



Exchange Sync for Microsoft Dynamics CRM



AutoSync Service



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Introduction

This document presents the details of Brite Global's CRM Exchange Sync application, the installation and configuration process, and running the application in manual or automated mode.

Brite Global's application integrated with both on-premise and cloud based solutions.

About CRM Exchange Sync

The CRM Exchange Sync solutions is made out of a Windows application, a Windows services and a Microsoft Dynamics CRM solution.

The application communicated between Microsoft Dynamics CRM and the Exchange Server in order to synchronize the CRM Contacts and Marketing List data and the Exchange Mail Contact and Distribution Group records.

The application verifies that the same members exist in the Marketing Lists and Exchange Groups and created new mail contacts to the Exchange Server or modifies existing mail contacts so that the information is synchronized between both environments.

This process enables the sending of email messages from Outlook/Exchange to distribution groups that contain the latest available data.

About Brite Global

Brite Global was established in 2005 in California and is a leader in delivering Microsoft Dynamics CRM and xRM solution to business customers. As a Microsoft CRM Partner, Brite Global has an impressive and rapidly growing list of customers that benefit from Microsoft Dynamics CRM solutions.

Brite Global has embraced the Power of Choice by providing its customers the choice of implementing their solutions on-premise, in the cloud or in a hybrid environment.

Headquartered in Teaneck, NJ with remote offices in Beverly Hills, CA and Europe, Brite Global provides CRM and software solutions to businesses in multiple industries including Public Sector and Education, Financial Services, Real Estate, Media and Entertainment, Not for Profit and other professional service companies.

For more information about Brite Global, you can visit us on the web at www.briteglobal.com.

Auto Sync Service

The following section contains the details of configuration of the Exchange Auto Sync service and the settings that have to be configured inside of your CRM environment.

CRM Configuration

When you originally ran the Configuration Wizard after installing the application, you were required to install a managed solution file to CRM. This managed solution file contained various entities and additional changes to existing entities.

Application Settings

The application settings entity contains Key/Value Pairs that are stored in CRM and provide information to the Windows Application, the Windows Service and the Command Line utility on the behavior of the application and the additional configuration settings that are related to both CRM and Exchange.

Additional Application Settings can be added for future releases.

User Job Rules

The User Job Rules entity specifies the frequency of when the Auto Sync service has to run. There are three frequency options, which are *Daily*, *Weekly* and *Monthly*.

In the 2016 release, a Profile Name also has to be entered so that the sync process which sync application to run.

The Daily settings contains three options as well. This tells the application whether to run it on *Every Day* (Sunday through Saturday), run in on *Every Weekday* (Monday through Friday) or run it on *Every Post Weekday* (which is Tuesday through Saturday) for companies that want to run their synchronization process after midnight.

The Weekly settings only specify the day of the week that you want to run the process. That means that if we select Weekly and Friday, the process will run once a week every Friday. If you want the process two run two times a week, you can create a rule for Tuesday for example and another rule for Friday.

The Monthly settings specify a particular day of the month. You can specify any day of the month from 1 to 31. If the process is specified as 31, and the month has less than 31 days, it will run on the last day of the month. Similar to the weekly settings you can run this multiple times in a month.

Regardless of the frequency setting (Daily, Weekly or Monthly), we need to specify the time of day that the service will execute. The time of day field has the values from 1 to 12 and the period of day has the values of AM or PM. By specifying these two values, we tell the service what time this should run.

The service does not run exactly at the 0 hour, but will run anytime between the hour. This means that if you specify the service to run at 11PM, it will run the process anytime between 11:00PM and 11:59PM. This is based on when the service was originally started. If the service is started first time at 2:30PM, the service will execute at approximately 11:30PM in the above scenario.

User Jobs

Every time the service has completed processing the required lists, a User Job record (related to User Job Rule) is created containing the logging information and if any errors were captured in the CRM record.

If you would like to have the system notify you if there were any errors when processing, you can create a workflow that will send you an email in case the value of the errors field in that record is greater than 0 when it was created.

Field Mappings

If you would like that your synchronization between CRM and Exchange will contain more than the basic fields, you can use the Field Mappings entity to link the fields between the CRM contact entity and Exchange Mail contact record. By default, these fields are set when the application is installed, but the application is not configured to use Field Mappings.

Additional Requirements

Sync Lists

In the 2016 Release of the solution, the Sync Lists entity has been created. The sync list contains all the lists that will be synchronized between Microsoft Dynamics CRM and Exchange. The Sync List entity stores also the profile information, so that it can store the lists based on the profile the user used to log in. The Sync Lists also allow the usage of multiple types of entities for synchronization.

Intersects

In the 2016 Release of the solution, the Intersects Entity allows connection between related entities and the Contact Entity. An example is if I want to create a Distribution Group for a particular Account that will contain all the Contacts for that account. I create an intersect for that account record, and add it to the Sync List later.

When using Dynamic Marketing Lists, there are various columns that are required by the application. These columns have been added to the Contact Advanced Find View and Published (as part of the Managed Solution).

These columns include: *First Name, Last Name, Full Name, Telephone 1, Email Address 1, Job Title, State Code*