User Guide Automation AIS-M365 CRM Sync v2.1

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1 Introduction

Addovation has developed a solution for seamless integration between Microsoft 365 and the CRM module in IFS Applications. This solution is long-awaited by the market and is now available from Addovation.

The solution includes synchronization of business activities (calendar appointments) and contacts connected to both leads and customers.

All tracking, logging and surveillance is handled through Addovation's own integration platform, Automation and Integration Server (AIS) using Message Tracking:

								AUTO		MATION SE	EF		l	LOGGED IN
0365IF	s .	N	1ES	SAC	BE OVE	RVIEW DASH	IBOARD CONFIG A	DMIN LOG OFF						
Show	10	•	entrie	s 🕈	Auto Refi	resh								
Colum	n visil	bility	C	ру	Excel	CSV PDF								1 2
					Item 11	LastUpdated	Type 11	E-Mail	lt	PersonID	11	Status 🗐	Stage 🗐	Info
Ê							Туре	E-Mail		PersonID		Status •	Stage •	Info
•	Q	G	Ð	•	1	15.05.2018 14:48	SYNC_ACTIVITIES	t_isab@addovation.com		ISAB		ок	FINISHED	Update syncronization task is succesfully finalized. Not [00:00:02.7503469 ms]
•	Q	G	Ð	•	1	15.05.2018 14.47	SYNC_ACTIVITIES	t_isab@addovation.com		ISAB		OK	FINISHED	Update syncronization task is succesfully finalized. Not [00:00:02.6734310 ms]
•	Q	G	Ð	•	1	15.05.2018 14:46	SYNC_ACTIVITIES	t_isab@addovation.com		ISAB		ОК	FINISHED	Update syncronization task is succesfully finalized. Not [00:00.02.5969329 ms]
•	Q	G	Ð	•	1	15.05.2018 14.44	SYNC_ACTIVITIES	t_isab@addovation.com		ISAB		ОК	FINISHED	Update syncronization task is succesfully finalized. Not [00:00.02.6412886 ms]
•	Q	G	Ð	-	1	15.05.2018 14:43	SYNC_ACTIVITIES	t_isab@addovation.com		ISAB		OK	FINISHED	Update syncronization task is succesfully finalized. Not [00:00:02.6227753 ms]
•	Q	0	Ð	•	1	15.05.2018 14.42	SYNC_ACTIVITIES	t_isab@addovation.com		ISAB		ОК	FINISHED	Update syncronization task is succesfully finalized. Not [00:00:02.8366739 ms]

Figure 1 – Message Tracking Overview

This user guide covers the following soft parts:

- Setup of basic data in IFS
- Setup of Message Tracking
- Synchronization rules
- Restrictions
- The integration flow "how to"

2 Technical requirements

The Office 365 CRM Sync assumes that O365 and mail server is set up in a Microsoft Azure environment with all its requirements. See separate white paper and setup guide for installation and requirements.

3 Users of the integration

3.1 User ID

Users of the integration need an IFS User ID which is connected to the Office 365 account.

The connection can be set up in two places in IFS;

- 1. On the person ID (priority 1)
- 2. On the user ID (priority 2)

The e-mail account function as the key against Office 365.

Priority 1: Person ID

Pe	Person									
Per	son ID:			Full N	ame:			Title:		User ID:
SU	SUWI			Susan	nne Wilhelmsen Edit					SUWI
G	eneral Ad	aress	Comm. Me	thod Docume	ents					
+	Comm ID	Name	Description	Communication Method	Value			Default per Method	Address ID	Default per Method and Address



Priority 2: User ID

User - Sus		
Identity:	SUWI	
User Name:	Susanne Wilhelmsen	
Directory ID:	SUWI	
Language:	en 🗸	A AN
E-mail:	suwi@addovation.com	
Database ID:	SUWI	Active User

Figure 3- User ID in IFS

Important! User needs to be connected in only 1 place, there is no limitation in IFS for this hence it is prone for errors.

3.2 Representative

Users of the integration must be added as representatives in CRM and SRM Basic Data – Representative.

A custom field (Office365) will be added to the *Representative* window to be able to turn the integration on/off for selected representatives. More information about this in chapter 4.2.

C	CRM and SRM Basic Data - Representative										
R	epresentative	Representative Roles	Representative Group	Activity Types	Activity Priority						
+	Representative I	D Name	Representative Role	Blocked for Use	Office365						
٠	SUWI	Susanne Wilhelmsen	Customer responsible		1						



3.3 Representative basic data

Users of the integration must have the same time settings in 3 places in order to have correct synchronization. For instance, representative ID ISAB will be using ISO standard US/Pacific with an offset of UTC-8 hours. First, we need to define IFS settings:

Q	C	RM an	nd SRM Basi	c Data - Ti	me Zone per User			
⊿	R	epreser	tative Representative Role		s Representative Group	Activity Types	Activity Priority	Time Zone per User
	+	User ID	Time Zone Code	Notify Change	Windows Time Zone Standard Name			
		GUKA	Europe/Stockholm	\checkmark	W. Europe Standard Time			
⊿		BRSH	Europe/Stockholm	\checkmark	W. Europe Standard Time			
Ē		PESE	Europe/Stockholm	\checkmark	Romance Standard Time			
_		JAGR	Europe/Stockholm	\checkmark	W. Europe Standard Time			
		ISSA	US/Pacific	\checkmark	Sri Lanka Standard Time			
:		ERWI	Europe/Stockholm		W. Europe Standard Time			
-	٨	ISAB	US/Pacific		Pacific Standard Time			
л		IFSAPP	Europe/Stockholm	\checkmark	W. Europe Standard Time			
Ē						-		

Figure 5 – Time Zone Per User



A separate setting is also being used in IFS for calendar view, so use RMB and choose UTC-8 here also:





Business Calendar						
4 1 5 7 31 😽 💷 🤱	\$					
(May) (2018)					CRM Test4 User	
⁴ M T W T F S S ¹⁸ 30 1 2 3 4 5 6		Monday, 14 May	Tuesday	, 15 May	Wednesday, 16 May	Thursday, 17 May
19 7 8 9 10 11 12 13 20 14 15 16 17 18 19 20 21 21 22 23 24 25 26 27 22 28 29 30 31 1 2 3	0600	Properties				
23 4 5 6 7 8 9 10	0700	Calendar Acti	vity Types	Opportu	unity Types	
Business Activities	07.5	Working Hours		08:00	▼ - 17:00 ▼	
Business Lead Activities	0800	First Day of Week	:	Monday		~
Marketing Campaign Activities		First Week of Yea	r	Default		~
Uutlook Items	0900			Show V	Veek Numbers	
CRM Test4 User	1000	Time Zone				
-	1100	(UTC-08:00) Paci	ic Time (US	8 Canada)	÷	~
Type a new Outlook task	1200				ОК	Cancel
Today ^	1300					
Visit Addams Family from						
Test of task Andreas	1400					
IIII 🚩 Another task for Janne						

Figure 7 – Time Zone

IFS also uses Microsoft Windows PC settings when it stores UTC datetime in Oracle, so one needs to make sure that PC client settings also uses UTC-8 hours here:

Settings						
命 Home	Date & time					
Find a setting	*Some settings are hidden or managed by your organization.					
Time & Language	Date and time					
🗟 Date & time	11:47, Wednesday, 16 May 2018					
⋠[≇] Region & language↓ Speech	Set time automatically On (UTC-08:00) Baja California (UTC-08:00) Coordinated Universal Time-08 (UTC-08:00) Pacific Time (US & Canada)					
	(UTC-07:00) Arizona (UTC-07:00) Chihuahua, La Paz, Mazatlan (UTC-07:00) Mountain Time (US & Canada) (UTC-06:00) Central America (UTC-06:00) Central Time (US & Canada) (UTC-06:00) Easter Island (UTC-06:00) Guadalajara, Mexico City, Monterrey					

Figure 8 – Time Zone in PC settings



Note that some of these settings might require administration rights in order to override.

