



Exchange Sync

for Microsoft
Dynamics CRM



Product Guide



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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.

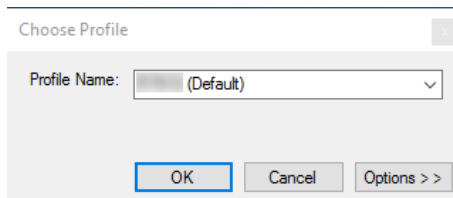
Product Instructions

The following section contains the details of running the CRM Exchange Sync application. This section describes the Windows Forms application for manual execution and not the AutoSync processing.

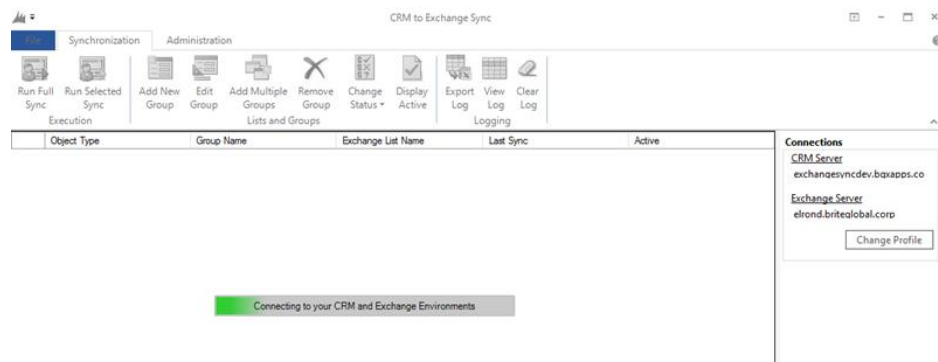
Application Execution

The application can be executed from multiple location. After installation, a desktop shortcut is created to easily run the application. The desktop shortcut is called Exchange Sync. The application can also be run from the Start Menu or from the installation folder. The default installation directory is in the Program Files (x86) directory under Brite Global\Exchange Sync. The physical name of the file is ExchangeSync.exe.

When the application is run it first asks for the profile to be used. If there are no additional profiles, the default profile (which will be displayed as the machine name) will be listed. Select the profile to use and click on the OK button.



When the profile is selected, the application attempts to connect to both the CRM Server and the Exchange Server. If the application cannot connect to either one of the systems, you will not be able to run the application.



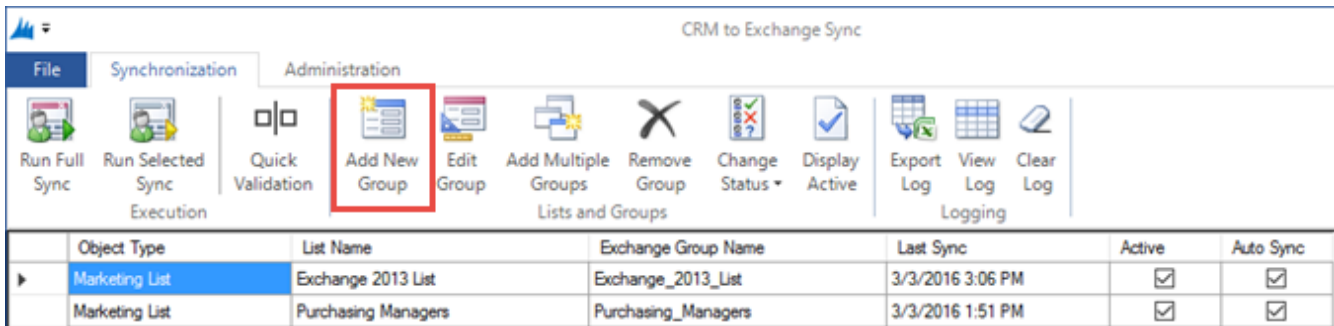
Once connectivity is successful, the application user interface will load and you will be able to start using the application.

Lists and Groups

In order to start the synchronization process, we must first define the matching groups in CRM and Exchange. The application allows us to create new Exchange Groups, modify the groups, remove the groups or enable or disable lists for synchronization.

Creating a new synchronization group

In order to add a new CRM marketing list for synchronization with Exchange, we must first define the match between the two groups. In order to do that, we click on the *Add New Group* ribbon button in the main application. This will pop up the *Add New Group* window.



The Add New List window has two parts, the CRM List information and the Exchange Group information. In the *Select CRM List* section, in the list type select "Marketing List", and in the list name, select the name of the CRM Marketing List that you want to synchronize.

If the List Type has more than just the Marketing List option, you can synchronize other types of entities with Exchange. This feature is not enabled by default.

In the *Select Distribution Group*, select the name of the Exchange Distribution Group, that you would like to synchronize with the selected CRM list. If you would like to create a new group in Exchange, click on the New button under Group Name, and type the name of the new Group next to it. Do not include spaces or other characters that are not valid in Exchange or the process will fail.

You can connect to Exchange Server and verify that the Distribution Groups have been created at this point.

