



Customer Relationship
Management

CRM ConnectLive 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

Aurea CRM connectLive is a plug-in for Microsoft Outlook.

It is available for Outlook 2010 and higher and, therefore, needs to be installed on the client. With CRM.connectLive, users have direct access to a contact person's data and child records as defined by the administrator, e. g. contacts, opportunities or project participations. CRM.connectLive communicates with the CRM.groupware server via XML over http(s) messages.

Basically, CRM.connectLive is configured in one configuration file, the `configuration.xml`. This file contains general information like URL, port of the groupware server as well as the definition about the data from Aurea CRM that needs to be displayed. For further details, see [The configuration.xml File](#).

If CRM.connectLive runs in combination with CRM.connector SE for Exchange, the user also can - in addition to accessing CRM data directly in Microsoft Outlook - link e-mails and appointments with CRM data (e.g. Opportunities). If the user moves or copies these e-mails to the synchronization folder, CRM.connector will synchronize them with the Aurea CRM database.

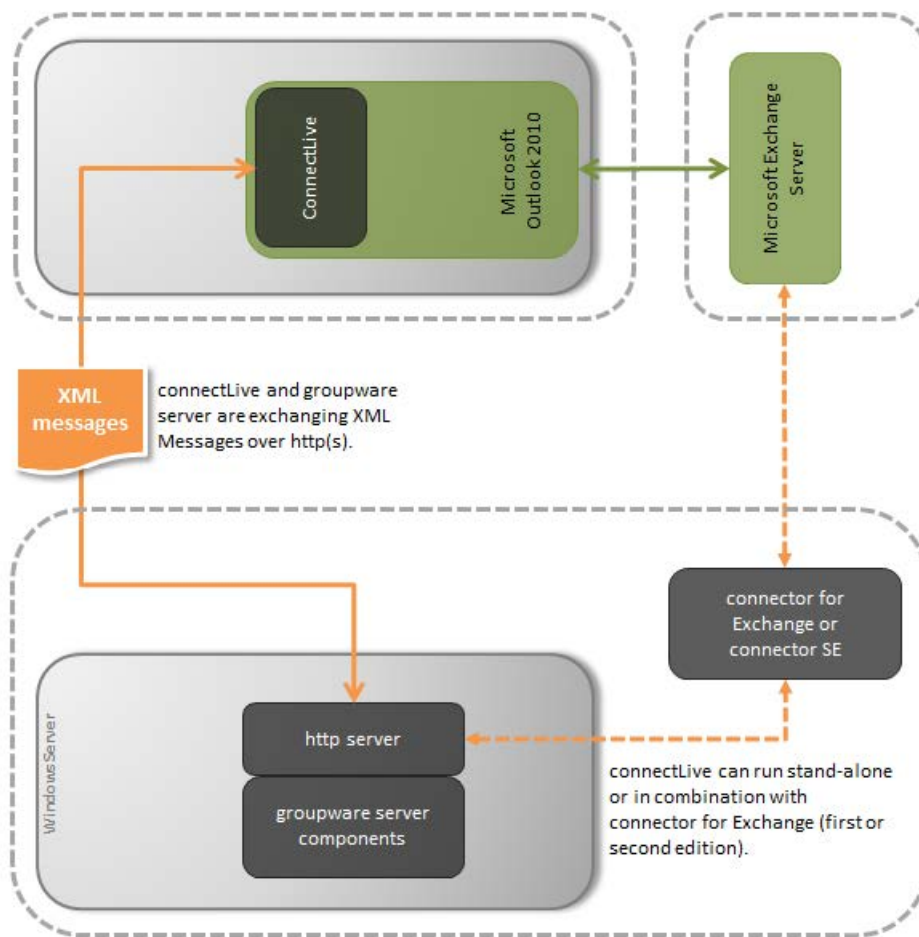
For further details on CRM.connector for Exchange or CRM.connector SE see the Technical Guide of these products.

Overview

Pictorial overview of the ConnectLive Administrator guide.

The product consists of two main parts:

- CRM.connectLive
- CRM.groupware server components



Functional Scope and Limitations

Functional overview of ConnectLive.

The following gives you an overview of the functions contained in this version and further planned functions:

Displaying CRM data in Microsoft Outlook

Item	Scope/Limitation
E-Mail View	YES
Appointment View	YES
Contacts (Contact Persons)	Planned for one of the next versions
Tasks	NO

Linking Microsoft Outlook objects with CRM data (e.g. Opportunities) with Drag & Drop

Item	Scope/Limitation
Synchronization	CRM.connectLive does not synchronize items. Synchronizing requires CRM.connector SE for Exchange. See the Technical Guide of your CRM.connector for its functional scope.
E-Mails	YES
Appointments	YES
Contacts (Contact Persons)	NO
Tasks	NO

General Functions

Item	Scope/Limitation
Single Sign-on	YES
Opening data in Aurea CRM web	YES
Multi language support	YES
SaaS support	YES

System Requirements

You can find information on requirements (hardware, software, access rights) at Aurea Support Portal: <https://support.aurea.com>.

