briteglobal

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.

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:

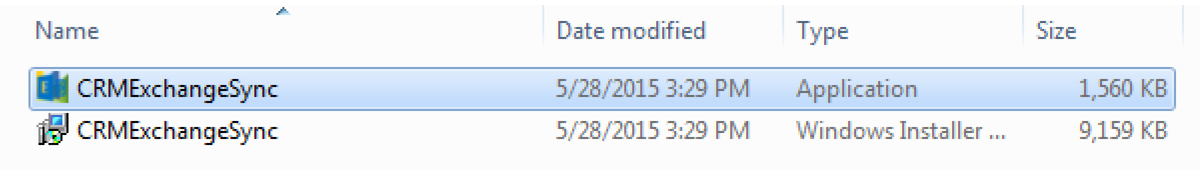
ExchangeSync.exe and ExchangeSync.msi

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

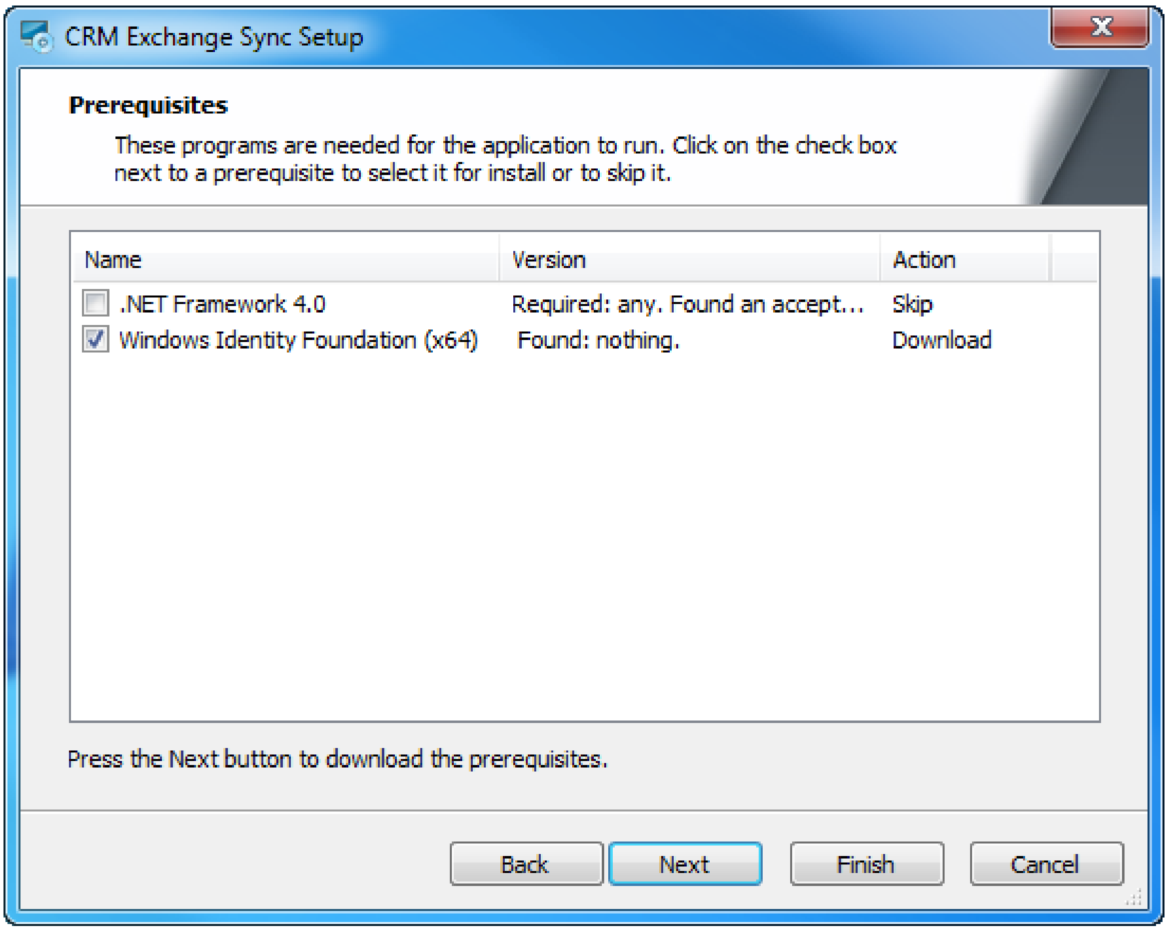
CRMExchangeSync3.exe and CRMExchangeSync3.msi

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

Run the CRMExchangeSync.exe application.



