

# Exchange Sync

for Microsoft  
Dynamics CRM

Installation

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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](http://www.briteglobal.com).

# Installation

The following section contains the details of installation the CRM Exchange Sync application on a workstation/server within your organization.

The solution can be installed on a Windows 7 machine (or above), or on a Windows Server 2008 R2 machine (or above).

## Prerequisites

The CRM Exchange Sync application can be installed on multiple environments, however at times, the environment will require some modifications in order for the application to run efficiently.

### Microsoft .NET Framework

The Microsoft .NET Framework 4.0 Client Profile must be installed on the machine that will be running the application. The application utilizes several CRM assemblies that require this version of the Framework.

The .NET Framework can be a large package, which is why it is not included in the setup package.

### Windows Identity Foundation

The Windows Identity Foundation 3.5 must be installed on the system in order to support connectivity with CRM On-Premise Internet Facing Deployment, Partner Hosted CRM (IFD) or CRM Online.

### Windows PowerShell 4.0 (Recommended)

It is recommended to have Windows PowerShell 4.0 install on the system, though earlier versions of PowerShell should work without any glitches.

### Exchange Management Console (Optional)

Although the Exchange Management Console is not required to be installed on the computer that runs the application, we do recommend installing it in order to allow verification of data synchronization and running of PowerShell commands if they are necessary.

## Installation Process



To start the installation of the CRM Exchange Sync application, extract the installation files to a folder on the target computer. The extracted folder will contain two files:

ExchangeSync.exe and ExchangeSync.msi

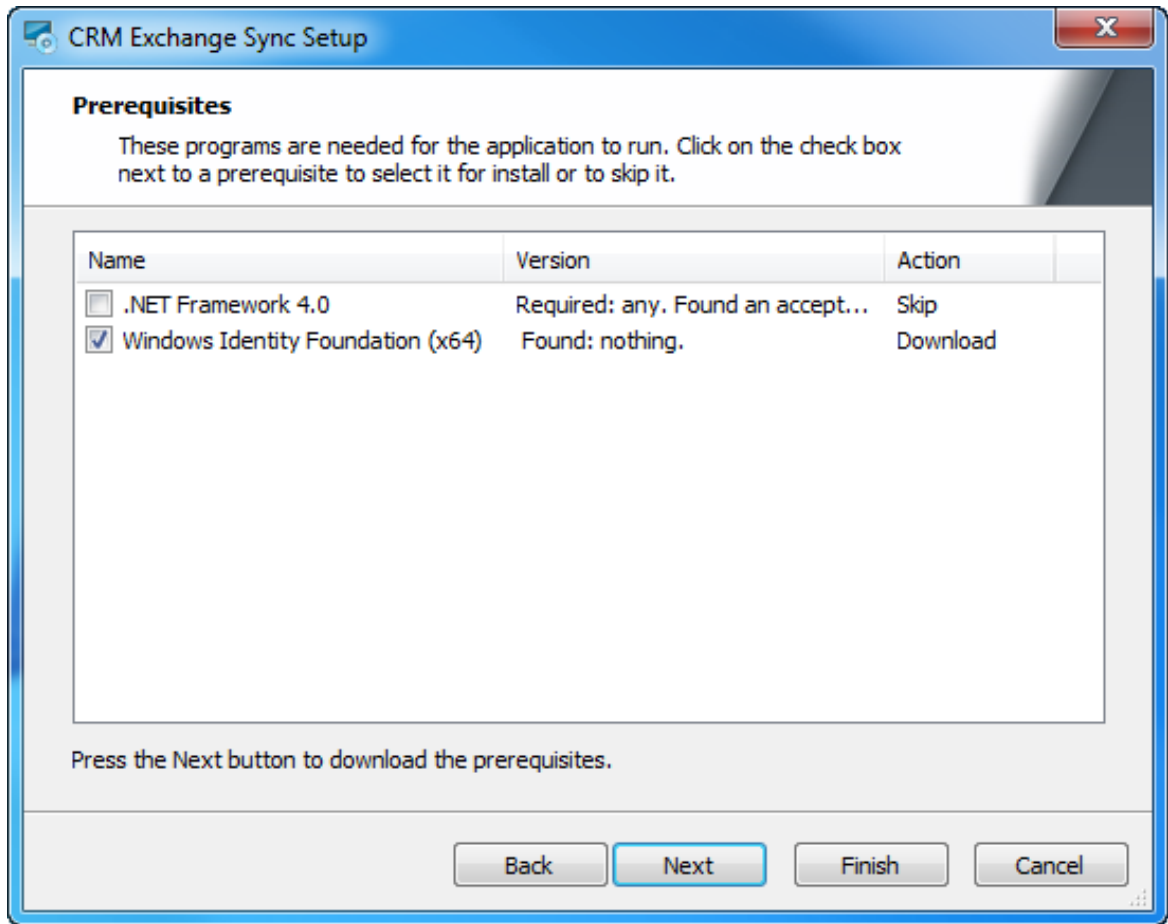
It is possible that a version number will be suffixed to the executable and msi files such as CRMExchangeSync3.exe and CRMExchangeSync3.msi

Those are for the older versions of the CRM Exchange Sync application.

