Setup Guide Automation AIS-M365 CRM Sync v2.1

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1 Installation Guide

1.1 Pre-installation instructions

Before the module is uninstalled, changed, or repaired, make sure that config files in the Directory and web config file with related message Tracking folder in inetpub are backed up properly.

HautomationServer 2.1.34252	🛃 AutomationServer 2.1.34252.34252 x86 Setup - 🗆 🗙			×
	Welcome to the Automat 2.1.34252.34252 x86 Se The Setup Wizard allows you to char AutomationServer 2.1.34252.34252 installed on your computer or to rem computer. Click Next to continue or (Wizard.	ionSer tup Wi ge the wa x86 featu ove it fron Cancel to e	ver zard ay ires are n your exit the Se	etup
COMPLIANT				
	Back Nex	‹t	Cano	:el

Figure 1 – Setup WIzard

The Automation Server is installed through an MSI package. Run the .msi file and follow the installation wizard. Review the license agreement and accept it, click "Next".



HautomationServer 2.1.34252.34252 x86 Setup -	×
End-User License Agreement Addovatio	n 🗸
Please read the following license agreement carefully	
LICENSE TERMS FOR ADDOVATION SOFTWARE These license terms are an agreement between Addovation and you. They apply to the Addovation Software, and any accompanying documentation	^
1. ACCEPTANCE BY INSTALLING THE SOFTWARE, YOU ACCEPT THESE TERMS. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THIS AGREEMENT, YOU MUST NOT INSTALL, USE, OR COPY THE SOFTWARE	
 2. INSTALLATION AND USE RIGHTS. You may install and use the software for agreed named users, or computers. or other unit of measure that are agreed between you and 	~
✓ I accept the terms in the License Agreement	
Print Back Next C	Cancel

Figure 2 – End-User License Agreement



1.2 Environmental Configuration

AutomationServer 2.1.34252.34252 x86 Setup X		
Environment configuration	Addovation 🗸	
Select configuration:	Environment configurations govern access to available databases and ease the task of switching between them. Use the buttons below to add, remove or edit existing environments.	
Race8SP2-2 (default)	Add new Delete Modify	
	Back Next Cancel	

Figure 3 – Environmental Configuration

When installing the software for the first time, you will need to specify which environment(s) you wish to be able to connect to. You do this by clicking the Add new button. When upgrading to a new version, or modifying an existing installation, you may choose to retain the current settings and simply click Next or make changes to the environment configuration by clicking Modify.

You will be able to choose between the environments in the AIS login dialog, from any of the supported MS Office applications.

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1.3 Configuration Settings

The configuration settings allow you to customize your installation.

AutomationServer 2.1.34252.34252 x86 Setup		
Configuration settings	Addovation 🗸	
Set up configuration parameters here to fit be changed later by restarting the installation	your particular installation. If needed, the settings can on wizard, using the "Change" option.	
Configuration name	Use server URL's	
jrace9dev	• IFS Enterprise Explorer	
Use as Default	◯ SharePoint	
Use single signon		
	IFS version	
	IFSApplications9 ~	
	Back Next Cancel	

Figure 4 - Configuration Settings

Configuration name: Choose a name that describes the configuration (e.g. Race 8 demo), if it should be the default logon choice, and whether IFS is configured for single sign-on.

Server URLs: Select the server URL of your choice

IFS Version: Choose your IFS version

If you are not sure what options to check, leave the default values. You can change the values temporarily from within the application at any time.

To add a new environment, you need to specify the address to IFS Extended Server (e.g. server1:58080), the Application owner (e.g. IFSAPP) and the IFS portal (e.g. <u>http://race75sp6:58080/</u>).



🖟 AutomationServer 2.1.34252.34252 x86 Setup	×
Data access information	Addovation 🗸
Enter database connection string, application owner ar	nd portal Url.
Database connection (e.g. 'server 1:58080'):	
race9dev:58080	
App owner (e.g. 'IFSAPP'):	
IFSAPP	
IFS Enterprise Explorer (e.g. 'http://server1:58080'):
http://race9dev:58080	
Ba	ack Next Cancel

Figure 5 - Data Access Information

The Database connection must use the prefix HTTP or HTTPS (in lower-case).

AutomationServer 2.1.34252.34252 x86 Setup				
Data access information Addovation				
Enter database connection string, application owner and portal Url.				
Database connection (e.g. 'server1:58080'):				
race9dev:58080				
App owner (e.g. 'IFSAPP'):				
IFSAPP				
IFS Enterprise Explorer (e.g. 'http://server1:58080'):				
http://race9dev:58080				
Warning ×				
Please use the prefix http or https (in lower-case) for the Database connection.				
ОК				

Figure 6 - Data Access Information



🛃 AutomationServer 2.1.34252.34252 x86 Setup	×
Data access information	Addovation 🗸
Enter database connection string, application owner and	l portal Url.
Database connection (e.g. 'server1:58080'):	
http://race9dev:58080	
App owner (e.g. 'IFSAPP'):	
IFSAPP	
IFS Enterprise Explorer (e.g. 'http://server1:58080'):	
http://race9dev:58080	
Bac	k Next Cancel

Figure 7 - Data Access Information



1.4 Additional Settings

In the Additional Settings dialog, you can define a symbol that exclude classes and formats with this particular symbol. This field is defaulted to the asterisk symbol. You can also define the Document Search URL in this dialog.

AutomationServer 2.1.34252.34252 x86 Setup X				
Additional settings	Addovation 🗸			
Display only default company classes when checking in	1			
Exclude classes and formats where description contains:				
l Document search URL:				
/secured/docmaw/DocTitleOvw.page				
Back	Next Cancel			

Figure 8 – Additional Settings



1.5 License Key

You will have received a license key from Addovation upon purchase of the AIS. Please enter the license key during the configuration of the software.

