



Customer Relationship
Management

CRM Connector For Domino Functional Overview

Version 14.1

Notices

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Preface

For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	<code>Fixed-width</code> font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Bold Fixed-width	Bold Fixed-width font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
Bold Sans serif	Bold sans serif typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter -LOGF.
[]	Brackets enclose optional arguments.
{ a b c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation File > > Exit means: "Open the File menu and choose Exit ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

Aurea global support

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Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).

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CRM.connector for domino

CRM.connector for domino allows you to integrate update.CRM with IBM Lotus Domino.

CRM.connector for Domino automatically synchronizes data (such as calendar elements and e-mails) between the groupware system and the update.CRM database. Synchronization takes place at regular intervals.

CRM.connector for Domino takes the CRM business logic and customer-specific process and rules (e.g. user rights) into account. Configuration takes place in update.CRM. Your administrator can configure several aspects of CRM.connector for Domino.

Data is synchronised between the groupware server and update.CRM as follows:

Elements	Synchronisation
Calendar entries (appointments)	bidirectional
E-Mails	unidirectional (from IBM (Lotus) Domino to update.CRM)
Companies/persons (contact addresses)	unidirectional (from update.CRM to IBM (Lotus) Domino)
Tasks	unidirectional (from update.CRM to IBM (Lotus) Domino)
Absences	unidirectional (from update.CRM to IBM (Lotus) Domino)

Configuration and requirements

CRM.connector lets you define further synchronization criteria.

Here's a list of synchronization criteria that your administrator can define:

- The users in the groupware system and update.CRM whose data should be synchronized automatically.
- Which contact types in update.CRM should be synchronized.
- Whether private appointments and e-mails should be synchronized.
- The time period over which appointments, tasks and e-mails should be synchronized (e.g. two weeks in the past, four weeks in the future).

- The interval in which new records should be synchronized (e.g. every 15 minutes). Calendar elements, tasks and e-mails can be synchronized in different intervals.
- Whether attachments are synchronized.
- Whether participants that cannot be (uniquely) identified are marked for subsequent editing, or whether these participants are entered in the text field.
- Whether appointments only involving internal reps are indicated as such.
- Which additional fields (e.g. address fields in contact addresses) are synchronized
- Whether data deleted in update.CRM is also deleted in the database, or only marked as deleted.
- Whether appointments organized by an external participant are published to update.CRM, so that these time slots are marked as busy.
- Whether appointments are only synchronized if they are added in update.CRM (unidirectional). Appointments added in the groupware system are not synchronized. Changes made to previously synchronized appointments are synchronized in both systems (bidirectional).

Requirements

Records in the groupware system (e.g. calendar elements or e-mails) can be transferred to the update.CRM database as contact records if the following requirements are met:

- The groupware user must be present in the update.CRM database as both a person and rep.
- The same e-mail address must be entered in both records. This e-mail address must be unique.

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Synchronizing appointments

The rule-based interface synchronizes appointments like calendar elements between update.CRM and the groupware system.

All participants are taken into account and stored in the Aurea CRM database.

If an existing appointment in the groupware calendar is edited, the appointment is matched up with the update.CRM database the next time data is synchronized. If an appointment is added in the update.CRM calendar, the appointment is also matched up with the groupware appointment the next time data is synchronized.

Synchronizing groupware appointments with Aurea CRM

Groupware appointments are synchronized with update.CRM using rules.

Rules for synchronizing appointments

When synchronizing appointments in the groupware system with update.CRM, the following rules are applied:

- If the appointment was added or edited in the groupware calendar, no additional participants were added, and the groupware user is found in the update.CRM database:
 - The appointment is added to the person record corresponding to the groupware user and the groupware user is entered in the **Rep** field of the appointment in update.CRM.
- If the appointment was added or edited in the groupware calendar, and additional participants were added:
 - If the groupware user is found in the update.CRM database, and all other participants are found unambiguously in update.CRM (based on their e-mail addresses):

The appointment is added to the person record corresponding to the groupware user and the groupware user is entered in the **Rep** field of the appointment in update.CRM. All other participants are also entered as participants in update.CRM for this appointment.