Run the CRMExchangeSync.exe application.

Name	Date modified	Type	Size
 CRMExchangeSync	5/28/2015 3:29 PM	Application	1,560 KB
 CRMExchangeSync	5/28/2015 3:29 PM	Windows Installer ...	9,159 KB

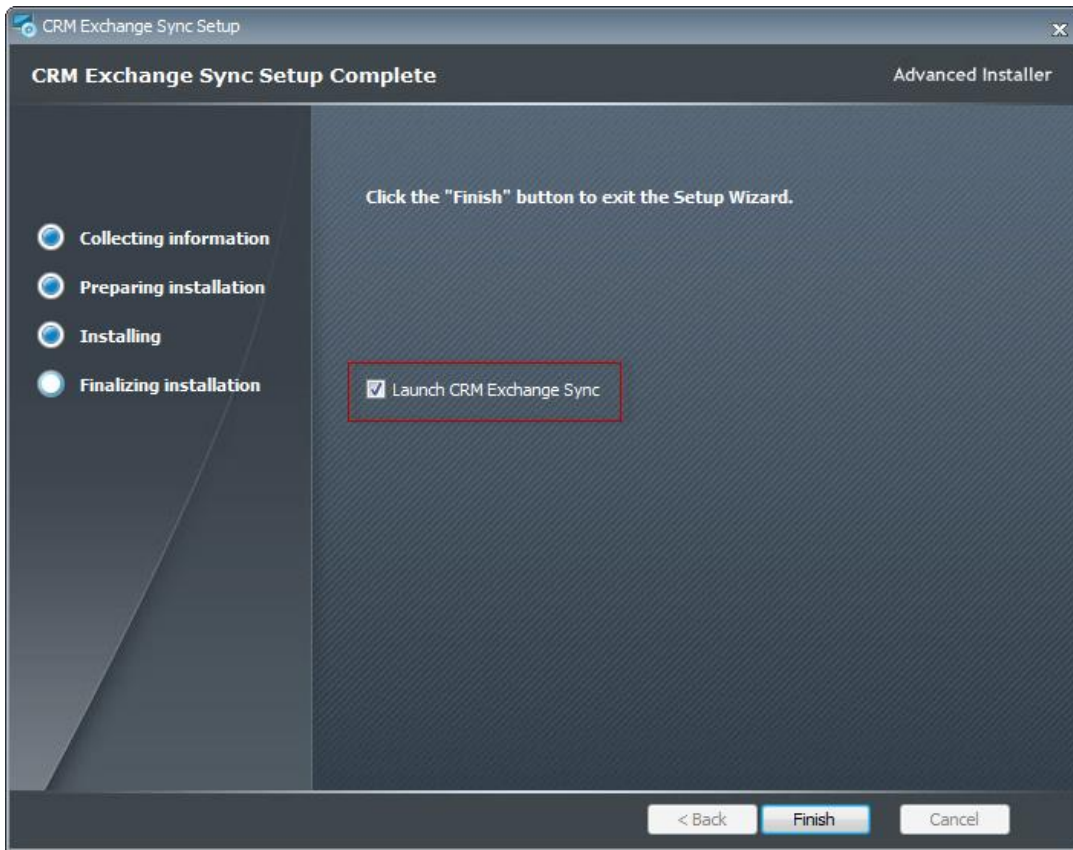
If any prerequisites are missing from the installation, the setup wizard will start with installing the prerequisites.



After the prerequisites installation is completed (if launched), the setup wizard will continue with the CRMExchangeSync installation. The installation wizard will display the following screens:

- Welcome to CRM Exchange Sync Setup
- End-User License Agreement
- Installation Folder
- Ready to Install
- Installing CRM Exchange Sync

- CRM Exchange Sync Setup Complete



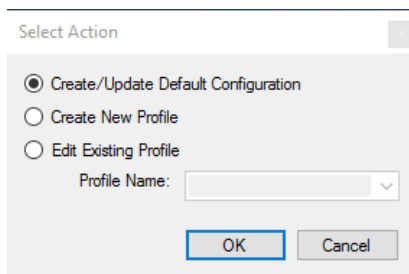
On the final screen, the checkbox Launch CRM Exchange Sync is checked. This will launch the CRM Configuration Wizard. Please make sure that you have all the required CRM and Exchange connectivity information and user account information before proceeding to this step.