HautomationServer 2.1.34252.34252 x86 Setup ×				
License and custom settings	Addovation 🗸			
Enter License key and help Url.				
License key (enter all characters including any hyphens)):			
Help URL:				
https://www.addovation.com/solutions/				
English (English)				
Back	Next Cancel			

Figure 9 - License and custom settings

In the Help URL field, you can specify what the help symbol in the AIS will point to. Included in the AIS is an online user documentation. The link is normally already filled in, so if you don't want to provide your own information, you can leave it as is.

When you have entered the correct license key, you will receive a validation listing the products and their date of expiry.



AutomationServer 2.1.34252.34252 x86 Setup X				
License key validation.		Addovati	on 🗸	
The license key entered entitles you access to the listed modules. Click the "Get Batch" button to create a batch installation file or "PL*SQL" button to execute database scripts (e.g. access granting scripts).				
Product name	Exp. date	License state		
AIS Uplink AIS Message Tracking AIS Cloud Office365 Create Document Serv Document Agent Plugin Executer	10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021	Valid Valid Valid Valid Valid Valid Valid Valid		
Get Batch PL*SQL	Back	Next	Cancel	

Figure 10 – License key validation

1.6 Simple distribution – 'Get batch'

The 'Get batch' option allows you to install the software on several machines, without having to enter your settings multiple times.

Have AutomationServer 2.1.34252.34252 x86 Setup				
License key validation.		Addovation 🗸		
The license key entered entitles you access to the listed modules. Click the "Get Batch" button to create a batch installation file or "PL*SQL" button to execute database scripts (e.g. access granting scripts).				
Addovation	Exp. date	License state		
AIS Uplink	10/9/2021	Valid		
Message Tracking	10/9/2021	Valid Valid Valid		
Office365 Create Document Serv	10/9/2021	Valid Valid		
Document Agent Plugin Executer	10/9/2021 10/9/2021	Valid Valid		
Get Batch PL*SQL Back Next Cancel				

Figure 11 – Get Batch

When you click on the button 'Get Batch', a .bat file is created, which will launch the .msi using the settings you defined in the current installation.

Observe the following with generating the batch file:

- The batch file must be executed by a user having administrator rights
- If you experience problems running from a network drive, try to copy the installation file to a local drive
- The batch file created can only be used to install 32 bit or 64-bit version, depending on the installation file.



	> This	PC > Documentr	7.	Search Documer		0
	> 1115	PC > Documents	0	Search Documer	165.	1
organize 👻 Ne	w folder				8:: •	0
This PC	^	Name	D	ate modified	Туре	
3D Objects		Adobe	20	017-03-01 12:25	File folder	
Desktop		Altova	20	016-07-27 2:24 PM	File folder	
		Any Video Converter	20	016-11-08 12:01	File folder	
Develoada		Any Video Converter Professional	20	016-11-08 12:12	File folder	
- Downloads		FeedbackHub	20	017-10-10 1:14 PM	File folder	
J Music		Graphics	20	016-09-30 10:33	File folder	
Pictures		IFS	20	018-02-02 10:21	File folder	
Videos		IfsDocsTemp	20	018-02-01 4:02 PM	File folder	
Local Disk (C:))	IISExpress	20	016-08-16 11:06	File folder	
Local Disk (D:))	Integration Services Script Component	20	016-11-09 3:17 PM	File folder	
	~ <					>
File name:	Autom	nationServerInstall_2.1.34252.34252.bat				_
Save as type:	Batch fi	les (*.bat)				

Figure 12 – Save batch file

A .bat file and a .PS1 file is generated at your chosen location.

When you want to distribute the software to other computers, download the .msi, the.bat and the .PS1 file to the chosen computer. Open the .bat file and right click 'run as administrator'. The installation file will then run with your chosen parameters, installing AIS on the computer.

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1.7 Automatic installation of scripts – PL*SQL

If this is the first time you run the AIS installation, you need to run the PL*SQL function.

體 /	AutomationServer 2.1.34252.34252 x86 Setup X						
L	icense key validation.		Addovation	~			
The cre scri	e license key entered entitles you ac ate a batch installation file or "PL*S(ipts). Idovation	ccess to the listed modu QL″ button to execute o	les. Click the "Get Batch" button t database scripts (e.g. access gran	to nting			
	Product name	Exp. date	License state				
	AIS Uplink AIS Message Tracking AIS Cloud Office365 Create Document Serv Document Agent Plugin Executer	10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021	Valid Valid Valid Valid Valid Valid Valid Valid				
	Get Batch PL*SQL	Back	Next Cancel				

Figure 13 – PL*SQL script



V Addovation Automation Server 2.1.34252.34252 x86	×
Execute PL*SQL scripts	Addovation 🗸
Scripts to be executed:	
ADDO_SETUP ADDO_DEFAULT_GRANTS ADDO_PRES_OBJ_CORE	
Execute using Username: Password: Environment: Race8SP2-2	Browse
	Execute Close

Figure 14 – Execute PL*SQL scripts

Click on the PL*SQL button and type in your username and password (Usually IFSAPP or IFSADM) and the environment where you would like to install the scripts.

If you have scripts saved to your drive, you can browse for these using the 'browse' button. Click 'Execute' to run the scripts and to give the necessary access and grants. The wizard will confirm that the scripts were run successfully. You may have to enter parameters for some of the scripts



1.8 Customized setup

Under 'custom setup' you can select the way the features are to be installed for the various MS Office components. Click on the icons in the tree list to adjust the installation for the components.