Last step is to make sure that Office365 client also uses same value:

And press "Save" when done.

Important! Failure to meet any of the above required steps will cause incorrect time to be replicated.



Figure 9- Time Zone in O365 Client

4 Setup IFS Applications

4.1 Integration user

An integration service-user must be set up and granted applicable permissions in IFS.

Name the integration user "O365_INT_USER" (Office 365 Integration User).

4.1.1 **Permission set for the integration user**

The integration user must be granted permissions to the integration itself. This permission set is provided by Addovation. The permission set is named ADDO_INT_CRM

Grant ADDO_INT_CRM to the integration user. The integration user also needs to be granted permissions to the CRM module and to all applicable companies and sites.

User - Off	User - Office 365 integration User \simeq 2 (2)									
Identity:	O365_INT_USER License Usage:									
User Name:	Office 365 integration User									
Directory ID:	O365_INT_USER									
Language:										
E-mail:	Active User									
Database ID:	USUS_INT_USER									
User Settings	Summary									
Secur Secur P S S S S S S S S S S S S S	ty Settings ermission Sets ADDO_CRM ADDO_INT_CRM IFS_ALL anies & Sites ompanies QA Addovation AS (10) QA Addovation Sweden AB (30) tes QA Addovation AS - Addovation AS (100) QA Addovation Sweden AB - Addovation Jönköping (300)									

Figure 10- Integration User

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4.1.2 CRM and SRM Access

If CRM and SRM Access it turned on for the objects business activity, business lead or business opportunity, the integration user must be granted access to applicable objects.

◄ ►										
0	CRM and SRM Access - Access ~ 1 (5) Access Users per Group Groups per User									
	Object: Business Activity Characterization Activate Access Control									
	+	User ID	Name	records for specifi	Admin Access	Delete Access	Edit Access	View Access		
	•	O365_INT_USER	Office 365	integration User			$\mathbf{\Sigma}$			

Figure 11 – CRM and SRM Access

4.2 Custom field that enables synchronization

As mentioned in chapter 3.2., the integration can be turned on and off for selected representatives.

To be able to control this, a custom field need to be created and added to the Representative window in IFS.

Note! The custom field can be installed but requires using the IFS installer to do this.

4.2.1 Create custom field manually

Go to the Representative tab in the CRM and SRM Basic Data window.

Use Right Mouse Button and select Custom Objects \rightarrow Fields \rightarrow Create New



Figure 12 - CRM and SRM Basic Data window

A custom field in the logical unit *BusinessRepresentatives* will now be created. The *Create Custom Fields Attribute* dialogue box will appear automatically.



Select *Persistent* field type. Give the custom field the name "OFFICE365". Write a comment if wanted.



Select Text and Unformatted as the *Data Type*. Set *Maximum Length* to 1. Select the properties Insertable, Updateable and Searchable.

Edit Custom Field	s Attribute - 'OFFICE365'	? ×]			
Data Type		Edit Custom Fields Attribute	- 'OFFICE365'		? ×	
Data Type		Text Attributes				
Text	The Data Type decides what kind of data that can be displayed			Edit Custom Fields At	tribute - 'OFFICE365'	? ×
Number Date Enumeration	Field.	Maximum Length:	Maximum number of text charac field will automatically have the click).	Properties		
Reference Format:		Multiline	Fields having a maximum length Multiline fields, enhancing the us affects data fields, not table co	🗹 Insertable	Makes it possible to enter a new value. Default Value: No default value	
Unformatted Uppercase Lowercase	Text is displayed using mixed characters. Text is displayed using uppercase characters. Text is displayed using lowercase characters.	Clickable Hyperlink	If the field content is a web or e	Updateable	Makes it possible to change an existing value.	
	Cancel < Previous			Searchable	Makes the field searchable, including it in the 'Search Dialog'. Includes the field in the List of Values', when referenced. Creates an index for the field, improving the search performance.	
			Cancel		Cappel < Previous Next >	Finish

Figure 14 - Custom object settings



Edit Custom Fields At	ttribute - 'OFFICE365' ? ×							
Publishing	Publishing Information							
Public	Generates the method 'Business_Representative_Cfp.Get_CF\$_Office365' making it possible to reference the field from other Logical Units.							
Approved	Approves the field for Publishing. When Publishing the Logical Unit, the field will also be published.							
Published	Indicates if the field, and the Logical Unit it's part of, is Published.							
	Cancel < Previous Next > Finish							

Figure 15 – Publishing Information

To publish the custom field, use Right Mouse Button in the custom field header and select *Publish*.

Custom Fields - Bu	sinessReprese	entative						
Logical Unit:		Prompt:	Activate RowKey		Module:			
BusinessRepresentative		Business Repres	Deactivate RowKey		CRM			
RowKey Activated	Activating the RowKey is the functionality that	r for a Logical Unit t connects standa	for a Logical Unit connects standa			an LU possible to be extended wi d LUs.		
Approved	Approve to make avail	able for Publishing	Publish Unpublish		ed from all pub	lishing logic.		
Published	Approved Detail Views Publish will generate ar	: None (o	Export View Cleanup	•	be used and re	eferenced from	n the (
	Published Date: None a	available	Populate Search in Context					
	Synchronized means th	none availad	Edit Subscriptions	•	:e it was last P	ublished.		
+ Attribute Name Prompt	Approved Publishe	d Field Type	Conditional Fields Custom Objects	•	Data Type	Format	Da	
OFFICE365 Office36	5 🗹 🗌	Persistent Fiek	Properties		String	Unformatted	1	
			Send To	×				
			Add To Selection	•]			

Figure 16 – Custom Fields

The custom field is now created.

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4.2.2 Add custom field in representative window

Go to the Representative tab in the CRM and SRM Basic Data window.

Use Right Mouse Button in the window and select *Properties*. Select *Include Custom Items*. Press ok.

Representative	Representative Roles	Representative Group Act		
Representative ID	Name	Representative Role		
	Populate Search in Context	Object Properties Window Behavior Mandatory Read Only	?	×
	Edit Output Quick Chart Subscriptions Conditional Fields Custom Objects Properties	Identity bwRepresentatve General Extended field validation Warn if result in selection combo exceeds Menu Configuration Include Original Items Itende Statems Items		

Figure 17 – Add custom feild

Use Right Mouse Button in the upper grey ribbon and select Custom Objects ightarrow Reload Configuration

CRM and SRM	l Basic Data					
Representative	Representative Roles	Representative Group	Group Activity Types Act			
+ Representative ID	Conditional Form Freeze Column Hide This Colum Column Chooser Go to Column Optimize This Co Optimize All Colu Auto Size Reset Current Vie	n tative i n 	Role Business	s Opportunity		
	Custom Objects	>	Fields	•		
	Properties		Menus	•		
		1	Add To Package Export Items			
			Reload Configuration			

Figure 18 - Reload Configuration



To fetch the custom field, use Right Mouse Button in the upper grey ribbon and select Column Chooser. Then mark the Office365 column and press Add.



