**GeniusConnect for Microsoft® Outlook® Example**

GeniusConnect can be installed and configured on every Outlook installation in an Organization; however in larger environments with MS Exchange server one dedicated GeniusConnect install has a number of advantages.

1. No installs and maintenance of GeniusConnect on client PC's
2. No performance hit on client PC's during the synchronizations
3. No connectivity errors on client PC if the client is offline

This example describes how to synchronize multiple MS Exchange user accounts from one dedicated PC/Server with MS Outlook and GeniusConnect.

In this example we want to synchronize user's Contact folders with a CRMCustomers table. Since our CRM system can change the Contact data outside of GeniusConnect, we will setup LastModificationTime compare, to solve possible synchronization conflicts. We want to sync only records owned by the user, so we will have to specify a filter and a default value with owner data for inserts. This will be **two-way synchronization**.

Hardware:
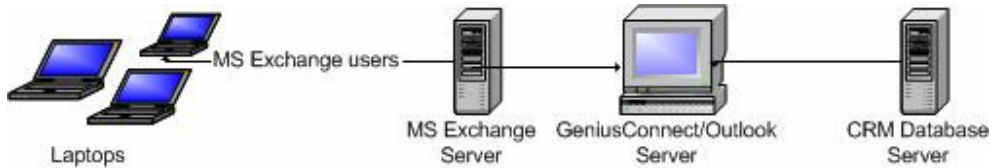
System boundary:
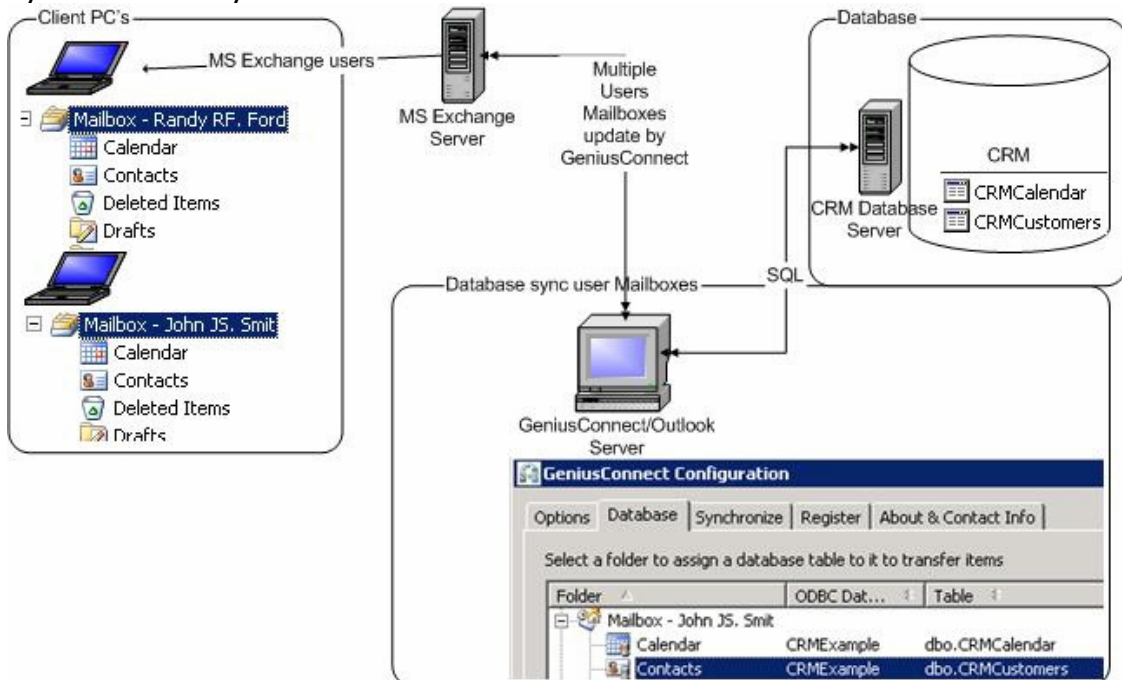
Requirements:

You must have a basic knowledge of MS Exchange/Outlook administration.