🖟 AutomationServer 2.1.34252.34252 x86 Setup		_		×
Choose Setup Type Choose the setup type that best suits your needs	Addo	ova	tion	~
Typical Installs all add-ins covered by your license. Re	commended f	for most	users.	
Custom Allows users to choose which program feature they will be installed. Recommended for advar	s will be insta nced users.	lled and t	where	
Complete All program features will be installed. Note tha space, and potentially slows down Application	t this requires startup.	s the mos	st disk	
Back	Next		Cance	el

Figure 15 – Setup Types



🖟 AutomationServer	AutomationServer 2.1.34252.34252 x86 Setup						×
Custom Setup Select modules to I	be installed.			A	ddov	atio	n 🗸
Choose how modul tree below.	les are to be insta	lled on y	our co	mputer by (clicking the ic	ons in the	
	ugin Executer ocument Agent Idovation Cloud Idovation Uplink essage Tracking		^	Core files	ure requires :	158KB on y	our
	ate Documents 365 CRM Sync eate Document A	zure Con	*	nard drive	2.		
Location:	C:\Program Files ((x86)\Add	dovatio	on\Automat	ion Server\	Browse	e
Reset	Disk Usag	je		Back	Next	Car	ncel

Figure 16 – Custom Setup

Components

- IFS to SQL Server Plugin
- Plugin Executor
- Document Agent
 - Reads files or emails from configured folder or mailbox and does stuff like create work orders or other IFS items.
- Addovation Cloud
- Addovation Uplink
- Message Tracking
- Create Documents
- M365 CRM Sync
- Create Document Azure Consumer

Location

Always try to use default location if possible. It's easier to find the folders if they are where they should be.

1.9 Disk Space Requirements

According to the selected features in the above step, disk space requirement is calculated and displayed in the Required Column. You can see this by pressing the Disk Usage.

AutomationServer 2.1.34252.34252 x86 Setup X							
Disk Space Requirements The disk space required for the installation of the selected reatones.							
Highlighted volumes do not have e can either remove some files from different destination drives.	enough disk space a the highlighted volu	vailable for selected umes, install fewer f	features. You features, or select				
Volume	Disk Size	Available	Required				
ec:	442GB	224GB	380MB				
l ⊋s:	1999GB	227GB	ОКВ				
🚽 🖵 U:	1999GB	227GB	0KB				
⊋ v:	1999GB	227GB	OKB				
<			>				
1							
			OK				

Figure 17 – Disk Space Requirements



1.10 Ready to Install

After adjusting the disk space as per the need in your local machine you can complete the installation

🕼 AutomationServer 2.1.34252.34252 x86 Setup	_		×
Ready to install AutomationServer 2.1.34252.34252 x86	Addova	atior	\
Click Install to begin the installation. Click Back to revi installation settings. Click Cancel to exit the wizard.	ew or change any of y	our	
Back	Install	Cano	cel

Figure 18 - Install



Message Tracking web site is not be able to install/upgrade without IIS. Setup will exit after giving below warning message.

🙀 AutomationServer 2.1	.34252.34252 x86 Setup)		_		×
Installing Automa 2.1.34252.34252	tionServer x86		Add	ova	tior	י•ו
Please wait while the So	etup Wizard installs Auto	mationSer	ver 2.1.342	52.3425	2 x86.	
Status Warning					×	
Plea web	ase install IIS feature be o site	fore insta	lling Messi	age Trac	king	
				0	ок	
		Back	Next	:	Can	cel

Figure 19 - IIS requirement



Figure 20 - Finish

2 Upgrade

2.1 Missing Keys/values

When an upgrade is done from a version before renaming of M365CRMSync (Ex: version with O365CRMSync To version with M365CRMSync), If new key/values are added to the config file, the new key/values will not be included in the '_servie_id.config' file.

So, it is recommended to compare "Addo.AIS.M365CRMSync.Daemon.exe.config file with "Addo.AIS.M365CRMSync.Daemon.exe_servie_id.config" for any changes in key/values pairs in config. If there are missing pairs, those key/values should be included manually in the "Addo.AIS.M365CRMSync.Daemon.exe_servie_id.config" file before the following steps to be executed.

2.2 Upgrading from old version to Automation Server 2.1.33794.33794 or higher version.

Multiple services creation facility has been introduced with released version, Automation Server 1.1.18.27828. After an upgrade using Automation Server 2.1.33794.33794 or higher, the previous default config file will be backed up to the new folder from the old folder and old folder will be removed.

But follow below steps to get service worked without any conflict.

- Assume that user has old config file, "Office365IFSSyncDaemon.exe.config". It will be copied to the new folder (Ex: 'M365CRMSync') and renamed as "Addo.AIS.M365CRMSync.Daemon.exe.config".
 - 1. Delete the old service (using SC DELETE command as described later in this document).
 - 2. Provide a value for 'ServiceID' in the config file.
 - 3. Install the service.

2.3 Upgrading using a version between 1.1.18.27828 & 2.0.0.32580 to Automation Server 2.1.33794.33794 or higher version.

Because of the changes done for the name of M365 CRM Sync module, folder names also have been changed occasionally as follows.

- 1. O365CRMIntegration
- 2. O365CRMSync
- 3. M365CRMSync

After an upgrade, the previous config files will be backed up to the new folder from the old folder and old folder will be removed. But follow below steps to get service worked without any conflict.

- Assume that user has old config file, "Addo.AIS.O365CRMIntegration.Daemon_App10.exe.config". It will be copied to the new 'M365CRMSync' and renamed as "Addo.AIS. M365CRMSync.Daemon_App10.exe.config".
 - 1. Delete the old service (using SC DELETE command as described later in this document).



- Get a copy of that old config file to a separate folder/place and rename the old config file to "Addo.AIS.M365CRMSync.Daemon.exe.config" and replace existing file in M365CRMSync folder (Ex: "C:\Program Files (x86)\Addovation\Automation Server\M365CRMSync".)
- 3. Install the service.

Important:

If the installed M365 CRM Sync service doesn't work at any point, due to any technical reason, service should be uninstalled and installed again.

