
User Guide

Automation

AIS-M365

CRM Sync

v2.1

Updated: Date 2020-09-29

Contents

1	Introduction	4
2	Technical requirements.....	5
3	Users of the integration	5
3.1	User ID	5
3.2	Representative.....	6
3.3	Representative basic data	6
4	Setup IFS Applications.....	9
4.1	Integration user	9
4.1.1	Permission set for the integration user.....	9
4.1.2	CRM and SRM Access	10
4.2	Custom field that enables synchronization	10
4.2.1	Create custom field manually	10
4.2.2	Add custom field in representative window	13
4.2.3	Custom field/menu to enable one main representative for all contacts of a customer	14
5	Synchronization rules from Office 365 to IFS.....	20
5.1	Business activities.....	20
5.1.1	Private activities	20
5.1.2	Connection to customer/lead	20
5.1.3	Activity type	21
5.1.4	Fields from O365 to IFS	22
5.1.5	Removal of appointments in O365	22
5.2	Contacts.....	23
5.2.1	Connection to customer/lead	23
5.2.2	Main representative.....	23
5.2.3	E-mail required.....	24
5.2.4	Person ID	24
5.2.5	Default Communication Method	24
6	Synchronization rules from IFS to Office 365.....	25
6.1	Business activities.....	25
6.1.1	Activities to be synchronized	25
6.1.2	Tasks.....	25
6.1.3	Reference to business opportunity	26
6.1.4	Fields from IFS to O365	27
6.1.5	Sync Contact person Information & Address in Business Activities to O365	28
6.1.6	Removal of Business Activities in IFS.....	32
6.2	Contacts.....	33

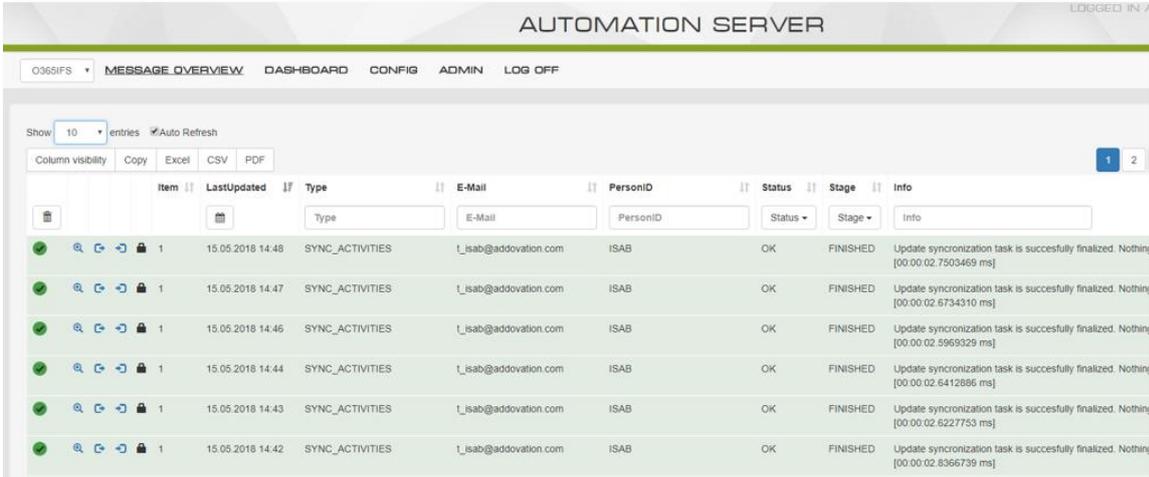
6.2.1	E-mail required.....	34
6.2.2	Value of Communication method for contact.....	35
7	Message Tracking.....	39
7.1	Functional configuration parameters (CONFIG)	39
7.2	Message overview	40
8	Possibilities and limitations.....	41
9	Contact.....	42

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:



Item	LastUpdated	Type	E-Mail	PersonID	Status	Stage	Info
1	15.05.2018 14:48	SYNC_ACTIVITIES	t_isab@addovation.com	ISAB	OK	FINISHED	Update synchronization task is successfully finalized. Nothing [00:00:02.7503469 ms]
1	15.05.2018 14:47	SYNC_ACTIVITIES	t_isab@addovation.com	ISAB	OK	FINISHED	Update synchronization task is successfully finalized. Nothing [00:00:02.6734310 ms]
1	15.05.2018 14:46	SYNC_ACTIVITIES	t_isab@addovation.com	ISAB	OK	FINISHED	Update synchronization task is successfully finalized. Nothing [00:00:02.5969329 ms]
1	15.05.2018 14:44	SYNC_ACTIVITIES	t_isab@addovation.com	ISAB	OK	FINISHED	Update synchronization task is successfully finalized. Nothing [00:00:02.6412886 ms]
1	15.05.2018 14:43	SYNC_ACTIVITIES	t_isab@addovation.com	ISAB	OK	FINISHED	Update synchronization task is successfully finalized. Nothing [00:00:02.6227753 ms]
1	15.05.2018 14:42	SYNC_ACTIVITIES	t_isab@addovation.com	ISAB	OK	FINISHED	Update synchronization task is successfully finalized. Nothing [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

Comm ID	Name	Description	Communication Method	Value	Default per Method	Address ID	Default per Method and Address
1			E-Mail	suwi@addovation.com	<input type="checkbox"/>	HOME	<input type="checkbox"/>

Figure 2 – Person Email ID

Priority 2: User ID

User Susanne Wilhelmsen

Identity: SUWI
User Name: Susanne Wilhelmsen
Directory ID: SUWI
Language: en
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.

Representative ID	Name	Representative Role	Blocked for Use	Office365
SUWI	Susanne Wilhelmssen	Customer responsible	<input type="checkbox"/>	1

Figure 4 - Representative

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:

User ID	Time Zone Code	Notify Change	Windows Time Zone Standard Name
GUKA	Europe/Stockholm	<input checked="" type="checkbox"/>	W. Europe Standard Time
BRSH	Europe/Stockholm	<input checked="" type="checkbox"/>	W. Europe Standard Time
PESE	Europe/Stockholm	<input checked="" type="checkbox"/>	Romance Standard Time
JAGR	Europe/Stockholm	<input checked="" type="checkbox"/>	W. Europe Standard Time
ISSA	US/Pacific	<input checked="" type="checkbox"/>	Sri Lanka Standard Time
ERWI	Europe/Stockholm	<input checked="" type="checkbox"/>	W. Europe Standard Time
ISAB	US/Pacific	<input checked="" type="checkbox"/>	Pacific Standard Time
IFSAPP	Europe/Stockholm	<input checked="" type="checkbox"/>	W. Europe Standard Time

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:

Figure 6 – Business Calendar

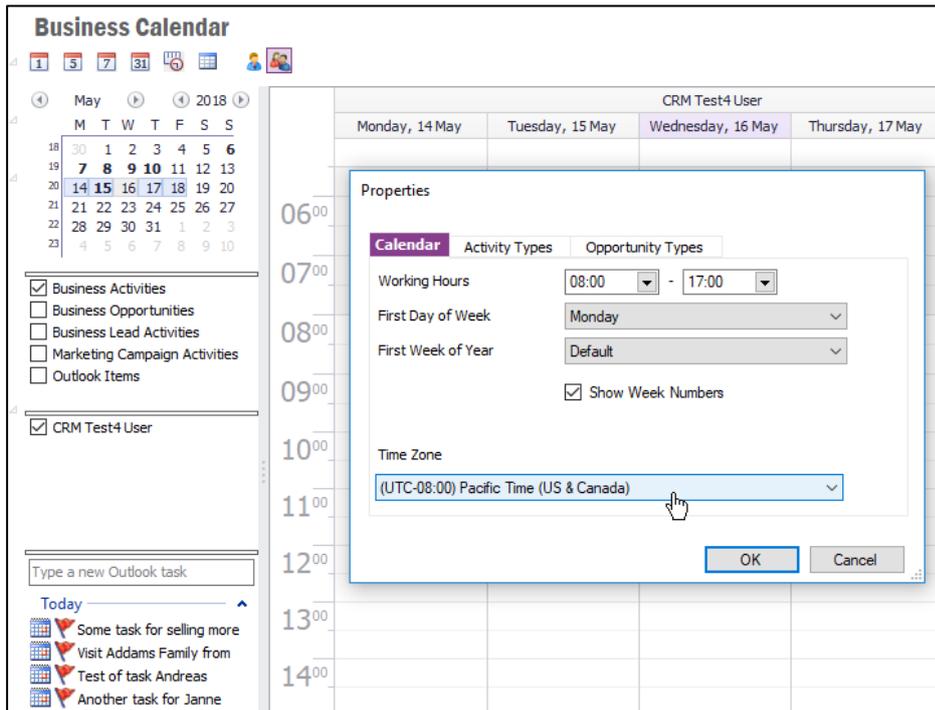


Figure 7 – Time Zone

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:

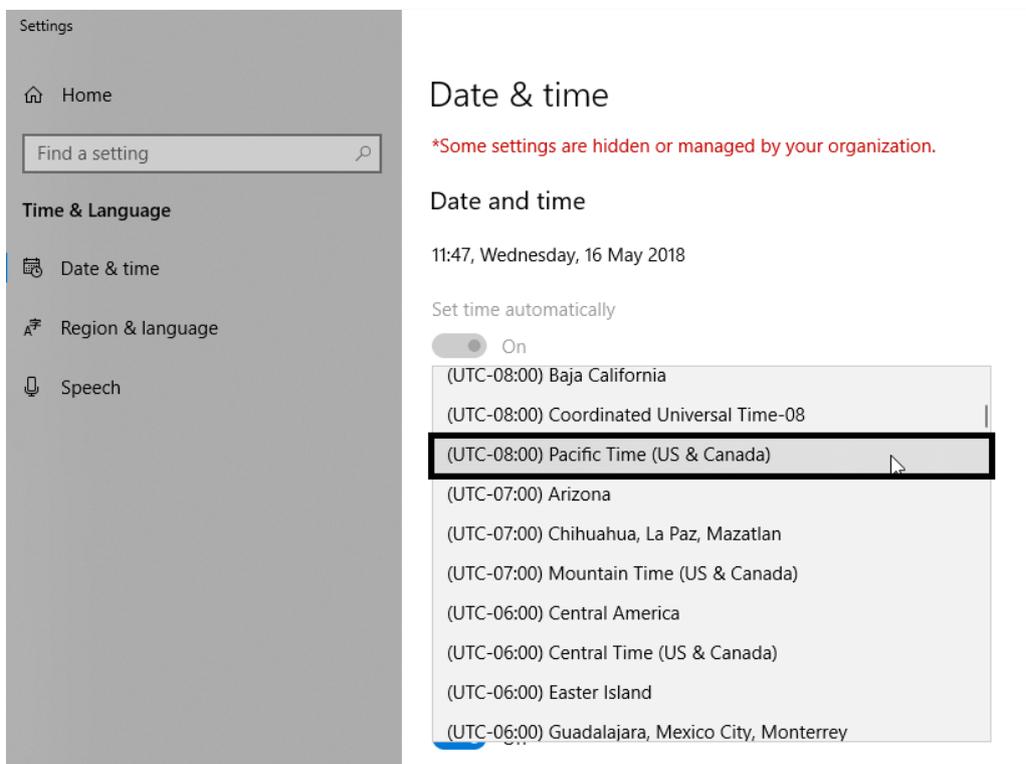


Figure 8 – Time Zone in PC settings

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.