Servers

- MS Exchange
  The administrator setting up the configuration must have full permissions on user Mailboxes/Folders used in synchronization
- Database server
  any ODBC compliant database like Oracle, mySQL etc.
  this example uses MS SQL Server 2000
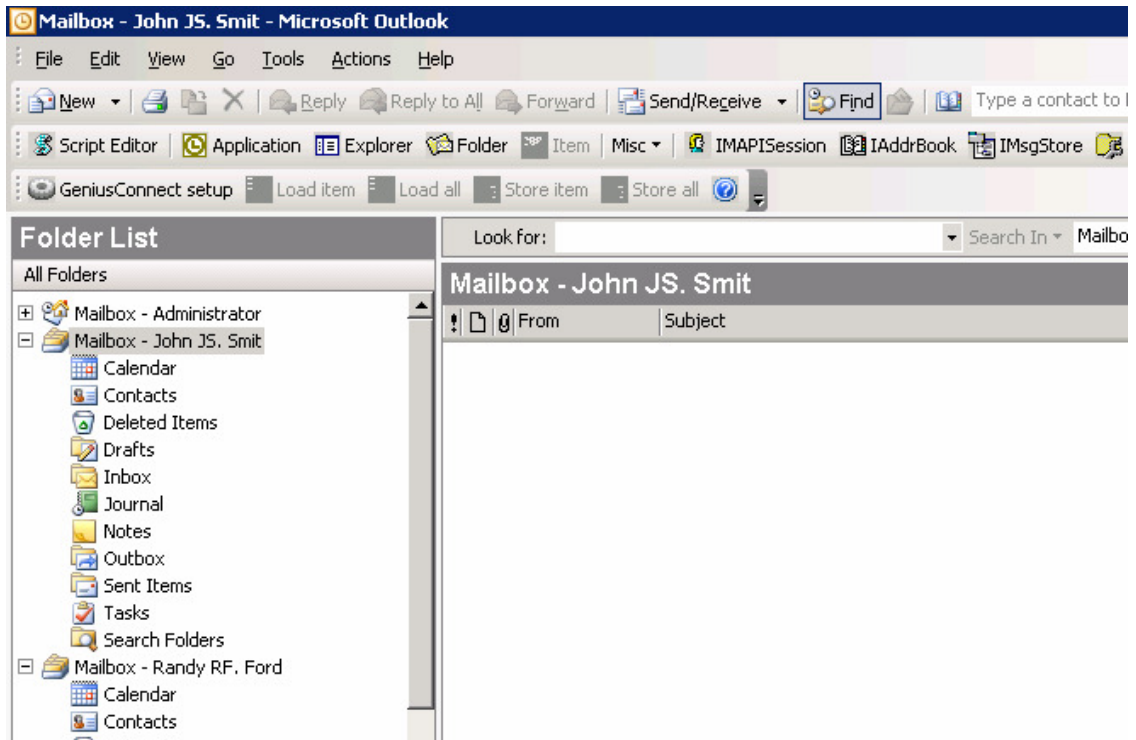
Dedicated GeniusConnect PC/Server

