Mail Logger
Visma Business
Service
Installation

Contents

Welcome to the Mail Logger for Visma Business – Service **3**
Introduction 3
Schematic Overview 3
Before you Begin 3
Mail Logger for Visma Business **4**
Installation 4
Configuration **5**
Starting the Configurator 5
License 6
Managing Firms (Connections) 7
Starting the service 10
Configuration Files 11
Log level 11
Installation complete 11

Welcome to the Mail Logger for Visma Business – Service

1

Introduction

The Mail Logger service will receive emails from the Outlook Add-In and archive them in Visma Business. It is a Microsoft Windows Service, installed on the Visma Business server.

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/203961041

Mail Logger for Visma Business 2

Installation

- Double-click on "SetupMailLoggerForVismaBusinessService_1.4.x.exe" to start the Visma Business Mail Logger Service Installation;
- The installer will check if .NET Framework 3.5 SP1 is installed on the machine;
- Press “Next >” to start the installation;
- 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;
- Change the default installation folder if necessary and press “Next >” to continue the installation;
- Enter the credentials for the user who can start the service needed for the Mail Logger. The configuration also has to be done whilst logged in with this user;
- Press “Next >” to continue the installation;
- Press “Install” to install the files needed for the Mail Logger Service for Visma Business;
- Check the ‘Launch Service Configurator’ if you want to continue immediately with the configuration of the connection to Visma Business;
- Press “Finish” to complete the installation of Mail Logger Service for Visma Business.

Configuration

3

Starting the Configurator

You can start the Mail Logger for Visma Business Configurator from the Windows start menu:

Start -> Programs -> InfoBridge -> Mail Logger for Visma Business Service -> Mail Logger Service Configurator

NOTE: *The configuration **has** to be done whilst logged in with the same Windows User as the user that will be running the Mail Logger service.*

License

The application needs a license in order for the Mail Logger service to start successfully.

The license is specified using the license button:

The License Settings screen will open:

A.	**Customer ID:** The license customer id, supplied by Visma or your reseller.
B.	**Activation Key:** The activation key, supplied by Visma or your reseller.
C.	**Import:** Using this button a license file can be imported by hand. In normal use this is not necessary.
D.	**Check:** Press the 'Check'-button to check the entered license details. The application will verify and try to activate the license. Any problems will be reported back.
E.	**Release:** Once a license has been activated it will be bound to the server. Using the license on another system will not be possible. In case the server name changes or the application is moved to a different server the license will first have to be released from the old server. This is done with the 'Release'-button.

NOTE: *An internet connection is required to verify your license. The license is also verified upon restart of the Mail Logger service.*

Managing Firms (Connections)

By adding firms, a connection to a Visma Business database can be made. Multiple firms can be added:

The Firm Connection Form will open:

A. **Firm Name:** The display name for the firm in the Add-In. This name is not used for the connection to Visma Business itself.

B. **Site ID:** The site ID of the Visma Business Services Host. By default this is 'standard'.

C. **Firm ID:** The Visma Business firm id. This is the following number in the Visma Business client:

D. **Username:** This is the username of a Visma Business System supervisor.

E. **Password:** The password of the user (This field is invisible in the version for Visma Business 5.31 and up).

F. **Test:** The connection details can be tested with the 'test'-button. The application will display if the connection can be made, or if there are problems.

G. **Custom fields:** A total of three custom fields (Organizational Units from Visma Business) can be selected. The tables **Organizational unit 1** to 12 can be selected, if available.

These fields will be displayed in the add-in. Users can then link the mail to specific 'Organization Unit'-values.

H. ***Mail Store path -*** The mail store path is the UNC path where the mails will be stored. This path has to be accessible by the clients. Users should have 'write-access' on this folder.

Example value:
\\servername\VismaBusinessMail

I. ***Security -*** If the option 'Only allow registered associates' is checked, only users that are available in the associate table for the firm are able to view/log to this firm in the Mail Log client. The user has to be an employee and the search is based on email address. **The users email address which is used for the check is his/her primary mail address in Outlook.**

To check if a user has a valid email address in Visma Business, open the employees for the specific firm:

In the example below 'john@acme.com' has access to the current firm (4600). Jane Doe has no email address and thus has no access if the option 'Only allow registered associates' is checked.

Saving
After pressing ‘OK’ the configuration is saved to the list:

Modify
To modify an existing connection, double-click on it in the list, or select it and press the modify button:

Remove
To remove an existing connection, select it from the list and press the ‘remove’-button:

NOTE: *Changes in the configuration are not applied until the service is restarted. Please refer to the chapter: Starting the Service, to do so.*

Starting the service

Emails cannot be logged if the Mail Logger Service is not running. To start the service, press the Service Status button:

Find the service in the list of services, it is called 'InfoBridge Mail Logger for Visma Business':

Press the start button to start the service:

Configuration Files

The configuration settings are stored in a “Configuration file”. This file, as well as the log files and license file are stored in the local app data folder of the logged in user. To open this folder, press the ‘Logs’-button:

Log level

The log level can be adjusted by pressing the Log Level button:

The log level screen will open:

A.	**Warning messages only:** If this option is checked only warning messages and important notifications are saved in the log file.
B.	**Informational and warning messages only:** If this option is checked, warning messages and extra informational messages are saved in the log file. (This will give a summary of the Mail Logging process like which data is being handled)
C.	**Debugging, informational and warning messages:** 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 Mail Logging process. This option should only be activated if instructed by InfoBridge.

NOTE: *Extensive logging will slow down the Mail Logging process and increase the size of the normal log file.*

Installation complete

The installation of the service is now complete. Please refer to the installation manual of the Outlook Add-in to continue the installation.

http://www.vismaplaza.com/Apps/Mail-Logger-for-VISMA-Business

©2013 InfoBridge Software, All rights reserved.

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

home page	:	www.infobridge.com
knowledge base	:	http://kb.infobridge.com
support e-mail	:	visma@infobridge.com
support phone	:	+31 (0)88 - 2762445