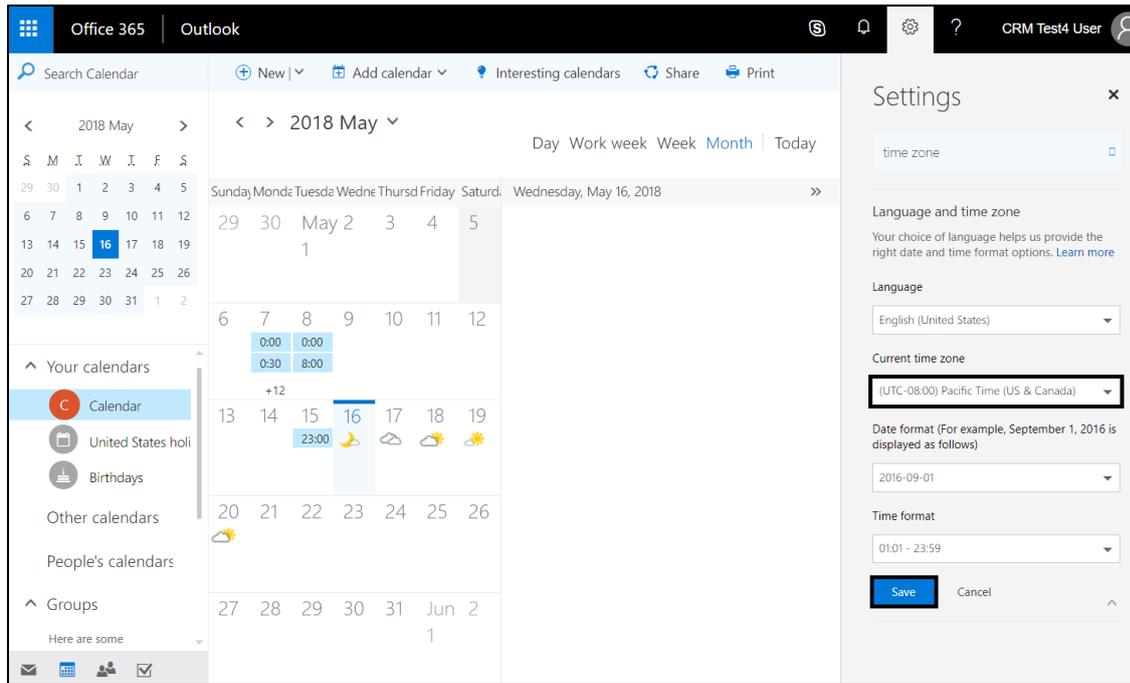


Figure 9- Time Zone in O365 Client

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 - Office 365 integration User 2 (2)

Identity: O365_INT_USER
User Name: Office 365 integration User
Directory ID: O365_INT_USER
Language: [Dropdown]
E-mail: [Text Field]
Database ID: O365_INT_USER

License Usage: Full

Active User

User Settings **Summary**

- Security Settings
 - Permission Sets
 - ADDO_CRM
 - ADDO_INT_CRM
 - IFS_ALL
- Companies & Sites
 - Companies
 - QA Addovation AS (10)
 - QA Addovation Sweden AB (30)
 - Sites
 - QA Addovation AS - Addovation AS (100)
 - QA Addovation Sweden AB - Addovation Jönköping (300)