- GeniusConnect –Multi User version
- MS Outlook 2002/2003

Outlook Profile configuration

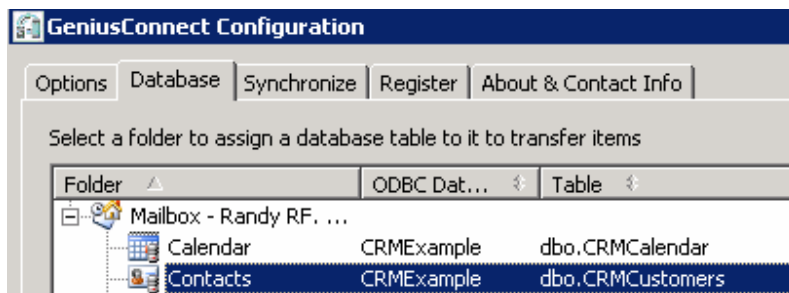In this example the Administrator account is used to open multiple user mailboxes in Outlook.
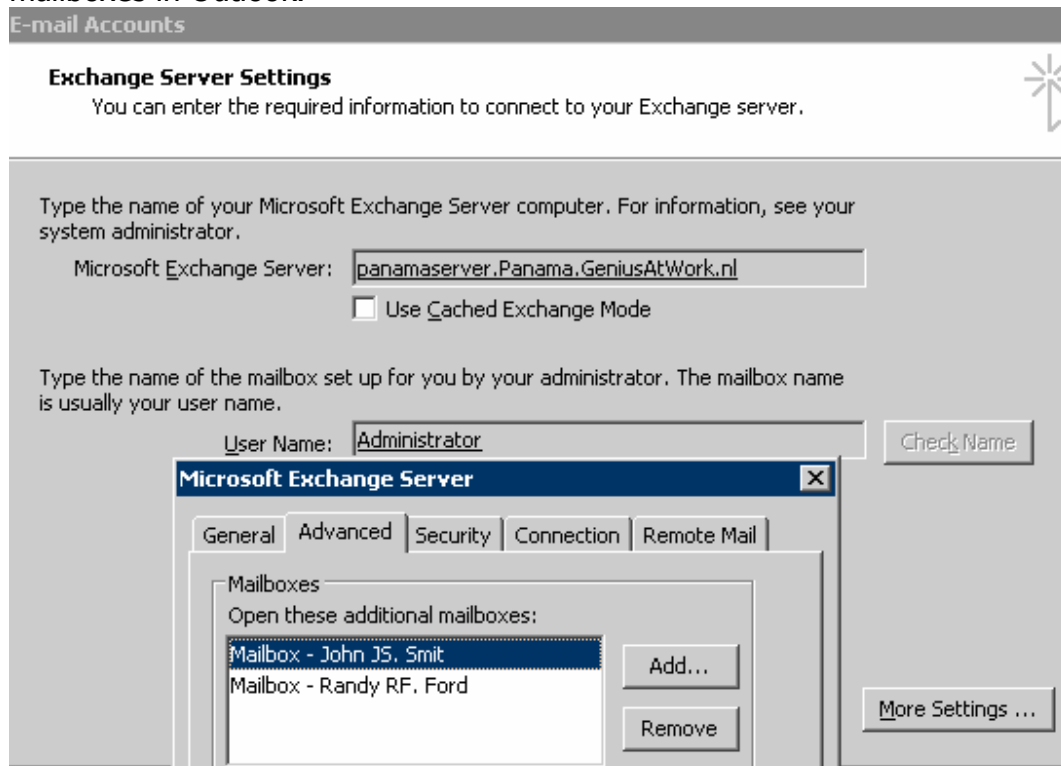
Outlook after adding additional mailboxes:

Setting up GeniusConnect

Setting up Contact sync

1. In Outlook click the GeniusConnect Setup button. GeniusConnect setup
2. Go to the Database Tab, select the user "Contacts" folder and click the "Assign Table" button.

3. Create an ODBC datasource to connect to your database, select it in the ODBC Data source Combo Box and hit Connect button.
   This example is using datasource called CRMExample.
   See Topic:" Create a data source" in GeniusConnect help file if you need help about ODBC datasources.