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Installation

Learn how to install CRM ConnectLive.

CRM.ConnectLive installation is a two-step process:

1. Build the CRM.ConnectLive client MSI installer package.

Aurea provides a master setup of packages that includes the Windows Installer XML (WiX) toolset to create the CRM.ConnectLive client MSI installer. The tool set is configured and batch files are used to generate the MSI installer binaries for single user or multiple users on a machine.

2. Use the appropriate MSI installer binary to install CRM.ConnectLive client for single user or multiple users.

To install CRM.ConnectLive:

1. Install the master setup.
2. Configure the master setup configuration files with appropriate information. For example, you can define the HTTP server endpoint. You must adapt the following configuration files:
 - `Configuration.xml`: Configure the URLs of CRM systems and components like CRM Interface and CRM Web that CRM.ConnectLive has to communicate with. Define the infoareas that CRM.connectLive can query, for required information in the CRM database. All information specific to a CRM system is maintained in a profile. CRM.ConnectLive can communicate with multiple Aurea CRM systems using their specific profile, see [configuration.xml File](#).
 - `ConnectLiveConfigGlobal.xml`: Copy the contents of the `Configuration.xml` to this file, see [ConnectLiveConfigGlobal.xml File](#).
 - `deploymentInfo.xml`: Contains deployment information like folders to maintain configuration, manifest and other required files. Different information sets can be maintained for different user groups. Adapt this file accordingly, see [deploymentInfo.xml File](#).
 - `ConnectLiveLanguage.xml`: If you want to run CRM.connectLive in additional languages, this file must contain the user interface strings for each language, see [ConnectLiveLanguages.xml file](#).
3. To create the CRM.connectLive client MSI installer:
 - a. **Single user machine:** Execute `CreateConnectLiveSetupPerUser.bat` to generate the `ACRM.connectLive_SingleUser.msi` installer binary.
 - b. **Multi-user machine:** Execute `CreateConnectLiveSetupPerMachine.bat` file to generate `ACRM.connectLive_AllUsers.msi`.

The `<versionnumber>` is automatically replaced by the patch's version number and appended to the resulting MSI file.
4. Provide the `ACRM.connectLive_SingleUser.msi` installer to a single user on a machine installing CRM.ConnectLive. The user only has to execute the file and the installation is carried out without any further interaction. The connectLive client is installed in the `%localappdata%` folder, which is typically located at `C:\Users\<username>\AppData\Roaming`. The registry keys are installed in **HKEY_CURRENT_USER**.
5. To install CRM.ConnectLive for multiple users on a machine, distribute the `ACRM.connectLive_AllUsers.msi` file to the administrator of the machine. The machine administrator installs CRM.ConnectLive client for all users on the machine. The connectLive client is installed in the `%programfiles(x86)%` folder, which is typically `C:\Program Files (x86)`. The registry keys are installed under **HKEY_LOCAL_MACHINE**.

-
6. You can define that the user can install updates when available, see [connectLive.manifest file](#).

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Configuring CRM.connectLive

You can configure CRM.connectLive by adapting the `Configuration.xml` file to your needs.

CRM.ConnectLive can be configured to work with multiple CRM systems with different configurations. This allows the user to easily switch between CRM systems. ConnectLive can also be configured to provide the user a choice of languages and select the CRM system he wants to work with on restarting Outlook. All the different configurations can be managed from the `configuration.xml` file.

DeploymentInfo.xml

The `DeploymentInfo.xml` file defines the path to the folder used to distribute the configuration files.

For example, this is the path to the folder where CRM.connectLive looks for configuration information when Microsoft Outlook is started. The path must include the name of the XML file that defines the configuration. This allows you to define more than one configuration file. For example, you can define separate configuration files for different user groups. You can also configure ConnectLive to use an external authentication provider.

Example:

```
<?xml version="1.0" encoding="utf-8"?>
<Deployment>
  <Configuration>ftp://atpc2690.update.com/BTB8SP2/Configuration.xml</Configuration>
  <Languages>http://atpc2690.update.com/ConnectLive/BTB8SP2/Languages.xml</Languages>
  <UpdatesManifest>\\atpc2690.update.com\Versions_8\ConnectLive\Configurations\BTB8SP2\update.CRM.connectLive.manifest.xml</UpdatesManifest>
  <ProxySettings enabled="true" useDefaultCredentials="true" credentials="zkAWMtODOIcVizW4MUM8yQ==" />
</Deployment>
```

In the example the path leads to a local drive. You can also enter an URL using `http`, `https` or `ftp` protocols.

You can also configure the following in the `Deploymentinfo.xml` file:

- `<Languages>`: Specify the URL where the `ConnectLiveLanguages.xml` file can be found. For more details, see [ConnectLiveLanguages.xml](#).
- `<UpdatesManifest>`: Specify the URL where the update file can be found. For more details, see [ConnectLive.manifest](#).
- `<ProxySettings>`: Configure the proxy server. For more details, see [Configuring Proxy Settings](#).
- `<Authentication>` - Configure the details of an external authentication provider. For more details, see [Configuring an External Authentication Provider](#).

