



Customer Relationship
Management

Connector Universal Administrator Guide

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

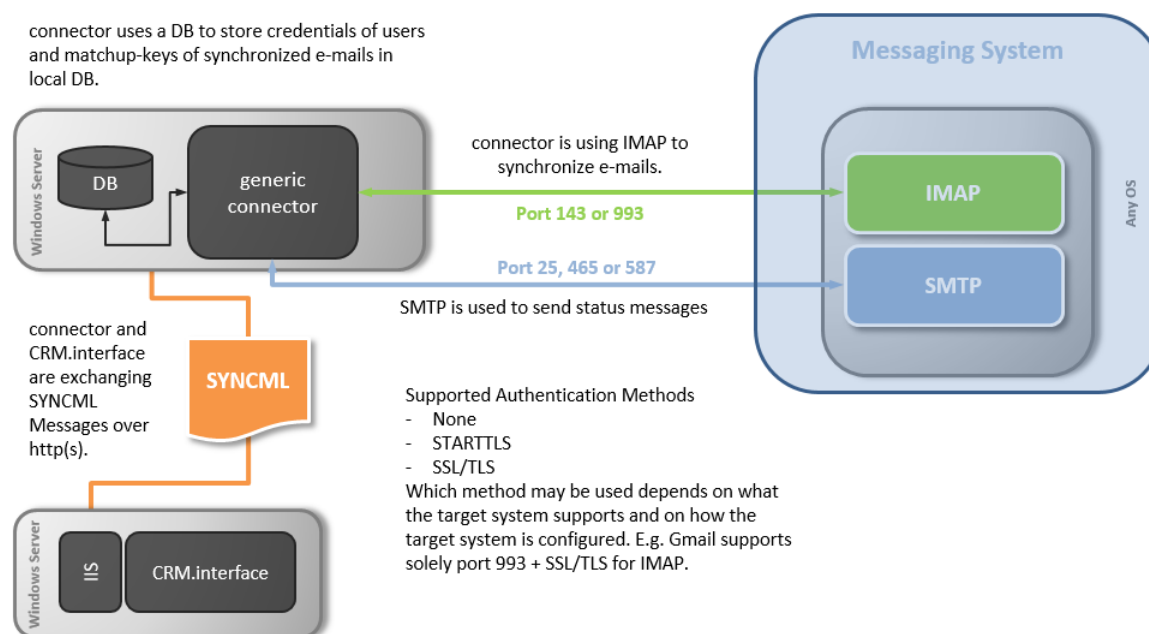
Connector universal is a server-based solution that allows the synchronization of e-mails between **IMAP**-aware messaging systems and Aurea.CRM.

Connector universal is referred to as "Connector" in this documentation.

The Connector is a server-based solution used to transfer e-mails from the messaging system to Aurea.CRM. Connector synchronizes all "not yet synchronized e-mails" from a defined synchronization folder and its sub-folders. The user just needs to move or copy the e-mails to one of these folders.

The already synchronized email information is stored in a local SQL Server database. This may be an SQL Server Express Edition. The credentials of the impersonation user and/or the users to be synchronized are stored in this database, too.

Architecture - Overview



The objects to be synchronized are transferred to CRM.interface as XML data streams. CRM.interface then transfers the objects to and from Aurea.CRM.

For a detailed functional description, please see chapter [Functional scope](#) on page 8.

Connector SE vs Connector for Domino

This topic explains how universal connector designed to support multiple messaging platform as compared to other connector.

CRM.connector universal is based on standard protocols and intended to support as many messaging systems as possible. Therefore connector is built on a subset of the functionality of connector SE and connector for Domino, which is implemented by all the systems. This consideration is the major reason for technical and functional differences.

Synchronization database

One of the main differences between connector universal and the other connectors is that connector universal **requires a (local) SQL server database**.

Note: Basically you can use any edition (e.g. Express Edition, Standard Edition etc.) of the SQL Server generations 2008 R2, 2012 and 2014. Explicit tests are performed with MS SQL Server 2012 Express Edition and SQL Server Native Client 11.0.

During the installation you have the option to install a local MS SQL Server 2012 Express Edition or to connect to an existing SQL Server instance.

Connector uses a SQL Server database to store:

- Information about which e-mails already have been synchronized. See section below, [Storage of synchronization information](#).
- Information about the users whose mailboxes are synchronized. See section below, [Authentication - Access of mailboxes, User management](#).

Storage of synchronization information

Connector does not store the synchronization information (e.g. the key of corresponding data records in Aurea.CRM and the status of the last synchronization) on the message level but in a separate (synchronization) database, except in case of Microsoft Exchange Server and Domino Server.

Authentication - Access of mailboxes, User management

Connector SE and connector for Domino both use a privileged account to impersonate the user's mailbox.

In case a messaging system does not support 2-legged authentication, connector requires the credentials of every user whose mailbox should be synchronized in order to access their mailboxes.

The credentials (SMTP address and password) are stored in the connector database (see [Connection Settings](#)). The user's passwords are encrypted with the key specified in the users.xml.

Most of the messaging systems do not support impersonation or other ways of 2-legged authentication.

Support for 2-legged authentication

Messaging Systems	2-legged authentication supported
Gmail	Yes
Open-Xchange	No
Zarafa	No
Zimbra	No

Note: Impersonation is only available to Google Apps for Business and Education accounts.

When Impersonation is used, ensure that the user account has a mailbox assigned to it on the correspondent platform.

Supported Systems

Learn about the systems supported by connector.

Connector is intended to synchronize e-mails between all IMAP-aware messaging systems and Aurea.CRM. As it is impracticable to test all systems we decided to perform explicit tests on:

- Gmail
- Open-Xchange
- Zarafa
- Zimbra Collaboration Suite

Note: For the synchronization between Aurea.CRM and Microsoft Exchange Server and Lotus Domino Server you have to use the specialized connector products (connector SE or connector for Domino). The usage of connector universal in combination with these two systems is neither supported nor tested.

Functional scope

Learn about the functional scope - – details, limitations and restrictions.

The following functionality is available:

E-mail synchronization – functional details

Functionality	Gmail	Open-Xchange	Zarafa	Zimbra
Automatic creation of synchronization folder Note: The synchronization folder has to be a direct child of the <inbox> and therefore only the format /<inbox>/sync_folder_name is accepted. In case of Gmail there are no folders, but labels.	YES	YES	YES	YES
Option: Synchronize e-mails received in BCC	YES	YES	YES	YES
Option: Synchronize / do not synchronize attachments	YES	YES	YES	YES
Option: do not synchronize attachments larger than n KB	YES	YES	YES	YES
Option: Store whole message as single document in Aurea.CRM. Note: Generic connector can save a representation of the original e-mail as an EML document in Aurea.CRM.	YES	YES	YES	YES
Option: Move successfully synchronized e-mails to Sub-Folder "Success". Note: In case of Gmail there are no folders, but labels.	YES	YES	YES	YES
Option: Move unsuccessfully synchronized e-mails to Sub-Folder "Failure". Note: In case of Gmail there are no folders, but labels.	YES	YES	YES	YES

Functionality	Gmail	Open-Xchange	Zarafa	Zimbra
Option: send synchronization failure message to the user.	YES	YES	YES	YES
Note: Sending e-mails is done via SMTP, therefore this feature requires that SMTP is enabled on the messaging system				
Two-legged authentication. See Authentication - Access of mailboxes , User management .	YES	YES	YES	YES

General features

General features	Supported
Inform and stop on error	YES, see Error Handling .
Writing performance data to performance counters	YES, see Writing performance data to performance counters .
Server-side installation	YES, no client-side installation required
Filtering list of synchronization users. It is possible to define additional criteria on the ID table in order to filter the list of users, which are synchronized by connector, see the WIKI article How connector(s) determine which users to synchronize.	YES, see the WIKI article How connector(s) determine which users to synchronize.

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Getting started

Get started with the CRM.Connector universal to synchronize your emails on Aurea CRM.

Learn to install the connector using the installation wizard provided to you and perform initial configuration on it. You can also know the user access to various info areas and catalog check table while installing CRM.interface.

Perform the below tasks to set up your connector:

Installation of connector

Look for installation wizard received from Aurea.

Aurea software AG provides an installation wizard that guides you through the installation of connector.

Installation of CRM.interface

Aurea software AG provides an installation wizard that guides you through the installation of CRM.interface.

Aurea CRM rights settings

During synchronization the following tables in Aurea CRM are accessed, therefore it is required that the users do have access to the info areas described below:

Info Area	Comment	Access Type
External Key (XK)	Match-up table for IDs of the messaging system and Aurea.CRM IDs.	write
Tel. No./E-mail (TN)	This table is used to search for the participants by e-mail address.	read-only
Activity (MA), Activity Participant (MB)	E-mails and appointments are stored in the MA table.	write
To-Do (TD), Message (MD), Reminder (ER)	Required for synchronization of the participation status and reminder management.	write
Company (FI), Person in Company (KP), Person (PE)	These tables contains person and company data.	read-only
Tasks (A1) Note: Currently synchronization of tasks is not supported by connector.	In case task synchronization is enabled.	write
Absences (A3) Note: Currently synchronization of absences is not supported by connector.	In case absences are synchronized.	read-only

Aurea CRM catalogs

Ensure that the following catalogs and catalog values exist and that the values do not have a tenant or a lock assigned.