4. Select the CRMCustomers table.
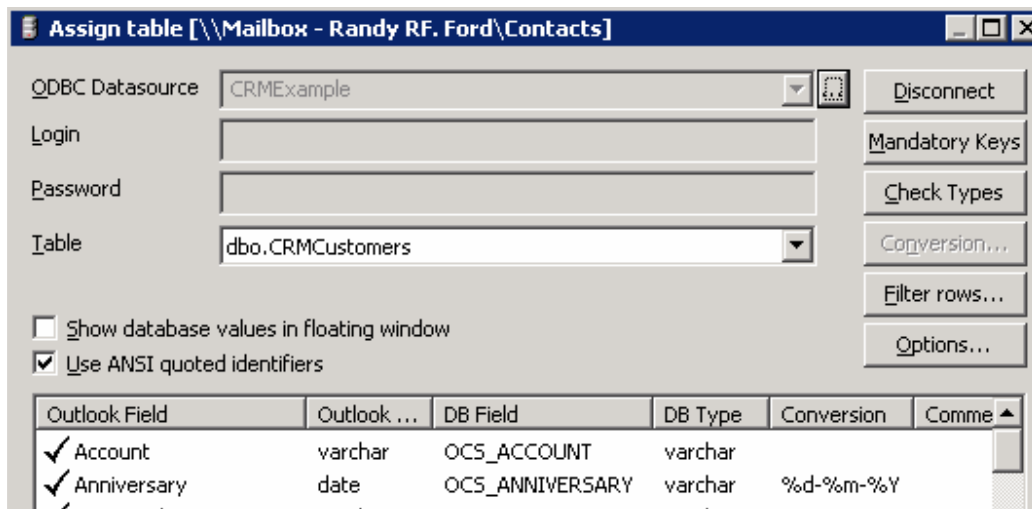
5. Create mappings between Outlook and table columns.
You can import the example template "CRMContactsTemplate<XXX>.ini" if you are using our example database.
You can ignore steps 6-9 if you have imported template.

6. Configure the primary key by clicking the Mandatory Keys button.
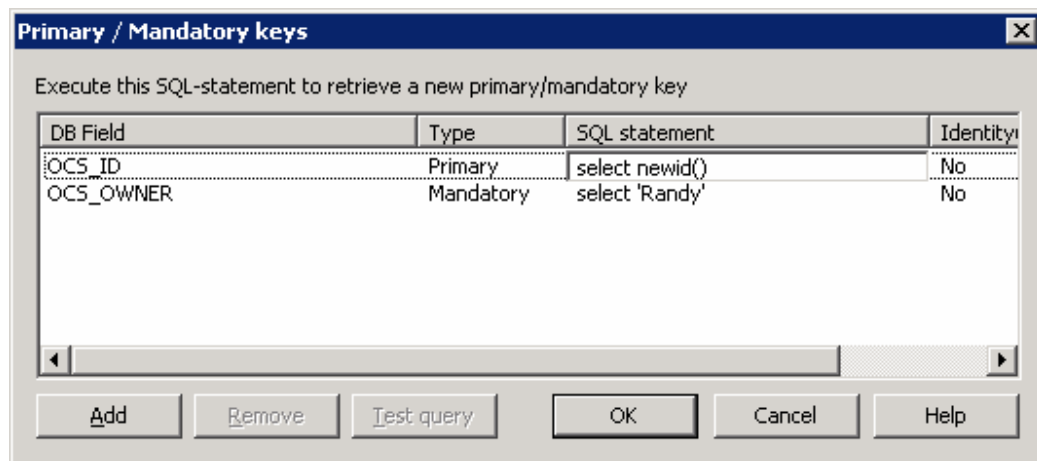
Set the column OCS_OWNER as Mandatory and enter a SQL statement for default value during the inserts. This value is needed when user adds a new Contact in Outlook and GeniusConnect will insert it to the database. This will automatically set the owner to "Randy". Change this for other users!