ConnectLive.manifest

Using the `connectLive.manifest` file you can define that available updates are indicated to the user.

The information is entered in the `ConnectLive.manifest` file. The path to the location of the manifest file must be given in the `DeploymentInfo.xml` file.

Enter the following information in the `connectLive.manifest` file:

- The current version number
- Whether this update is mandatory (mandatory = true).
- The URL where the new msi-package is available for download
- Information about the update.

```
<?xml version="1.0"?>
<package>
  <version>1.8.0</version>
  <mandatory>true/false</mandatory>
  <url> http://ATPC1891-2k8/update.seven/ConnectLive/ConnectLive_7.0.8.27.msi</url>
  <description>This update fixes a security ....</description>
</package>
```

CRM.connectLive checks this file on start-up whether a newer version is available. If the update is not mandatory, the user can decide whether to install the update.

ConnectLiveConfigGlobal.xml

The `ConnectLiveConfigGlobal.xml` file contains a copy of the `Configuration.xml`. Therefore, if you adapt your `Configuration.xml` file, do not forget to copy the content to the `ConnectLiveConfigGlobal.xml`.

The `ConnectLiveConfigGlobal.xml` is added to the client setup file and then stored locally. If the configuration cannot be downloaded from the server, the system accesses the `connectLiveConfigGlobal.xml` file.

Accessing CRM.connectLive in update.revolution SaaS

If you use CRM.connectLive in combination with update.revolution SaaS, authentication is carried out with the Revolution Access Service (RAS) using HTTP requests. RAS checks the credentials of a user and directs the request to the specific customer instance of Aurea CRM.

The users must enter their e-mail address as user name and their password.

To enable RAS you need to add the following node to the `ConnectLiveConfigGlobal.xml` file that you can find in the directory:

```
<revolutionauthentication>
  <ras>https://RAS-Web-Server</ras> Url to the RAS-WEB
  <appid>RasAppID</appid> RAS-Application-ID assigned to the User
</revolutionauthentication>
```

ConnectLiveConfigUser.xml

The `connectLiveConfigUser.xml` file contains user-specific settings and is stored on the client in the `..\AppData\Roaming\update CRM\connectLive` directory.

The `connectLiveConfigUser.xml` file contains following information:

- `<search infoareas="0,1,2,3,4">`: Defines which info areas are searched. By default, all info areas defined in the `Configuration.xml` are listed in the order they are defined in the `Configuration.xml`. If this tag does not exist, it is automatically created.
- `<cache=enabled timeout=300>`: Defines that data is cached on the client. The default cache period is 300 seconds.

ConnectLiveLanguages.xml

The `ConnectLiveLanguages.xml` file allows you to use use CRM.connectLive in more than the two default languages (German and English). You must enter the translation for each additional language in this file. This file must be stored in the directory given in the `DeploymentInfo.xml` file.

The user can select the desired language when logging on. The client downloads the language file during startup and stores it in the `%appdata%\update\ConnectLive\` directory.

Example:

```
<?xml version="1.0"?>
<languages>
  <language name="Deutsch" id="de">
    <string id="1">Zurück zum Suchergebnis</string>
    <string id="2">Zurück zum Datensatz</string>
    <string id="3">Verknüpfungen</string>
    ...
  </language>
  <language name="English" id="en">
    <string id="1">Return to search results</string>
    <string id="2">Return to records</string>
    <string id="3">Go to links</string>
    ...
  </language>
  <language name="Polish" id="pl">
    <string id="1">Wróć do wyników wyszukiwania</string>
    <string id="2">Wróć do widoku rekordów</string>
    <string id="3">Przejdź do widoku linków</string>
    ...
  </language>
</languages>
```

Configuring Proxy Settings

If a proxy server with authentication is applied, an HTTP error (407) can occur. You can prevent this error by setting the `<ProxySettings>` xml element.

Example:

```
<ProxySettings enabled="true" useDefaultCredentials="false"
credentials="C8c/BC4QXJ4ob6OAGbVduxbmL5FG/V5RWYjfUBqs2Lc="/>
```

The following attributes are available:

- `enabled='true'`: If set to `true`, the `useDefaultCredentials` attribute is checked.
- `useDefaultCredentials='false'`: If set to `true`, the default credentials are applied. If set to `false`, the credentials given in the `credentials` attribute are applied.
- `credentials='abcxyz'`: If this attribute is not given or is left empty, no credentials are applied for the proxy. If credentials are given, the encrypted value is decrypted into username and password and then applied to set the `NetworkCredential` object for the proxy.

Configuring an External Authentication Provider

You can configure ConnectLive to use an external authentication provider to authenticate ConnectLive users. You can enable this by setting the following properties in the `<Authentication>` element of the `Deploymentinfo.xml` file:

- `url` - The URL of the external authentication provider.
- `showExternalLogin` - Set this property to `true`, to enable external authentication.
- `saveCookies` - Setting this to `true`, enables ConnectLive to use the cookies for subsequent authentication with the external provider, until the cookies expire.