If you do not have the required information, uncheck the Launch CRM Exchange Sync checkbox and click finish. You can run the program later by going to Start -> All Programs -> CRM Exchange Sync -> Configuration Wizard, which is located in the target installation folder under the name configurationwizard.exe.

## Configuration Wizard

The CRM Exchange Sync application can be installed on multiple environments, however at times, the environment will require some modifications in order for the application to run efficiently.

When you launch the configuration wizard, you will be asked to select the action to perform. The first time the Configuration Wizard is launched, the only possible option is to Create the Default Configuration. After the initial configuration has been created, you can launch the Configuration Wizard to modify your Default Configuration, Create a Profile or Modify an existing Profile.

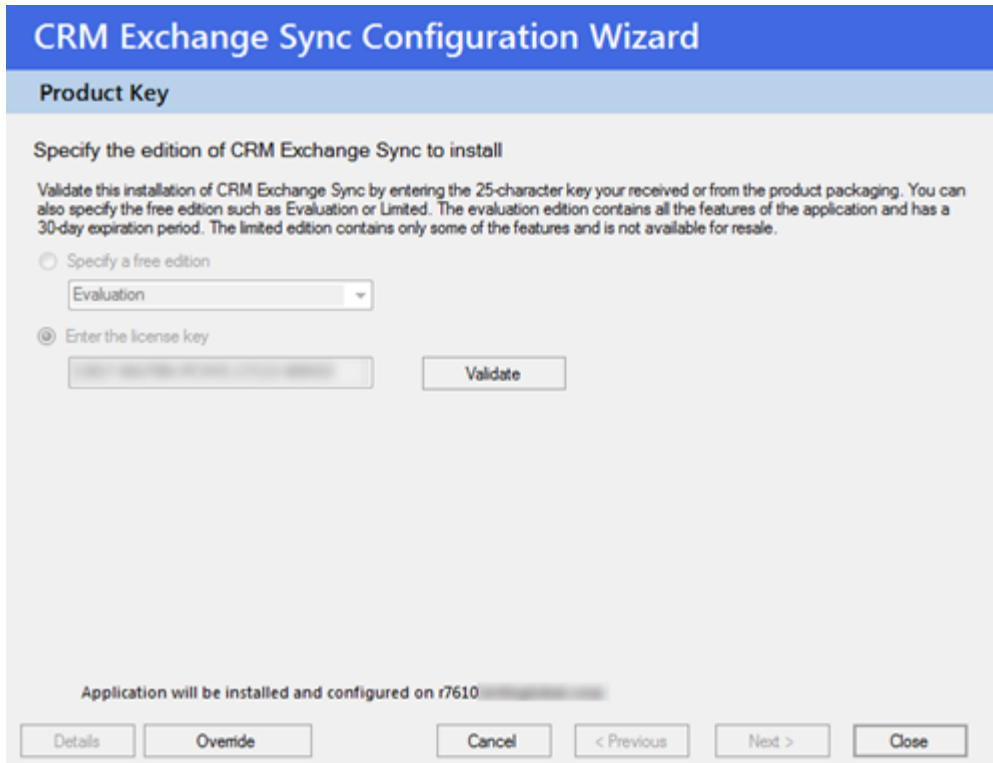
The image shows a dialog box titled "Select Action". It contains three radio button options: "Create/Update Default Configuration" (which is selected), "Create New Profile", and "Edit Existing Profile". Below these options is a text field labeled "Profile Name:" followed by a dropdown arrow. At the bottom of the dialog are two buttons: "OK" and "Cancel".

When you click on the OK button after selecting Create Default Configuration, the product key screen shows up specifying whether you have the evaluation version or a licensed version. This information will be prepopulated.

If you have a licensed version, click on the Validate button next to the product key in order to continue with the installation.

If the product key is validated, and message will appear on the screen that you can continue with the installation.





The image shows a software configuration window titled "CRM Exchange Sync Configuration Wizard" with a sub-header "Product Key". The main instruction is "Specify the edition of CRM Exchange Sync to install". Below this, a paragraph explains that users can validate the installation by entering a 25-character key or specify a free edition like "Evaluation" or "Limited". The "Evaluation" edition is noted to have all features and a 30-day expiration, while the "Limited" edition has some features and is not for resale. There are two radio buttons: "Specify a free edition" (unselected) and "Enter the license key" (selected). Under the first option is a dropdown menu currently showing "Evaluation". Under the second option is a text input field for the license key and a "Validate" button. At the bottom, a status bar says "Application will be installed and configured on r7610". Navigation buttons at the very bottom include "Details", "Override", "Cancel", "< Previous", "Next >", and "Close".