- If one or more participants were not found in the update.CRM database:

The appointment is added to the person record corresponding to the groupware user and is marked for editing in update.CRM.

Opening appointments in Aurea CRM from the groupware system

Your administrator can determine that a link to the corresponding update.CRM record is displayed in the text field in appointments in the groupware system. Click on the link to open the record in update.CRM.

Synchronizing update.CRM appointments

Contacts that are added or edited within the time period defined by the administrator are transferred from Aurea CRM to the groupware calendar during synchronization.

By default, letter and telephone contacts are not transferred to the groupware calendar. Your administrator can define further criteria that limit the contact records to be synchronized. All participants are taken into account and entered in the appointment in the groupware calendar.

If an existing appointment in the Aurea CRM calendar is edited, the appointment is included in the next synchronization process.

Sending Invitations

Invitations are automatically sent to internal participants in IBM Domino for appointments in the future, including those already started but yet to finish.

If a previously synchronized appointment is edited, an invitation is sent to internal participants if the following is changed in Aurea CRM:

- The date, start or end time for appointments in the future (including meetings rescheduled for the future).

No invitations are sent if an appointment is rescheduled to take place in the past.

- The subject
- If participants are added or removed, only those participants affected by the changes receive a corresponding message.

Invitations are **not** automatically sent:

- for contacts added for a company and not a person,
- to external participants.

Publishing appointments

If an external participant sends you an appointment invitation and you accept the appointment, the appointment is displayed in your groupware calendar.

However, as you are not the organizer of the appointment, the appointment is not synchronized. Your administrator can determine that these appointments can also be published to the update.CRM calendar, ensuring that the time period is marked as busy in update.CRM, and preventing other appointments being added for this time.

The following applies to publishing appointments:

- Appointments can only be published to update.CRM by the groupware system. Changes made to the appointment in update.CRM are overwritten with data from the groupware system the next time appointments are synchronized. Your administrator can choose to highlight these appointments and prevent them from being changed in update.CRM by configuring access rights.
- If you delete a published appointment in update.CRM, you need to also delete the appointment manually in IBM Domino.
- Recurring appointments created in the groupware system cannot be published.
- Published appointments' type is set to "Info".
- Published appointments are highlighted in update.CRM, allowing users to see the times of appointments in the calendar.
- Published appointments are assigned to the user; the customer is not entered automatically. You can add the customer as a participant in update.CRM, or enter the organizer and other participants in a text field.

Deleting appointments

Depending on your configuration, determined by your administrator, appointments deleted in update.CRM of the groupware system can be deleted in the other system during the next synchronization process.

Your administrator can define the following:

- The time period in which deleted appointments are synchronized. This time period can be different from the time period defined for new or edited appointments.

Deleted appointments scheduled within this time period are also deleted in the second system.

- Whether deleted appointments are actually removed or only marked as deleted in update.CRM.
- How an appointment is marked as deleted, if the appointment is not deleted from the database. These appointments can be searched for using selections/queries in update.CRM.

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Synchronizing absences

Absences that are added or edited in Aurea CRM within the time period defined by the administrator are transferred from Aurea CRM to the groupware calendar during synchronization.

Absences are displayed as appointments in the groupware system's calendar, the reason for the absence (holiday, sickness or other reasons) is shown in the title.

If an existing absence in the Aurea CRM calendar is edited, the absence is included in the next synchronization process.

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Synchronizing e-mails

E-mails are synchronized from IBM Lotus Domino to Aurea CRM.

E-mails are assigned to person records in update.CRM as follows:

- If the sender can be identified in update.CRM based on the e-mail address, the e-mail is assigned to this person.
- If the sender cannot be uniquely identified, the e-mail is assigned to the person record corresponding the recipient (groupware user) by default.