As an example, see the following sample configuration:

```
<Authentication url="https://crmtest.com/UpdateCRM_web"
  showExternalLogin="true"
  saveCookies="true"
  sendNtlmCredentials="false"
  sso="true"/>
```

configuration.xml

The `configuration.xml` file contains information about the CRM systems like CRM interface and CRM Web URLs, the info areas that can be searched in the Aurea CRM database and the fields that can be displayed.

It uses profiles to maintain information that is specific to different CRM systems.

The following description refers to the default `configuration.xml` file provided by Aurea and is stored in the `Configuration` directory of your installation.

The file is divided into several sections:

- `<common>`: Contains the definitions for the default browser used to open an Aurea CRM record and the folder used to synchronize emails by clients, see [Common](#) on page 16.
- `<Profiles>`: Contains the definitions of profile template and profile(s).
 - `<template>`: contains configuration of vCard, display and search info areas.
 - `<vcard>`: Defines the layout of the business card and the Details area, see [<vcard> Section](#).
 - `<display>`: Defines which additional info areas the user can access, see [<display> Section](#).
 - `<search>`: Defines the fields that are searched, when the user enters search criteria in the search field, see [<search> Section](#).
 - `<profile>`: Contains CRM Interface and CRM Web URLs. There can be multiple profile sections defined targeting different CRM installations.
 - `<interface>`: Defines the CRM Interface server URL and Port number.
 - `<crmweb>`: Defines the address of the Aurea CRM web server

Common

In the `<common>` section you can define if the default system browser will be used to open a CRM record and set the folder where the emails will be stored for synchronization.

For example,

```
<common>
  <useDefaultSystemWebBrowser>true</useDefaultSystemWebBrowser>
  <synchronizationFolder path="<inbox>/CRM" createIfNotFound="true" method="move"
/>
</common>
```

The sections below describe the two elements..

`<useDefaultSystemWebBrowser>`

You can define with the `<useDefaultSystemWebBrowser>` element which browser is used to open an Aurea CRM record when a user clicks on a link in CRM.connectLive:

- By default, if this element is not defined then Internet Explorer is used.
- If set to `true`, the browser the user has set as default browser (the browser that is registered as the default browser in the operating system) is used.
- If set to `false`, Internet Explorer is used.

If the browser is already open, the record is displayed according to the user's browser settings, e.g. in a new tab or a new browser window. Example:

```
<useDefaultSystemWebBrowser>true</useDefaultSystemWebBrowser>
```

<synchronizationFolder>

In the <common> section, you can define that the user can move an e-mail to a specific synchronization folder. How often this folder is synchronized depends on CRM.connector SE.

The <synchronizationFolder> tag can have three attributes:

- **path**: Defines the folder where to the items are moved.
- **createIfNotFound**: Creates the folder if it does not exist yet. Possible values `true/false`.
- **method**: Defines whether the items are moved or copied.

Possible values: `move` (default) / `copy`

Example:

```
<synchronizationFolder path='<inbox>/CRM' createIfNotFound='true' method='copy'>
```

`<inbox>\CRM` is CRM.connector's default value and creates (if it does not exist yet) a sub-folder to the `Inbox` called `CRM`.

In addition, if you set this parameter, the **Send & Sync** button is displayed in the in the e-mail form. If the user clicks on this button, the e-mail is sent and a copy is stored in the synchronization folder automatically (according to the user's settings in the **Save messages** section of the e-mail clients **Options**).

Profiles

The <Profiles> section contains definition of the profile template and profile(s).

The attribute `autologin` can be used to configure whether the last used profile should be used to log in automatically into CRM after Outlook is restarted.

Template

The <template> section contains configuration information of the vCard, display and info areas to search.

These elements are used to display data when connectLive connects to a CRM specified in the profile section.

Below are the three kinds of section:

<vcard> Section

The <vcard> element defines the elements that are displayed in CRM.connectLive in the business card area.



The <vcard> section contains further sections:

- <searchareas>: Defines the info areas (tables) and the fields that are searched in the Aurea CRM database.
- <displays> defines the fields that are displayed for a person or company if matching data is found.
- The <display> element of the <displays> section also contains the <details> section. Data defined in this sections is only displayed after the user opens the Details area in the application.

These sections contain further elements defining which fields of which tables are displayed. In addition, fields can be grouped and labels can be added.

<searchareas> Element

The <searchareas> element defines the info areas and fields (by default, the companies and persons and their e-mail fields) that are automatically searched when a user clicks on an e-mail from a contact person.

For each info area to be searched, you need to add a <infoarea> element. The <infoarea> element contains a <table> element (defining the tables that are searched) and a <fields> element with the <group> and the <field> elements (defining the e-mail fields to be searched).

The `<display>` section also contains following elements:

- `<infoarea>`
- `<table>`
- `<fields>`
- `<group>`
- `<field>`

For more information on these elements, see [Elements Contained in all Sections](#).