Making changes to the synchronization group

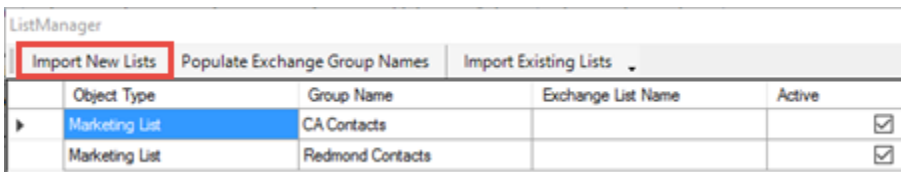
If you have created a synchronization group and would like to change the group in Exchange that the CRM will synchronize with or if you would like to create a new group in Exchange for synchronization, select the group that you would like to make changes to by clicking on its row and then click on the *Edit Group* button

on the main application ribbon. This will bring up the same window as with the new synchronization group, but will have the CRM information pre-populated. You will only be able to modify the Exchange information portion.

Adding multiple lists to the synchronization group

If you have multiple Marketing Lists in CRM that you would like to import for synchronization all at once, you can do this, by clicking on the *Add Multiple Groups* button.

This will pop up the List Manager form. In the click on the Import New Lists button. This will show all the Marketing Lists in CRM that have not been added for synchronization.

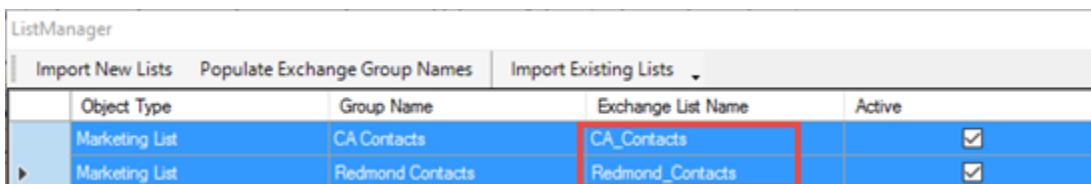


ListManager				
Import New Lists				
Populate Exchange Group Names				
Import Existing Lists				
	Object Type	Group Name	Exchange List Name	Active
▶	Marketing List	CA Contacts		<input checked="" type="checkbox"/>
	Marketing List	Redmond Contacts		<input checked="" type="checkbox"/>

Click on the Populate Exchange Group Names to Automatically generate Exchange Group Names.




The result will show the Exchange Group Names similar to the ones in CRM (with invalid characters removed). The result will show the following. You can edit the Exchange Group names if necessary.



ListManager				
Import New Lists				
Populate Exchange Group Names				
Import Existing Lists				
	Object Type	Group Name	Exchange List Name	Active
▶	Marketing List	CA Contacts	CA_Contacts	<input checked="" type="checkbox"/>
	Marketing List	Redmond Contacts	Redmond_Contacts	<input checked="" type="checkbox"/>

Click on the Accept button to add the lists to your Sync Lists.

 If you have lists from the previous version of the Exchange Sync App, click on the Import Existing Lists to add them to your Sync Lists..

Removing a synchronization group

If you have a group that you do not want to have synchronized anymore you can remove it from the list. Removing a group does not delete the CRM Marketing List or the Exchange Distribution Group.

In order to remove the group, select the group in the main application, by clicking on the row of the Group and then clicking on *Remove Group* ribbon button.

Active and Inactive groups

All groups that are listed in the main application have a status of either Active or Inactive. When a group is Active it will execute the synchronization process for that group when we run the synchronization. An Inactive group will be skipped.

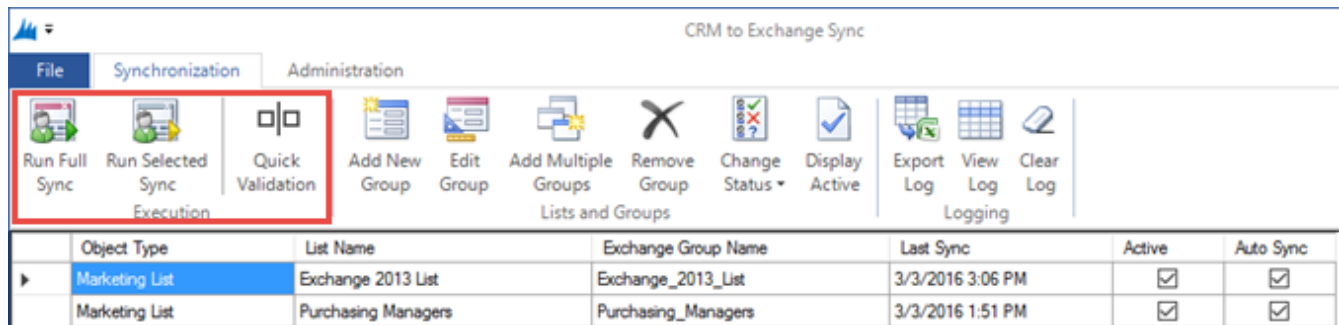
In order to change the status of a group and Set it to Active or Inactive, we must select the row of the group that we want to make the change to, and click on the ribbon *Change Status* drop down button. The ribbon Change Status button has four available options: Enable, Disable, Enable All or Disable All.