Your administrator can determine that e-mails are flagged by status in update.CRM. You can search for records with a specific flag using selections/queries.

Your administrator determines which e-mail folders are synchronized. Sub-folders created by users in the synchronization folder are also synchronized by default. These sub-folders can also be linked to opportunities.

Note: In IBM (Lotus) Domino e-mails are not displayed in folders, therefore, "Sent" (e-mails) cannot be defined for synchronization.

The groupware user needs to move the e-mails to one of these folders (manually or automatically based on rules that were defined in the groupware system). During synchronization, the system checks whether new e-mails have been stored in the corresponding folder(s).

Your administrator can determine the following:

- The maximum size of e-mails: If an e-mail is larger than the limit defined by your administrator, the mail is not synchronized.

Note: If an e-mail includes attachments, and the size of the mail including attachments exceeds the size limit, but the size of the mail without attachments is below the limit, the e-mail is synchronized without attachments.

- Whether warnings are sent to users via e-mail if an e-mail (text or attachment) could not be synchronized completely.

Rules for synchronizing e-mails

With CRM.connector, you can synchronize e-mails with rules.

When synchronizing e-mails in the groupware system with Aurea CRM, the following rules are applied:

- If a groupware user receives a mail from an external sender:
 - If the sender of the e-mail can be uniquely identified in the update.CRM database, and the recipient is the groupware user (owner of the mailbox):

A contact record (**Type**: E-mail) is added to the person record corresponding to the sender in update.CRM. The recipient is entered as the **Rep** in the contact.
 - If the sender of the e-mail cannot be uniquely identified in the update.CRM database, but the recipient (owner of the mailbox) can be uniquely identified: `

A contact (**Type**: E-mail) is added to the person record corresponding to the recipient in update.CRM. The recipient is also entered as the **Rep**. The e-mail is flagged for editing in update.CRM.
- If the e-mail was sent to several internal and external recipients:
 - If the (external) sender can be uniquely identified in update.CRM:

A contact record (**Type**: E-mail) is added to the person record corresponding to the sender in update.CRM. The groupware user is entered as the Rep in the contact. All further recipients that can be identified are added as participants. If at least one of the recipients cannot be uniquely identified, the e-mail is flagged for editing in update.CRM.
 - If the sender of the e-mail cannot be uniquely identified:

A contact record (**Type**: E-mail) is added to the person record corresponding to the groupware user in update.CRM. The groupware user is also entered as the **Rep** in the contact. All further recipients that can be identified are added as participants. The e-mail is flagged for editing in update.CRM.

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Synchronizing attachments and tasks

Attachments stored for appointments and e-mails can be synchronized and linked to the corresponding contact record in Aurea CRM.

Your administrator can determine:

- Whether attachments are synchronized.
- The maximum size and type of the attachments to be synchronized.
- Whether the link to the e-mail (in Lotus Notes) is saved in the update.CRM database.

Note: Attachments for recurring appointments cannot be synchronized.

Tasks are synchronized from Aurea CRM to IBM (Lotus) Domino.

New tasks and changes to previously synchronized tasks are transferred from update.CRM to IBM (Lotus) Domino.

Status changes are accepted and synchronized by both systems.

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Synchronizing companies and persons

Companies and persons are synchronized from Aurea CRM to the groupware system.

Changes in update.CRM are transferred to the groupware system. Changes in the groupware system are overwritten with data from update.CRM when data is synchronized. Your administrator is responsible for defining which of the following records are synchronized:

- Companies assigned to the current user.
- Persons assigned to the current user.
- Persons assigned to a sales group that the current user is assigned to.
- Persons and/or companies in the current user's favorites.

Deleting companies and persons

If you delete a company or person in update.CRM, this is not synchronized. If you delete a record in the groupware system that has already been synchronized, the record is restored the next time data is synchronized.

To delete records in both systems:

1. Delete the record in update.CRM
2. Delete the record in the address book in the groupware system.