Example:

```
<searchareas>
  <infoarea>
    <table tablename="Person" table="KP">
      <table tablename="Company" table="FI"/>
    </table>
    <fields>
      <group>
        <field tablename="KP" fieldname="E-mail1"/>
        <field tablename="KP" fieldname="E-mail2"/>
        <field tablename="KP" fieldname="E-mailPriv"/>
      </group>
    </fields>
  </infoarea>
</searchareas>
```

`<displays>` Element

The `<displays>` element of the `<vcard>` encloses the content displayed in the business card. If different content should be displayed (e.g. if a contact person is found, person and company data is displayed otherwise only company data is displayed), you must add a `<display>` element for each content type.

The fields are displayed in the order as they are entered in the `configuration.xml` file. You can also group them, see [<group> Element](#).

The `<displays>` element also contains the `<details>` element. The fields added to the `<details>` element are only displayed in the application after the user clicks on the **Details** button.

`<display>` Element

The `<display>` element contains the fields that are displayed in the business card.

If you want to display differing data you must add a `<display>` tag for each data group you want to display. These elements contain the fields. You can also group these fields, see [Elements Contained in all Sections](#).

Example:

The following `<displays>` element contains two `<display>` elements: the first contains the fields that are display in the application when a contact person for a company is found, the second defines the content shown for companies without person data.

```
<displays>
  <display>
    <group>
      <field tablename="KP" fieldname="Sex"/>
      <field tablename="KP" fieldname="FirstName" newline="false"/>
      <field tablename="KP" fieldname="LastName" newline="false"/>
    </group>
    <group>
      <field tablename="KP" fieldname="JobTitle"/>
    </group>
    <group>
      <field tablename="FI" fieldname="Company"/>
    </group>
    <group label="Contact">
      <field tablename="KP" fieldname="E-mail1" icon="mail"/>
      <field tablename="KP" fieldname="Telephone" icon="phone"/>
      <field tablename="KP" fieldname="MobileNo" icon="phone"/>
    </group>
    <group label="Address">
      <field tablename="FI" fieldname="Street"/>
      <field tablename="FI" fieldname="ZipCode"/>
      <field tablename="FI" fieldname="City" newline="false"/>
      <field tablename="FI" fieldname="Country"/>
    </group>
    <details>
      <group>
        <field tablename="FI" fieldname="Internet"/>
        <field tablename="KP" fieldname="Division"/>
        <field tablename="KP" fieldname="DOB"/>
        <field tablename="KP" fieldname="MainContactPerson"/>
        <field tablename="KP" fieldname="Acaddegree"/>
        <field tablename="KP" fieldname="Infix"/>
        <field tablename="KP" fieldname="Position"/>
      </group>
    </details>
  </display>
  <display>
    <group>
      <field tablename="FI" fieldname="Company"/>
    </group>
    <group label="Address">
      <field tablename="FI" fieldname="Street"/>
      <field tablename="FI" fieldname="ZipCode"/>
      <field tablename="FI" fieldname="City" newline="false"/>
      <field tablename="FI" fieldname="Country"/>
    </group>
    <details>
      <group>
        <field tablename="FI" fieldname="Internet"/>
      </group>
    </details>
  </display>
</displays>
```

Note: If you add `icon="mail"` to an e-mail field, the e-mail address is linked to the e-mail application.

`<details>` Element

Each `<display>` element can contain a `<details>` element. The `<details>` element defines which fields are displayed in the business card's **Details** area:

Details

Internet: www.update.com
Division: Production/Logistics
MainContactPerson: N
Acaddegree: n/a
Infix: n/a
Position: Employee

This section is not displayed by default, the user must click the **Details** button first. You must add a `<fields>` element for each field. You can also group these fields, see [Elements Contained in all Sections](#).

Example:

```

<details>
  <group>
    <field tablename="FI" fieldname="Internet"/>
    <field tablename="KP" fieldname="Division"/>
    <field tablename="KP" fieldname="DOB"/>
    <field tablename="KP" fieldname="MainContactPerson"/>
    <field tablename="KP" fieldname="Acaddegree"/>
    <field tablename="KP" fieldname="Infix"/>
    <field tablename="KP" fieldname="Position"/>
  </group>
</details>

```

<display> Section

The `<display>` element contains the info areas and all relevant information (fields, filters, etc.) that are displayed in the area below the business card.

The `<display>` section also contains following elements:

- `<infoarea>`
- `<table>`
- `<fields>`
- `<group>`
- `<field>`

For more information on these elements, see [Elements Contained in all Sections](#).

<sortlist> Element

With the `<sortlist>` element you can sort the records in the result list. The sort criteria is defined in `<sort>` elements. To combine sort criteria add a `<sort>` element for each criteria. Data is then sorted in the order of the `<sort>` elements.

Attributes for the <sort> element:

- `tablename`: The name of the table given in the info area, e. g. Contacts or Opportunities.
- `fieldname`: The name of the field that the result list is sorted by, e. g. Date.
- `reverse`: Defines whether the list is sorted descending (`=true`).

Possible values: `true/false`.