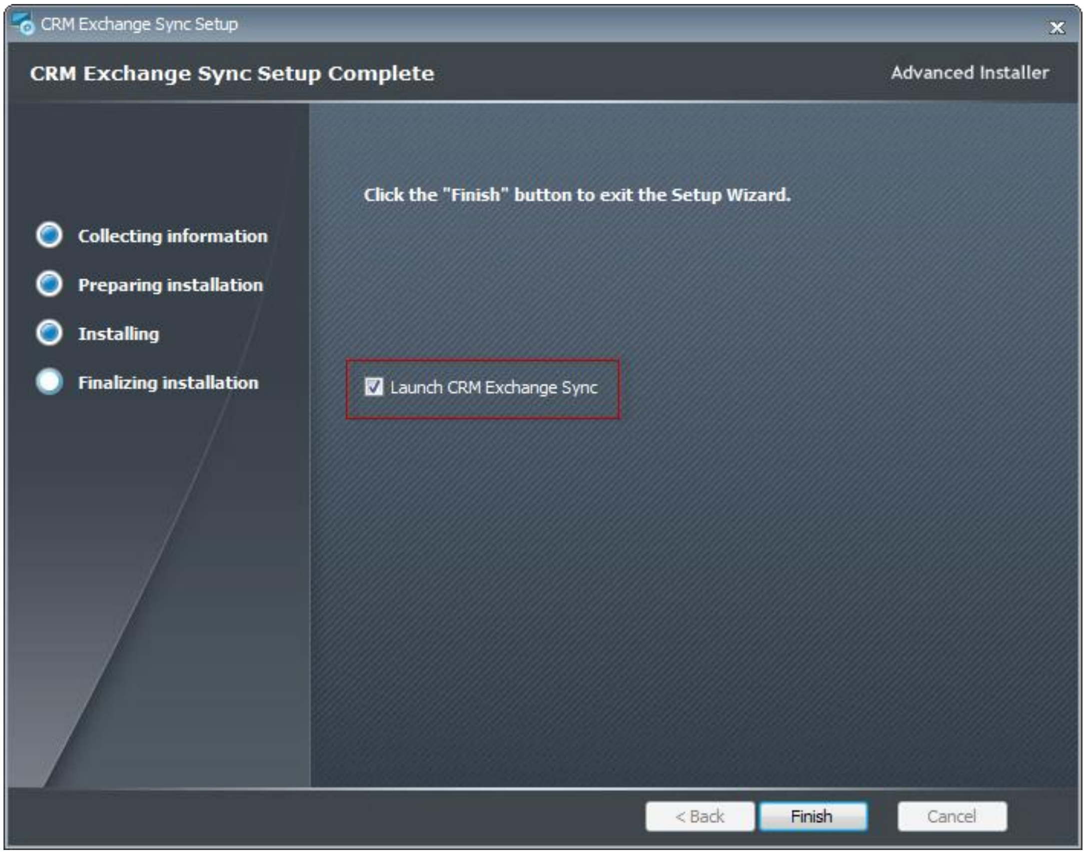
If any prerequisites are missing from the installation, the setup wizard will start with installing the prerequisites.