Figure 19 – Column Chooser

Now the custom field has been added to the *Representative* tab.

CRM and SRM Basic Data - Representative									
Representative	Representative Roles	Representative Group	Activity Types	Activity Priority	Time Zone per	User Departments			
Representative ID	🔺 Name	Representative Role	Business	Opportunity Pr Bu	siness Activity Pr	Marketing Campaign Pre	Business Lead Pr	Blocked for Use	Office365
ERWI	Erik Wistner	Customer responsible	e						
EXT_ANKJ	Anders Kjersem	Customer responsible	e						
EXT_HAHE	Hans Hedlund	Customer responsible	•						

Figure 20 – Custom field in Representative tab

4.2.3 Custom field/menu to enable one main representative for all contacts of a customer

User can set one main representative for all contacts in a specific customer without setting one at a time. To achieve this, custom objects need to be imported and setup.

To import custom objects, go to Solution Manager -> User Interface -> Custom Objects -> Application Configuration Package

Application Configuration Pa File View Tools	ickage - A Window	NDERSH @ RnD IFS9 Up9 - IFS Applications Help				- 8 ×
	• •	🔹 🕂 🔹 Solution Manager 🗦 User I	iterface $>$ Custom Objects $>$ Application	Configuration Package	× C Search	৫ 🔞 -
=	Q	Application Configuration Packa	ge			
Lobby Diverse. Ubby Diverse. Ubby Diverse. Decoment R Case		Nane: Auftor: Last Modified Date: Import Details Version: Orign: Orign:	Description:		Jan <mark>ort</mark> Publiki Export	
		Rems Translations Name Rem Type	Associated Object Presentation	Object Definition Changed Approved Published	in Sync	
?	Task	s Attachments Output Help System	n Info			요엽() 💔





To import the custom objects, click '*Import*' & '*Open File*' and it will give the option to select the relevant file which comes with installation as depicted bellow (C:\Program Files (x86)\Addovation\Automation Server\O365CRMSync).

There will be one folder with custom objects for each IFS application instance. Select the appropriate application version and select the 'O365CRMSync' file.

Open File							×
-> 👻 🕇 📙 « 03	65CRMSync → 0365 CRM Sync Cust	omObjects > IFS Applications 10		5 V	Search IFS	Applications 10	Q
rganise 👻 New folde	r				_		0
OneDrive	Name	Date modified	Туре	Size			
 This PC 3D Objects Desktop Documents Downloads Music Pictures Videos Windows (C:) chpr (\\addovati public (\\addovati development (\\ 	Items O365CRMSync	1/13/2020 3:28 PM 1/9/2020 9:31 AM	File folder XML Document		2 KB		

Figure 22 – Import Configuration

Import Configuration - ANDE	ERSH @ RnD IFS9 Up9 - IFS App	lications				- & ×
File View Tools	Window Help					
A	▲ ▶ - Ⅲ • >	Solution Manager > User Interface > Cu	stom Objects $ > $ Import Configuration		× C Search	৫ 👰 -
≡		Import Configuration				
		Name CRMIntegration	Version	Author Addovation	AS	
Lobby Overv My Administ		Version Timestamp 3/19/2018 5:52:52 Al	M File Name CRMIntegration.xml	Origin IFS9-30325	D-IFS9TEST	
;;; ①		Last Modified 3/14/2018 11:49:29 /	VM Not Installed	Info		
openIFS Co IFS Online		Export Comment				
X X	Open File					
Lobby Data Lobby Elem	View Log	Set Customer Main Representative	Identical	Vali	I	
Document R Case		Main Representative Custom Field Persistent	Identical	Valia		
	Import					
	▼ Import					
		Items: 2 Errors: 0 Warnings: 0		All items	are validated	
?	Tasks Attachments	Output Help System Info				도 웹 () 🖋

Figure 23 – Imported Configuration



To fetch the custom field, use Right Mouse Button in the window and select *Custom objects -> Reload Configuration. OR*

File View Tools Window Help Image: Customer Customer Customer Customer Image: Customer Customer Set Customer Copy Customer Image: Customer Customer Set Customer Copy Customer Image: Customer Customer Set Customer Set Customer Main Representative Copy Customer. Populate Set Customer Populate Set State Default Language: Our ID at Customer Copy Customer Set Customer Image: Company Our ID at Customer Company Company Ur ID at Customer Company Image: Company Our ID at Customer Company Company Custo Set Customer Company Our ID at Customer Company Company Customer Set Customer	
Application Base Setup > Enterprise > Customer > C	File View Tools
Customer Copy Customer Cop	A
Customer: Company Our D Company O	≡
Libby Overv. Wry domin.	
General Address Contact Comm. Method Message Setup Invoice Payment Credit Info Order CRM Info Project Report Parameters Custo Populate SearCh in Context Default Language: Our JD at Customer Logo Company Our D Company Our D Conditional Fields	Lobby Overv My Administ
Operation Default Language: Our ID at Customer Logo Bearch in Context Edit Company: Our ID Company: Our ID	•••
openIPS Co IPS Online Edit Company Our D Edit	••••
Conditional Fields	openIFS Co IFS Online
Country.	- 2 8 - 2 8
Labby Data. Labby Bien Fields Custom Objects	Lobby Data Lobby Elem
Category: Information Cards Properties	
Conners R. Case Menus >	Document R Case
Creation Date:	
Add to Proceeding and the second seco	
Form of Business Form of Business Description:	
11 klertifier Reference: ID Reference Validation:	
💬 🗄 Tasks Attachments Output Help System Into 🖓 🗄 🕻 🧎	"

Figure 24 – Fetch custom fields

Right click in the window and select 'Properties'.

Then select the 'Include Custom Items' and go to 'Layout' tab.

	Object Properties	?	\times	
pplication Base	Window Behavior Mandatory Read Only Layout			
	fmQustomerInfo			
	General			
	Extended field validation			
	Warn if result in selection combo exceeds 100 records			
s Contact C	Menu Configuration			Parameters
	Include Original Items Advanced			
	Include Oustom Items			
	Default			
er				
	OK Cancel	Ap	olv	_
Output He				

Figure 25 - Properties



	Use customized screen layout				
	Objects on 'frmCustomerInfo':				
	Name	Order # Associ	Custom Field	Item Attributes:	
	abl Customer	0	No	VDject: Label:	
	✓ abl Name	1	No		
tact C	✓ abl Association No	2	No	┖╋╩╚╋╩	Parameters
		3 General	No	- +	
		4 General	No	+	
		5 General	No	Switch objects position	
	abl creation Date	7 General	No	Change tab association	
_	abl cofePatho	7 General 8	No		
		9	No	Tab Attributes:	
		10	No	Change the tab visibility	
	Sel Form of Business	11 General	No	Adjust the tab margin	
	abl Form of Business Description	12 General	No	Adjust the tab margin	
	✓ abl Identifier Reference	13 General	No		
	✓ ■ ID Reference Validation	14 General	No		
	🗹 🗹 One-Time Customer	15 General	No		
	Our ID at Customer	16 General	No		
	✓ dblOurld>	17 General	No		
	abl <dfsexist></dfsexist>	18	No		
	<pre>cpicPicture></pre>	19 General	No		
		20 General	No		
	Main Representative	21	Yes		
			'		

Mark 'Use customized screen layout' and 'Main Representative' and apply.