Catalog	Values
Ext. System (Rep)	Marketing.Manager
	notes
	outlook
	universal
Content Type (External Key)	application/x-mmRecord
	text/x-mmAbsences
	text/x-mmPerson
	text/x-mmTasks
	text/x-vevent

Aurea CRM module rights

The users must have the module right **groupware connector** assigned.

Aurea CRM user settings

See topic [Creating User Settings in Aurea CRM](#).

Aurea CRM master user

See topic [Creating a Master User in Aurea CRM](#).

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Using Connector

Learn to configure the connector, and to add and manage users on it.

After installation you need configuration the connector application using a configuration console (SynchroConnectorConfigurator.exe). After this you can define the basic settings regarding connecting to the messaging system and configuration of CRM.interface.

create users and master user and configure credentials for them. Such users need to have certain settings enabled on them for mail synchronization to happen successfully for them.

Below are required configuration and settings:

Connection Settings

In this dialog you can define the basic settings regarding connecting to the messaging system and configuration of CRM.interface.

Connection Settings Dialog

Configurator for CRM.connector universal 8.2.7.6837

Connection | E-Mails | Error Handling

Messaging server

Server type: Universal | Server Name (e.g. mailserver.xyz.local): myserver.mycompany.com

IMAP/SMTP settings

IMAP port: 143 | Encryption: STARTTLS

SMTP port: 25 | Encryption: STARTTLS

Mail address spaces to be synchronized (e.g. company.com, company.internal, company.test)

mycompany.com | Add | Edit | Remove

URL of CRM.interface

HTTP://localhost/CRMinterfaceBB/xml | Port 80

☒ Automatically update list of mailboxes to synchronize | 1 | time a day at 23:00

Synchronization Database

Connection string (Note: do not specify user credentials here)

server=mydbserver;Trusted_Connection=no;database=TEST_CONNECTOR_UNIVERSAL;connection t

Manage Users

No service | Service name: Unknown | Running state: Unknown | Direct link: No link

OK | Cancel | Apply

Set the **Configuration for the CRM.Connector universal** as per the table below:

Fields	Description
Server type	The Server type can be either " Gmail " or " Universal ". See chapter Authentication - Access of mailboxes, User management for further details.
Hosting Domain or Server name	Depending on the value you have selected for "Server type", you either have to specify the Hosting Domain (in case of Gmail) or the Server name (in case of all other systems). See Example Configuration below.
IMAP/SMTP settings	Supported Authentication Methods are: • None • STARTTLS • SSL/TLS What method to choose depends on what the target system supports and on how the target system is configured. E.g. Gmail supports solely port 993 and SSL/TLS for IMAP. See Example Configuration below. Note: • IMAP is used for retrieving e-mails from the messaging server. • SMTP is used to send messages to users or administrators (see "Sending Warning Message" Settings and Inform admin users about the following events).
Setting "Mail address spaces to be synchronized"	Add all mail address spaces you want to synchronize. If connector comes across e-mail addresses of a mail space which is not defined to be synchronized, you can find information concerning this matter in the log file. <pre>[...] does not belong to any of the defined mail spaces: [...] and is NOT to be synchronized</pre>
URL of CRM.interface	CRM.interface can be either installed on the same or a different machine as connector.
Port Number	This setting specifies the port number of CRM.interface; since CRM.interface is running in IIS, the port number is either 80 (or 443 when using HTTPS) by default.

Fields	Description
Automatically update list of mailboxes to synchronize n time(s) a day	Updating the list of mailboxes requires re-initialization of connector -which may take a while in a scenario with many users- and therefore can have a huge impact on the duration of synchronization cycles. Therefore it might make sense to consider doing this update only once a day or even switch it off in a scenario in which the user list (users whose mailboxes are supposed to be synchronized) doesn't change often. If this setting is set to "1" you can additionally schedule when the list should be updated.
Connection string to synchronization data base	The connection string must be built in the following form: <pre>server=MYSERVER; Trusted_Connection=no; database=MYDATABASE; connection timeout=5</pre> Note: The attributes <code>server</code>, <code>database</code>, <code>Trusted_Connection</code> are mandatory; the <code>connection timeout</code> parameter is optional. <code>Trusted_Connection</code> must always be set to <code>no</code>. The credentials of the user are read from <code>users.xml</code> and therefore must not be provided in the connection string. Examples <pre>server=PC1711\\SQLEXPRESS;Trusted_Connection=no;database=connector_timeout=5 server=dbserver01;Trusted_Connection=no;database=connector_universa_timeout=5</pre>

Example configurations

Connection Settings for Zimbra Collaboration Suite

Messaging server

Server type: **Universal** Server Name (e.g: mailserver.xyz.local)

Imap/Smtp settings

IMAP port: 143 Encryption: STARTTLS

SMTP port: 587 Encryption: STARTTLS

Connection Settings Open-Xchange

Messaging server

Server type: **Universal** Server Name (e.g. mailserver.xyz.local)

IMAP/SMTP settings

IMAP port: 143 Encryption: STARTTLS

SMTP port: 25 Encryption: STARTTLS

Connection Settings for Zarafa

Messaging server

Server type: **Universal** Server Name (e.g. mailserver.xyz.local)

IMAP/SMTP settings

IMAP port: 143 Encryption: None

SMTP port: 25 Encryption: None

Connection Settings for Gmail

Messaging server

Server type: **Gmail** Hosting Domain (e.g. user@xyz.com.work-google-x.com => work-google-x.com)

IMAP/SMTP settings

IMAP port: 993 Encryption: SSL/TLS

SMTP port: 25 Encryption: STARTTLS

Starting/Stopping Service and applying changed settings to the running service

Starting and Stopping of the Service: Connector service cannot only be restarted using Microsoft Tools but also via the administrative console ("configurator") of the application as well.

At the bottom of the administrative console the "state" of the service is displayed. Possible values are "unknown" or any of the regular states of Windows services (starting, started, stopping, stopped, etc.).

Connection Settings Dialog - Status information

Start service  Service name: update.CRMConnectorUniversal

Running state: Stopped

Direct link: No link

OK Cancel Apply

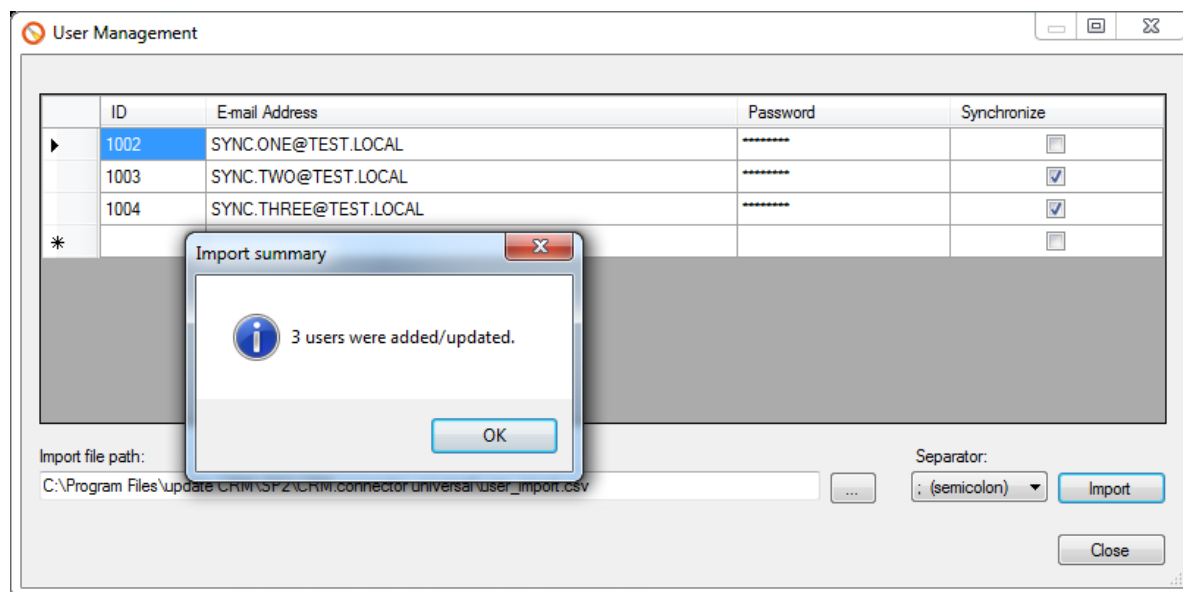
Applying changed settings to running service: It is possible to apply changed settings to the running service, which means that the service doesn't need to be restarted to use the new settings. Depending on which configuration has changed, the injection of the new settings causes a full, a partly or even no re-initialization of the service. For example changing the messaging server endpoint causes a full re-initialization.

After the injection the configuration changes are added to the command queue of connector and processed after the connector has finished its current tasks. Typically it won't take more than a few seconds until the new settings are applied by connector. Information on the (re-)initialization progress and result are displayed at the bottom of the dialogue box along with a progress bar.

Managing Users

With this functionality you can either manually add users or import users from a *.csv file.

Adding/Importing user



The following attributes are required for each user, independent if users are created manually or imported:

- E-mail Address (SMTP Address)
- Password

Note: When synchronizing with Gmail only the SMTP addresses of the users are required. See Authentication - Access of mailboxes, User management for further information.