7. Click the "Options…" button
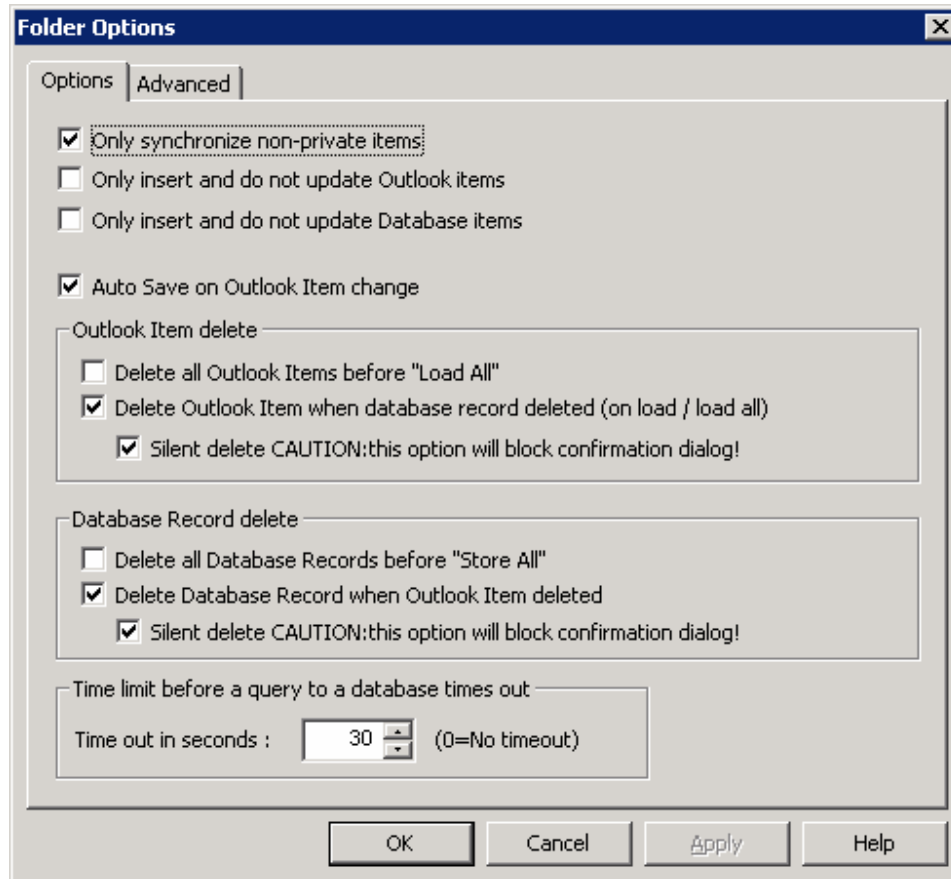
Check the "Only synchronize non-private.." checkbox to ignore private contacts. Check the "Auto Save on Outlook Item change" checkbox, this option will save changes in a Contact item immediately to the database.

Check both "Delete Outlook Item/Database Record" checkboxes. Check also the "Silent delete" options, otherwise GeniusConnect will raise Yes/No dialog to get User confirmation. Click OK to save the options.

8. Click the "Advanced" Tab
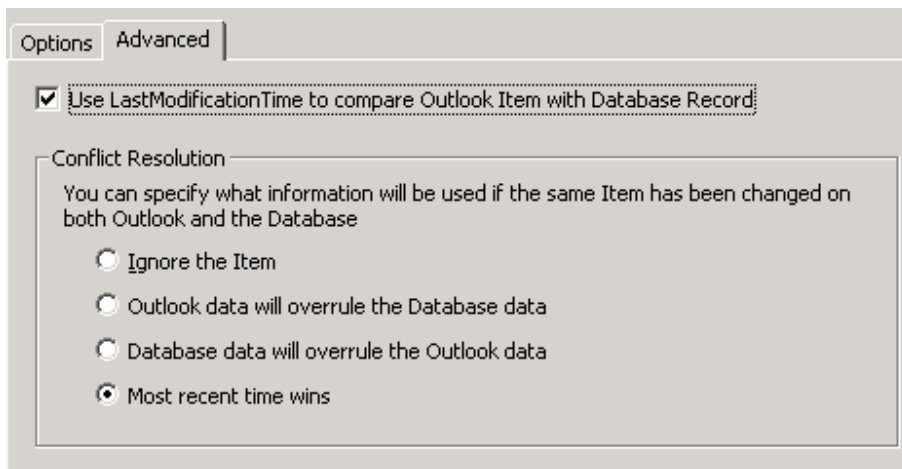
Check the "Use LastModificationTime.." and use the "Most recent time wins" option. With this option, GeniusConnect will compare last modification time of Outlook Item and database record (LastModificationTime column <u>must</u> be linked to a table column).