Figure 26 – Object Properties

The custom field will be displayed in the window.

Customer - A															- ē ×
File Vie	ew Tools	Window	Help												
•		▲ ▶		 > Application Base 	ase Setup > Enter	prise 🗦 Custorr	ier > Cus	stomer					× C Search		े 🌠 -
=		0	Custom	ier								_			
		~ 4	Customer:		Name:			Association	No:	Main Representat	ive:				I
Lobby Overv	My Administ		1030		YIT STOCK	HOLM (UTGÁTT)									I
		4	General	Address Contact	Comm. Method	Message Setup	Invoice	Payment	Credit Info Ord	er CRM Info	Project Report Par	ameters	Customer Projects		I
openIES Co	UES Online	+	+ Person	ID Name		Role Title	Customer A	Address ID BI	locked for Use in CR	M Contact Address	Main Representative	Main Repre	esentative Name	Personal Interest	Campaign Interes
		Ð	4331	Robert Fern		Mr.					ADDOUSER1	ADDOUSE	R1		
*	*		4332	Hustle Ion		Ms.					ANDERSH	ANDERSH			
LODDY Data	Lobby Elem		4333	Fed Riton		Mr.					ISSA	Isuru Sama	aranayake		
			4334	Yashoshi Fern		Mr.					ISAB	AIS Autom	ation Test Person		
Document R	Case		► 4335	Nicola Redi		Mr.					CHPR	John Mack	son Fed		
		z	4336	Mickael Turnol		Mr.					ANDERSH	ANDERSH			
		e l													
			<												,
		at	Contact I	nfo Person Info A	ddress Person	Comm Method	Represe	entatives							
			+ Main Re	epresentative Represe	ntative ID Name		Re	presentative	Role						
			•	CHPR CHPR	John Macks	on Fed									
		(F)													
	_														19
Ţ,,		Task	s Attach	ments Output	Help System Inf	0								Ē 1	11 💉

Figure 27 – Configured custom field



Select a main representative.

Customer - File Vi	ANDERSH @ Rn	D IFS9 Up9 Window	9 - IFS Applicati Help	ons											- @ ×
		◀ ▶	· · · ·	> Application Ba	se Setup > Enter	prise > Custon	ier > Cus	tomer					× C Search		ৎ 🎊 -
≡		Q	Custome	er								_			
Lobby Overv	My Administ		Customer: 1030		Name: YIT STOCK	HOLM (UTGÅTT)		Association 1	No:	Main Representa	itive:]			
	<i>m</i>	+	General /	Address Contact	Comm. Method	Message Setup	Invoice	Payment	Credit Info 0	rder CRM Info	Project Report Par	ameters	Customer Projects		
openIFS Co	IFS Online	`⊿	+ Person E	D Name		Role Title	Customer A	ddress ID Blo	ocked for Use in (CRM Contact Addres	s Main Representative	Main Repre	sentative Name	Personal Interest	Campaign Interes
x	æ	Ð	4331	Robert Fern		Mr.					ADDOUSER1	ADDOUSER	21		
Lobby Data	Lobby Elem	n	4332	Hustle Ion		Ms.					ANDERSH	ANDERSH			
			4333	Fed Riton		Mr.					ISSA	Isuru Sama	ranayake		
Document R	Case		4334	Vasnosni Fern		Mr.					CHER	John Mack	ation lest Person		
			4336	Mickael Turnol		Mr.					ANDERSH	ANDERSH	5011 64		
		E													
							_								
		dt	Contact Int	to Person Into A	idress Person	Comm Method	Represe	ntatives							
			+ Main Rep	resentative Represer	tative ID Name	- Fed	Rej	presentative F	lole						
				✓ CHPR	John Macksi	on red									
		÷.													
"	1	Task	s Attachm	ients Output	Help System Inf									모 13	11 🗳

Figure 28 – Main Representative

Set selected main representative for all contacts of the customer by right clicking in the window and selecting 'Set Customer Main Representative'

	Name: YIT STOCK	(HOLM (UTGÅTT)		Association	n No:		Main Representati ISSA	ve:]		Set Customer Main Representati
omm.	Method	Message Setup	Invoice	Payment	Credit Info	Order	CRM Info	Project Report Para	meters	Cu	Copy Customer
		Role Title	Customer A	ddress ID	Blocked for Use	in CRM	Contact Address	Main Representative	Main Repre	sentati	View End Customer Connections
		Mr.						ADDOUSER1	ADDOUSER	21	Populate
		Ms.						ANDERSH	ANDERSH		Search in Context
		Mr.						ISSA	Isuru Sama	ranaya	Edit
		Mr.						ISAB	AIS Automa	ition Te	Subscriptions
		Mr.						CHPR	John Macks	son Fee	Conditional Fields
		Mr.						ANDERSH	ANDERSH		Custom Objects
											Properties
											Send To
					1						Add To Selection
ss e ID	Name	Comm Method	Represe	ntatives presentativ	e Role						
	lehe Meeke	on Fod									





JU Cust	STOME	r	Name:		Association No:		Main Representativ	e:	
103	0		YIT STOCKHOLM (UT	GÁTT)			ISSA		
Ge	eneral A	ddress Contact Con	m. Method Message	e Setup Invoice	Payment Cred	lit Info Orcer	r CRM Info	Project Report Para	meters Customer Proj
+	Person ID	Name	Role Title	e Customer A	ddress ID Blocked	for Use in CFM	Contact Address	Main Representative	Main Representative Name
	4331	Robert Fern	Mr.					ISSA	Isuru Samaranayake
	4332	Hustle Ion	Ms					ISSA	Isuru Samaranayake
	4333	Fed Riton	Mr.					ISSA	Isuru Samaranayake
	4334	Yashoshi Fern	Mr.					ISSA	Isuru Samaranayake
	4335	Nicola Redi	Mr.					ISSA	Isuru Samaranayake
	4336	Mickael Turnol	Mr.					ISSA	Isuru Samaranayake

Figure 30 - Customer Main Representative

5 Synchronization rules from Office 365 to IFS

5.1 Business activities

5.1.1 **Private activities**

Business activities marked as private are not synchronized into IFS.

Details			
Dentist appointment			
Add a location or a room			
itart			
Sun 6/17/2018	10:30	AM 👻	All day
ind			
Sun 6/17/2018	12:00	PM 👻	✓ Private

Figure 31 – Private Activities

5.1.2 **Connection to customer/lead**

In IFS, a connection to a customer or lead is mandatory when creating business activities.

To connect a business activity in Office365 to a customer or lead in IFS, use tags (#) in subject and/or the note field.

If no customer or lead is tagged, or the tag consist of an incomplete name/number, the business activity will not synchronize into IFS.

Example:

Customer ID: 10224 Customer Name: ABC Company

Approved connection to customer (will be synchronized to IFS): # ABC Company or #10224 Not approved connection to customer (will not be synchronized to IFS): # ABC

There are two methods to sync appointments using the tag (#) on subject field/note field.