- Synchronize (boolean flag: either `TRUE` or `FALSE`, case-insensitive). If this field is set to `TRUE` (respectively checked in the user interface) then the user's mailbox is synchronized. Instead of `TRUE|FALSE` you also can use 1|0.

Note: The mailbox of a user is only synchronized if the user is **activated in Aurea.CRM** via his ID table settings **and activated** in the **synchronization database** as well.

At first glance, this logic might look like overkill, but for several considerations, we do not want to hold the users' passwords for the messaging system in Aurea.CRM.

Additionally, it might be quite helpful for testing purposes, because it allows for limiting the number of synchronization users without any need to change the settings in Aurea.CRM.

If you are importing the users via a file import, you have to provide the same columns separated by either semicolons, commas or tabs. You cannot mix different separators in a single import file.

Note: The row "ID" is filled automatically.

Example of a user import file

```
sync.one@test.local;mypassword1;FALSE
sync.two@test.local;mypassword2;TRUE
sync.three@test.local;mypassword3;TRUE
```

Note: The deletion of a user may cause duplication of synchronized items as the information in which items have been synchronized is deleted as well. However, to delete a line mark the very first column and press <delete>.

Configuration of users

The credentials (username or e-mail address and password) of the technical users are stored in an encrypted XML file - `users.xml`. Use the file `update.Users.exe` – which is installed in the installation directory of connector- to create or modify the `users.xml` file.

Sections users.xml

Section in <code>users.xml</code>	Description Necessary input	Required?
Universal Connector Master	Impersonation user for Aurea.CRM. Username, password.	Mandatory for all systems
Connector Technical User	used by connector to send warning and error e-mails. SMTP address, password.	Mandatory for all systems.
2-legged Authentication User	Impersonation user for Gmail. SMTP address and password.	Mandatory for Gmail.
Synchronization Database Admin	Used to access the synchronization database. Username, password.	Mandatory for all systems.
User Password Encryption	Secret phrase used for the encryption of user passwords in the synchronization database.	Optional

Creating a Master User

Create an Aurea CRM user matching the credentials of the master user specified in the step [Configuration of users, creation of users.xml](#) above.

Note: In `forms.xml` by default the master user OCSU is pre-configured. If you want to use a different user (name), you have to change the master user in `forms.xml` accordingly (section `<masterUser client='universal' login='Principal,ClientID'>OCSU</masterUser>`);

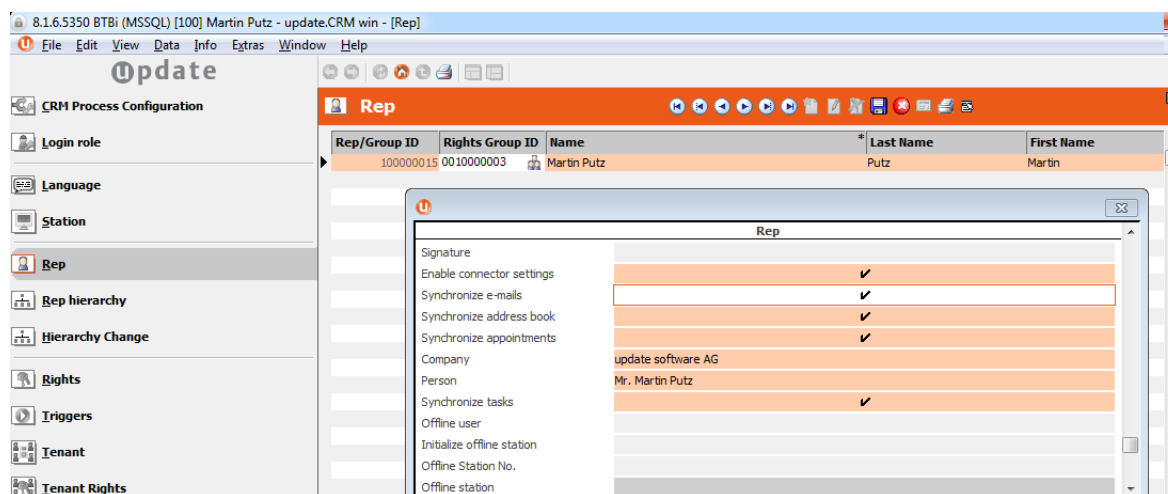
Creating User Settings

On start-up, connector requests a user list from Aurea.CRM. This list is based on the "Enable Connector settings" flag in the rep table.

In other words, in order to add a user to the synchronization process, you have to enable the "Enable Connector settings" check box for the rep and further enable at least one of the options "Synchronize e-mails" or "Synchronize appointments" for this user.

Note: The value in the Rep's "E-mail" field must match the rep's e-mail address in messaging system.

Note: as of Service Pack 2 it is possible to define additional conditions on the ID table, see the WIKI article [How connector\(s\) determine which users to synchronize](#) for further information.



Note: If you want to synchronize the mailbox of a user, said user needs to be created in Aurea.CRM as a rep with a person assigned. In addition, the user must have the module right "groupware connector".

In other words, if you want to synchronize the mailbox of "Simon Seller" the following must exist:

- A KP record for Simon Seller,
- An ID record for Simon Seller,
- A Login for Simon Seller with the "**groupware connector**" module right and the "**Enable Connector settings**" option for the rep Simon Seller activated.

Note: If you have set the CRM.interface option "**use FI/KP from rep**" to true, CRM.interface always takes the KP record linked to the relevant ID record of the user. If set to false, it is mandatory that the e-mail addresses of the Reps have to be unique within the KP table.

Tip: If this person "Simon Seller" has meetings with other employees of your enterprise (whose mailboxes are not synchronized) and you want to synchronize the full information, you have to create an entry in the rep table for these persons, but there is no need to create a login for them as well.

E-mail Synchronization Settings

Learn how to configure the E-mail Synchronization Settings.

This topic explains the various settings you can perform on the e-mails to be synchronized. Such as the synchronization timing, attachment rules and action that can be performed in case of synchronization failure.

E-mail Synchronization Settings Dialog

Configurator for CRM.connector universal 8.2.7.6088

Connection E-Mails Error Handling

☒ Synchronize E-Mails every 1 minutes. (Note: 0 = as often as possible).

Name of the synchronization folder (this format only: /<inbox>/folder_name)

/<inbox>/crm_inbox

☒ Automatically create folder

☒ Synchronize E-Mails even if the mailbox owner cannot be found in the recipient list (e.g. was added as BCC)

Attachments

☐ Do not synchronize attachments

☒ Synchronize attachments

☒ Do not synchronize attachments larger than 200 kilobytes

☐ Save whole message as EML file (attachments are included)

☐ Do not synchronize EML files larger than 2000 kilobytes

Synchronization Success

☒ Move successfully synchronized messages to 'sync_success' folder or its subfolders

Synchronization Failure

☒ Send error messages to the users by E-Mail

☒ Move unsuccessfully synchronized messages to 'sync_failure' folder

Sending Warning Message

☒ Message body was truncated

☒ At least one attachment was not synchronized

Start service Service name: update.CRMConnectorUniversal Running state: Stopped Direct link: No link

OK Cancel Apply

Set the **E-mail Synchronization Settings** as per the below instructions:

Synchronize E-Mails / Synchronization Interval

Synchronize e-mails: If this check box is activated, e-mails are synchronized. Deactivate the checkbox to prevent connector from synchronizing any e-mails at all.

Synchronize e-mails every n minutes: You can additionally define the interval (in minutes) in which the connector checks users' mailboxes for new mails to synchronize.

Name of the synchronization Folder and additional options

Name of the synchronization folder: connector synchronizes e-mails in a specific folder (and its sub-folders) with the Aurea.CRM system. This means that the user has to move or copy the mails which should be synchronized to this folder.

Note: In case of Gmail there are no folders, but labels.