2.4 Upgrading old versions to Automation Server 2.1. 33715 or higher.

While performing an upgrade, environments and license key should be added again, due to the fact that previously configured environments won't be available during and after the upgrade.

3 Message Tracking

Addovation Message Tracking is a common platform for all supervision and message logging.

The integration solution for Microsoft 365 will log all user's synchronizations in Message Tracking. If something goes wrong in any user's sync, mail alerts will be sent to a configurable mail address.

The integration is a flexible solution. Configuration can be done per customer.

Login to Message Tracking should be done by an administrator.

	AUTOMATION SERVER
Log in.	
Email	
Password	
Log in	
	© 2018, Addovation - Automation Server Dashboard Version: 1.1.0.1861

Figure 21 – Message tracking Login



3.1 Setup 'O365' message category

- Admin-> MESSAGE CATEGORIES
- Register the message category 'O365IFS'

Index - Automation Serve 🗙	
\leftarrow \rightarrow C () localhost:8089/MessageCategoryAdmin	
	AUTOMATION SERVER
ADMIN LOG OFF	
MESSAGE CATEGORY PREVIEW	
Create New	
Message Category	
Demo	Edit Details Delete
	© 2017, Addovation - Automation Server Dashboard Version: 1.1.0.23285

Figure 22 - Message category

\leftarrow \rightarrow \circlearrowright localhost:8089/MessageCategoryAdmin/Create	
	AUTOMATION SERVER
ADMIN LOG OFF	
ADD MESSAGE CATEGORY	
MESSAGE_CATEGORY O365IFS DESCRIPTION O365IFS Create Back to List	
	© 2017, Addovation - Automation Server Dashboard Version: 1.1.0.28891

Figure 23- Create message category



\leftarrow \rightarrow \circlearrowright localhost=8089/MessageCategoryAdmin	
	AUTOMATION SERVER
ADMIN LOG OFF	
MESSAGE CATEGORY PREVIEW	
Create New	
Message Category	
Demo	Edit Details Delete
O365IFS	Edit Details Delete
	© 2017, Addovation - Automation Server Dashboard Version: 1.1.0.20091

Figure 24 - Message category

• Go to Admin -> Users -> click on 'Edit' (Edit the admin user)

\leftarrow \rightarrow \circlearrowright localhost:8089/AccountAdministration			□ ☆ =	- 12 6
	AUTOMATION SERVE	ER	LOGGED IN AS : ADMIN®AI	
ADMIN LOG OFF				
USERS PREVIEW				
Create New				
User Name	Email	Roles	Categories	
admin@addovation.com	admin@addovation.com	Admin		Edit
	© 2017 Addrvation - Automation Server Dashboard			
	Version: 1.1.0.28891			

Figure 25 – Edit user

- Add the '0365IFS' category to the user & Save
- Now the menu is extended.



\leftarrow \rightarrow \circlearrowright \mid localhost:8089/AccountAdministra	ation/Edit/3d230b8a-ddb2-4659-b3aa-e80c7d76c6b4?Claims=System.Collections.Generic.List9	6601%5BMicrosoft.AspNet.
	AUTOMATION SERVER	LOGGED
0365IFS V MESSAGE OVERVIEW	DASHBOARD CONFIG ADMIN LOG OFF	
UPDATE USER		
User Name	Roles	Categories
admin@addovation.com	M Admin	Demo
Email		⊘O365IFS
admin@addovation.com		
Save		
Back to list		

Figure 26 – Edit user

\leftrightarrow \rightarrow O	localhost:8089/AccountAdministra	ition					III \$	
		AU	том		N SER	VER	LOGGED IN AS : ADI	MIN®ADDOVATION
O365IFS V	MESSAGE OVERVIEW	DASHBOARD	CONFIG	ADMIN	LOG OFF			
USERS PREVIE	W							
Create New								
User Name		Email				Roles	Categories	
admin@addova	tion.com	admin@a	addovation.com			Admin	O365IFS	Edit
			© 2017, Addov	ation - Automat	ion Server Dashbo	oard		

Figure 27 – Add O365IFS



3.2 Setup Category Type/s

• Admin-> MESSAGE TYPES

O365IFS 🔻	MESSAGE OVERVIEW	DASHBOARD	CONFIG	LOG OFF
ADD MESSAG	GE TYPE			
MESSAGE_TYF				
DESCRIPTION Syncronization	n of events			
Create Back to List				

Figure 28 - Category Type/s

3.3 Setup basic data for message tracking service.

- Open Message Tracking Dashboard
- Go to 'admin' page and select 'Message Tracking Configuration'

	N LOG OFF
SYSTEM ADMINISTRATION	
USERS	ROLES
MESSAGE CATEGORIES	MESSAGE TYPES
MESSAGE TRACKING CONFIGURATION	LOG VIEW
TABLE CONFIGURATIONS	
BATCH OVERVIEW	MESSAGE OVERVIEW
BATCH ITEMS	ITEM HISTORY

Figure 29 - Message Tracking Configuration



• Create New or Edit basic data for the given Message Type

N	IESSAG Create Ne	E TRACK	ING SETTINGS			
		Message Category	Message Type	INFORMATION_REFERENCE	CLEANUP_TRACKINGS_DAYS_OLD	CLEA
	Edit Details Delete	O365IFS	SYNC_ACTIVITIES		1	2
	Edit Details Delete	O365IFS	SYNC_CONTACTS		2	2

Figure 30 - Basic data



0365IFS V MESSAGE OVERV	IEW	DASHBOARD	CONFIG	LOG OFF
UPDATE MESSAGE TRACKING SE	ETTIN	GS		
MESSAGE_TRACKING_CONFIG_	TAB			
MESSAGE TYPE				
SYNC_ACTIVITIES •				
MESSAGE_CATEGORY				
0365IFS •				
INFORMATION_REFERENCE				
CLEANUP_IRACKINGS_DAYS_OLD				
2				
CLEANUP_MESSAGES_DAYS_OLD				
2				
CLEANUP_ERR_TRACKINGS_DAYS_OLD)			
2				
CLEANUP_ERR_MESSAGES_DAYS_OLD				
30				
REPROCESS_LOCATION				
REPROCESS_RIGHTS				
NONE				
2				
-				
Save				
Back to List				

Figure 31 – Message tracking basic data

4 Setup Azure Portal AD App Registration setup

To use role-base access control within only one organization, it needs to register an Azure Active Directory application, service principle and assign the required permission. The registration gives an 'Application ID'. It will be used to work with M365 CRM Sync service.