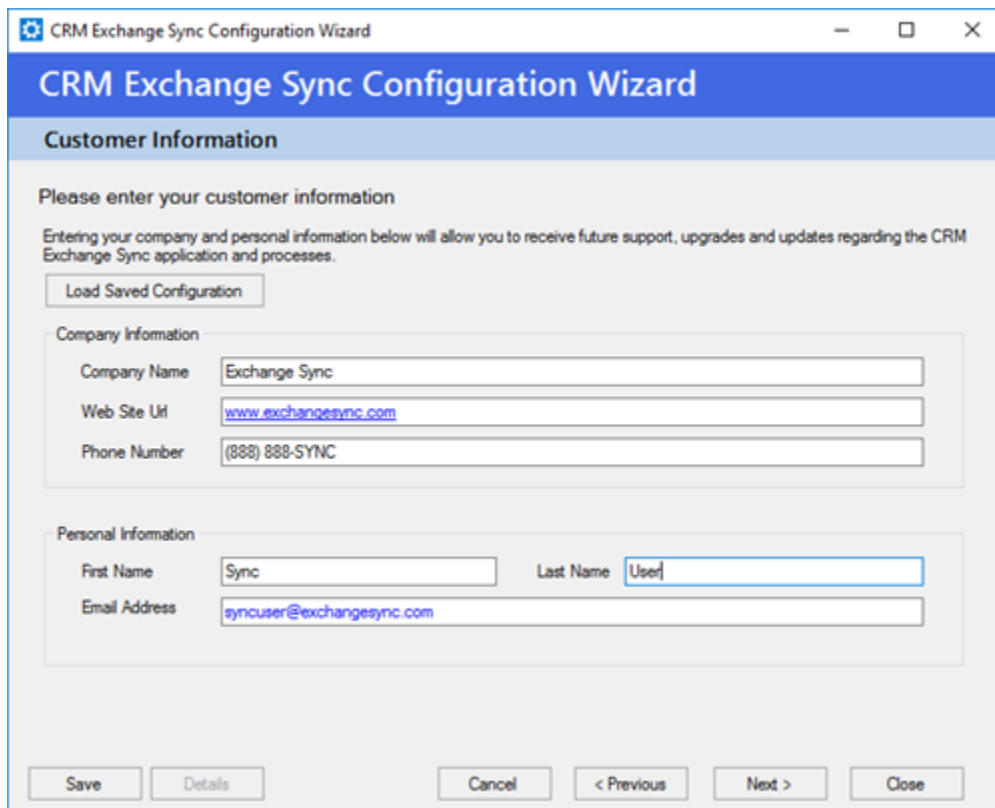
Please note that the application is preconfigured to be installed on a specific machine, and cannot be installed on any other machine. A separate license key is required for configuration the application on a separate machine.

Customer Information

Enter your customer information in the screen below. The company name and web site url will be prepopulated if this is a licensed version.

Fill out the necessary Company Information and Personal Information. As you tab through the last field, the information you enter will be validated, and if all fields are entered properly, the next button will be enabled. Click on the Next button to continue.

If you have started filling out the Configuration Wizard previously, but did not finish, and saved your configuration, you can click on the Load Saved Configuration button to pre-populate the fields on the Wizard that you have entered before.



The image shows a screenshot of the 'CRM Exchange Sync Configuration Wizard' window. The title bar at the top reads 'CRM Exchange Sync Configuration Wizard'. Below the title bar, the main heading is 'CRM Exchange Sync Configuration Wizard'. Underneath, there is a section titled 'Customer Information'. The text 'Please enter your customer information' is displayed, followed by a note: 'Entering your company and personal information below will allow you to receive future support, upgrades and updates regarding the CRM Exchange Sync application and processes.' A button labeled 'Load Saved Configuration' is present. The form is divided into two sections: 'Company Information' and 'Personal Information'. The 'Company Information' section contains three fields: 'Company Name' (filled with 'Exchange Sync'), 'Web Site Url' (filled with 'www.exchangesync.com'), and 'Phone Number' (filled with '(888) 888-SYNC'). The 'Personal Information' section contains three fields: 'First Name' (filled with 'Sync'), 'Last Name' (filled with 'User'), and 'Email Address' (filled with 'syncuser@exchangesync.com'). At the bottom of the window, there are five buttons: 'Save', 'Details', 'Cancel', '< Previous', and 'Next >', and a 'Close' button.

CRM Exchange Sync Configuration Wizard

## CRM Exchange Sync Configuration Wizard

### Customer Information

Please enter your customer information

Entering your company and personal information below will allow you to receive future support, upgrades and updates regarding the CRM Exchange Sync application and processes.