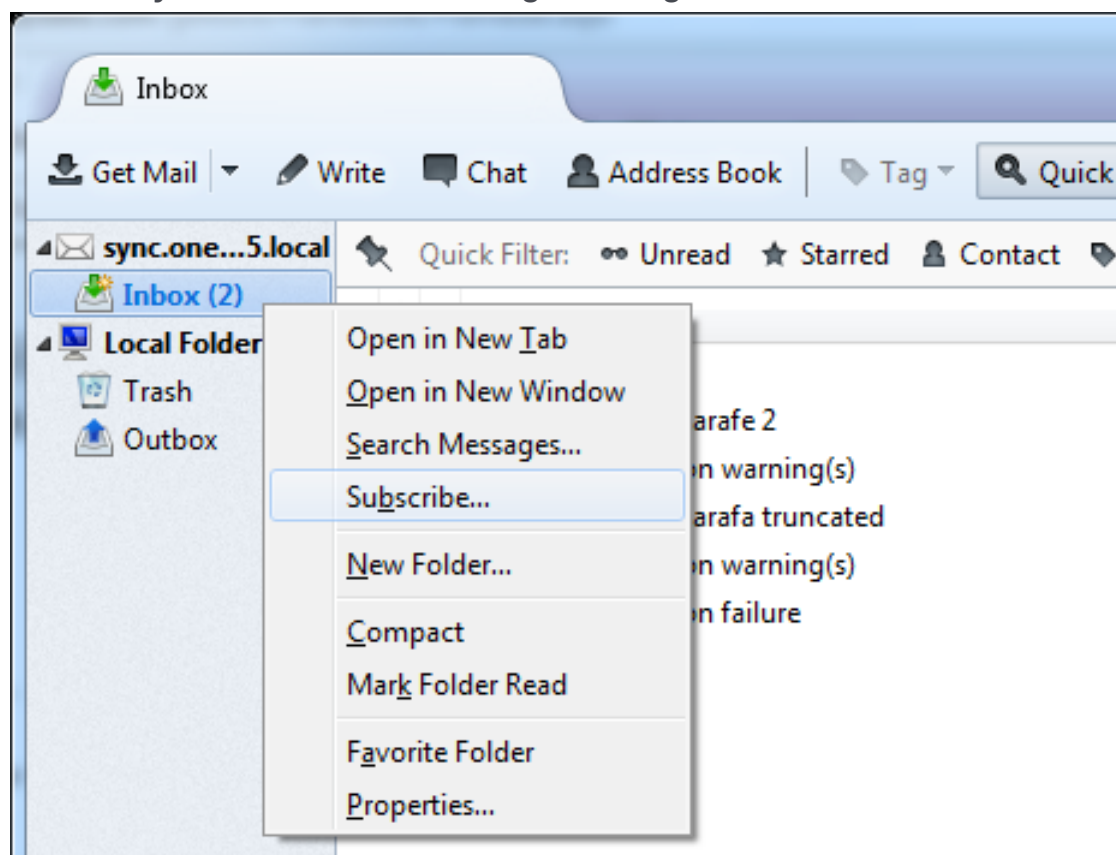
Note: The synchronization folder has to be a direct child of the <inbox> and therefore only the format /<inbox>/sync_folder_name is accepted.

Automatically create folder: If this option is enabled, connector adds this folder to the user mailboxes if it does not already exist. If this option is unchecked, the user needs to create the synchronization folder manually.

/<inbox> is a language independent placeholder for the inbox. If you set the parameter to /<inbox>/crm, the connector creates the CRM sub-folder below the Inbox in an English or Posteingang in a German mailbox. As administrator, you do not need to care about the different languages of your users' mailboxes.

Note: Typically it is required to add the folder to the IMAP subscription list in your e-mail client in order to see newly created folders. Neither Thunderbird nor Outlook update the folder list automatically.

E-mail Synchronization Settings Dialog



Synchronize e-mails if the owner of the mailbox cannot be found in the recipients' list (e.g. was added as BCC): If this option is enabled the owner of a mailbox is added to the recipient list exchanged between connector and CRM.interface to allow for synchronization of such e-mails.

"Attachments" Settings

Do not synchronize attachments: Enable this option to prevent attachments from being synchronized.

Synchronize attachments: If you enable this option, every attachment is synchronized as a single document and linked to the appointment (MA) record in the CRM system. You can also limit the size of the attachments via the "Do not synchronize attachments larger then <n> kilobytes setting".

Save whole message as EML file (attachments included): If enabled, the message itself including all attachments is linked to the appointment (MA) record in the CRM system as a document. You can also limit the size of the EML file via the "Do not synchronize EML files larger then <n>kilobytes setting".

"Synchronization Success" Setting

Move successfully synchronized e-mails to the following sub-folder: If this option is enabled, e-mails which have been successfully synchronized with Aurea.CRM are moved to the `sync_success` folder or the matching sub-folder.

Note: In case of Gmail there are no folders, but labels.

Note: The `sync_success` folder is always a direct sub-folder of the synchronization folder.

E.g. if an e-mail from a `</inbox>/crm/company1` sub-folder is synchronized with Aurea.CRM it is moved to the `</inbox>/sync_success/crm/company1` sub-folder.

The particular sub-folders (in our example the `company1` folder below `</inbox>/sync_success/crm/`) are generated automatically.

"Synchronization Failure" Settings

Send error messages to the users by e-mail: If this option is enabled, the user is notified of synchronization failures via e-mail.

Note: It is not recommended to use this option without enabling "Move unsuccessfully synchronized e-mails to the following sub-folder" as well. connector stores the last reason for a failure in the synchronization database (`mmSyncStatus` property) and does not send another error message unless the error reason changes, but in a scenario where connector is not able to access the `mmSyncStatus` property (e.g. if decoding of e-mail fails), it keeps sending error messages over and over.

Move unsuccessfully synchronized e-mails to the following sub-folder: If this option is enabled, e-mails which are not synchronized are moved to the `Sync_Failure` sub-folder of the synchronization folder.

Note: In case of Gmail there are no folders, but labels.

Note:

- The `Sync_Failure` folder is always a direct sub-folder of the synchronization folder.
 - In contrast to successfully synchronized e-mails connector doesn't create subfolders in the `Sync_Failure` folder.
-

If you have defined `/<inbox>/crm` as the synchronization folder connector, creates a folder `/<inbox>/crm/Sync_Failure` and moves unsuccessfully synchronized e-mails into this folder. connector then no longer tries to synchronize these e-mails.

"Sending Warning Message" Settings

Message body was truncated: If this option is enabled, the user receives a warning e-Mail from the connector in case the message text (body field) of a synchronized message exceeds the size of the text field in Aurea.CRM.

Note: With the option **Save whole message as EML file (attachments included)** enabled, you can ensure that the complete message is synchronized to Aurea.CRM.

At least one attachment was not synchronized: If this option is enabled, the user receives a warning message from connector in case an attachment is not synchronized because its size exceeded the defined limit.

Email and Appointment Synchronization with G-Suite

Configuration to add/update the service account needed for email and appointment sync for **G-Suite** domain/accounts.

Below are the required configuration:

Connector side

Learn about the connector side configuration in this topic.

On the Configuration for CRM.connector universal screen, make the following entry:

Note: In the below settings, the configuration parameter value may differ as per your environment / setup.

Connection

Fields	Value
Server type	Select <code>Gmail</code> .
Hosting Domain	Enter <code>imap.gmail.com</code> .
IMAP port, Encryption	Enter <code>993</code> , <code>SSL/TLS</code> .
SMTP port, Encryption	Enter <code>25</code> , <code>STARTTLS</code> .
Mail address spaces to be synchronized (e.g. company.com, company.internal, company.test)	Enter <code>aureatest.com</code> .
URL of CRM.interface	Enter <code>http://localhost/release-ent-mss-ISI-12.0.0.interface/xml</code> .
Port	Enter <code>80</code> .
Automatically update list of mailboxes to synchronize	Enable checkbox and set to <code>1</code> , set time a day at <code>00:00</code> .
Connection string	Enter <code>server=IP-0A4266BA;Trusted_Connection=no;database=UNIVERSAL_CONNECTOR;connection timeout=5</code>

Configurator for CRM.connector universal 12.0.1.8

Connection E-Mails Appoint. (I) Appoint. (Ia) Appoint. (II) Error Handling

Messaging server

Server type: Gmail Hosting Domain (e.g. user@xyz.com.work-google-x.com => work-google-x.com): imap.gmail.com

IMAP/SMTP/iCal settings

IMAP port: 993 Encryption: SSL/TLS

SMTP port: 25 Encryption: STARTTLS

Path to iCal files

☐ Add "User-Agent" HTTP header to requests sent to CalDAV server. Name:

Mail address spaces to be synchronized (e.g. company.com, company.internal, company.test)

aureatest.com Add Edit Remove

URL of CRM.interface

http://localhost/release-ent-mss-ISI-12.0.0.interface/xml Port: 80

☒ Automatically update list of mailboxes to synchronize 1 time a day at 00:00

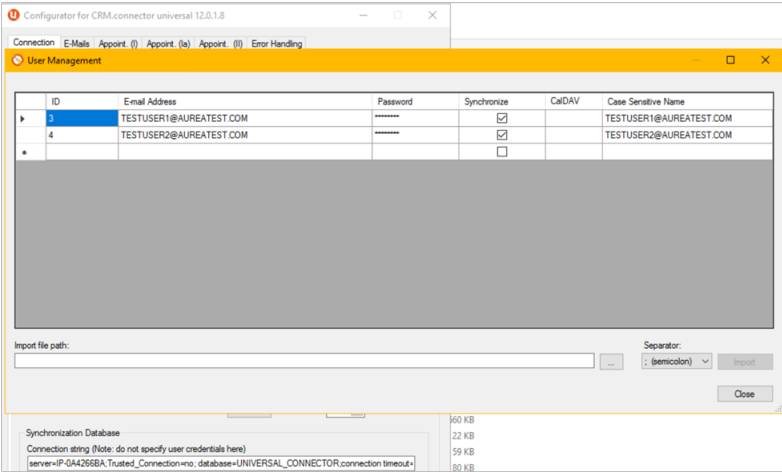
Synchronization Database

Connection string (Note: do not specify user credentials here)

server=IP-0A4266BA;Trusted_Connection=no;database=UNIVERSAL_CONNECTOR;connection timeout=5

Manage Users

Click **Manage Users**. Here you can either manually add user or import users from a *.csv file.



Emails

Fields	Value
Synchronize E-Mails every	Enable the checkbox and select 0 from minutes dropdown.
Name of the synchronization folder	/<inbox>/crm_support1
Automatically create folder	Enable checkbox.
Do not synchronize attachments	Enable radio button.
Maximum content size	Select 0 characters.
Move successfully synchronized messages to 'sync_success' folder or its subfolders	Enable the checkbox.
Move unsuccessfully synchronized message to 'sync_failure' folder	Enable the checkbox.