1. '#' tag and customer id or name at the end of the subject field and/or the note field.

Examples for supported scenarios:

- Progress Meeting with #10224
- Progress Meeting with #ABC Company



Examples for not supported scenarios:

- #10224 Progress Meeting
- Progress Meeting with #10224 phase II

2. '#' tag in '()' and customer id, or Name at any place in the subject field and/or the note field.

Examples for supported scenarios:

- (#10224) Progress Meeting
- Meeting with (#10224) for progress Phase I
- Progress meeting with (#10224)
- Meeting with (#ABC Company) for progress Phase I
- (#ABC Company) Meeting with for progress Phase II
- Progress meeting with (#ABC Company)
- Meeting with (#10224) for progress phase II

Examples for not supported scenarios:

• Progress meeting with #ABC Company)

Details						
Meeting with Jack #Tusenfryd AS						
Add a location or a room				Repeat	Save to calendar	
Start				Never	Calendar	Ψ.
Mon 03/12/2018	14:00	•	All day	Reminder 15 minutes	Show as	Ŧ
Mon 03/12/2018	14:30	•	Private	Add an email reminder		
				🔊 😌 В І <u>Ш</u> 🗛 А́ Meeting with Jack to discuss future of	<u>Ar</u> A ∷ ∷ ∷ 至 → ∨ deals <mark>#Tusenfryd AS</mark>	

5.1.3 Activity type

Figure 32 – Example business activity

Activity type is mandatory for business activities in IFS. All business activities created in Office 365 will be assigned with a default activity type. If needed, change the activity type in IFS after synchronization.

Default value for activity type must be set up in the CONFIG in Message Tracking. This is shown in the chapter above (5.1). It is up to you if you use an already existing activity type (e.g. CALL) or create a new one for this purpose (e.g. 0365).



5.1.4 Fields from O365 to IFS

Following fields will be updated on created Business Activity in IFS from O365.

- Title for the event
- Start Date & time
- End Date & time
- Connection ID
- Connection type
- Notes

5.1.5 **Removal of appointments in O365**

• If you remove an appointment in O365 & synchronize, the connected business activity in IFS will also be removed.

Important:

- Created appointments of sync users' will always be synced to IFS regardless of the attendees' response (acceptation or rejection) since there is no need for the attendees of the appointment (internal or external) to accept/reject the invitation for the meeting to be synced.
- But if you receive meeting invitations (internal or external), only invitations accepted by you, will be synced to IFS. (all required standard should be followed)



5.2 Contacts

5.2.1 Connection to customer/lead

Only contacts connected to a customer or lead will be synchronized. This connection is made in the company field.

If the company field is blank, the contact will not synchronize to IFS. If the customer/lead name or number is incomplete or incorrect, the contact will not synchronize to IFS.

Example:

Customer ID: 10224 Customer Name: Tusenfryd AS

Approved connection to customer (will be synchronized to IFS): 10224 or Tusenfryd AS Not approved connection to customer (will not be synchronized to IFS): Tusenfryd

Work	
Job title	Notes
Department	CUSTOMER contact
Company Tusenfryd AS	

Figure 33 – Company field

If company field is changed from customer to business lead, contact will be removed from customer and will be updated under the business lead in IFS.

5.2.2 Main representative

- 1. Get contact list from IFS, where sync person is main representative for the specified customer. ('IFS List')
- 2. Check O365 email against 'IFS list'.
 - 2.1. If contacts are found: Update changes in IFS.
 - 2.2. If no records found against 'IFS List': Check all 'default email' address of contacts, for that customer. 2.2.1. If contacts found and
 - 2.2.1.1. If main representative is empty: update changes & set main presentative
 - 2.2.1.2. If main representative is NOT empty: skip sync
 - 2.2.2. If no records found: Add contact & set as main representative



5.2.3 E-mail required

Only contacts assigned with an e-mail will be synchronized to IFS.

Add contact	
Name	
First name Greg	Notes
Last name Hillbilly	LEAD contact
⊕ Name	
Email	
Email greg.h@yahoo.com	



5.2.4 Person ID

Person IDs are created in IFS for every synchronized contact. A serial number will be given.

5.2.5 **Default Communication Method**

When a new contact is created in O365 with a communication method, OR Contact (which has no communication method defined in IFS) is updated with new communication method in O365, IFS will be updated the new method as a 'Default per method' of the contact under the 'Person Comm Method'.

F		• •		> Appli	cation Ba	ise Setup	> Enterpris	e 🗦 Cust	omer	> Custor	ner				$\times G$	Search		Q
С	us	tome	r∓															
С	usto	mer:				Name:			,	Association	No:							
1	4					Tusenfryd	AS											
_																		
	Gen	eral /	Address	Contact	Comm	. Method	Message S	etup Inv	oice	Payment	Cre	dit Info Or	der	CRM Info	Proje	ect Report P	arameters	Cl + +
ŀ	+ •	erson	Name	0	Custome	Connect A	Il Customer A	Contact Ad	dress I	Blocked for	Us	Main Rep	Mair	n Representa	itive Name	E-mail	P	ersonal I
	• 3	03	Elizabe	th Annik								ISSA	Isur	u Samaranay	/ake	<u>e anniken2</u>	22@hotmail.com	
	<																	>
	Cor	ntact Inf	o Pe	erson Info /	Address	Perso	n Comm M <u>eth</u>	od Re	presen	tatives								
		Comm ID	Name	Description	Communi	cation 1	Value							Default 4	Address ID)	Default ner	Vali
	+	00	amo	Coccuption	Method		14.00						F	per Meth			Method and Addr	e
	•	1	Email		E-Mail		e_anniken22@h	otmail.com						\bowtie				



6 Synchronization rules from IFS to Office 365

6.1 Business activities

6.1.1 Activities to be synchronized

Only business activities that belongs to 'me' are synchronized to Office 365.

Description:		Connection Type:	Start Date:		End Date:	
Call customer after summe	r	Customer ~	15.08.2018	13.30 ~	15.08.2018	13.30
Name:			Category:		Status:	
University of Oslo			Customer		Not Started	
Activity Type:	Description:		Priority:		Description:	
CALL	Call					
Name:			Main Representative:		Main Representativ	e Name:
			SUWI		Susanne Wilhelms	en
	Description: Call customer after summe Name: University of Oslo Activity Type: CALL Name:	Call customer after summer Name: University of Osio Activity Type: Description: Call Name:	Call customer after summer Customer (Customer after summer Customer after summer Customer Customer Customer Customer Customer Customer Customer Customer Customer Call Call Call Call Call Call Call Cal	Description: Connection Type: Start Date: Call customer after summer Customer 15.08.2018 Name: Category: Customer University of Osio Customer Customer Activity Type: Description: Priority: CALL Call Main Representative: Name: SUWI	Description: Connection Type: Start Date: Call customer after summer Customer 15.08.2018 13.30 ~ Name: Category: Customer CALL Call Priority: Name: Main Representative: SUWI	Description: Connection Type: Staft Date: End Date: Call customer after summer Customer 15.08.2018 13.30 15.08.2018 Name: Category: Status: University of Oslo Customer Not Started Activity Type: Description: Priority: Description: CALL Call Main Representative: Main Representative: Name: Susanne Wilhelms

Figure 36 - Business activity

6.1.2 **Tasks**

Business Activities of calendar item type *Task* are synchronized to Office 365 as appointments. The output in Office 365 will show that the business activity is of the type Task.