Default: `false`

Example:

The following example defines that the list of opportunities is sorted by level in descending order.

```
<sortlist>
  <sort tablename="Y1" fieldname="Level" reverse="true"/>
</sortlist>
```

<condition> Element

You can reduce the number of records displayed by defining conditions. You need to define a `<condition>` element for each table to which a condition is applied.

The `<condition>` element contains:

- `<lop>` element: Defines the operator that links different comparisons.

Attribute:

- `value`: The operator, i.e. AND or OR
- `<cond>` element: Used within a `<conditon>` element and defines the table and the field that are compared to the comparison value.

Attributes:

- `tablename` (mandatory): The name of the table that is accessed, e.g. Contacts or Opportunity.
- `fieldname` (mandatory): The field name of the field you want to compare, e. g. Date.
- `op`: The comparison operator.

Possible values: `<`, `>`, `=`, `<=`, `>=`, `<>`, `()` (i.e. include), `)(` (i.e. exclude). You can combine these values.

Note: These operators must be entered in HTML encoding as, for example, the `<` or `>` characters have another purpose in XML. For example, instead of `<` you need to enter `"<"` and instead of `>` `">"`.

The criteria given is compared in all the fields that are given in the `<cond>` element.

- `value`: The value the field content is compared with.

You can add more than one `<condition>`, `<cond>` and `<lop>` elements to an `<infoarea>` element to combine conditions.

Example:

The following example limits the number of contact records listed by comparing the date to the current date +/- one week. Only the contacts within this two weeks period are displayed.

```
<condition>
  <lop value='and'>
    <cond tablename='MA' fieldname='Date' op='>=' value='$curDay-1w' />
    <cond tablename='MA' fieldname='Date' op='<=' value='$curDay+1w' />
  </lop>
</condition>
```

Example for search:

```
<condition>
  <lop value='and'>
    <cond tablename='FI' fieldname='Company' op='()' />
  </lop>
</condition>
```

No comparison value (value attribute) is given.

The operator `op='()'` results in the search criteria entered being compared to the field given in the `<cond>` element.

<search> Section

The `<search>` element enables you to set the info areas to be searched and the fields displayed when a search is performed.

The `<search>` element defines:

- The info areas and the fields that are searched when the user enters search criteria into the search field.
- The fields that are displayed when matching records are found.

You must add an `<infoarea>` section for each info area to be searched. You must also add a `<condition>` element.

The `<search>` section also contains following elements:

- `<infoarea>`
- `<table>`
- `<fields>`
- `<group>`
- `<field>`

For more information on these elements, [<infoarea> Element](#). You must also add conditions, [<condition> Element](#).

Example:

The following example shows the definition for the Company info area.

```
<search>
  <infoarea>
    <table tablename='Company' table='FI' />
    <fields>
      <group>
        <field tablename='FI' fieldname='Company' />
      </group>
      <group label='Address'>
        <field tablename='FI' fieldname='Street' />
        <field tablename='FI' fieldname='ZipCode' />
        <field tablename='FI' fieldname='City' newline='false' />
        <field tablename='FI' fieldname='Country' />
      </group>
    </fields>
    <condition>
      <lop value='and'>
        <cond tablename='FI' fieldname='Company' op='()' />
      </lop>
    </condition>
  </infoarea>
  .
<! --- Further info areas --!>
  .
</search>
```

Profile Section

The <profile> section contains CRM interface and CRM web URLs in the <interface> and <crmweb> sections.

There can be multiple <profile> sections defined targeting different CRM installations. The name of each profile must be unique and each profile can have the `languages` attribute which defines the language the user can choose on the login screen. The `languages` value consists of language id (defined in `languages.xml` file) or ids separated with semicolon. If an attribute doesn't exist or has an empty value the English language is used by default.

<crmweb> Section

The <crmweb> section contains the URL of the Aurea CRM web server installation that is used to open a record directly from CRM.connectLive, e.g. when a user clicks on a link in the application.

Example:

```
<crmweb>
  http://myservername.mycompany.com/btb_mss/Framework
</crmweb>
```

<interface> Section

The <interface> element defines the CRM.groupware server and the port.

Example:

```
<interface>
  <url>http://myservername.mycompany.com/url>
  <port>18080</port>
  <useDefaultSystemWebBrowser>true</useDefaultSystemWebBrowser>
</interface>
```

If you are configuring an Aurea CRM revolution SaaS version:

- Add the following element to the `<interface>` section:

```
<revolutionauthentication>true</revolutionauthentication>
```

Possible values: `true/false` (default). In a SaaS environment, this option must be set to `true`. Then, the `SingleSignOn` control is not displayed and HTTP Basic Authentication is applied.

- If you want to use RAS (Revolution Access Service) for user authentication in SaaS environments (instead of Single Sign-on), add also the following elements:

`<ras></ras>`: Contains the RAS webserver URL.

`<appid></appid>`: Contains the RAS application ID assigned to the groupware server.

Elements Contained in all Sections

Learn about the elements contained in all sections.