Configurator for CRM.connector universal 12.0.1.8

Connection E-Mails Appoint. (I) Appoint. (Ia) Appoint. (II) Error Handling

☒ Synchronize E-Mails every 0 minutes. (Note: 0 = as often as possible).

Name of the synchronization folder (this format only: /<inbox>/folder_name)

/<inbox>/cm_support1

☒ Automatically create folder

☐ Synchronize E-Mails even if the mailbox owner cannot be found in the recipient list (e.g. was added as BCC)

Attachments Maximum content size 0 characters

☒ Do not synchronize attachments

☐ Synchronize attachments

☐ Do not synchronize attachments larger than 2000 kilobytes

☐ Save whole message as EML file (attachments are included)

☐ Do not synchronize EML files larger than 2000 kilobytes

Synchronization Success

☒ Move successfully synchronized messages to 'sync_success' folder or its subfolders

Synchronization Failure

☐ Send error messages to the users by E-Mail

☒ Move unsuccessfully synchronized messages to 'sync_failure' folder

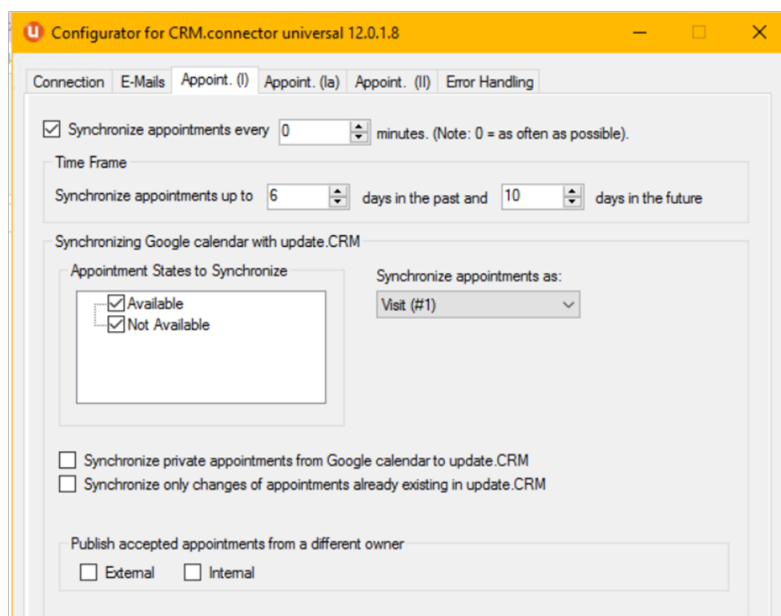
Sending Warning Message

☐ Message body was truncated

☐ At least one attachment was not synchronized

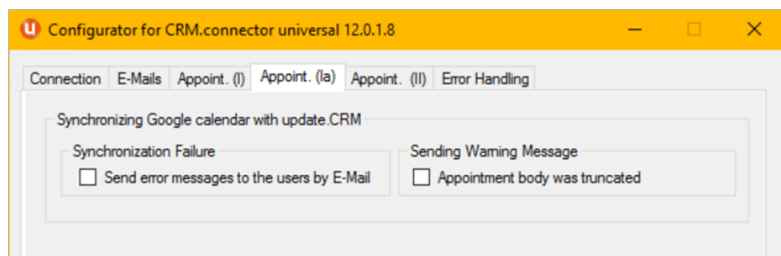
Appoint. (I)

Fields	Value
Synchronize appointments every	Enable the checkbox and set 0 from dropdown.
Synchronize appointments up to	Set 6 days in the past and set 10 days in the future .
Appointment states to synchronize	Enable checkboxes Available and Not Available .
Synchronize appointments as	Select Visit (#1) .



Appoint. (Ia)

Disable both the checkboxes - **Send error messages to the users by E-Mail** and **Appointment body was truncated**.



Appoint. (II)

Fields	Value
Appointment Types to Synchronize	Enable checkboxes Telephone (#0) and Visit (#1) .
Enable deletion	Enable checkbox.
Default time frame	Enable radio button.

Configurator for CRM.connector universal 12.0.1.8

Connection E-Mails Appoint. (I) Appoint. (Ia) Appoint. (II) Error Handling

Synchronizing update.CRM with Google calendar

Appointment Types to Synchronize

☒ Telephone (#0)
☒ Visit (#1)
☐ Letter (#2)
☐ Event (#3)
☐ Fax (#4)

Get types from update.CRM database

Deleting Appointments

☒ Enable deletion

Time Frame

☒ Default time frame (Note: same as for appointment synchronization)
☐ Individual synchronization time frame for deleting appointments
Delete appointments up to days in the past and days in the future

Open appointments in update.CRM

☐ Insert web link to message body
Host URL (e.g. http://xyz.company.com/crm)

☐ Send invitations to reps only

Error Handling

Field	Value
Connection Timeout Http:	Set 60 seconds from dropdown.
CRM.interface errors Error codes	Enter 511;.

Configurator for CRM.connector universal 12.0.1.8

Connection | E-Mails | Appoint. (I) | Appoint. (Ia) | Appoint. (II) | Error Handling

Connection Timeout

Http: 60 seconds

Note: as long as there are no problems with timeouts do not change the default value (60 seconds)

CRM.interface errors

Error codes (e.g. 500;511;...) 511;

☐ Stop connector on CRM.interface errors

Max number of errors before stopping connector: 25

☐ Exclude mailboxes from synchronization in case of 5 consecutive access failures

When all mailboxes are excluded from synchronization

☐ Stop connector immediately

☒ Wait 30 minutes and then try to reinitialize messaging server access module

☐ Stop connector if reinitialization occurs 5 times within last 24 hours

Inform admin users about the following events (NOTE: may not work if the messaging system is down)

☐ Connector stops on CRM.interface errors, excluding all mailboxes or too many reinitializations

☐ Mailbox gets excluded from synchronization

☐ Connector's messaging server access module reinitializes

☐ One of the above defined CRM.interface errors occurs

Smtip addresses of administrative users to be informed about errors

Add

Edit

Remove

☐ Write performance data to performance counters

☐ Write synchronization statistics to log file

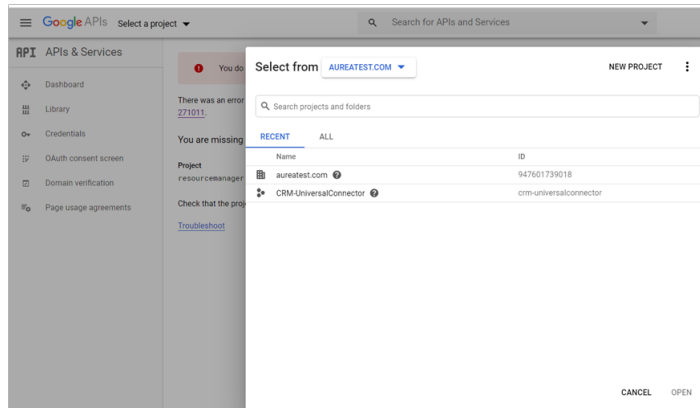
☐ Generate separate statistics files

G-Suite Service Account Configuration

Learn about the G-Suite service account configuration in this topic.

Assuming you have valid Domain already created for customer and have admin account credentials, you may follow below steps to configure Project and Service Account for the same.

1. Navigate to [https://console.developers.google.com/](https://console.developers.google.com/https://console.developers.google.com/) and login to Admin account. Select your Domain from the drop down and create **New Project**.



New Project

Project name *

Project ID: universal-connector-1. It cannot be changed later. [EDIT](#)

Organization

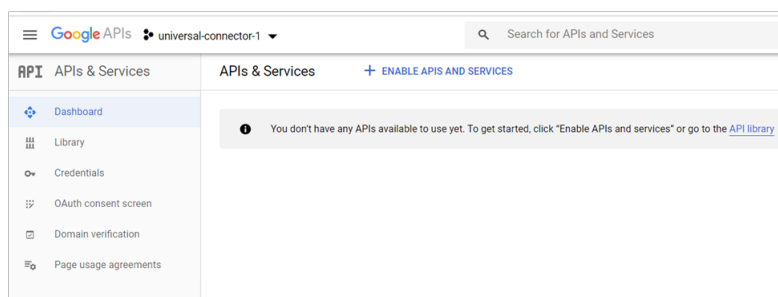
This project will be attached to aureatest.com.