4.1 Create an Azure Active Directory application.

1. Sign into the azure account & select 'Azure Active Directory'.

🖹 🖅 🔥 Home - Microsoft Azure 🗙	+ ~		-	
\leftarrow \rightarrow \circlearrowright $ເall$ https://por	al.azure.com/#home	□ ☆	\$= &	r
	▷ Search resources, services, and docs (G+/)			🙆
Azure services				
+ 🔸	📍 🚺 🗷 😥	•		
Create a resource Azure Active Directory	Subscriptions Cost Service Bus Resource Management + groups	Virtual machines		
۵ 🗖	\rightarrow			
App Services Storage accounts	More services			

Figure 32 - Azure Active Directory



2. It will be redirected to the overview page.



Figure 33 - Overview



3. Select 'App Registrations' from the menu.



Figure 34 - App Registrations



4. You can find the already created 'Owned Applications' here.



Figure 35 - Owned Applications



5. Click 'New Registration' to register a new application.

	▷ Search resources, services, and docs (G+/)	🙆
Home > addornd - App registrations		
addornd - App registra	ations	× ×
, Search (Ctrl+/)	$\overset{\ll}{\mapsto} + \text{New registration} \bigoplus_{\text{Le}} \text{Endpoints} \textcircled{P} \text{ Troubleshooting} \bigtriangledown \text{ Got feedback?}$	
() Overview	\sim (i) Welcome to the new and improved App registrations (now Generally Available). See what's new \rightarrow	
 Getting started Diagnose and solve problems 	Looking to learn how it's changed from App registrations (Legacy)? Learn more Still want to use App registrations (Legacy)? Go back and tell us why	

Figure 36 - New Registration

6. Provide an application name.

■ Microsoft Azure		🙆
Home > addornd - App registrations > R	egister an application	
Register an application		×
* Name		
The user-facing display name for this applic	ation (this can be changed later).	
МуАрр		\checkmark
Supported account types		
Who can use this application or access this	API?	
 Accounts in this organizational directo 	ry only (addornd only - Single tenant)	
O Accounts in any organizational directo	ry (Any Azure AD directory - Multitenant)	
O Accounts in any organizational directo	ry (Any Azure AD directory - Multitenant) and personal Microsoft accord	unts (e.g. Skype, Xbox)
Help me choose		
Redirect URI (optional)		
We'll return the authentication response to changed later, but a value is required for m	this URI after successfully authenticating the user. Providing this now i ost authentication scenarios.	s optional and it can be
Web v e.	g. https://myapp.com/auth	

Figure 37 - Application name



7. Select a supported account type, which determines who can use the application. In this case select 'Accounts in this organizational directory only'.

🖹 🖅 🔥 Register an application X + V	_	-		×
\leftarrow \rightarrow \circlearrowright \land https://portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/Regist \square \bigstar	∱≡	L	È	
Microsoft Azure P Search resources, services, and docs (G+/)				0
Home > addornd - App registrations > Register an application				
Register an application				×
* Name				
The user-facing display name for this application (this can be changed later).				
МуАрр	~			
Supported account types				
Who can use this application or access this API?				
Accounts in this organizational directory only (addornd only - Single tenant)				
Accounts in any organizational directory (Any Azure AD directory - Multitenant)				
Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)				
Help me choose				
Redirect URI (optional)				
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.	l.			
Web e.g. https://myapp.com/auth				
By proceeding, you agree to the Microsoft Platform Policies ${ar t}^\eta$				
Register				
<				>

Figure 38- Accounts in this organizational directory only

- 8. Provide a redirect URI of the location where the authorization server sends the user once the application has been successfully authorized and granted an authorization code or access token. The authorization server sends the code or token to the redirect URI.
 - a. URI must begin with the 'https'. 'http' can be used for localhost URIs (an exception for certain scenarios).
 - b. URI should be case-sensitive. Case should be matched the case of the URL path of the application.
 - c. Maximum of 256 characters can be used for each redirect URI.

Register an application

МуАрр	
Supported a	count types
Who can use th	is application or access this API?
 Accounts i 	any organizational directory (Any Azure AD directory - Multitenant)
Accounts i	any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, X
O Personal N	icrosoft accounts only
Help me choos	
Help me choos	<u>A</u>
Help me choos	
Help me choos Redirect URI	(optional)
Help me choos Redirect URI We'll return the changed later,	(optional) authentication response to this URI after successfully authenticating the user. Providing this now is optional and it c but a value is required for most authentication scenarios.

Figure 39- Redirect URI

Important

Applications running under credentials with administrator privileges can be very powerful, so please be sure to keep the application's ID and secret credentials in a secure location.