When we have a list with many rows, containing both Active and Inactive lists for synchronization, and would like to view only the rows that will be synchronized we can click on the *Display Active* ribbon button, and it will hide all the inactive lists. Click on the button a second time will show both Active and Inactive lists again.

Running the Synchronization Process

Now that all the lists and groups have been configured, we are ready to run the synchronization process. You can run the synchronization process for all the Active Groups or only for a single Active group if you need to test or modify a single group.

To run the synchronization process for all Active Groups, click on the *Run Full Sync* button. A pop-up message will appear asking you if you would like to start the Synchronization Process. Click on the OK button to start.



When the synchronization process is being run, you will be able to see the progress of the synchronization on the status bar. It will loop through all the lists, and show you a progress bar based on the number of contacts being synchronized in each list. It is recommended to verify the results in Exchange after the process has been completed.

If you only do not want to synchronize all the groups, but only a single of few groups, select the groups that you want to synchronize by clicking on the row of the group, and click on the *Run Selected Sync* button. This will run the synchronization for only the selected lists.

After synchronization has been completed, and you want to validate and see if all Contacts were synchronized, you can click on the *Quick Validation* button, which will make a comparison of the number of Contacts in the Lists in CRM and in the Groups in Exchange. The Tree view at the side of the lists will display the results.

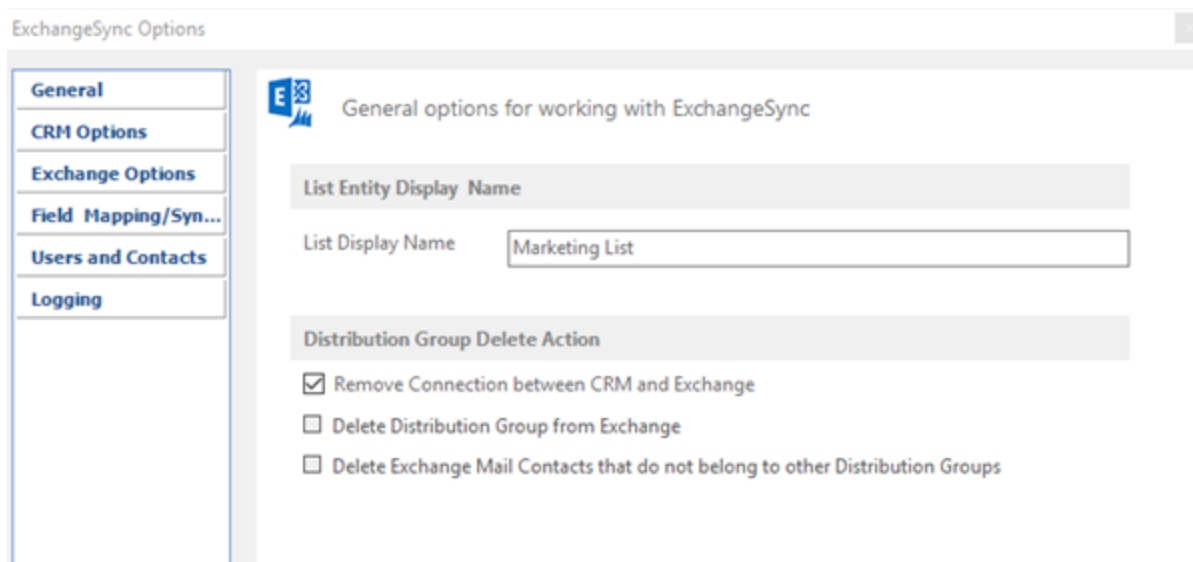
Product Options

The Exchange Sync options allows making changes to general and product specific options of the application. Most of the options are stored in the Application Settings entity of the CRM solution, however modifications should be made from the Options window, so that the application does not break.

The options are separated into 6 pages: General Options, CRM Options, Exchange Options, Field Mapping and Sync Filter Options, Users and Contact Options and Logging Options.

You can make changes to the available options, which will control the flow of the application and autosync process. When changes are done, click on OK to save the changes back to the Application Settings.

The image below shows the Exchange Sync Options window.



Logging and Export

By default, when the application is running, a log is generated of the process. You can either view the log within the application, or export the log to a Microsoft Excel file.

To view the log on the screen, on the main application ribbon, click on the *View Log* button. This will display the log, and provide you the ability to sort or view the log by different columns. When you are done, you can click on the *View Log* button again to see the groups and lists screen again.

If you want to export the log into a csv format, click on the *Export log* button. This will place the log file in the C:\logs directory for you.

You can also clear the log file by clicking on the *Clear Log* button on the ribbon. The log will be cleared by default every time the synchronization is run.