The `<infoarea>` element defines which table and which fields are searched. You must add an `<infoarea>` element for each info area.

The `<infoarea>` element contains:

- `<table>` element (mandatory)
- `<fields>` element (mandatory). You must add a `<field>` element for each field to be searched.
- `<group>` element (mandatory)
- `<field>` element (mandatory)

Example:

```
<infoarea>
  <table tablename="Person" table="KP">
    <table tablename="Company" table="FI"/>
  </table>
  <fields>
    <group>
      <field tablename="KP" fieldname="E-mail1"/>
      <field tablename="KP" fieldname="E-mail2"/>
      <field tablename="KP" fieldname="E-mailPriv"/>
    </group>
  </fields>
</infoarea>
```

In this example, the Person and the Company tables are searched for matching records.

`<table>` Element

The `<table>` element defines the tables that are accessed. You need to add a `<table>` element for each table within the first `<table>` element.

Attributes:

You can use the following attributes in the `<table>` element:

- `tablename` (mandatory): This name is displayed in CRM.connectLive, e.g. Company, Contact Person, Appointments.
- `table` (mandatory): The ID of the table that is accessed, e.g. FI, KP, MA.
- `mmlink="true"`: Attribute that the user can link e-mails with this table. Exception: You cannot link e-mails with company or person records.

Exception: This attribute is not valid in the `<searcharea>` element of the `<vcard>` section.

Possible values: `true/false`.

- `flags="256"`: If you set the attribute `flags="256"`, records are only listed if a record exists both, the parent and the child record.

Exception: This attribute is not valid in the `<searcharea>` element of the `<vcard>` section.

Example: Objects and object participants are read from the database. If `flags=256` is set, only the records where the e-mail sender is a participant are displayed. If you do not set this attribute, no objects, but all object participants are listed.

Example:

The following example defines that data is searched in two tables, data is only displayed, if linked records are found.

```
<table tablename="Property Participant" table="OB">
  <table tablename="Projects" table="OJ" mmlink="true" flags="256"/>
</table>
```

As the `mmlink` and `flags` attributes are set, this is a `<table>` tag from the `<display>` section.

<fields> Element

The `<fields>` element defines which fields are searched or displayed. You need to add a `<field>` element for each field within the `<fields>` element.

Example:

```
<fields>
  <group label="Contact">
    <field tablename="KP" fieldname="E-mail1" icon="mail"/>
    <field tablename="KP" fieldname="Telephone" icon="phone"/>
    <field tablename="KP" fieldname="MobileNo" icon="phone"/>
  </group>
  <group label="Address">
    <field tablename="FI" fieldname="Street"/>
    <field tablename="FI" fieldname="ZipCode"/>
    <field tablename="FI" fieldname="City" newline="false"/>
    <field tablename="FI" fieldname="Country"/>
  </group>
</fields>
```

This example is displayed in CRM.connectLive as follows:



<group> Element

You can group fields, e. g. you can combine first and last name to be displayed in a group.

The groups are displayed in the application in the same order they are added in the `configuration.xml` file.

The `<field>` elements of a section must always be within a `<group>` element.

Attribute:

You can define the following attribute.

- `label`: The given term is displayed as heading for the group.

If you run `CRM.connectLive` in several languages, you can also enter the *StringID* defined in the `ConnectLiveLanguages.xml` file (instead of a term). For example, `label='#200'` displays the term that was assigned to this value.

Exception: Labels are not applied to the first two groups in the `<display>` element of the `<vcard>` section.

Example:

```
<group label="Contact Person">
  <field tablename="KP" fieldname="Sex"/>
  <field tablename="KP" fieldname="FirstName" newline="false"/>
  <field tablename="KP" fieldname="LastName" newline="false"/>
</group>
```

<field> Element

The `<field>` elements define which fields are accessed, searched or displayed. You must add a `<field>` element for each field in the database you want to access, search or display.

All `<field>` elements of an area must always be within a `<group>` element.

Attributes:

- `tablename` (mandatory): The ID of the table that is accessed, e.g. FI, KP, MA.
- `fieldname` (mandatory): The field name of the field you want to search, display or access, e. g. Street or ZipCode.
- `icon`: You can define that an icon is displayed at the left side of a field:



Note: Currently only three icons can be displayed: phone, mail and company.

- `maps`: If you add this attribute, the  (**Show location on map**) button is displayed in the application besides the address. If the user clicks this button, the address is displayed in Google Maps.

The fields that have this attribute set to `true` (default value = `false`) are used in the Google Maps URL:

```
<group label="Company Address">
  <field tablename="FI" fieldname="Street" uselabel="false" maps='true' />
  <field tablename="FI" fieldname="ZipCode" uselabel="false" maps='false' />

  <field tablename="FI" fieldname="City" newline="false" uselabel="false"
maps='true' />
  <field tablename="FI" fieldname="Country" uselabel="false" maps='true' />

</group>
```

- `newline`: By default, if you add several fields, each field is displayed in a new line. Use the `newline` attribute to display more than one field in the same line. The first field to be displayed in one line does not need this attribute.

