tables are replicated to Travel or Satellite databases. This means that after the installation the first time when the down files are generated, the down files will hold information about the newly created tables.

SuperOffice CRM Settings

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

Check the replication panel in SuperOffice Administration

- Start the SuperOffice 7 Administration module;

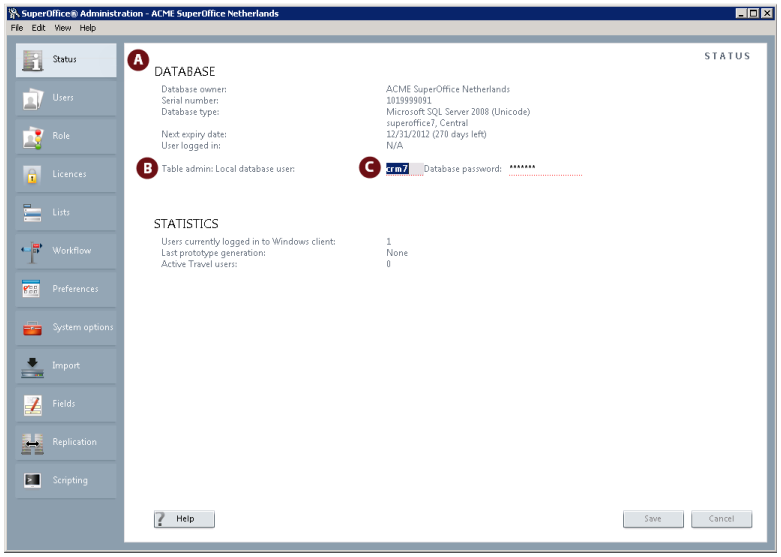


A	**Replication**: Select the 'Replication' panel
B	**Travel and satellite configurations are possible (transaction logging is active)**: Check this option.

NOTE

*Even when the SuperOffice CRM travel is not used, the option '**Travel and satellite configurations are possible**' must be checked! The InfoBridge Exchange Synchronizer is using the travel transaction option to detect changes in the SuperOffice CRM database.*

Check the ‘Table Admin’ in the SuperOffice Administration



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

NOTE

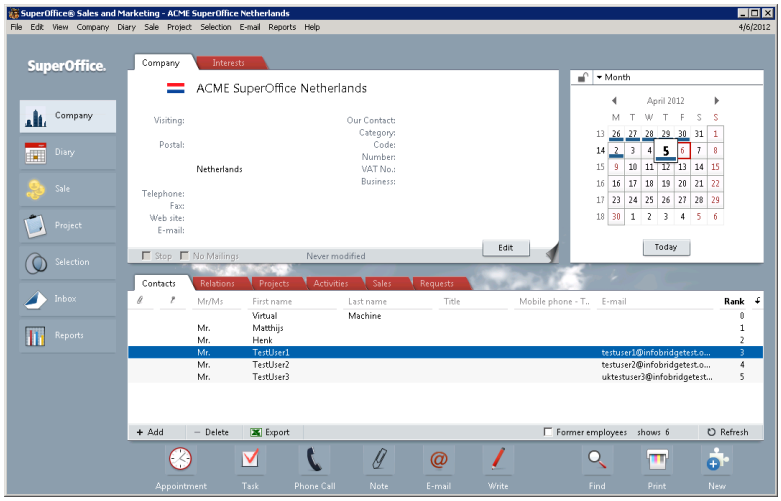
*In most cases the default SuperOffice CRM user has an user name with **CRM5** and the password **CRM5MYD** or the user name is **CRM7** and the password **CRM7MYD** will have enough rights to create the tables.*

Check the ‘Contact’ e-mail addresses

Make sure that the SuperOffice CRM users have a valid e-mail address stored in the SuperOffice contact person card. The e-mail address of SuperOffice is being used to link the user to Microsoft Outlook. The e-mail address can be quickly checked by using the following two methods.

Method 1: Check the e-mail addresses using SuperOffice CRM.

There are no e-mail addresses for the first three users in the contacts list

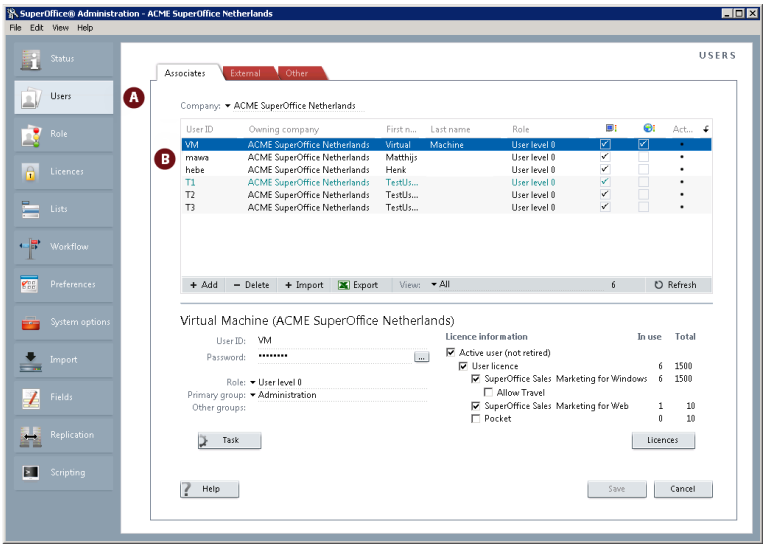


- Start SuperOffice CRM 7.
- Select your Own Company card.
- Select the ‘Contacts’ tab and look for missing e-mail addresses.