Location *
 [BROWSE](#)

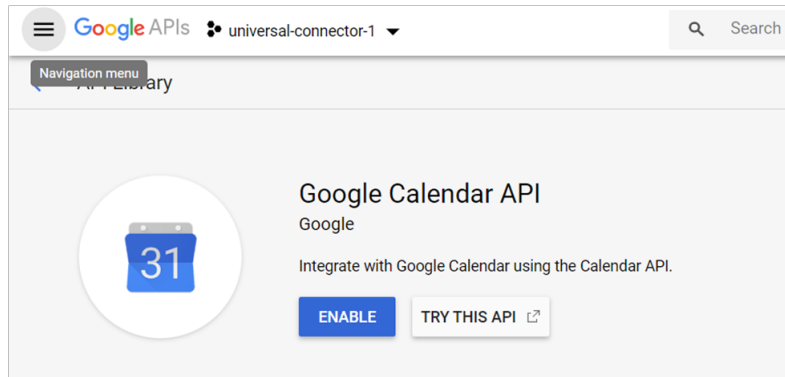
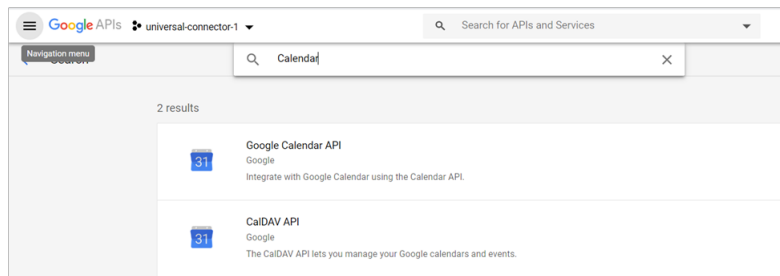
Parent organization or folder

[CREATE](#) [CANCEL](#)

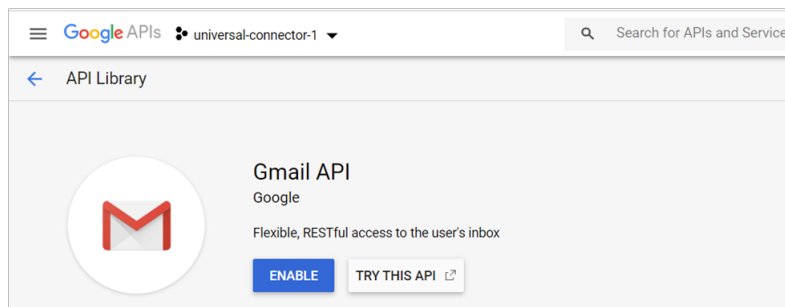
2. Go to **DashBoard** as shown below and add **Calendar and Gmail API** and enable the same as shown below.



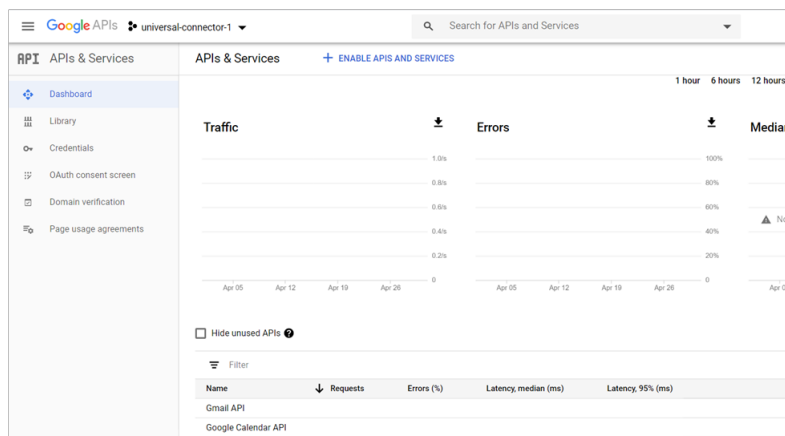
3. Enable **Google Calendar API**.



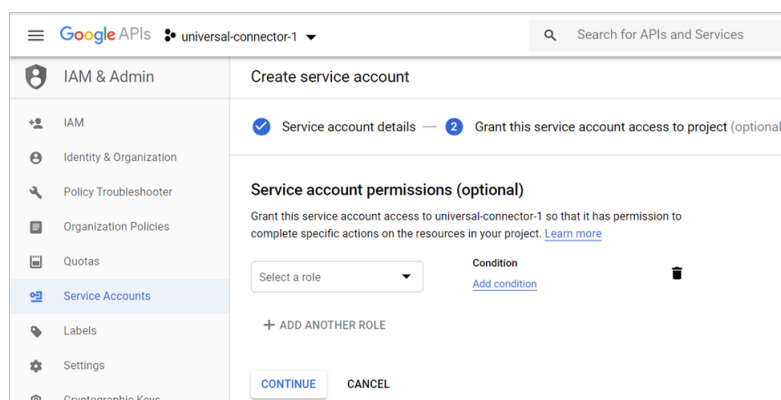
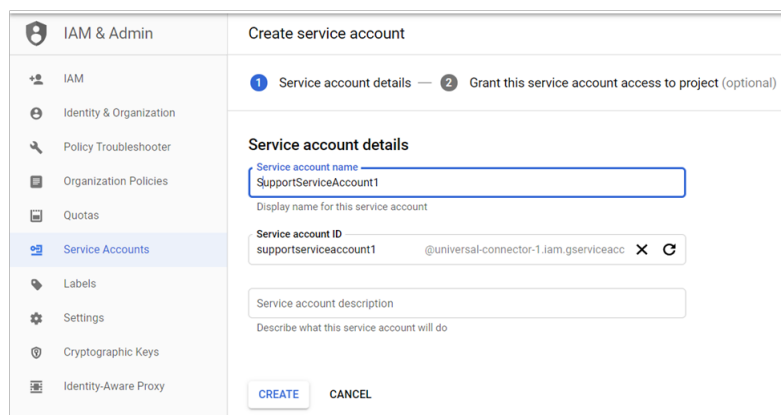
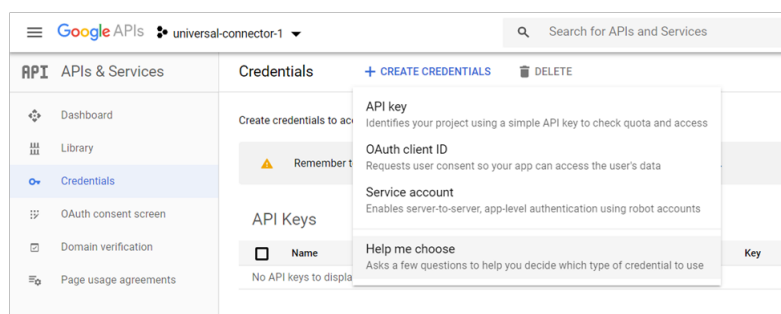
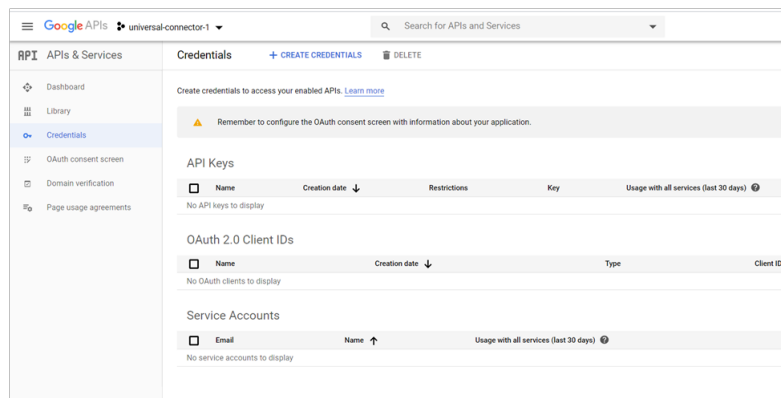
4. Similarly enable **Google Gmail API**.



5. After you have added both the API, the **Dashboard** shows them added.



6. Now, go to **Credentials > Create Credentials** to create service account credentials.



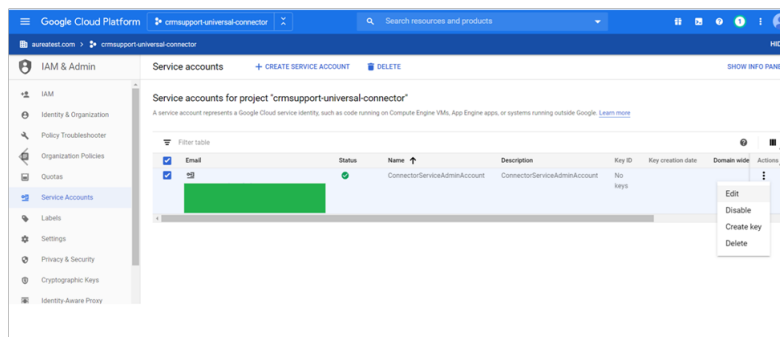
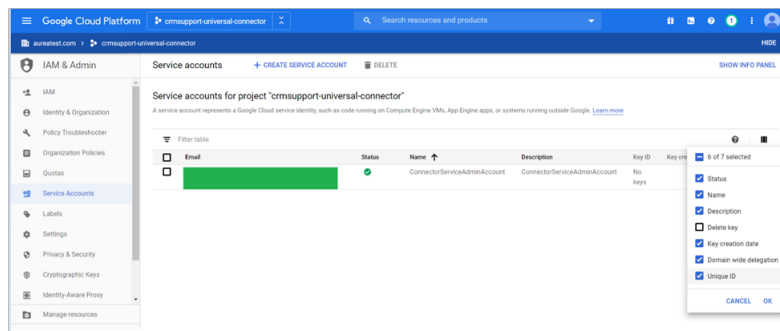
The screenshot shows the Google IAM & Admin console. The left sidebar has 'IAM & Admin' selected, with 'Service Accounts' highlighted. The main content area is titled 'Create service account' and includes a section for 'Grant users access to this service account (optional)' with roles like 'Service account users role' and 'Service account admins role'. Below this is the 'Create key (optional)' section, which instructs the user to download a private key file. The right sidebar shows the 'Create key (optional)' dialog with 'Key type' set to 'P12' (recommended) and 'JSON' as an alternative. 'CREATE' and 'CANCEL' buttons are visible at the bottom of the dialog.