**Company Information**

Company Name

Web Site Url

Phone Number

**Personal Information**

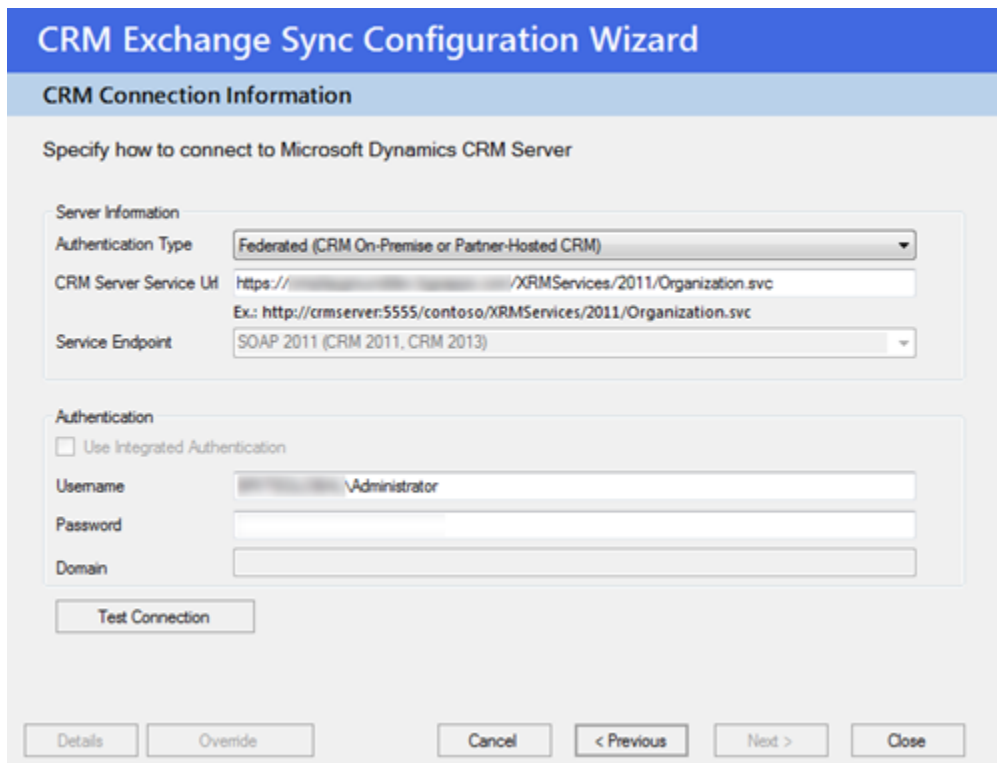
First Name  Last Name

Email Address

At any stage during the configuration process if you need to stop and come back later, you can click on the Save button, which will save the information you already entered. The only information that will not be saved is passwords, which you will have to re-enter.


## CRM Connection Information

On this screen you will specify how to connect with Microsoft Dynamics CRM. The Authentication Type requires two parameters.



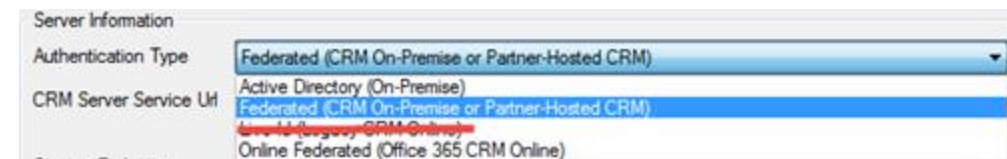
The screenshot shows the 'CRM Exchange Sync Configuration Wizard' window, specifically the 'CRM Connection Information' tab. The title bar is blue with the text 'CRM Exchange Sync Configuration Wizard'. Below the title bar is a light blue header with the text 'CRM Connection Information'. The main area is titled 'Specify how to connect to Microsoft Dynamics CRM Server'. It contains two sections: 'Server Information' and 'Authentication'. In the 'Server Information' section, there are three fields: 'Authentication Type' (a dropdown menu set to 'Federated (CRM On-Premise or Partner-Hosted CRM)'), 'CRM Server Service Url' (a text box with 'https://...' and an example 'Ex.: http://crmserver:5555/contoso/XRMServices/2011/Organization.svc'), and 'Service Endpoint' (a dropdown menu set to 'SOAP 2011 (CRM 2011, CRM 2013)'). In the 'Authentication' section, there is a checkbox 'Use Integrated Authentication' which is unchecked. Below it are three text boxes: 'Username' (containing 'Administrator'), 'Password' (empty), and 'Domain' (empty). At the bottom of the 'Authentication' section is a 'Test Connection' button. At the very bottom of the window are five buttons: 'Details', 'Override', 'Cancel', '< Previous', and 'Next >', followed by a 'Close' button.