Figure 10- Integration User

4.1.2 CRM and SRM Access

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

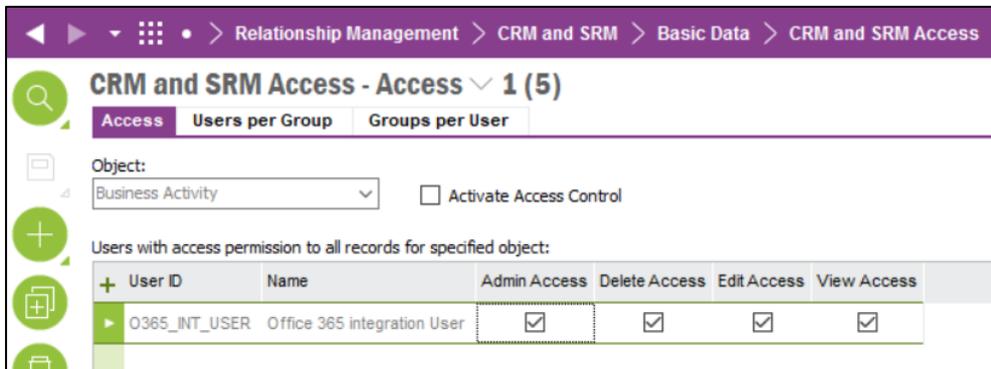


Figure 11 – CRM and SRM Access

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* → *Fields* → *Create New*

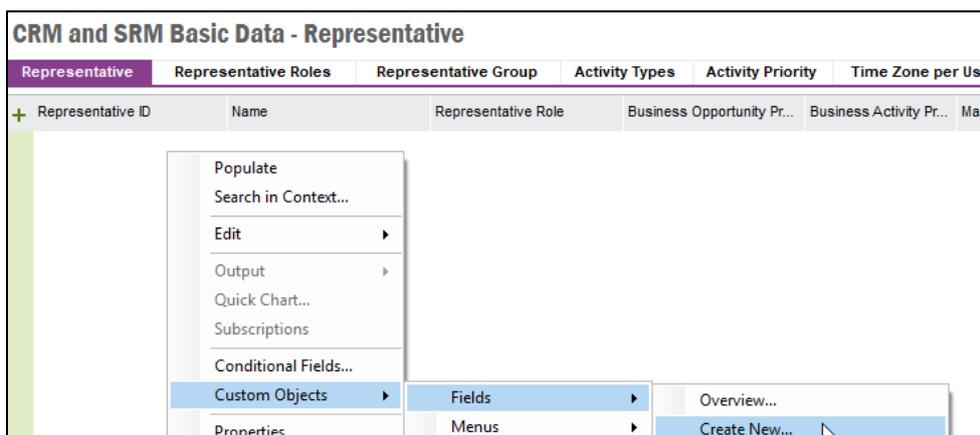
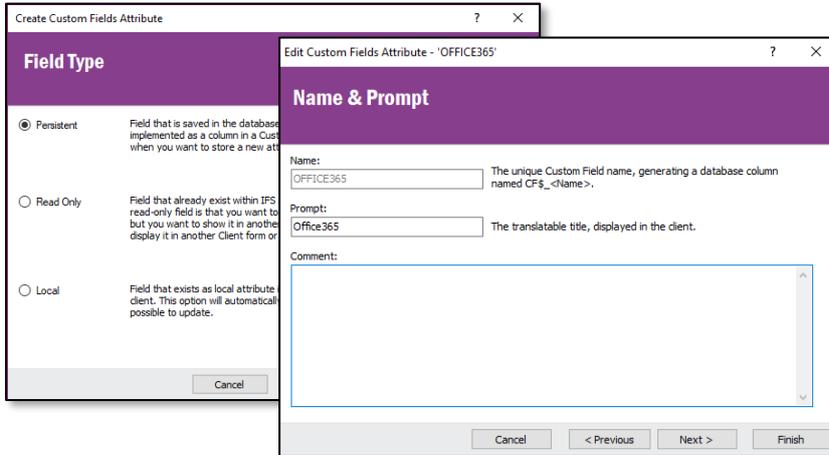


Figure 12 - CRM and SRM Basic Data window

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.