You may either create & download the key now or can proceed and download it later, in last step.

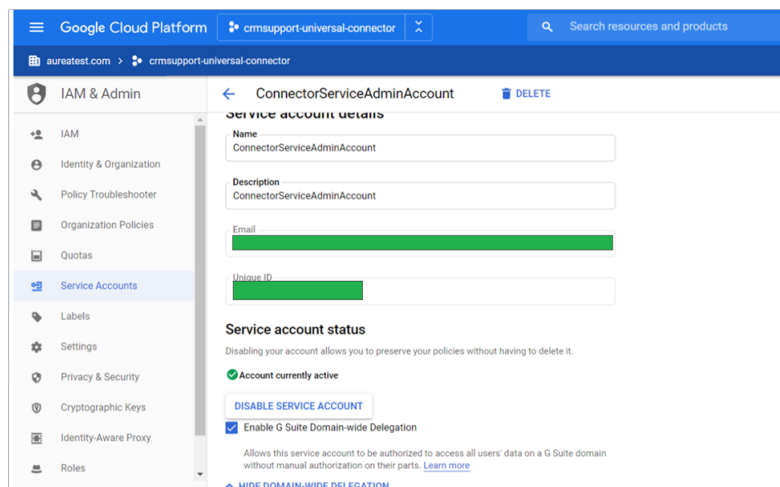
The screenshot shows the 'Credentials' page in the Google Cloud Platform console for the project 'universal-connector-1'. The left sidebar has 'APIs & Services' selected, with 'Credentials' highlighted. The main content area shows sections for 'API Keys', 'OAuth 2.0 Client IDs', and 'Service Accounts'. The 'Service Accounts' section lists one account: 'SupportServiceAccount1' with email 'support-service-account@universal-connector-1.iam.gserviceaccount.com'. A 'Manage service accounts' link is present.

The screenshot shows the 'Credentials' page in the Google Cloud Platform console for the project 'cm-support-universal-connector'. The left sidebar has 'APIs & Services' selected, with 'Credentials' highlighted. The main content area shows sections for 'API Keys', 'OAuth 2.0 Client IDs', and 'Service Accounts'. The 'Service Accounts' section lists one account: 'ConnectorServiceAdminAccount' with email 'connector-service-admin@cm-support-universal-connector.iam.gserviceaccount.com'. A 'Manage service accounts' link is present.

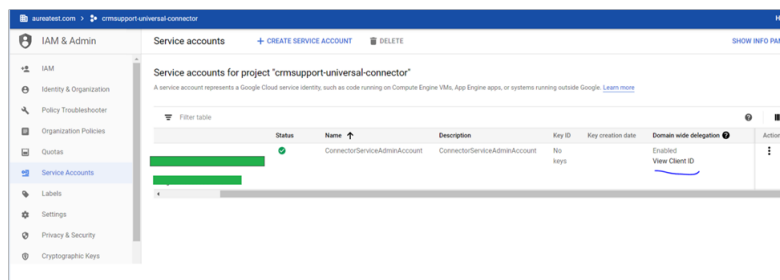
- Click on **Manage Service Account** in the above screenshot and add **columns** and then you can **Edit**.



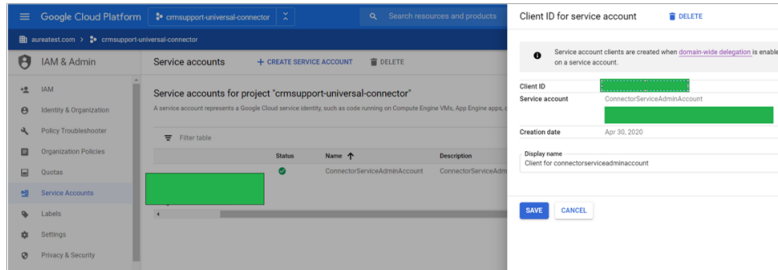
- Enable **G-Suite Domain-wide Delegation** as shown.



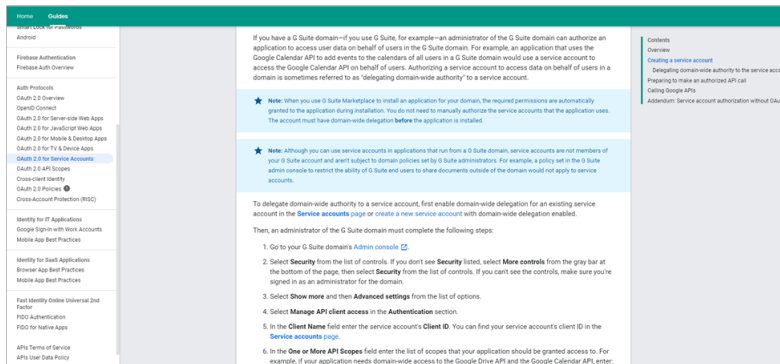
- Next is to enable Manage Client API Access, Click **View Client ID**.



10. Note down the client ID in notepad for future reference.



11. Click on the **Domain-wide delegation** link above and you should land on below page to navigate to **Admin Console**.

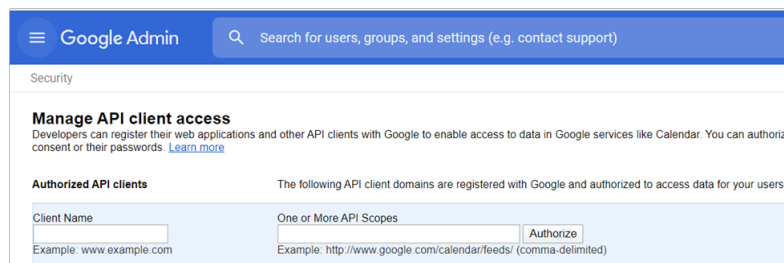
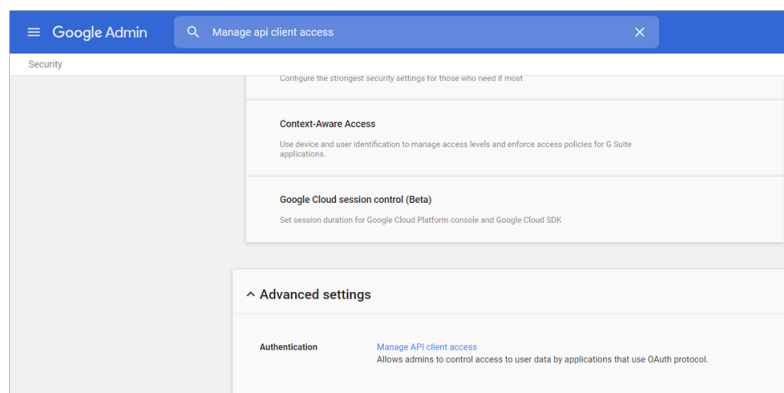
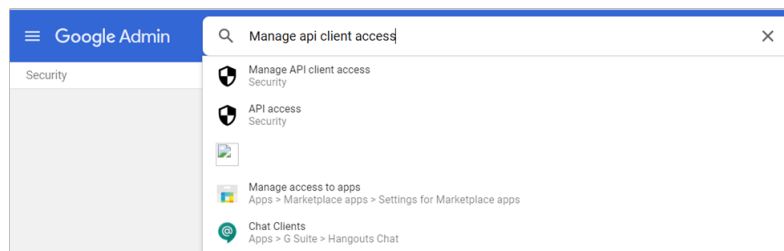


12. You may also Login with your Google Apps administrator account to <https://console.developers.google.com/> Admin console and go to **Security > Advanced > Manage API client access** screen.

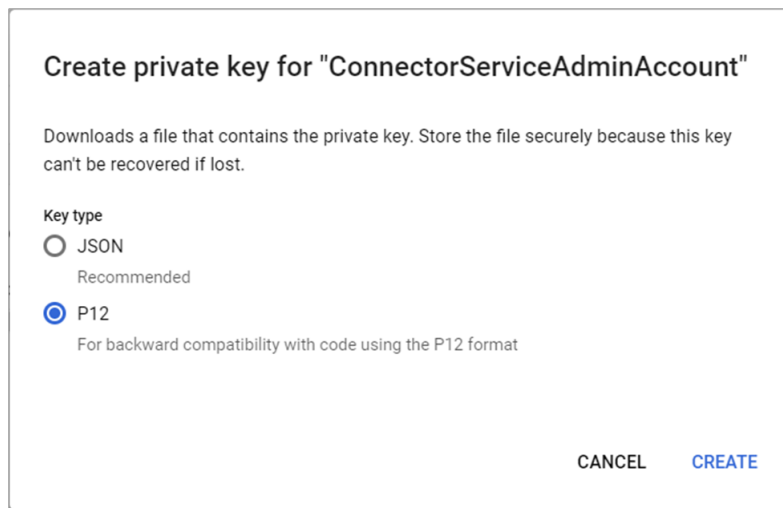
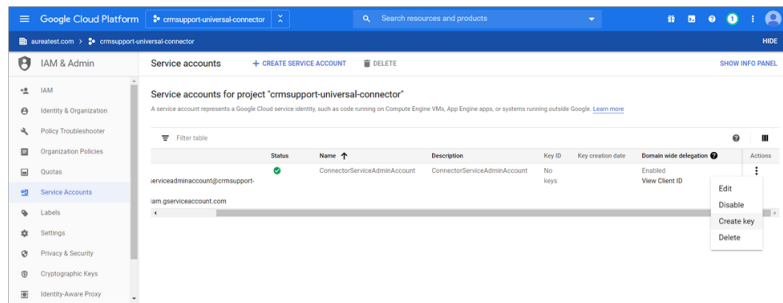
Paste the **Client ID** and the text

<https://mail.google.com/%2Chttps://www.googleapis.com/auth/calendar>

<https://mail.google.com/>, <https://www.googleapis.com/auth/calendar> in "**One or More API Scopes**" textbox then click **Authorize** button.