9. In 'Overview' you can find created application information.



Figure 40 - Overview



10. Copy and keep the Application(client) ID saved in a secure location.



Figure 41- Application(client) ID

Addovation V

4.2 Grant Permission

1. For Microsoft365 CRM Sync you will need to grant access to specific APIs.



Figure 42 - Grant Permission



2. Go to 'API Permission' & click 'Add a Permission'.



Figure 43- API Permission



≡ Microsoft Azure	, > Search resources, services, and docs (G+/)
Home > addornd - App registrations > N	yApp - API permissions
— MyApp - API permissions	\$ ×
	🕐 Refresh
 Overview Quickstart Manage 	Configured permissions Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. Learn more about permissions and consent
 Branding Authentication 	+ Add a permission Grant admin consent for addornd
📍 Certificates & secrets	API / Permissio Type Description Admin C Status
-> API permissions	✓ Microsoft Graph ····
Expose an API	User.Read Delegated Sign in and read us ····

Figure 44 - Add a permission



3. On the Request API permission page, select 'Microsoft Graph'



Figure 45 - Microsoft Graph



4. Select 'Application Permission' .



Figure 46 - Application Permission



5. Search for permissions you require to add to the application.

C Interps://portalazure.com/#blade/hicrosoft_AAD_RegisteredApps/ApplicationMenuBlad C Microsoft Azure Image: Search resources, services, and docs (G+/) Image: CALADIS Image: Microsoft Graph https://graph.microsoft.com/ Docs (G*/) Image: Caladis Image: Caladis Image: Caladis Image: Delegated permissions Image: Caladis Image: Caladis Image: AdministrativeUnit Image: AdministrativeUnit Image: Application Image: AdministrativeUnit Image: Approvallequest Image: Approvallequest Image: Caladis Image: Caladis Image: Caladis Image: Caladis Image: Caladis Image: Caladis	🖻 🖅 🔥 Rec	quest API permission × + ∨ – □ ×
Mcrosoft Azure	$\leftarrow \ \ \rightarrow \ \ \mho$	A https://portal.azure.com/#blade/Microsoft_AAD_RegisteredApps/ApplicationMenuBlad □ ☆ ☆ ん ピ …
Home > add Request API permissions × Image Call APIs Microsoft Graph Image Microsoft Graph Microsoft Graph Image Delegated permissions Your application require? Image Delegated permissions Your application needs to access the API as the signed-in user. Application permissions Image Select permissions copand all Image Permission Admin Consent Required Image AdministrativeUnit AdministrativeUnit Image AdministrativeUnit Application Image Application Application Image AdministrativeUnit Application Image AdministrativeUnit Application <t< th=""><th>≡ Micros</th><th>oft Azure P Search resources, services, and docs (G+/) ···· 🐣</th></t<>	≡ Micros	oft Azure P Search resources, services, and docs (G+/) ···· 🐣
Image Call APIs Search (C) Microsoft Graph Mitrosoft Graph Mitrosoft Graph Mange Delegated permissions does your application require? Image Delegated permissions Vour application needs to access the API as the signed-in user. Application permissions Mange Select permissions Image Select permissions Image Select permissions Image Select permissions Image Application needs to access the API as the signed-in user. Image Select permissions Image Select permissions Image Application needs to access the API as the signed-in user. Image Select permissions Image Call permission Image AdministrativeUnit Image Application Image Application Image Application Image Application Image AdministrativeUnit Image ApprovalRequest Image AuditLog Image BitlockerKey Image Calls Image Calls Image Chat Image Chat Image DelegatedPermissionGrant Image Device	Home > add	Request API permissions ×
DeviceManagementApps DeviceManagementConfiguration	Home > add MyA Search (C 	Kequest API permissions × Call APIs Microsoft Graph https://graph.microsoft.com/ Does [2] What type of permissions does your application require? Application permissions Delegated permissions Permissions Your application needs to access the API as the signed-in user. Application runs as a background service or daemon without a signed-in user. Select permissions expand all Type to search I Permission Admin Consent Required > AccessReview > > Application > > Addmin Consent Required > > Application > > Application > > AppRoleAssignment > > Auditlog > > Calendars > > Calendars > > Contacts > > DeviceManagementApps > > DeviceManagementApps >

Figure 47 - Application Permission



For Example: 'mail' and under 'Mail' check 'Mail.Read' & 'Mail.Send'.

🖻 🖅 🔥 Rec	uest API permission × + ~		-		×
\leftrightarrow \rightarrow O	A https://portal.azure.com/#blade/Microsoft_AAD_RegisteredApps/ApplicationMenuBlad	☆☆	h	Ġ	
≡ Micros	oft Azure P Search resources, services, and docs (G+/)				0
Home > add	Request API permissions				×
<u></u> МуА					
	Microsoft Graph https://graph.microsoft.com/ Docs 💣				
Overview	What type of permissions does your application require?				
🗸 Quickstar Manage	Delegated permissions Application permissions Your application needs to access the API as the signed-in user. Your application runs as a background service signed-in user.	vice or daemon	without	3	
BrandingAuthentic	Select permissions		e	cpand a	all
📍 Certificat	mail		Demuine	, ,	/
🗢 API perm	Vermission Ac	imin Consent	Require	a	
Expose at Owners	MailboxSettings.Read Read all user mailbox settings ①	Yes			
Roles anc	MailboxSettings.ReadWrite Read and write all user mailbox settings ①	Yes			
Support + Tra	Allows the app to read mail in all mailboxes without a signed-in user.				
C Troublest	Mail.Read Read mail in all mailboxes	Yes			
🧟 New supp	Mail.ReadBasic Read basic mail in all mailboxes ①	Yes			
	Mail.ReadBasic.All Read basic mail in all mailboxes ①	Yes			
	Mail.ReadWrite Read and write mail in all mailboxes ①	Yes			
	☐ Mail.Send Send mail as any user ⊙	Yes			
<	Add permissions Discard				