◀ ▶	\star \vdots \bullet $>$ Rela	tionship Management >	CRM and SRM $ ightarrow$	Business Activity $ ightarrow$ Busines	s Act	livity				
a	Business Activi	ty ${}^{\checkmark}$ 1494 (1494)								
	Activity No:	Description:		Connection Type:		Start Date:		End Date:		
	188	Send offer to customer		Customer	\sim	19.04.2018	11.00 ~	19.04.2018	11.30	\sim
	Connection ID:	Name:				Category:		Status:		
	15115	University of Oslo				Customer		Not Started		
	Company:	Activity Type: De			Priority:		Description:			
	10	PROP	roposal			30		High		
ΕĽ	Main Contact:	Name:				Main Representative:		Main Representative Name:		
						SUWI		Susanne Wilhelmsen		
· ·	General Represent	atives Contacts Referen	ices Access Histo	ory						
=	Calendar Item Type:	Task 🗸								
_	Completed Date:									
7	Notes:	Send the offer before lunch				^				

Figure 37 - Task



Detaljer		Tilbakemeldin
Send offer to customer		×
Leaa til en plassering eller et ro		
37		
to 19.04.2018	II:00 - Hele dagen	
٨t		
to 19.04.2018	📰 11:30 👻 🗌 Privat	
enta	Lagre i kalender	
lidn	* Kalender *	
minnelse	Vis som	
5 minutter	✓ Opptatt ✓	
B U	AA A A A II I	^
Activity Type: PROP Activity No: 188	: Proposal	
0 t - t N	Started	
Status: Not		

Figure 38 – Synced appointment

6.1.3 **Reference to business opportunity**

Business activities that are created from business opportunities, or linked to business opportunities, will be synchronized to Office 365 with a reference to the opportunity.

0	Business Opport	unity							
	Opportunity No:	Description:	Wanted Delivery Date:	Company: E	Business Type:	Status:			
	61	Sell IFS licenses		10	New ~	Unconfirmed]		
	Customer No:	Name:	Customer Category:	Currency:	Probability	(%):	-		
	15115	University of Oslo	Customer	NOK		~			
Ŧ,	Est Opp Value/Base:	Est Opp Value/Curr:	Actual Opp Value/Base:	Actual Opp Value/	Contribut	ion Margin/Base:			
	0,00	0,	0,00		0,00				
Ē)	Main Contact:	Name:	Main Representative:	Main F	Representative Nam	ne:	-		
			SUWI	Susa	nne Wilhelmsen				
Ē)	Quantum la Companya de la	Lines Descentations Cont		tine Revisio	Deferre		Weter		
	General Opportunity	Lines Representatives Cont	acts Activities Competit	ors Line Revisio	on References	valid for sites Access	HISTORY		
	+ Activity No Description	DN	Start Date	End Date	Status	Calendar Item Type Activity	y Type Priority Main Contact	Main Representative	Originated Fro
	189 Send e-m	ail to plan meeting	20.04.2018.09.00.00	20.04.2018.10.00	00 Not Started	Task MAII		SUWI	

Figure 39 - References



DUSITIESS ACL	ivity						
Activity No:	Description:		Connection Type:	Start Date:		End Date:	
189	Send e-mail to plan r	neeting	Customer ~	20.04.2018	11.00 ~	20.04.2018	
Connection ID:	Name:	Categ		Category:		Status:	
15115	University of Oslo			Customer		Not Started	
Company:	Activity Type:	Description:		Priority:		Description:	
10	MAIL	E-mail					
Main Contact:	Name:				ive:	Main Representati	ive N
				SUWI		Susanne Wilhelm	isen
General Repres	entatives Contacts Object Reference	References Access Object Reference Desc	History ription Originated From	1			
S Duringer Opport	1 61	Sell IES licenses					

Figure 40 - Reference

Detaljer			Tilbakemelding
Send e-mail to plan meeting			×
Legg til en plassering eller et roi			
Start			
fr 20.04.2018	11:00	▼ Hele dagen	
Slutt			
fr 20.04.2018	12:00	- Privat	
⊕ Tidssone ∨			
8 L			
ajenta	Lagre i kalender		
Aldri	▼ Kalender	Ŧ	
Påminnelse	Vis som		
15 minutter	▼ Opptatt	•	
.egg til en e-postpåminnelse	Ă <u>& A</u> ∺ ;= ≡ ⊒	E Y	
IFS INFORMATION - DO	N'T CHANGE IN THIS AREA		^
Connection: 153 Activity Type: MAD	<pre>L: E-mail</pre>		
Connection: 151 Activity Type: MAJ Activity No: 189	15: University of Oslo L: E-mail		
Connection: 151 Activity Type: MAJ Activity No: 185 Status: Not Type: Tax	15: University of Oslo L: E-mail Started		

Figure 41 – Synced activity

6.1.4 Fields from IFS to O365

Following fields will be updated on created Appointment in O365 from IFS.

- Title for the event
- Start Date & time
- End Date & time
- Connection ID /Name
- Activity type
- Activity No
- Status
- Calendar Item Type
- Contact Address
- Notes

6.1.5 Sync Contact person Information & Address in Business Activities to O365

Business Activities of IFS are synchronized to Office 365 as appointments with the contact & address details (*Not from O365 to IFS*).

The contact person should be specified under the customer. Default visit address for the contact person of the customer can be found on Person Info in IFS.

Customer							
Customer: N 1050 C	ame: GLOBAL ENERGI SERVICE AB	Associatio	on No:				
General Address Contact Comm.	Method Message Setup	Invoice Paymen	t Credit Info Ord	er CRM Info	Project Report Para	ameters Customer Pro	jects
+ Person ID Name	Role Title	Customer Address ID	Blocked for Use in CR	I Contact Address	Main Representative	Main Representative Name	Personal Intere
873 Eric Robertson				A1	AISAUTOMATION	0365 Automation Test User	
<							
Contact Info Person Info Address	Person Comm Method	Representatives					
Address Identity: A1 General Address Info	~						
Country: NORWAY Address:	→ Address Type	Default Address	^				
Diawon Road 5214 5222 - Southern City 852 South	Visit Work		`				
NO - NORWAY	Valid From:	Valid To:					
+ Comm ID Name Description Communicat Method	ion Value	Default De per Method Method	fault per Valid Fro and Address	m Valid To			

Figure 42 – Default visit address

If 'main contact person' attached to the business activity in IFS, contains a default visit address, related appointment in O365 will be updated with the 'name' and 'default visit address' of the attached main contact person.