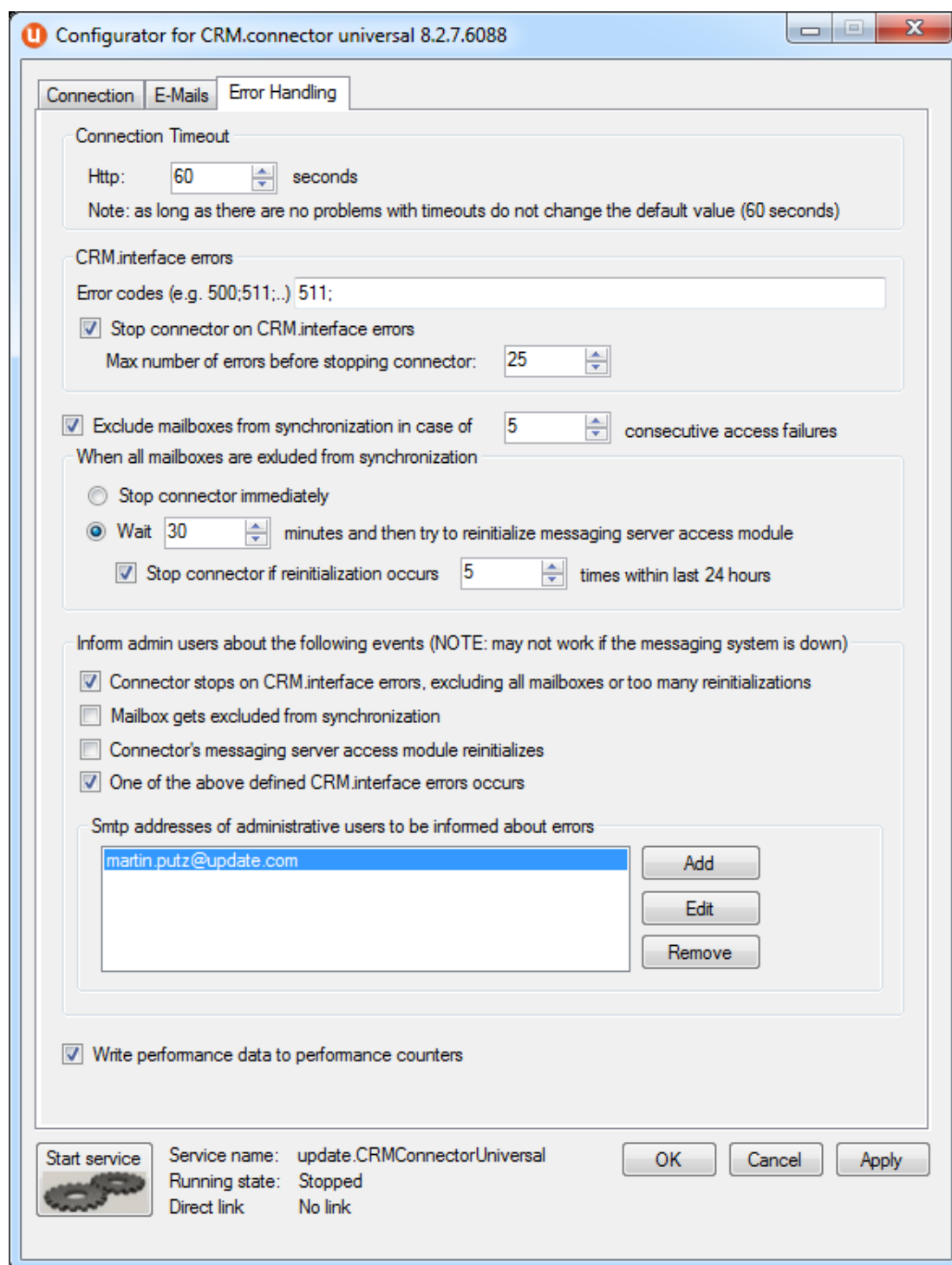
13. Once the above steps are done, you can now generate the KEY through **Create Key** menu and download the file, rename it to **connector.p12** and place it under Connector Root Directory.



Error Handling

Learn to configure the Error Handling Settings.

Error Handling Dialog



Set the **Error Handling** as per the below instructions:

http Connection Timeout

Timeout n seconds: normally there is no need to change the default value (60 seconds) unless you experience timeouts in the log file. Such timeouts typically are caused by "thin" connections between connector and Aurea.CRM http server or when synchronizing huge attachments. This setting solely concerns the timeout of requests from connector to http server, but not requests to the messaging system.

CRM.interface errors

You can define on which errors returned by CRM.interface connector should react and which actions to take.

Error codes (e.g. 500;511;...): Error codes to be monitored. Monitor the SYNCML error code 511. Error 511 is returned if something unexpected happened on the CRM.interface side – a system returning a lot of 511 errors is considered to be unhealthy and you should investigate further. Typically error 500 is related to configuration errors, e.g. if CRM.interface is not able to save a record because of a rights-constraint. A typical message for such an error is "Permission denied (required field missing)". These errors indicate that you have to change your configuration to ensure proper synchronization.

Stop connector on CRM.interface errors | Max number of errors before stopping connector: With this setting you can configure that connector should stop after exceeding the error count threshold.

Note: Exceeding this threshold does not necessarily stop connector immediately. Typically connector is sending packages of 10 items to CRM.interface server and needs to process the whole response and send all failure messages before quitting. If for example `MaxErrorCount="5"` and the actual error count was already set to 2 and all of the 10 items fail with `HttpErrorCodes="511"`, connector stops after 12 errors in total.

Exclude mailboxes from synchronization in case of "n" consecutive access failures:

In combination with the settings below you can force connector to reinitialize its messaging server interface (simplified: closing existing connection to the messaging system and establishing a new connection). The idea behind this feature is to exclude certain mailboxes which are not accessible due to lack of access rights and thus save processing time (typically such situations are not "self-healing").

When all mailboxes are excluded from synchronization

With this setting you can either stop connector or enforce a reinitialization of connector's messaging server interface.

Stop connector immediately: If this option is activated connector stops once all mailboxes are removed from the synchronization list due to access failures. This can happen if the messaging system is not reachable.

Wait n minutes and then try the reinitialize connector's messaging server access module: You can define the interval after which connector should reinitialize the connection to the messaging system. Normally removing all mailboxes from the synchronization list does not happen unless there are connection problems or the messaging system is down. Therefore expecting a certain delay between the occurrence of this problem and the reinitialization is reasonable.

Stop connector if reinitialization occurs n times within last 24 hours: With this setting you can force connector to stop, which might be reasonable in situations where there is a substantial and permanent problem in the infrastructure preventing connector from accessing the messaging system. Please note, that 24 hours in this case are meant literally - the error count is monitored 24 hours after the first occurrence (e.g. if it happens at 8 p.m., the observation time frame is until 8 p.m. of the next day).

Inform admin users about the following events

Note: In case the messaging system is down, connector does not send e-mails and therefore this notification feature fails.

Connector stops on groupware server errors, exclusion of all mailboxes or too many reinitializations: If this option is enabled, the defined administrative user(s) is/are informed if connector stops because of one of the above mentioned events.

Mailbox gets excluded from synchronization: If this option is enabled, the defined administrative user(s) is/are informed if a mailbox is removed from the list of synchronization users. There is only one e-mail per mailbox until connector is either restarted or reinitialized. (And – of course – the problem accessing this mailbox is persistent).

Connector's messaging server access module reinitializes: If this option is enabled, the defined administrative user(s) is/are informed if connector reinitialized the connection to the messaging system.

One of the above defined CRM.interface occurs: If this option is enabled, the defined administrative user(s) is/are informed if CRM.interface errors occur.

Smtp addresses of administrative users to be informed about errors: You can specify a list of SMTP addresses which should receive such information messages as defined above.

Note: Only one e-mail is sent if an error occurs, e-mails are not sent if the same error occurs when subsequently synchronizing the same appointment again.

Writing performance data to performance counters

Write performance data to performance counters: If this option is enabled, connector is writing its state and some performance data to performance counters. These performance data can be viewed and monitored with the Windows Performance Monitor software; the counters are available in the category "CRM.connector universal".

Note: The counters for connector are only visible for instances of connector for which the configuration option "Write performance data to performance counters" has been enabled.

Note: See the WIKI article Writing performance data to performance counters for further details on the performance counters.