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



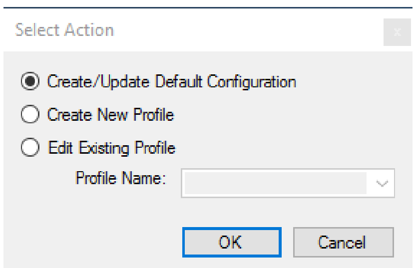
On the final screen, the checkbox Launch CRM Exchange Sync is checked. This will launch the CRM Configuration Wizard. Please make sure that you have all the required CRM and Exchange connectivity information and user account information before proceeding to this step.

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.

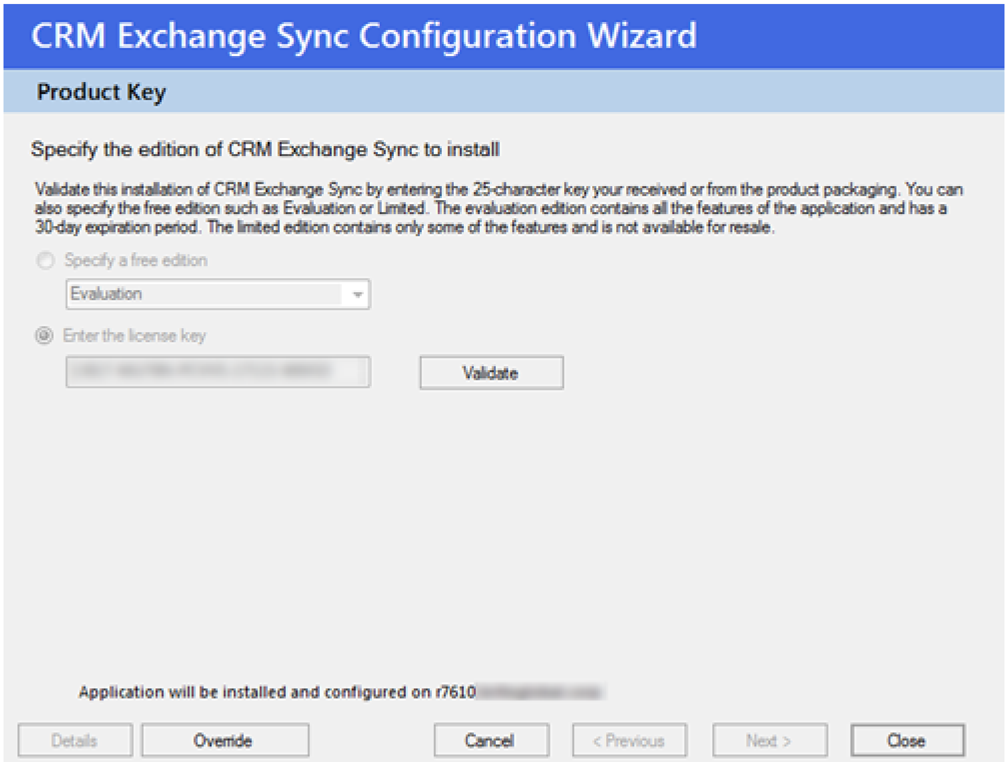
When you launch the configuration wizard, you will be asked to select the action to perform. The first time the Configuration Wizard is launched, the only possible option is to Create the Default Configuration. After the initial configuration has been created, you can launch the Configuration Wizard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



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.



