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:



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.

Exchange Server Settings You can enter the required information to connect to your Exchange server.	****
Type the name of your Microsoft Exchange Server computer. For information, see your system administrator. Microsoft Exchange Server: panamaserver.Panama.GeniusAtWork.nl	
Use Cached Exchange Mode	
Type the name of the mailbox set up for you by your administrator. The mailbox name is usually your user name. User Name: Administrator Microsoft Exchange Server	Chec <u>k</u> Name
General Advanced Security Connection Remote Mail	
Open these additional mailboxes:	
Mailbox - John JS. Smit Mailbox - Randy RF. Ford Remove	More Settings

Outlook after adding additional mailboxes:

🧿 Mailbox - John JS. Smit - Microsoft Outlo	ok	
Eile Edit <u>View G</u> o Tools Actions E	lelp	
👔 New 🖌 🎒 📔 🗙 🔍 Reply 🦓 Repl	ly to All 🙈 Forward 📑 Send/Receive 👻 I 😰 Fi	nd 🖄 🔟 Type a contact to I
😨 Script Editor 🙆 Application ፤ Explorer	🔯 Folder 🛛 Item Misc 🕶 🧟 IMAPISession 🕃	🛿 IAddrBook 🚼 IMsgStore 🥠
GeniusConnect setup Load item Load	ad all 📑 Store item 📑 Store all 🔞 💂	
Folder List	Look for:	✓ Search In ▼ Mailbo
All Folders	Mailbox - John JS. Smit	
	Prom Subject	

Setting up GeniusConnect

Setting up Contact sync

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

e a	Genius	Connect C	onfiguratior	ì				
	Options	Database	Synchronize	Register	About	& Conta	ct Info	
	Select a	a folder to as	sign a databa	ise table to	it to tra	nsfer ite	ms	
	Folder	r 🛆		ODBC Dat	*	Table	\$	
	<u> </u>	Mailbox - R	andy RF					
		-📆 Calend	ar	CRMExampl	е	dbo.CRM	4Calendar	
	-	📲 Contac	ts	CRMExampl	e	dbo.CRM	4Customers	

- 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.

🚦 Assign table [\'	\Mailbox	: - Rand <mark>y</mark> RF	. Ford\Contacts]				_ 🗆 ×
ODBC Datasource	CRMExa	ample				Di	sconnect
<u>L</u> ogin						Man	datory Keys
Password						⊆h	eck Types
<u>T</u> able	dbo.CRM	1Customers			-	Cog	version
						Eilt	er rows
Show database	values in I	floating windo	W			⊴	ptions
I Use ANSI quote	d identifie	rs					
Outlook Field		Outlook	DB Field	DB Type	Conversi	ion	Comme 🔺
🖌 Account		varchar	OCS_ACCOUNT	varchar			
🖌 Anniversary		date	OCS_ANNIVERSARY	varchar	%d-%m	-%Y	
Z A second se		· · - · · - - - · ·	OCC ACCTCTANTS	· · - · · ·			

- 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.

Pri E	mary / Mandatory keys xecute this SOL-statement to retrieve a	a new primary/m	andatory key	×
Γ	DB Field	Туре	SQL statement	Identity
	OC5_ID	Primary	select newid()	No
	OCS_OWNER	Mandatory	select 'Randy'	No
	▲dd <u>R</u> emove <u>I</u> est	query	OK Cano	iel Help

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

Folder Options	×
Options Advanced	
Only insert and do not update Outlook items	
Only insert and do not update Database items	
Auto Save on Outlook Item change	
 Delete all Outlook Items before "Load All" Delete Outlook Item when database record deleted (on load / load all) 	
Silent delete CAUTION: this option will block confirmation dialog!	
Database Record delete Delete all Database Records before "Store All" Delete Database Record when Outlook Item deleted Silent delete CAUTION:this option will block confirmation dialog!	
Time limit before a query to a database times out Time out in seconds : 30 (0=No timeout)	
OK Cancel Apply Help	

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.

ilter rows	2
It is recommended to create "View" on the database instead of using where c GeniusConnect. Use this feature only if you need dynamic parameter in the W	lause in /HERE clause,
Dynamic parameter:	ОК
Current param value	Cancel
	Help
Do not use WHERE keyword. Example WHERE clause: country_id='NL' AND userid='{WINDOWS_USER}'.	Test Query
OCS_OWNER='Randy'	

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

Options Database Synchronize Register Ab	out & Contact Info	
 ✓ Synchronize with database automatically: Interval ○ Synchronize only at startup ⊙ Synchronize every 	minutes	
C Extern Scheduler (Outlook must be active)	
Folder	Direction	•
\\Mailbox - John JS. Smit\Contacts	Load all/Store all	
\\Mailbox - Randy RF. Ford\Contacts	Load all/Store all	

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':

Options Database Synchronize Register About & Contact Info
Settings will be ignored if error or warning occurs
\square Use progress window to show current progress during database operations
\square Close the progress window after synchronization has ended
Statusbar will be used when progress window is not selected.(Press any key to abort)
Block error and warning Message Box
Les directorus
Log directory:
Logging can affect performance. Leave blank for no logging.
Logging can affect performance. Leave blank for no logging.
Logging can affect performance. Leave blank for no logging. Time limit before a query to a database times out (can be overruled per Folder) Time out in seconds : 30 (0=No timeout)

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.