Business Activ	ity												
Activity No:	Description:	Connection Typ	Connection Type: Start Date:		ate:		End Date:						
3599	Pre planning meeting 1 Customer V			12/14/201	9	3:30 P	м ~	12/14/2019	3	:30 PM	\sim		
Connection ID:	Name:					Category:				Status:			
1050	GLOBAL ENERGI SERVICE AB					Customer				Not Started			
Company:	Activity Type:	Description:				Priority:				Description:			
M1	5	Email											
Main Contact:	Name:				Main Representative:			Main Representative Name:					
873	Eric Robertson					AISAUTOM	1ATION			O365 Automation	Test U	ser	
General Represe	entatives Contacts R	eferences Access	History										
+ Main Contact Pers	on ID Name	Title	Contact Role	Address Identity	Conta	ct Address	Phone No	Mobile	E-mail		Fax	www	Notes
M 873	Eric Robertson				A1		478547	479	eric@	globalenergi.com			

Figure 43 – Contacts in business activity



•	Pre plannin	ig meeting 1					
Ŀ	Sat 12/14/2019 3	Sat 12/14/2019 3:30 PM					
Ŭ	Remind me: 15 r	minutes before $$					
=	IFS INFORM Connection: Activity Type: Activity No: Status: Type: Address:	AATION - DON'T CHANGE IN THIS AREA 1050: GLOBAL ENERGI SERVICE AB 5: Email 3599 Not Started Appointment Eric Robertson Diawon Road 5214 5222 Southern City 852 South NO - NORWAY					

Figure 44 – Synced activity

If main contact person information doesn't specify a default visit address, appointment in O365 will display the main contact's name and customer's default visit address.

Customer						
Customer:	Name:		Association	No:		
1050	GLOBAL I	ENERGI SERVICE AB				
General Address Conta	act Comm. Method	Message Setup	Invoice Payment	Credit Info Order	CRM Info	Projec
Address Identity:	Customer's Own Add	ress ID: Custom	er Name:			
End Customer End Customer:	Name:		Address	ildentity:		
General Address Info	Delivery Tax Inform	ation Docum	ent Tax Information	Order Address Inf	io	
SWEDEN	\checkmark	Within City Limit	+ Address Type	Default Address	^	
Address:		Jurisdiction Code:	PrimaryContact			
East zone 5214	ŧ		SecondaryContac			
342 36 - ALVESTA SE - SWEDEN		Valid From:	Visit		*	
		Valid To:	Primary Contact:	Secondary Contact:		
Comm Method:						
+ Comm ID Name Description	on Communication V Method	/alue Default per Metho	Default per od Method and Address	Valid From Valid To		

Figure 45 – Default visit address



•	Pre plannir	ng meeting 02					
Ŀ	Sat 12/14/2019	Sat 12/14/2019 3:30 PM					
Ũ	Remind me: 15 minutes before $ \smallsetminus $						
=	IFS INFOR Connection: Activity Type: Activity No: Status: Type: Address:	MATION - DON'T CHANGE IN THIS AREA 1050: GLOBAL ENERGI SERVICE AB : 5: Email 3600 Not Started Appointment Eric Robertson East zone 5214 342 36 ALVESTA SE - SWEDEN END OF IFS INFORMATION					

Figure 46 – Example synced activity

If no default visit address is specified on the customer or on main contact person, contact field and address field will be left blank in the appointment.

•	Pre plannin	g meeting 05				
Ŀ	Sat 12/14/2019 3:30 PM					
U	Remind me: 15 minutes before $ \smallsetminus $					
=	IFS INFORM Connection: Activity Type: Activity No: Status: Type: Address: E	ATION - DON'T CHANGE IN THIS AREA 1050: GLOBAL ENERGI SERVICE AB 5: Email 3602 Not Started Appointment ND OF IFS INFORMATION				

Figure 47 - Example synced activity

Also, if no main contact is assigned to the business activity, appointment will be updated with only the customer's default address(no name of a contact person will be updated).



	a course of the		Connection Type:		Start Date:		End Date:	
3601	Pre planning meeting 04		Customer	~	12/14/2019	3:30 PM 🗸	12/14/2019	3:30 PM 🗸 🗸
Connection ID:	D: Name:				Category:		Status:	
1050	GLOBAL ENERGI SERVIC	E AB			Customer		Not Started	
Company:	Activity Type: Description:				Priority:		Description:	
M1	5	Email						
Main Contact:	Name:				Main Representativ	2:	Main Representative	Name:
					AISAUTOMATION		O365 Automation Te	est User
General Repres	sentatives Contacts	References Access	History		-			
+ Main Contact Per	son ID Name	Title	Contact Role Address Identit	y Conta	actAddress Phone M	lo Mobile E-mai	I F	ax www Notes



•	Pre plann	ing meeting 04					
Ŀ	Sat 12/14/2019 3:30 PM						
Ũ	Remind me: 1	Remind me: 15 minutes before $$					
	IFS INF Connection: Activity Typ Activity No: Status: Type: Address:	ORMATION - DON'T CHANGE IN THIS AREA 1050: GLOBAL ENERGI SERVICE AB pe: 5: Email 3601 Not Started Annointment East zone 5214 342 36 ALVESTA SE - SWEDEN - END OF IFS INFORMATION					

Figure 49 -Main contact details



Summary for above sync methods

	Condition (on Business Activity in IFS)	Output (in O365)
1.1	Main Contact + Main Contact Default Visit Address	Main Contact Name + Main Contact Default Visit Address
1.2	Main Contact + No Main Contact Default Visit Address + Customer Default Visit Address	Main Contact Name + Customer Default Visit Address
1.3	No Main Contact + Customer Default Visit Address	Customer Name OR 'Empty' + Customer Default Visit Address
1.4	Main Contact + No Main Contact Default Visit Address + No Customer Default Visit Address	Empty

6.1.6 **Removal of Business Activities in IFS**

• If you remove a business activity in IFS & synchronize, the connected appointment in O365 will also be removed.



6.2 Contacts

Default setup from Message Tracking: Only contacts that belong to 'me' are synchronized to Office 365.

Cu	stomer \sim 1 (2)			
Customer:		Name:		Association No:
101	52	Unilabs AB		556118-7179
Gei	neral Address Contact C	Comm. Method Messa	ge Setup Invoice F Main Representative	Payment Credit Info Order CRM Info
	197	Ylva Petterson	SUWI	Susanne Wilhelmsen
•	100	Henrik Giertsen	SUWI	Susanne Wilhelmsen

Figure 50 – Contacts of main representative

If you wish to synchronize contacts that you are a representative for, but not *main* representative, turn the button shown below *off* in the CONFIG. This is mainly used if contacts in IFS have several representatives. Only one can be main representative.

YNC ONLY MAIN REPRESENTATIVE CONTACTS	Cı	istome	er \sim 135 (14	43)						
ON	Cu:	stomer: 114			Name: Asker E	Bryggeri		As	sociation No:	
	G	eneral A	ddress Contact	Comm. I	Method	Message Setu	ip Invoice	Payment	Credit Inf	o Orde
	+	Person	D	Name		Title				
		232		Gerd 1	franby Fr	edriksen Fru				
		234		Peter	Grieg					
		235		Simen	Young	Mr				
		237		Petra	yng					
		238		Harry	Hole					
		239		Grace	Hubbard					
	<									
	С	ontact In	fo Person Info	Address	Perso	n Comm Metho	d Repres	sentatives		
	+	Main Re	presentative Repr	esentative	ID Name	e	Represent	ative Role		
			SUW	1	Susa	nne Wilhelmsen	Customer	responsible		
	٠		KAN	D	Kari N	Nordmann	Customer	responsible		

Figure 51 – Sync only main representative's contact



6.2.1 E-mail required

Only contacts assigned with an e-mail will be synchronized to O365.