Exception: This attribute is not valid in the `<searcharea>` element of the `<vcard>` Section.

Values: `true` (default) / `false`.

- `uselabel`: Defines whether a text label is applied.

Exception: This attribute is not valid in the `<searcharea>` element of the `<vcard>` Section.

Possible values: `true` (default)/`false`.

<attendee> Section

Defines the email address and other details of the attendee.

It includes the details that are displayed like the First Name, Last Name, Company Name and any other relevant fields.

The attendee email address is defined in the `<emailfield>` element and the other details that are displayed are defined in the `<displayname>` element.

For example, in the following sample the email address is retrieved from the KP infoarea and the field name is E-mail1. The display details include the contact's first name and last name, and the company name is retrieved from the FI infoarea that is linked to the KP infoarea.

```
<infoarea>
  <table tablename="Person" table="KP" mmlink="true">
    <table tablename="Company" table="FI" />
  </table>
  <fields>
    <group>
      <field tablename="KP" fieldname="Sex" />
      <field tablename="KP" fieldname="FirstName" newline="false" />
      <field tablename="KP" fieldname="LastName" newline="false"/>
    </group>
    <group>
      <field tablename="FI" fieldname="Company" uselabel="false" icon="company" />
    </group>
    <group>
      <field tablename="KP" fieldname="JobTitle" />
    </group>
    <group label="Contact">
      <field tablename="KP" fieldname="E-mail1" icon="mail" uselabel="false" />
      <field tablename="KP" fieldname="Tel1" icon="phone" uselabel="false" />
      <field tablename="KP" fieldname="Tel2" icon="phone" uselabel="false" />
    </group>
    <group label="Address">
      <field tablename="FI" fieldname="Street" uselabel="false" />
      <field tablename="FI" fieldname="ZipCode" uselabel="false" />
      <field tablename="FI" fieldname="City" newline="false" uselabel="false" />
      <field tablename="FI" fieldname="Country" uselabel="false" />
    </group>
  </fields>
  <condition>
    <lop value="or">
      <cond tablename="KP" fieldname="LastName" op="()" />
    </lop>
  </condition>
  <attendee>
    <emailfield tablename="KP" fieldname="E-mail1"/>
    <displayname>
      <part tablename="KP" fieldname="FirstName" textafter=" " />
      <part tablename="KP" fieldname="LastName" />
    </displayname>
  </attendee>
</infoarea>
```

Formatting the displayed details

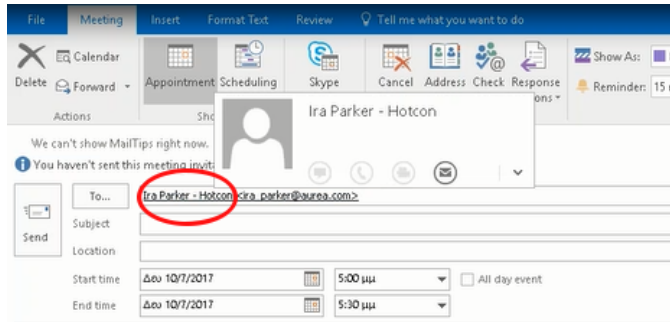
The fields added to the `displayname` element are concatenated and displayed in outlook. The `displayname` element allows a certain measure of control on how the field values are displayed. You can use the following attributes to format the displayed details:

- `textbefore`—allows you to introduce a whitespace character or text value before the field value.
- `textafter`—allows you to introduce a whitespace character or text value after the field value.

For example, the following configuration sample introduces a blank space between the firstname and last name, and the characters blank space, dash and blank space between the last name and company name.

```
<attendee>
  <emailfield tablename="KP" fieldname="E-mail1"/>
  <displayname>
    <part tablename="KP" fieldname="FirstName" textafter=" " />
    <part tablename="KP" fieldname="LastName" textafter=" - " />
    <part tablename="FI" fieldname="Company" />
  </displayname>
</attendee>
</infoarea>
```

The following screenshot shows how the details are displayed in MS Outlook:



Ira Parker is the name (first and last) of the contact followed by a space, a hyphen, a space and name of the company.

4

Troubleshooting

Troubleshooting ConnectLive.

If errors occur or if CRM.connectLive behaves unexpectedly, try the following:

- Log file stored in %appdata%\update CRM\connectLive\
 - Check the log messages.
 - Check the path from where the configuration is downloaded.
 - If configuration was downloaded successfully, check the XML queries sent to the CRM.groupware server and the server's responses.
 - Check for exceptions.
- DeploymentInfo.xml:
 - Check the address of the configuration file.
- Firewall
 - As CRM.connectLive sends XML requests to the CRM.groupware server via http(s), maybe you must allow Microsoft Outlook to pass the firewall, or you must unlock the used communication port.
- Log file for client installation:
 - If the client setup is not carried out correctly, a log file can be created using the `msiexec` command. Example:

```
msiexec /i update CRM_ConnectLive_7.0.8.xx.msi /log MyLog-File.txt
```