Please see also the trigger used on CRMCustomers table. The trigger will update the *gc_LastModificationTime* column automatically if update/insert statement does not provide a value. So if for example the CRM application updates a Contact record, this trigger will automatically update the LastModificationTime value.

```
CREATE TRIGGER [tiu_CRMCustomersTimeStamp] ON [dbo].[CRMCustomers]
FOR INSERT, UPDATE
AS
begin
    if @@rowcount = 0
    return

    if not update(gc_LastModificationTime)
    begin
        update c
        set gc_LastModificationTime = CURRENT_TIMESTAMP
        from CRMCustomers c inner join inserted i on (c.OCS_ID=i.OCS_ID)

    end
end
```

9. Click "Filter Rows" button to open the "Filter rows" dialog.


Enter a where clause to synchronize only CRMCustomers records where owner is the Mailbox owner, in this case "Randy". Click OK to save the filter.

10. If you are using your own database, save your configuration by clicking the Export button. You can import the template for quick configuration of other user Contacts Folder.

11. Repeat the steps for every user "Contacts" folder you want to sync with the database.

12. Go to Synchronize tab and setup the auto sync for every 10 minutes
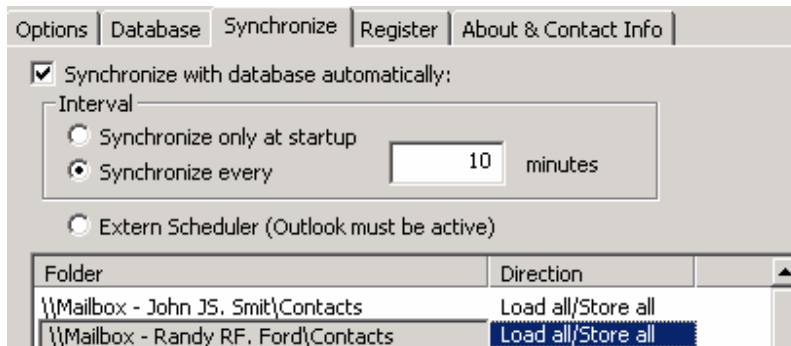
Select the User folder and set the direction to Load All/Store All.

13. If you don't want GeniusConnect to display progress dialog or raise error messages, go to 'Options Tab':
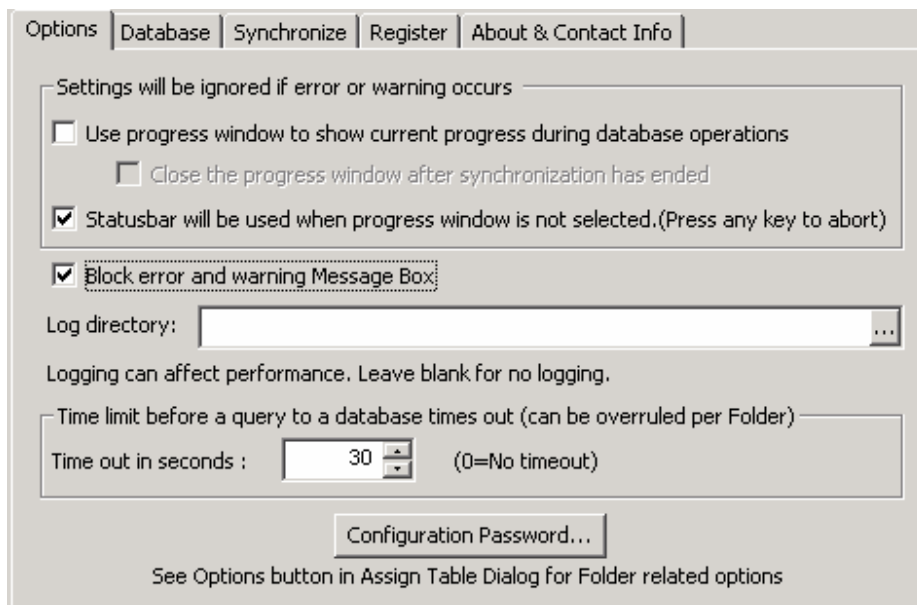
Uncheck the "Use progress…" checkbox and check the "Block error.." checkbox. Please set these options after you have tested your settings and everything is working.

Since this configuration will run unattended, the "Block error and warning Message Box" will avoid error dialogs waiting for user interaction.

14. Click OK to save the configuration and close the configuration dialog.