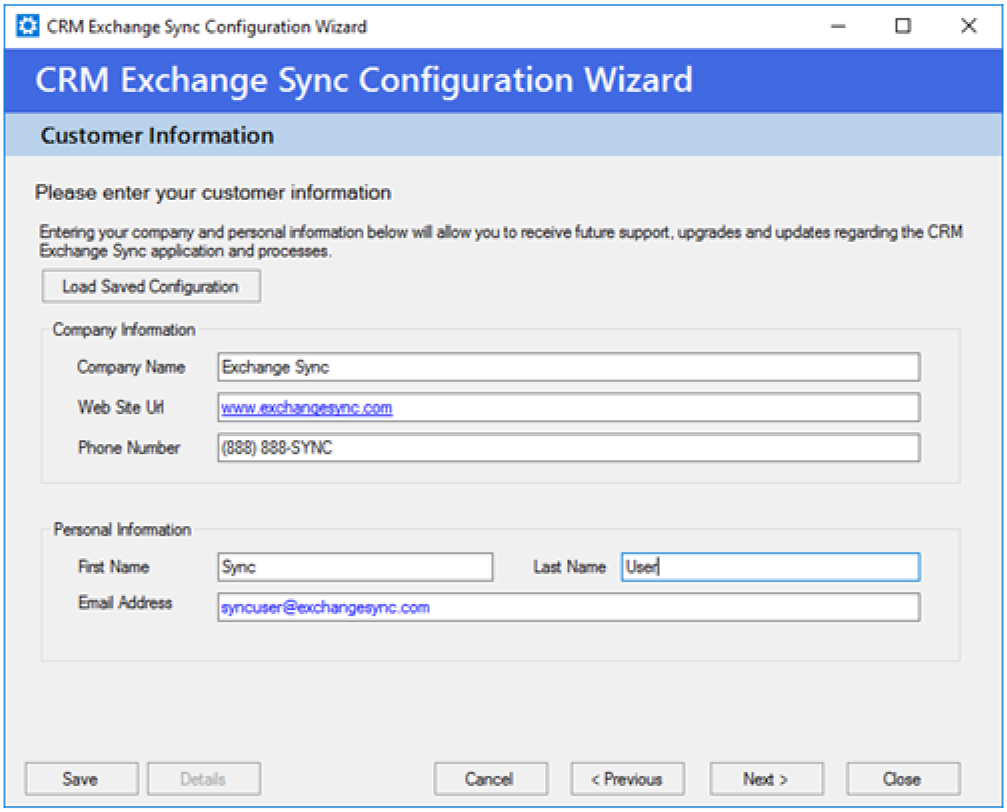
Please note that the application is preconfigured to be installed on a specific machine, and cannot be installed on any other machine. A separate license key is required for configuration the application on a separate machine.

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.

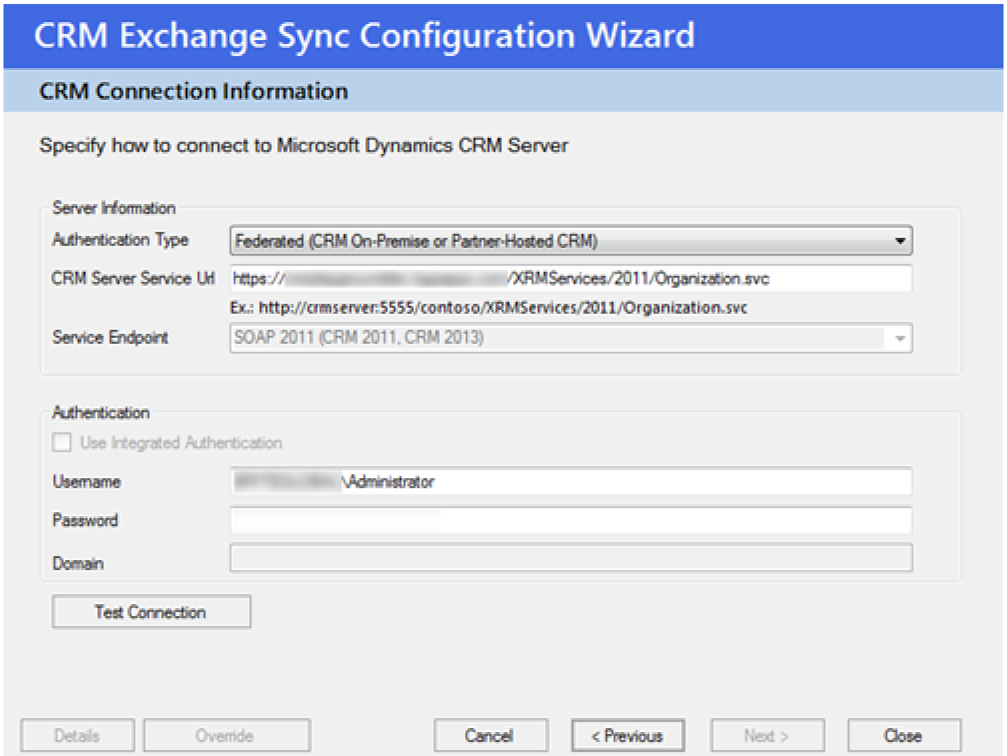
If you have started filling out the Configuration Wizard previously, but did not finish, and saved your configuration, you can click on the Load Saved Configuration button to pre-populate the fields on the Wizard that you have entered before.