◀ ▶	- III	• > Ap	plication I	Base Setu	ip > Ei	nterprise	e > Cu	stomer $>$	Cus	tomer					
Q	Custon	ner													
	Customer:				Name:					Associatio	n No:				
	15111				Tusenfr	ryd AS				44554466	3				
⊿															
	General	Address	Contact	Comm. M	ethod	Messag	e Setup	Invoice	Paym	ent Cred	lit Info	Order	CRM	Info Pro	oject Report
	+ Perso	n ID		Name			Main Rep	presentative	e Mair	n Represer	ntative N	lame T	itle		Role
Ð	▶ 191			Elizabet	th Annike	n Wilh	SUWI		Sus	anne Wilhe	Imsen				
A															
л															
	<														
	Contact	Info Pe	rson Info /	Address	Persor	n Comm I	Method	Represe	entativ	ves					
	+ Comm	ID Name	Descriptio	n Commu Method	nication	Value				Default per Metho	Add	ress ID	De	efault per d and Addre	Valid From
A	•	1		E-Mail		e_wilh	elmsen3	33@yahoo.	com						

Figure 52 – Email of the contact

6.2.2 Value of Communication method for contact

When an address identity is connected to a person, if only one communication method is connected to that address identity, the connected value will be updated in the contact and it will get synced to the O365 as well.

< > -	• 👯 • > Applic	cation Base Setup	> Enterprise > 0	Customer $>$ (Customer				
Custome	er \sim 135 (137	7) ∓							
Customer:		Name:		Asso	ciation No:				
14		Tusenfryd	AS						
General	Address Contact	Comm. Method	Message Setup	Invoice Pay	ment Crea	lit Info Order	CRM Info	Project Report Parameters	Customer Projects
+ Person I	D Name	Customer Add	Connect All Custome	r Addresses Co	ntact Address	Blocked for Use	e in Main Repr	esentative Main Representative N	lame E-mail
▶ 303	Elizabeth Annike	n		AD	DRESS 1		ISSA	Isuru Samaranayake	e anniken@gmail.com
< Contact In	fo Person Info A	ddress Perso	n Comm Method	Representati	ves				
General	Address Info								
NORWAY		~	+ Address Type	Default Addres	s ^				
ddress:			 Correspondence 	\checkmark					
Streat 1		~ E	Home	\checkmark					
Oslo			Residence						
NO - NORW	AY		-		~				
Comm Mothe	4.	~	Valid From:	Valid To:					
Comm IF) Name Description	Communication	alue		Default	Default per	Valid From	Valid To	
+		Method			per Method	Method and Add	ress		
▶ 2	2 Email I	E-Mail e	_anniken@gmail.com						

Figure 53 – Communication method

If address identity has more than one method, only the method marked as 'Default per method' will be updated in the contact.



If address identity is connected to the contact and it has no communication method defined, person communication method will be updated in the contact. (when contact has only one communication method)

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Figure 54 - Communication method



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Figure 55 – Address ID of customer's contact

If address identity is connected to the contact and it has no communication method defined and contact has more than one communication methods, only the method marked as 'Default per method' will be updated in the contact.

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Figure 56 - Default per method

If there is no any communication method marked as 'Default' (when contact has more than one communication methods) no value will be updated.

If one contact is updated under two or more customers, contact in O365 will be updated with last updated customer details. (same will be happened for business leads)

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7 Message Tracking

7.1 Functional configuration parameters (CONFIG)

Different parameters can be adjusted in the config window in Message Tracking. These parameters can be changed during runtime. No restart is needed.

O365IFS 🗸	MESSAGE OVERVIEW	DASHBOARD	CONFIG
CONFIG			
S			
SYNC TIME	EVENTS-IN MINUTES-	Save	
SYNC TIME	CONTACTS-IN MINUTES	Save	
SYNC EVER	NTS-DAYS-BACK FROM CUR	Save	
SYNC EVE	NTS-DAYS-FORWARD FROM	CURRENT DATE	
	ACTIVITY TYPE	Save	
SYNC ONL	Y MAIN REPRESENTATIVE CO	NTACTS-	
FORCE SY	NCHRONIZATION OF CONTAC	TS	
FORCE SYI	NCHRONIZATION OF EVENTS-		

Figure 57 - Configuration parameters

Sync time events in minutes

How often events/business activities should be synchronized.

Sync time contacts in minutes

How often contacts should be synchronized.

Sync events days back from current date

Time span events-start.

Sync events days forward from current date

Time span events-end.

Default activity type

When creating business activities, activity type is mandatory. All activities created in Office 365 will be assigned this default activity type.

Force synchronization of events

For testing purposes. Will force a synchronization.

Force synchronization of contacts

For testing purposes. Will force a synchronization.

Sync only main representative contacts

Synchronize only contacts where you are main representative. Default setting is ON.



7.2 Message overview

Synchronization details can be seen in the Message Overview. If something went wrong in the synchronization, an error message will appear. Synchronizations that is ok is marked in green, while errors are marked in red. Information about what is synchronized (activities, contact), for which user and how it went is shown.

9	Q	e	Ð	-	1	3/13/2018 3:45 PM	O365IFS	SYNC_ACTIVITIES	t_test6@addovation.com	OLNO	OK	FINISHED	Update syncronization task is succesfully finalized. 1 event is updated in Office365. [00:00:01.6492293 ms]
0	Q	G	Ð	•	1	3/13/2018 3:44 PM	O365IFS	SYNC_CONTACTS	t_test6@addovation.com	OLNO	OK	FINISHED	Update syncronization task is succesfully finalized. Nothing is created or updated. [00:00:01.6543907 ms]
0	Q	G	Ð	C	1	3/13/2018 3:44 PM	O365IFS	SYNC_ACTIVITIES	t_test6@addovation.com	OLNO	ERROR	PROCESSED	ORA-20111: The Business Activity Type object does not exist.

Figure 58 – Message overview

Important:

The synchronization always be initiated from IFS to O365 and then from O365 to IFS. Therefore, changes of contacts & activities in IFS will be synchronized to O365 as the first phase and changes in O365 will be synchronized to IFS as the second phase. If both IFS and O365 have changes, O365 changes will be overwritten by IFS changes.



8 Possibilities and limitations

The integration does support:

- New contacts and new activities in both IFS and Office 365
- Changes made on contacts and activities in both IFS and Office 365
- Removal of activities
- Activities of type "appointment" and "task"
 - Task is "read" in Office 365 as an appointment
- Business activities with references to business opportunities

The integration does not support:

• Removal of contacts – if you remove a record in IFS/Office 365, this will not be synchronized. Deleting contact records must be done in both systems.



9 Contact

For further inquiries, please contact your nearest Addovation office:

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+47 32 22 38 88	+46 (0)765510202	Sweden
sales@addovation.com	sales@addovation.com	+46 707 330 399
		sales@addovation.com
SWEDEN – LULEÅ	SRI LANKA – PANNIPITIYA	
SWEDEN – LULEÅ Luleå Science Park, Aurorum 1 C, 977 75 Luleå, Sweden	SRI LANKA – PANNIPITIYA Addovation (Pvt) Ltd, Level 5, 370 Highlevel Road,	
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For existing customers, please use http://support.addovation.com

For further inquiries, please have a look at <u>www.addovation.com</u> for contact information.