- Double click the contact person where the e-mail address is missing.
- Enter the correct e-mail address for the contact person.
- Click ‘Save’.
- Repeat this for all contact persons where the e-mail addresses are missing.

Method 2: Check each individual user by double clicking the user out of the ‘**Users**’ panel of the SuperOffice Administration.

- Start the SuperOffice 7 Administration module.



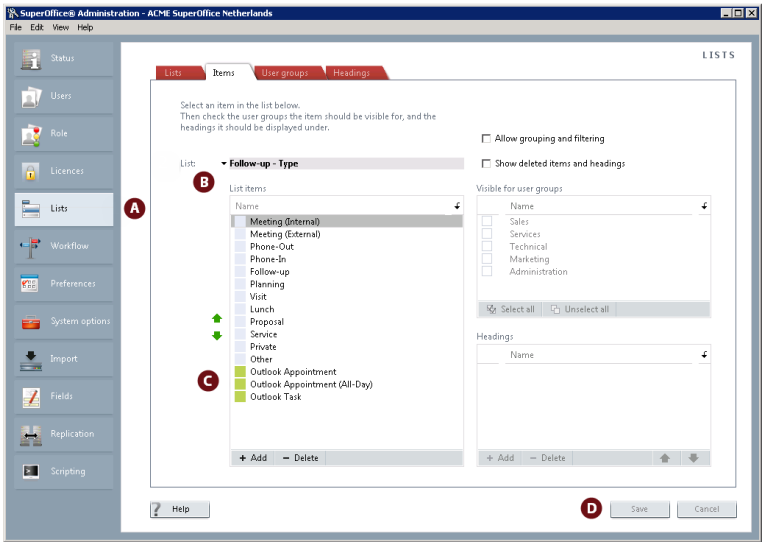
A	**Users**: Select the ‘Users’ panel.
B	**Users list**: Double click the user that must be changed.

- The Contact form is shown; Enter the correct e-mail address.
- When done click '**Save**'.
- Repeat this for all contact persons where the e-mail addresses are missing.

Add new list items to SuperOffice CRM

It is important to distinguish Outlook appointments or tasks from SuperOffice CRM appointments. This can easily be accomplished by adding some new list items to SuperOffice CRM.

- Start the SuperOffice 7 Administration module.

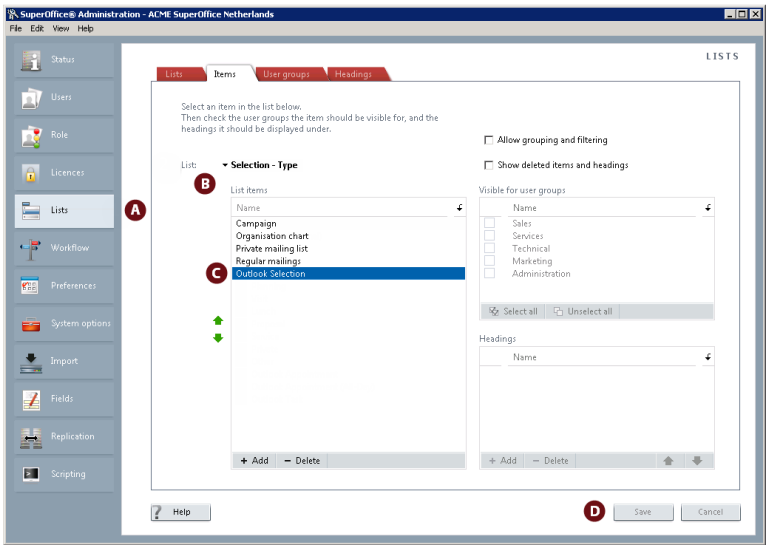


A	**Lists**: Select the 'Lists' panel.
B	**Follow-up - Type**: Double Click on **'Follow-up - Type'**; The Follow-up – Type list is shown.
C	**Items**: Add the following list items; ▪ Add the task item **'Outlook Appointment'**, Type is Appointment. ▪ Add the task item **'Outlook Appointment (All-Day)'**, Type is Appointment. ▪ Add the task item **'Outlook Task'**, Type is Task.
D	**Save**: Save the changes you have made.

Creating a new selection type

If the option is being used to synchronize SuperOffice selections it is recommend to create a separate selection type. By using this type, synchronization users can decide which contacts from SuperOffice CRM should always be available in Microsoft Outlook.

- Start the SuperOffice 7 Administration module.



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; Add the type '**Outlook Selection**'
D	**Save**: Save the changes you have made.

Registering the special SuperOffice component

To enforce the SuperOffice database integrity and to make the SuperOffice database aware of the new tables which are needed by the Outlook Synchronizer, the tables are created using a special SuperOffice component called SODictionarySDK.DLL.

This DLL needs to be registered. To register Windows components the regsvr32 program should be used, register the SODictionarySDK.DLL by typing the command REGSVR32, for example if the local installation path of SuperOffice is C:\program files\SuperOffice\SuperOffice 7 windows and the SODictonarySDK.dll is copied to this folder, the command is:

REGSVR32 "C:\PROGRAM FILES\SUPEROFFICE\SuperOffice 7 Windows\SODictionarySDK.DLL"

- Go to Start > Run;
- Register the 'SODictionarySDK.DLL' with REGSVR32.EXE;
- Click **OK** to see that the **SoDictionarySDK.dll** is registered successfully

www.crmplaza.com/apps/Outlook Online Synchronizer

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