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.

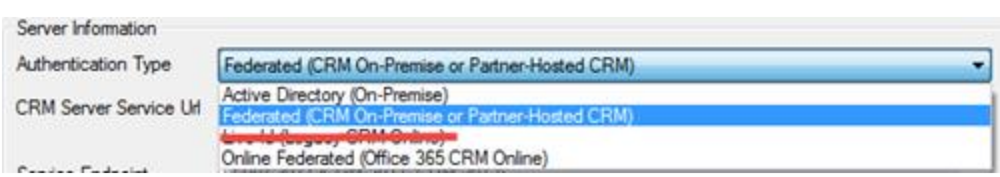


The first parameter is the Authentication Information which can be Active Directory (On-Premise), Federated (CRM On-Premise or Partner-Hosted CRM) and Online Federated (Office 365 CRM Online).

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

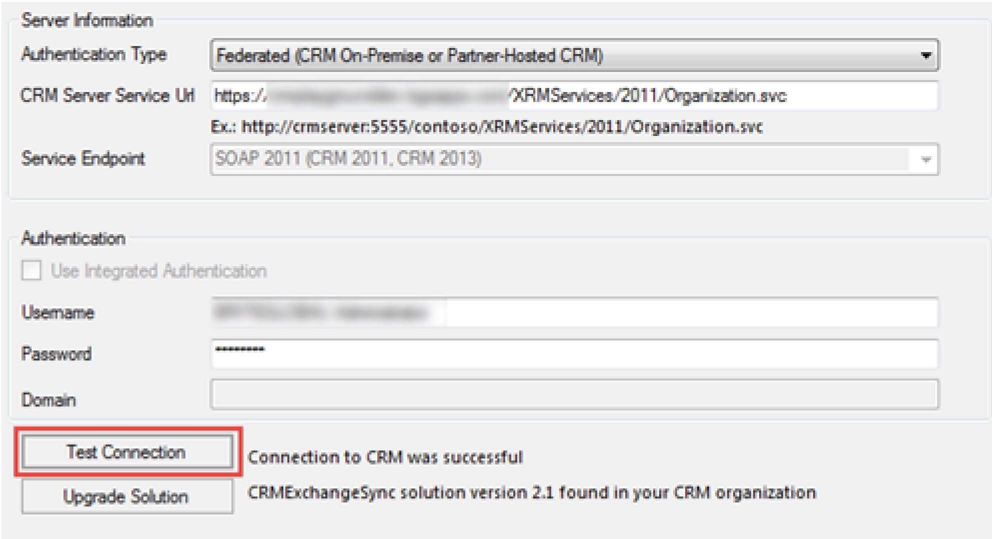
The second parameter is the CRM Service Url, which is the Url of the CRM Organization Service. If you are not sure what this value is, navigate to your CRM environment and go to Settings -> Customizations -> Developer Resources.

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.



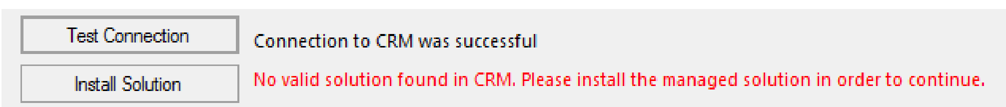
If you are using the Exchange AutoSync Service, you cannot use Integrated Authentication.

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



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.