Figure 48 - Application Permission



🖻 🖅 🔥 Red	quest API permission \times + \checkmark		_		×
$\leftrightarrow \rightarrow $ 0		∱≡	h	Ŕ	
≡ Micros	oft Azure Search resources, services, and docs (G+/)				0
Home > add	Request API permissions				×
Home > add → MyA Search (C Overview Quickstar Manage Branding Authentic Certificatu API perm Certificatu Certificatu Certificatu Certificatu Roles anc Nanifest Support + Troi P Troublest New supp	Request API permissions (AI APIs Microsoft Graph https://graph.microsoft.com/ Docs (2) What type of permissions does your application require? Delegated permissions Application permissions Your application needs to access the API as the signed-in user. Application permissions Select permissions Your application runs as a background service or signed-in user. Select permissions Mail Permission Admin > MailboxSettings Mail VMail (1) Mail.Read Mail.ReadBasic Mail Read basic mail in all mailboxes () Mail.ReadBasic cAll Read basic mail in all mailboxes () Mail.ReadBasic cAll Mail.Read Mail.Send Send mail as any user () Mail.Send	r daemon v Consent I Ves Ves Ves Ves Ves	Require	ed	all
<	Add permissions Discard				

Figure 49 - Add Permissions

And select 'Add Permissions'.



6. Permissions are not granted or effective yet.



Figure 50 – Configure permissions

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7. Select 'Grant admin consent' since admin consent may not be shown immediately after consent has been granted.



Figure 51 - Grant admin consent



8. Sign into the relevant account.



Figure 52 – Sign in



9. This prompt will grant the app access to the requested data on behalf of the entire tenant.



Figure 53 – Accept

10. You may notice that admin consent may not be shown immediately after consent has been granted. You have to wait few minutes to see the latest consented permissions.



Figure 54 - Consented permissions

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11. To Get your application secret ID, select 'Certificates and Secrets' on the API application page.



Figure 55 - Certificates and Secrets



12. Select 'New Client Secret'

Client secrets				
A secret string that th application password	ne application uses to	prove its identity when	n requesting a token. Also can be referred to as	
+ New client second Description	et E	xpires	Value	
<			>	
No client secrets have	e been created for th	is application.		

Figure 56 - New Client Secret

Addovation V

13. Type the description as you require and select the 'Expire' option and 'Add'.



Figure 57 – Description



14. Copy and keep the key value saved in a secure location.



Figure 58 - Copy and keep



Client secrets			
A secret string that the applicat application password.	ion uses to prove its identity	/ when requesting a t	token. Also can be referred to as
+ New client secret			
Description	Expires	Value	Copy to clipboard
MySecret	11/19/2020	8q/X0nb=5zXP	3oxcYKARvzbj_ejBF?Nw
<			\bigcirc ,

Figure 59 – Client secret

5 Microsoft365 CRM Sync Service- IFS Instance/s

Program shortcuts

Go to -> Start -> Programs -> Addovation ->M365CRMSync

M365 CRM Sync Daemon Service

	Addovation	×	📙 Addovation Create Document Consumer 🔸	•	
		×	📙 Cloud 🔹 🕨	•	
		×	📃 DocumentAgent 🔹 🕨	•	
	📴 Dell	١	M365CRMSync 🕨	۱.	✓ Configure M365 CRM Sync Daemon Services
		۲	📑 MessageTracking 🔹 🕨		🤤 Install M365 CRM Sync Daemon Services
		×	📙 Services 🔹 🕨	۱	🤐 Restart M365 CRM Sync Daemon Services
	📴 IIS	×	📙 Uplink 🔹 🕨	۱	🤹 Uninstall M365 CRM Sync Daemon Services
۶.		×	👄 OneDrive		
		×	M OneNote 2016		
Þ		Þ	over the second		
	- M		A		

Figure 60 - M365CRMSync shortcut

5.1 How to configure the M365 CRM Sync

Go to Start-> Programs-> Addovation-> M365CRMSync -> Configure M365 CRM Sync Daemon Services

MB	865 CRM Syn	Configuration		-		×
	Azure AD Cli	ent Settings				
	Client ID:	Client ID				
	Client Secret:	Client Secret				
	Domain:	Domain				
	IFS Settings	ovider Url:				
	Access Provi	der URL				
	IFS User ID:					
	User ID					
	IFS Password					L
	IFS Version:					
	IFSApplicati	ons10			•	1
	Country/Site	Settings				
	Filter by C	ountries/Sites				
	Select Counti	y:				
			-	Add		
				Remove Selecte	d	
				Clear List		
	Site/s :					
	Basic Setting					
	✓ Sync Activ	ities				
	✓ Sync Cont	acts				
	-					



Service ID:	
Service ID	
Log Folder Path	
Enter Log Folder Path	
Message Tracking Connection String:	
Message Tracking Connection String	
	Open Config Save

Figure 61 - M365 CRM Sync configuration

Click 'Open Config' & select the 'Addo.AIS.M365CRMSync.Daemon.exe.config 'configuration file
 - C:\Program Files (x86)\Addovation\Automation Server\ Addo.AIS.M365CRMSync

M	1365 CRM S Azure AD Cl	ync Configurati ient Settings	lon			-		1	
Open									×
· → · ↑ 📙	« Automat	ion Se > M36	65CRMSync	~	ō	Search M	365CRMSyn	c	P
Organise 🔻 Nev	v folder							•	?
 Screenshots OneDrive This PC 3D Objects Desktop Documents Downloads Music Pictures Videos Windows (Ci) 	▲ Na	me IFSAP9 IFSAP10 Addo.AIS.M36	5CRMSync.Daen	non.exe			Date mod 9/7/2020 9/7/2020 8/25/2020	lified 12:39 PM 12:39 PM) 10:04 AM	
Windows (C:)	~ <						lj.		>
	File name:				~	Config Fi	iles (*.config	g) Cancel	~
V				Oper	n Config	Sa	ive		

Figure 62 – Open config



Configurations are loaded, now you can change the data.