The first parameter is the Authentication Information which can be Active Directory (On-Premise), Federated (CRM On-Premise or Partner-Hosted CRM) and Online Federated (Office 365 CRM Online).

 The Live Id option has been deprecated. It was previously available as a connection to CRM, but is no longer available.

The second parameter is the CRM Service Url, which is the Url of the CRM Organization Service. If you are not sure what this value is, navigate to your CRM environment and go to Settings -> Customizations -> Developer Resources.

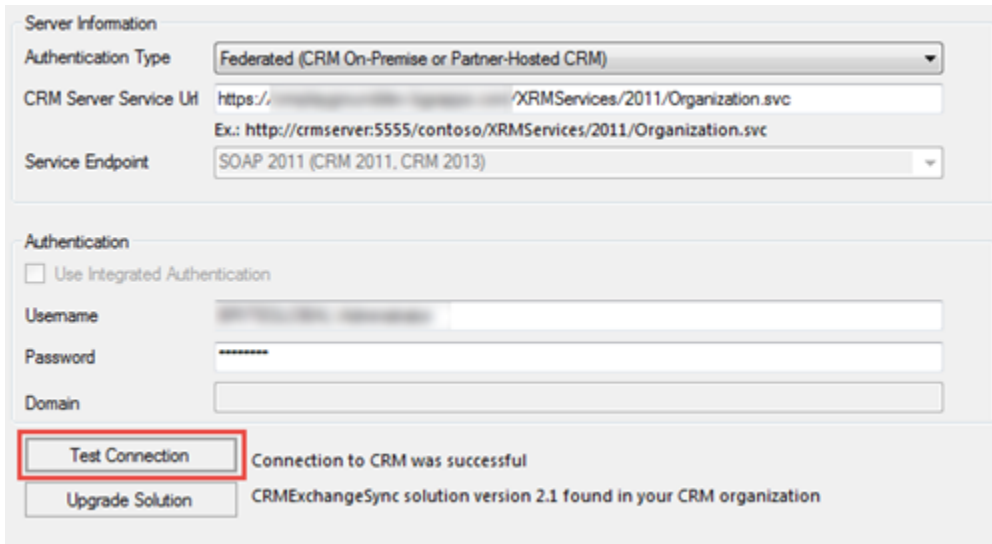
Enter your authentication information. For Active Directory authentication, enter your Username, Password and Domain or choose Integrated Authentication. For Federated or Online Federated Authentication enter your Username and Password.



The screenshot shows a close-up of the 'Authentication Type' dropdown menu. The menu is open, showing four options: 'Active Directory (On-Premise)', 'Federated (CRM On-Premise or Partner-Hosted CRM)', 'Live Id (deprecated CRM Online)', and 'Online Federated (Office 365 CRM Online)'. The 'Live Id (deprecated CRM Online)' option is highlighted in red.

If you are using the Exchange AutoSync Service, you cannot use Integrated Authentication.

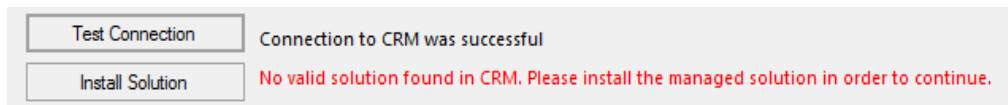
After you have entered all the information, click on the Test Connection button.



The screenshot shows a configuration window with two main sections: 'Server Information' and 'Authentication'. In the 'Server Information' section, 'Authentication Type' is set to 'Federated (CRM On-Premise or Partner-Hosted CRM)', 'CRM Server Service Uri' is 'https://.../XRMServices/2011/Organization.svc', and 'Service Endpoint' is 'SOAP 2011 (CRM 2011, CRM 2013)'. The 'Authentication' section has 'Use Integrated Authentication' unchecked, and fields for 'Username', 'Password', and 'Domain'. At the bottom, the 'Test Connection' button is highlighted with a red rectangle. To its right, a message states 'Connection to CRM was successful'. Below this, the 'Upgrade Solution' button is visible with the text 'CRMExchangeSync solution version 2.1 found in your CRM organization'.

This will verify that you are able to connect to CRM, and will also verify if the ExchangeSync solution is installed in your CRM environment. The minimum version number for this version of the ExchangeSync application is 4.0.

If the solution is not installed, click on the Install Solution button, and this will install the solution in your CRM environment.



This screenshot shows a portion of the configuration window. The 'Test Connection' button is present with the message 'Connection to CRM was successful'. The 'Install Solution' button is highlighted. To its right, a red error message reads: 'No valid solution found in CRM. Please install the managed solution in order to continue.'

You will be asked to enter the location of the solution file, which is located on the resources subdirectory under the installation directory of ExchangeSync of the application.