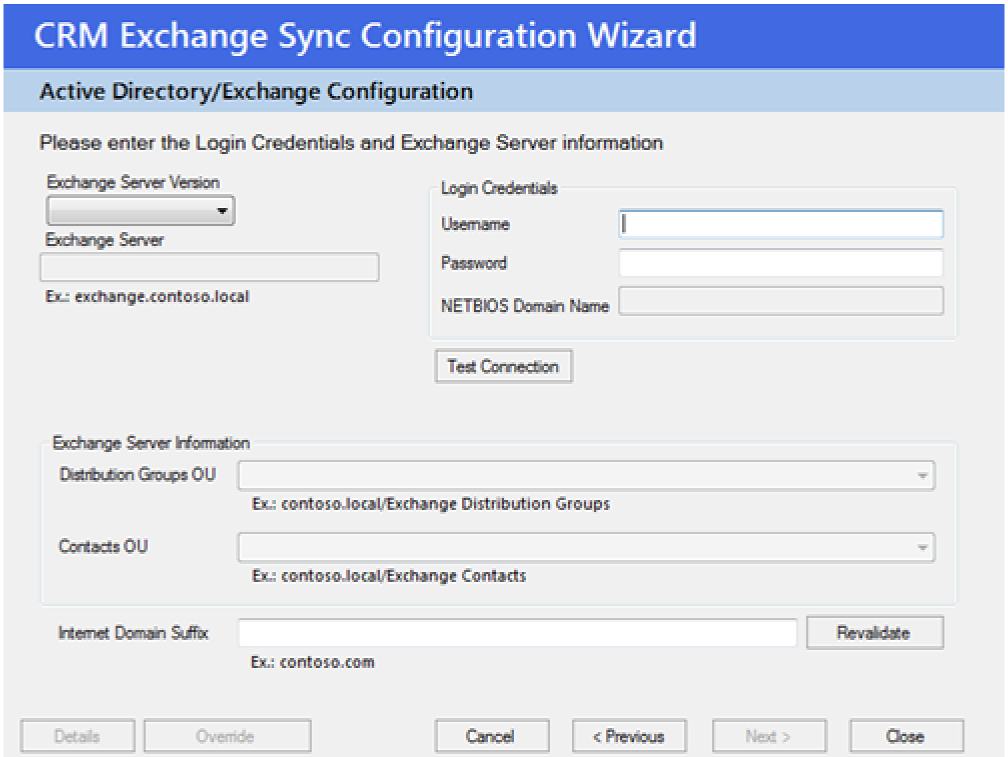
You will be asked to enter the location of the solution file, which is located on the resources subdirectory under the installation directory of ExchangeSync of the application.

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.

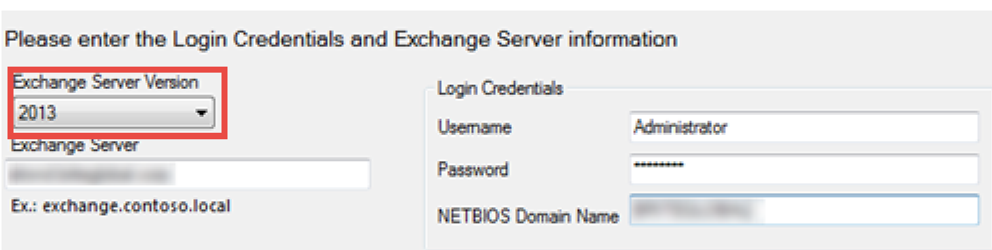
Exchange Connection Information

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.

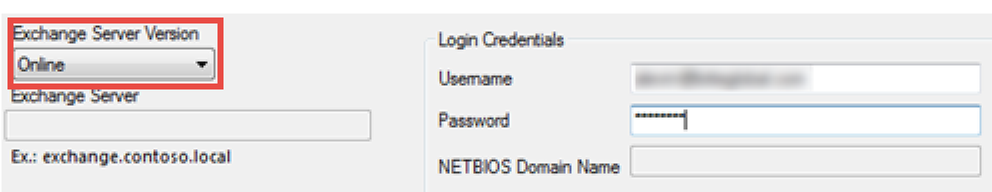


The first thing that we need to enter is the Exchange Server version. We can either use Exchange 2010, Exchange 2013, Exchange 2016 or Exchange Online.

