



Customer Relationship
Management

CRM Connector For Exchange SE 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

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

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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Introduction

CRM.connector SE for Exchange allows you to integrate Aurea CRM with Microsoft Exchange.

Salient features of CRM.connector SE for Exchange:

- It automatically synchronizes data (such as calendar elements and e-mails) between the groupware system and the Aurea CRM database. Synchronization takes place at regular intervals.
- It takes the CRM business logic and customer-specific process and rules (e.g. user rights) into account.

Configuration takes place in Aurea CRM. Your administrator can configure several aspects of CRM.connector SE for Exchange.

Data is synchronized between the groupware server and Aurea CRM as follows:

Elements	Synchronization
Calendar entries (appointments)	bidirectional
E-Mails	unidirectional (from Microsoft Exchange to Aurea CRM)
Tasks	unidirectional (from Aurea CRM to Microsoft Exchange)
Companies/Persons (contact addresses)	unidirectional (from Aurea CRM to Microsoft Exchange)
Absences	unidirectional (from Aurea CRM to Microsoft Exchange)

Note: Your administrator can define that **new** calendar entries are only synchronized unidirectional from Aurea CRM to Microsoft Exchange. Changes to these items are synchronized bidirectionally from both systems.

Your administrator can define further synchronization criteria, such as:

- The users in the groupware system and Aurea CRM whose data should be synchronized automatically.
- Which contact types in Aurea 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 Aurea CRM is also deleted in the database, or only marked as deleted.
- Whether appointments organized by an external participant are published to Aurea CRM, so that these time slots are marked as busy.
- Whether appointments are only synchronized if they are added in Aurea CRM (unidirectional). Appointments added in the groupware system are not synchronized. Changes made to previously synchronized appointments are synchronized in both systems (bidirectional).

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

- The groupware user must be present in the Aurea 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 (calendar elements) between Aurea CRM and the groupware system.

For further details, see [Rules for Synchronizing Appointments](#). 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 Aurea CRM database the next time data is synchronized. If an appointment is added in the Aurea CRM calendar, the appointment is also matched up with the groupware appointment the next time data is synchronized.

Note: Recurring Appointments are also synchronized.

Synchronizing groupware Appointments with Aurea CRM

Groupware appointments are synchronized with Aurea CRM using rules.

Rules for Synchronizing Appointments

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

- If the appointment is added or edited in the groupware calendar, no additional participants are added, and the groupware user is found in the Aurea 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 Aurea CRM.
- If the appointment is added or edited in the groupware calendar, and additional participants are added:
 - If the groupware user is found in the Aurea CRM database, and all other participants are found unambiguously in Aurea 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 Aurea CRM. All other participants are also entered as participants in Aurea CRM for this appointment.
 - If one or more participants are not found in the Aurea CRM database:

The appointment is added to the person record corresponding to the groupware user and is marked for editing in Aurea CRM, see [Error Handling](#).

Opening Appointments in Aurea CRM from the Groupware System

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

Synchronizing Aurea CRM Appointments

Learn how to synchronize Aurea 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 (reps) in Microsoft Exchange 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.

Sending Invitations to External Participant

Sending invitation to external participants can be allowed by your CRM.Connector administrator.

External participants are attendees whose email address is not registered in the CRM.Connector mail space that is synchronized. Such participants are added to unsendable attendee list in Outlook Exchange.

Note: You can send invitations to the attendee by enabling the participant in the attendee list of Outlook but they cannot be in the synchronization list of CRM.Connector.

If sending appointments to external participants are enabled then the external participants are added or moved to the sendable attendees list in Outlook Exchange. Appointments for external attendees are synchronized in the same manner as internal attendees. For more information, see [Sending Invitations](#) on page 9.

Publishing Appointments

Learn all about appointments publishing in CRM.interface.

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 Aurea CRM calendar, ensuring that the time period is marked as busy in Aurea CRM, and preventing other appointments being added for this time.

The following applies to publishing appointments:

- Appointments can only be published to Aurea CRM by the groupware system. Changes made to the appointment in Aurea 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 Aurea CRM by configuring access rights.
- If you delete a published appointment in Aurea CRM, you need to also delete the appointment manually in Microsoft Exchange.
- Recurring appointments created in the groupware system cannot be published.
- Published appointments' type is set to "Info".
- Published appointments are highlighted in Aurea 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 Aurea 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 Aurea 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 Aurea 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 Aurea 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.. Your administrator can define that absences are displayed in a different color.

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 Microsoft Exchange to Aurea CRM.

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

- If the sender can be identified in Aurea 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 Aurea 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.

The groupware user needs to move the e-mails to one of these folders (manually or automatically based on rules that are 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.
- Color codes used to highlight previously synchronized e-mails in all folders.

Rules for Synchronizing E-mails

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 Aurea 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 Aurea CRM. The recipient is entered as the Rep in the contact.
 - If the sender of the e-mail cannot be uniquely identified in the Aurea 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 Aurea CRM. The recipient is also entered as the **Rep**. The e-mail is flagged for editing in Aurea CRM, see [Error Handling](#).
- If the e-mail is sent to several internal and external recipients:
 - If the (external) sender can be uniquely identified in Aurea CRM:

A contact record (**Type**: E-mail) is added to the person record corresponding to the sender in Aurea 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 Aurea CRM, see [Error Handling](#).
 - 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 Aurea 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 Aurea CRM, see [Error Handling](#).

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Synchronizing Attachments

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 e-mails (including attachments) are stored as MSG files in the Aurea CRM database.

Note: Attachments for recurring appointments cannot be synchronized.

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Synchronizing Companies and Persons

Companies and persons are synchronized from Aurea CRM to the groupware system. Changes in Aurea CRM are transferred to the groupware system. Changes in the groupware system are overwritten with data from Aurea 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 Aurea 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 Aurea CRM
2. Delete the record in the address book in the groupware system.

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Synchronizing Tasks

Tasks are synchronized from Aurea CRM to Microsoft Exchange.

New tasks and changes to previously synchronized tasks are transferred from Aurea CRM to Microsoft Exchange.

Status changes are accepted and synchronized by both systems.

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Error Handling

Records in the groupware system can be indicated as having been synchronized or subject to errors.

Indicating Synchronized Data

All appointments that are synchronized successfully can be indicated as such (depending on your groupware client). For example, synchronized entries are indicated using a different color in Microsoft Outlook. This allows you to tell at a glance which appointments have already been synchronized with Aurea CRM.

Indicating Errors

You can determine that entries in the groupware system are displayed differently depending on various criteria. For example, if an appointment could not be added in Aurea CRM (e.g. the person record could not be found), the appointment can be displayed in a different color in your groupware client (depending on your client).

In order for an appointment to be included in the next synchronization process, the appointment's category must be changed. How these changes are applied depends on both your groupware system and the rules defined in the system.

All participants in an e-mail (To, CC etc.) or appointment (participants) are transferred to the contact record in Aurea CRM. If one of the participants is not found in the Aurea CRM database, you can optionally flag the corresponding contact record in the Aurea CRM database. These e-mails can then quickly be identified using a suitable query.