If the solution is already installed, and you are running the Configuration Wizard on another machine, or to reconfigure your CRM/Exchange settings, you can click on Upgrade Solution to upgrade to a newer release of CRMExchangeSync solution.

After installation is complete or verified, the next button will be enabled, and you can continue with the installation process.

## Exchange Connection Information

The Exchange Connection is slightly more complicated due to different classes that have to be configured based on the use of Exchange On Premise or Exchange Online.

## CRM Exchange Sync Configuration Wizard

### Active Directory/Exchange Configuration

Please enter the Login Credentials and Exchange Server information

<p>Exchange Server Version  <input type="text"/></p> <p>Exchange Server  <input type="text"/>          Ex.: exchange.contoso.local</p>	<p>Login Credentials</p> <p>Username <input type="text"/></p> <p>Password <input type="password"/></p> <p>NETBIOS Domain Name <input type="text"/></p> <p><input type="button" value="Test Connection"/></p>
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Exchange Server Information

Distribution Groups OU   
 Ex.: contoso.local/Exchange Distribution Groups

Contacts OU   
 Ex.: contoso.local/Exchange Contacts

Internet Domain Suffix    
 Ex.: contoso.com

The first thing that we need to enter is the Exchange Server version. We can either use Exchange 2010, Exchange 2013, Exchange 2016 or Exchange Online.

If we enter Exchange 2010, Exchange 2013 or Exchange 2016 you will need to supply the name of the Exchange Server, the domain Username, Password and the NetBIOS domain name.

Please enter the Login Credentials and Exchange Server information

Exchange Server Version  
 2013

Exchange Server  
  
 Ex.: exchange.contoso.local

Login Credentials

Username

Password

NETBIOS Domain Name

If we enter Exchange Online, we do not supply the Exchange Server name or the NetBIOS domain name, only the Office 365 Username and Password of an admin account that has enough access to add/edit recipient and group information.

Exchange Server Version  
 Online

Exchange Server  
  
 Ex.: exchange.contoso.local

Login Credentials

Username

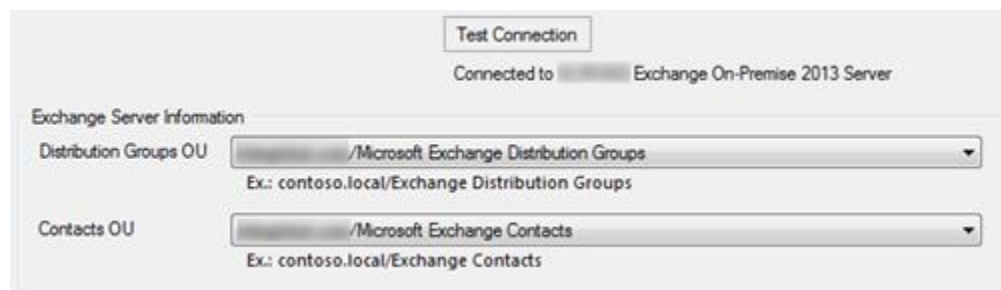
Password

NETBIOS Domain Name

After the connection information has been entered, we click on the Test Connection button. The application attempts to Connect to the Exchange Server.

If connectivity is unsuccessful, an error will occur.

If connecting the Exchange 2010-2016 (On Premise), when connectivity is successful, the Distribution Group OU and Contacts OU list fields will appear, and you will have to select where you are going to want your Sync contacts and groups to be stored in Exchange (shown below):

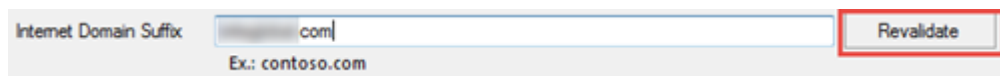


The screenshot shows a dialog box titled "Exchange Server Information". At the top, there is a "Test Connection" button and a status bar indicating "Connected to Exchange On-Premise 2013 Server". Below this, there are two dropdown menus. The first is labeled "Distribution Groups OU" and shows the selected value as "/Microsoft Exchange Distribution Groups" with an example "Ex.: contoso.local/Exchange Distribution Groups". The second is labeled "Contacts OU" and shows the selected value as "/Microsoft Exchange Contacts" with an example "Ex.: contoso.local/Exchange Contacts".

If connecting to Exchange Online, the Distribution Group OU and Contacts OU lists will be disabled.

Finally we will need to enter the external domain name (such as contoso.com), which will allow the system to distinguish between Exchange Users and Exchange Contacts, and click on the Revalidate button to enable us to continue.

Click on the Next button to Continue.



The screenshot shows a text input field labeled "Internet Domain Suffix" containing the text "com". Below the field is an example "Ex.: contoso.com". To the right of the field is a "Revalidate" button, which is highlighted with a red border.