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.



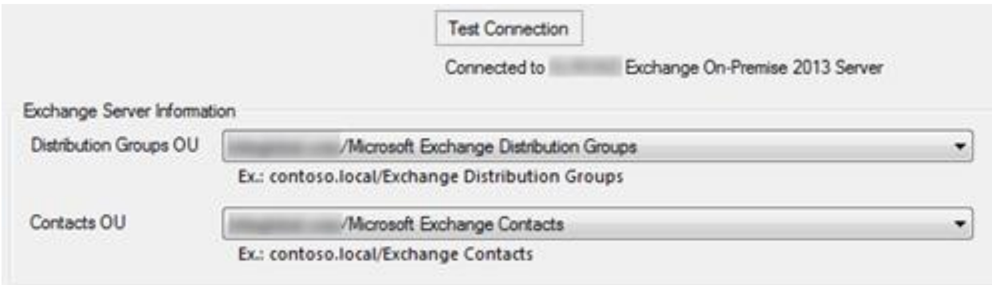
If we enter Exchange Online, we do not supply the Exchange Server name or the NetBIOS domain name, only the Office 365 Username and Password of an admin account that has enough access to add/edit recipient and group information.



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.

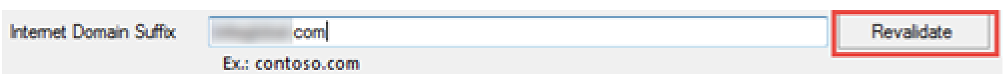
If connecting the Exchange 2010-2016 (On Premise), when connectivity is successful, the Distribution Group OU and Contacts OU list fields will appear, and you will have to select where you are going to want your Sync contacts and groups to be stored in Exchange (shown below):



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

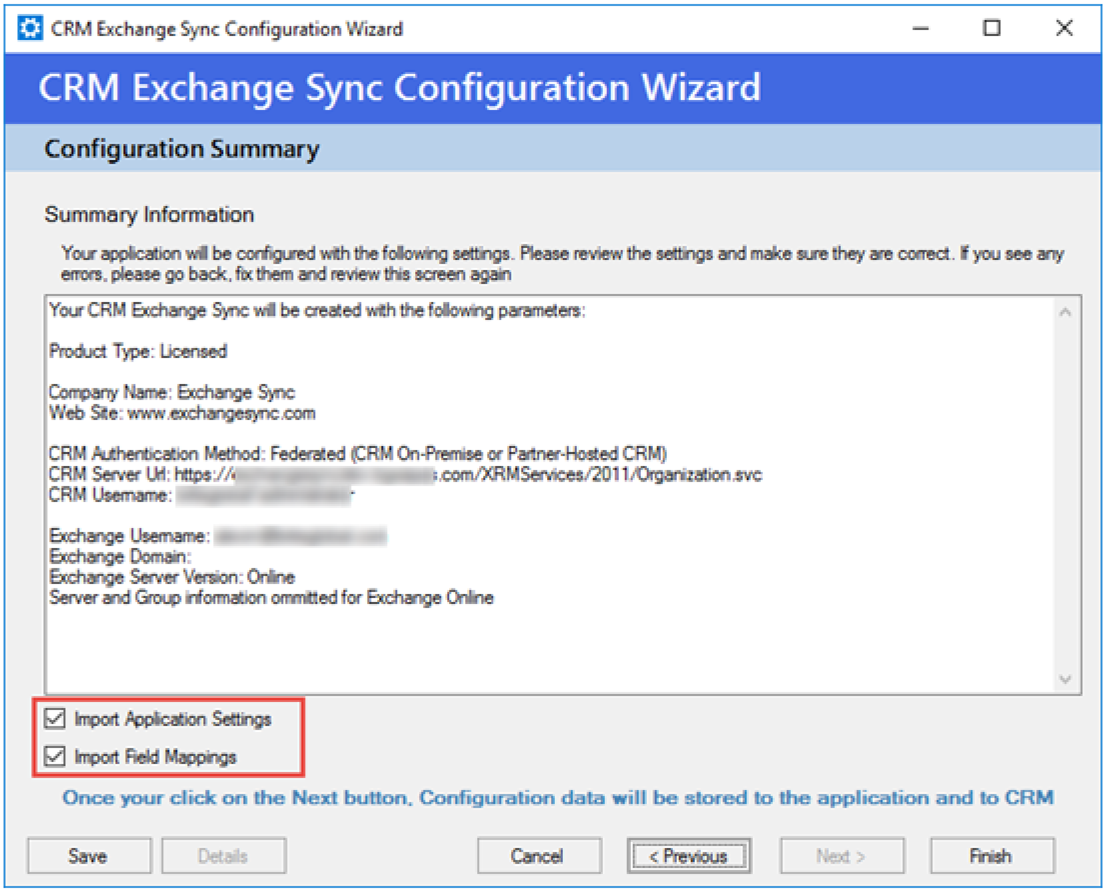
Finally we will need to enter the external domain name (such as contoso.com), which will allow the system to distinguish between Exchange Users and Exchange Contacts, and click on the Revalidate button to enable us to continue.