Figure 13 – Create custom objects

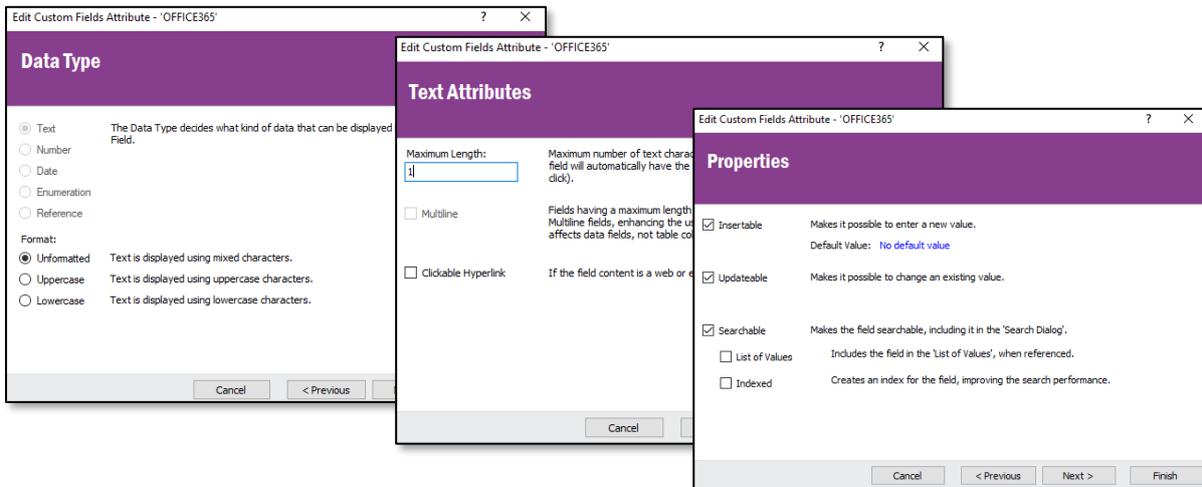
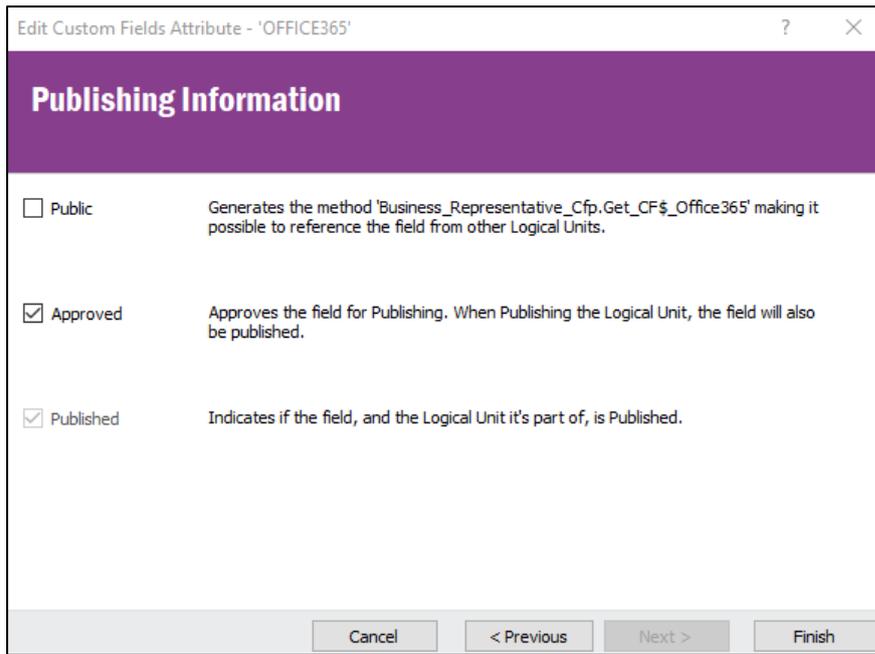


Figure 14 - Custom object settings



In the *publishing information*, select *Approved*. Click *Finish*.