- Client ID: The Azure AD client id assigned in the Azure AD application-setup
- Client Secret: The client secret assigned in the Azure AD application-setup
- **Domain:** The company's domain
- IFS Settings:
 - IFS Access Provide Url: Url to IFS Application Server
 - IFS User ID: User ID for IFS app
 - IFS Password: password
 - IFS Version: IFS version (9/10)
- Country/Site Settings
 - Filter by Country/Site: This check box enables filtering by creating services according to the Main representative's country or site settings in IFS (Country defined in the PERSON window).

	Default Values	Default Process	Choosing Default	Process	Oppor	tunity Probab	oilty	Sales P	ocess	Sales P	rocess Te	mplate
	Representative	Representative Roles	Representati	ve Group	Activity	Types	Activity Price	ority	Time Zon	e per User	Dep	artments
+	Representative ID	Name	Representative Role	Business	Business A	Marketing Ca.	Business	Validity			Office365	
۲	ISSA	Isuru Samaranayake						Active			1	
												-

Person #						
Person ID:	Full Name:		Title:	User ID:	Validity:	
ISSA	Isuru Samaranayake	Edit		ISSA	Active	
General Address Comm. Method	Documents					
Default Language:		Customer Contact				
English v		Customer Contact	Blocked for Use			
Country:		Contact for Customer:				
SWEDEN V		Customer No Name		Category Cus	stomer Address ID R D	epartment Manag Blocked for Use in
Creation Date: 2/28/2018						
Atemative Name:						
		<				
Protected						

Figure 63 – Open config

- Select Country: The main representative's country should be included in selected country list.
 User will be able to click 'Add' to add countries one by one.
 - Select the country which you want to remove and click on 'Remove Selected' to remove it from list
 - Click 'Clear' to remove the all countries selected in the list.
- Site/s: Sites related to the main representative should be included. (Site/s defined in *the* SITES PER USER window)



	Sites per User 🔻		
⊿∟	User ID:		
	ISSA		Isuru Samaranayake
4	Default Coordinator ID:	*	IFS APPLICATIONS
	Default Buyer ID:		IFS APPLICATIONS
⊿ 	Default Planner ID:	*	IFS APPLICATIONS
	+ Site Description	Company Default Site	
	 O1 Jönköping 	10 🗹	

- Basic Settings:
 - Sync Activities: If you tick this, activities will be synced between IFS and O365.
 - Sync Contacts: If you tick this, contacts will be synced between IFS and O365.
 If both are ticked, activities and contacts will be synced.
 - Its mandatory to tick at least one of above to get service worked.
 - Test Mode: If you tick this check box data will not sync & it will only test data. So, you need to
 untick this check box
 - Enable Logs: Select this check box to enable logging.
 - **Service ID:** Providing an ID for multiple services (Ex. App9, App10)
 - **Log Folder Path:** Select a folder for logs, Then the configurations will automatically create a folder structure inside the log folder (as below image).

Important

When an upgrade is done from a version before renaming of M365CRMSync (Ex: version with O365CRMSync To version with M365CRMSync), If new key/values are added to the config file, the new key/values will not be included in the 'servie_id.config' file and 'Addo.AIS.M365CRMSync.Daemon.exe.config' file.

So, it is recommended to compare "Addo.AIS.M365CRMSync.Daemon.exe.config file with "Addo.AIS.M365CRMSync.Daemon.exe_servie_id.config" for any changes in key/values pairs in config. If there are missing pairs, those key/values should be included manually in the "Addo.AIS.M365CRMSync.Daemon.exe_servie_id.config" file.

If user needs to change values in config file per se,

- Stop the related service
- Do the changes in related 'servie_id.config' file (Ex:Addo.AIS.M365CRMSync.Daemon_APP10.exe.config)
- Start the service

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5.2 How to Install, Restart, Uninstall the M365 CRM Sync Daemon Service

Go to Start-> Programs->Addovation->M365CRMSync->

- Install M365 CRM Sync Daemon Services
- Restart M365 CRM Sync Daemon Services
- Uninstall M365 CRM Sync Daemon Services

	Addovation	١	📙 Addovation Create Document Consumer	Þ			
	Auslogics	F	🔜 Cloud	×			
	Classic Shell	×	🔄 DocumentAgent	×			
	📙 Dell	×	M365CRMSync		✓ Configure M365 CRM Sync Daemon Services		
	ESET		📕 MessageTracking	Þ	🔍 Install M365 CRM Sync Daemon Services		
	Free PDF Reader		📙 Services	×	🧠 Restart M365 CRM Sync Daemon Services		
	📙 IIS		📙 Uplink	×	🤐 Uninstall M365 CRM Sync Daemon Services		
۶.		×	👄 OneDrive				
	Microsoft Azure	×	NoneNote 2016				
۶.	Microsoft Office Tools	Þ	og Outlook				
	- KA1		🔿 n				

Figure 64 - M365 CRM Sync Daemon Service

n.	Name	Description	Status	startup iype	Log On As
	🖏 ActiveX Installer (AxInstSV)	Provides Us		Manual	Local Syste
ſ	Addovation Message Tracking Service (app10)	Message Tra	Running	Automatic	Local Syste
	🆏 Addovation O365 CRM Sync Service (APP10-addovation.com)	Sync betwe	Running	Manual	Local Syste
	Addovation Services	Processing		Automatic	Local Syste

Figure 65 - M365 CRM Sync Daemon Service

5.2.1 Multiple Services

Multiple services can be created as below image.

Addovation M365 CRM Sync Service (APP10-addovation.com)
Addovation M365 CRM Sync Service (APP9-addovation.com)

Figure 66 - Multiple Services



Important: When Multiple services are being used , 'sc delete' command can be used to uninstall services.



Figure 67- Uninstall services