Click on the Next button to Continue.



Installation Summary Page

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



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.

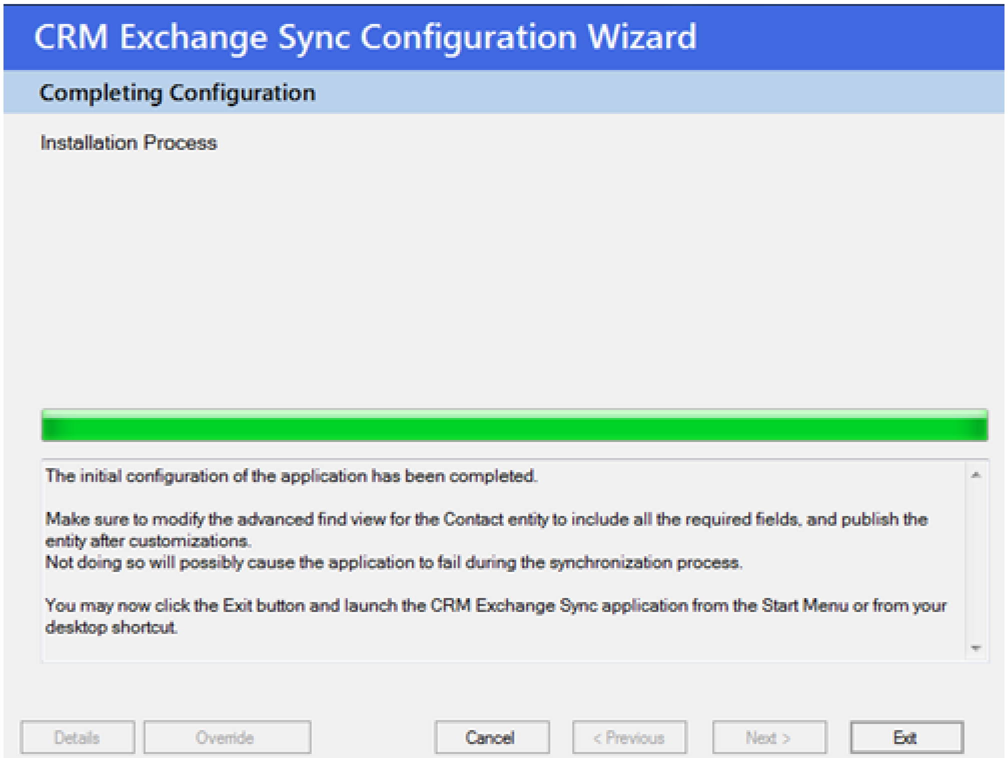
Click on the Finish button to complete the Installation at this point.

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.