Figure 15 – Publishing Information

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

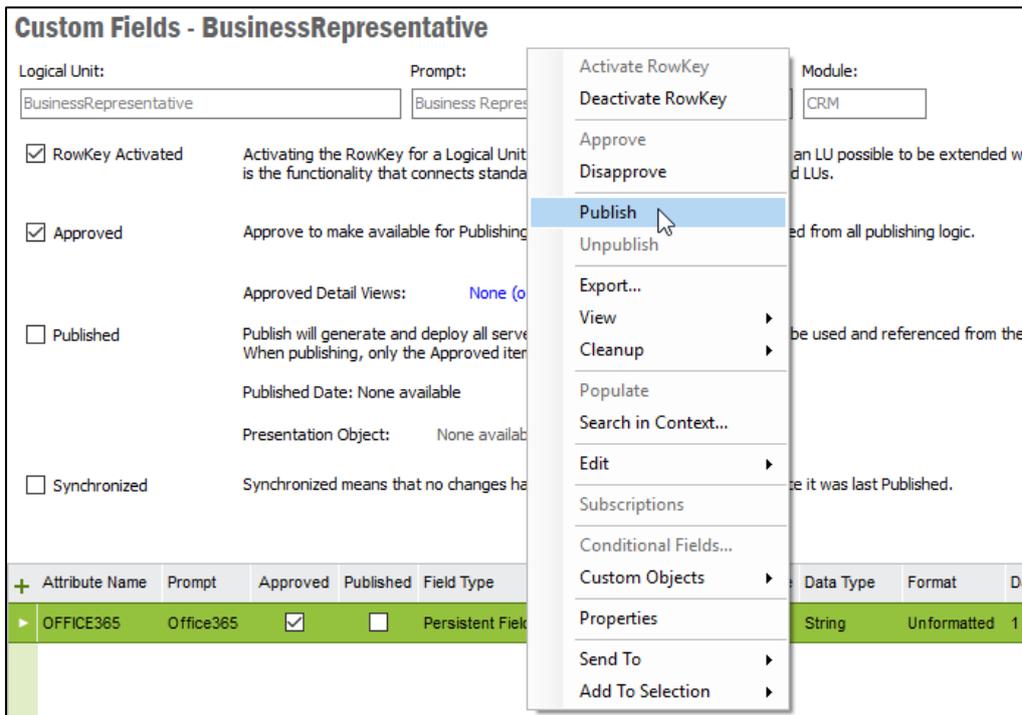


Figure 16 – Custom Fields

The custom field is now created.

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.

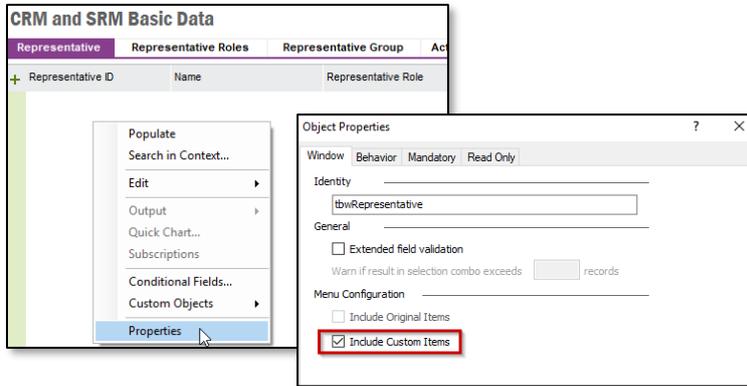


Figure 17 – Add custom feild

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

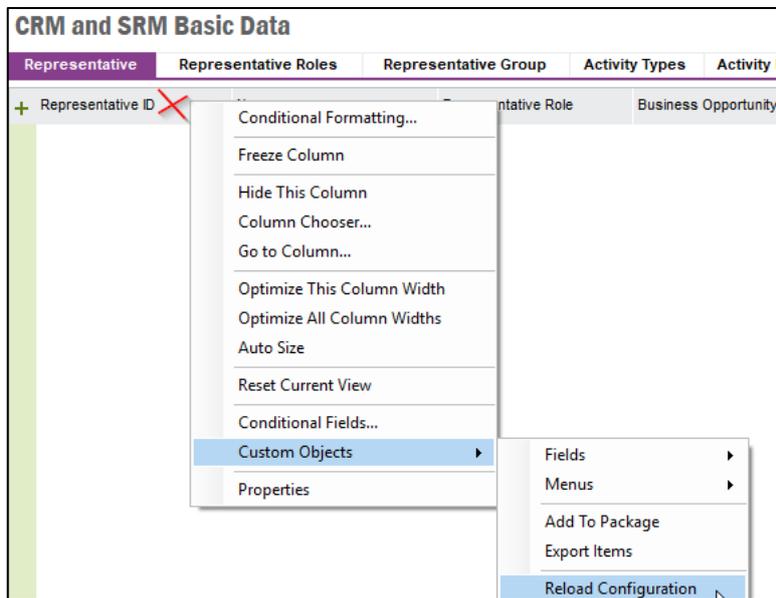


Figure 18 - Reload Configuration

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.