## Installation Summary Page

The installation summary page will show the Summary details of your CRM and Exchange settings before you continue. If you need to make changes, you can go back and restart.

The screenshot shows the 'CRM Exchange Sync Configuration Wizard' window. The title bar includes a gear icon and the text 'CRM Exchange Sync Configuration Wizard'. The main title is 'CRM Exchange Sync Configuration Wizard' in a blue header. Below this is a section titled 'Configuration Summary'. Under 'Summary Information', a message states: 'Your application will be configured with the following settings. Please review the settings and make sure they are correct. If you see any errors, please go back, fix them and review this screen again'. A scrollable box contains the following parameters: 'Your CRM Exchange Sync will be created with the following parameters:', 'Product Type: Licensed', 'Company Name: Exchange Sync', 'Web Site: www.exchangesync.com', 'CRM Authentication Method: Federated (CRM On-Premise or Partner-Hosted CRM)', 'CRM Server Url: https://[redacted].com/XRMServices/2011/Organization.svc', 'CRM Username: [redacted]', 'Exchange Username: [redacted]', 'Exchange Domain: [redacted]', 'Exchange Server Version: Online', and 'Server and Group information omitted for Exchange Online'. Below the scroll box are two checked checkboxes: 'Import Application Settings' and 'Import Field Mappings', which are highlighted by a red rectangle. A blue note reads: 'Once your click on the Next button, Configuration data will be stored to the application and to CRM'. At the bottom are buttons for 'Save', 'Details', 'Cancel', '< Previous', 'Next >', and 'Finish'.

If the application is installed on a second machine or you are running and update, uncheck the *Import Application Settings* and *Import Field Mappings* check boxes.

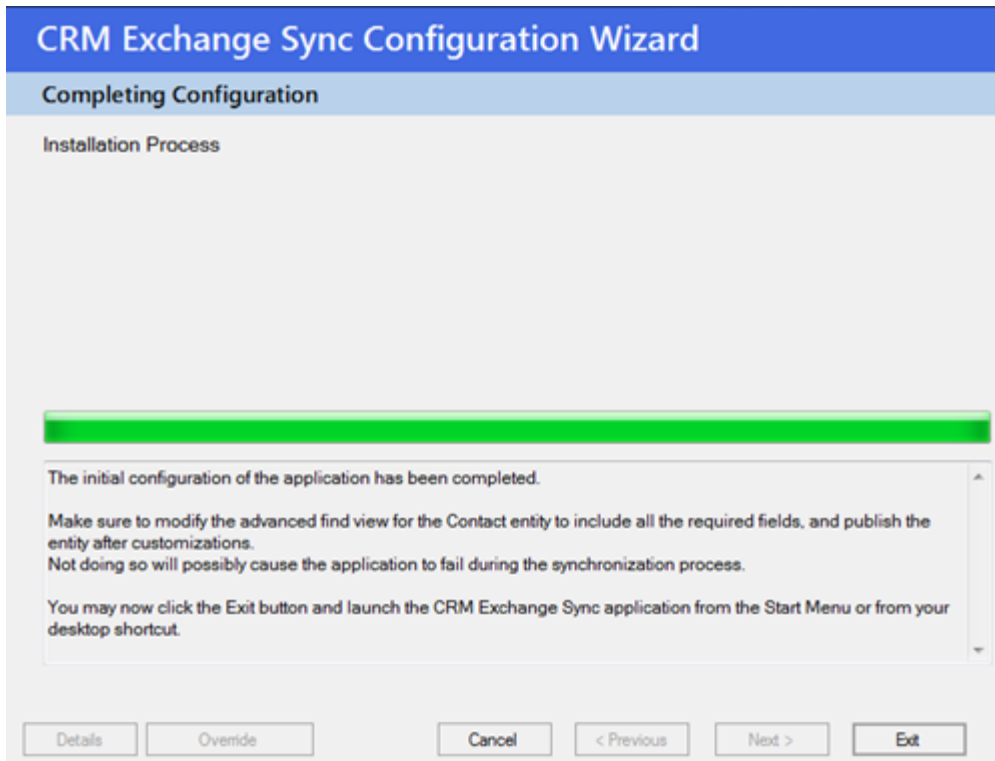
Click on the Finish button to complete the Installation at this point.

## Installation Process Page

The installation process page will show the details of your configuration, which includes the components that are being updated.

The Process will include the following steps:

- Update the Application Configuration File
- Configure the Exchange Sync Security Role
- Import/Update the Application Settings in CRM
- Import/Update the Field Mappings in CRM



Click on the Exit button after the installation has been completed.

At this point you can run the Exchange Sync application and Start the ExchangeSync AutoSync Windows Service.