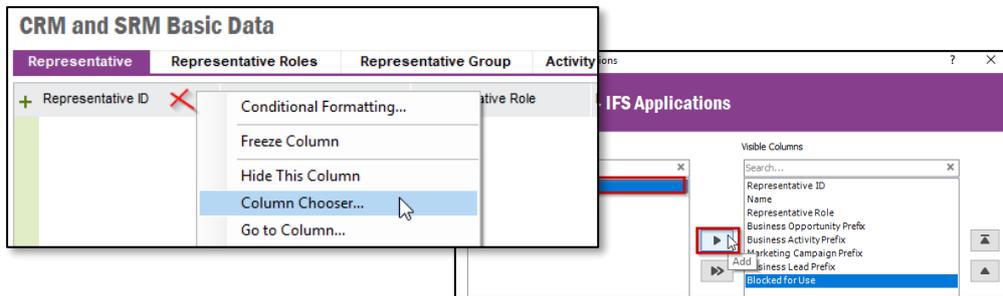


Figure 19 – Column Chooser

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...	Business Activity Pr...	Marketing Campaign Pre...	Business Lead Pr...	Blocked for Use	Office365	
	ERVI	Erik Wistner	Customer responsible					<input type="checkbox"/>		
	EXT_ANKJ	Anders Kjersem	Customer responsible					<input type="checkbox"/>		
	EXT_HAHE	Hans Hedlund	Customer responsible					<input type="checkbox"/>		

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

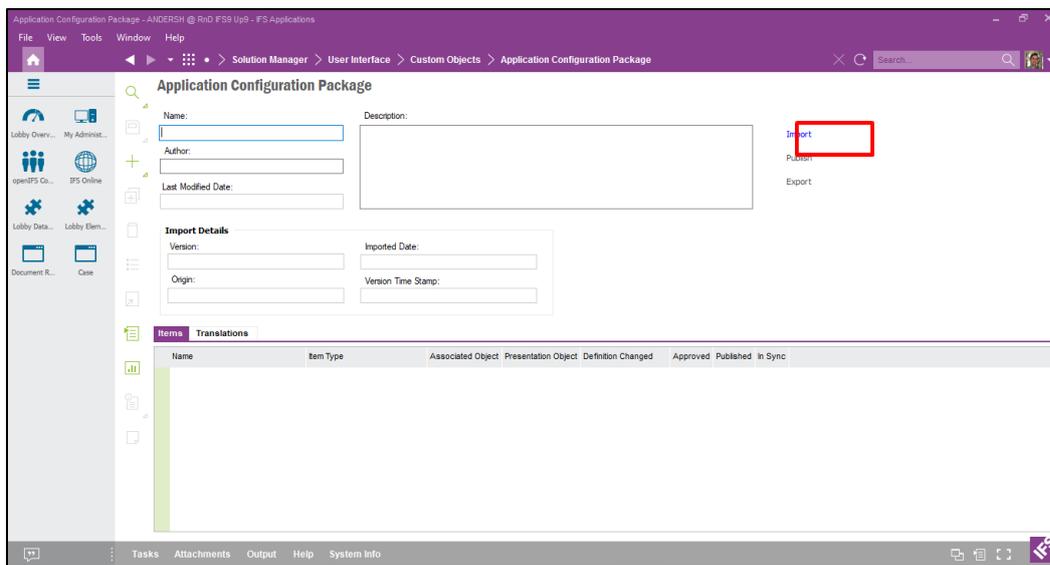


Figure 21 – Application Configuration Package

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.

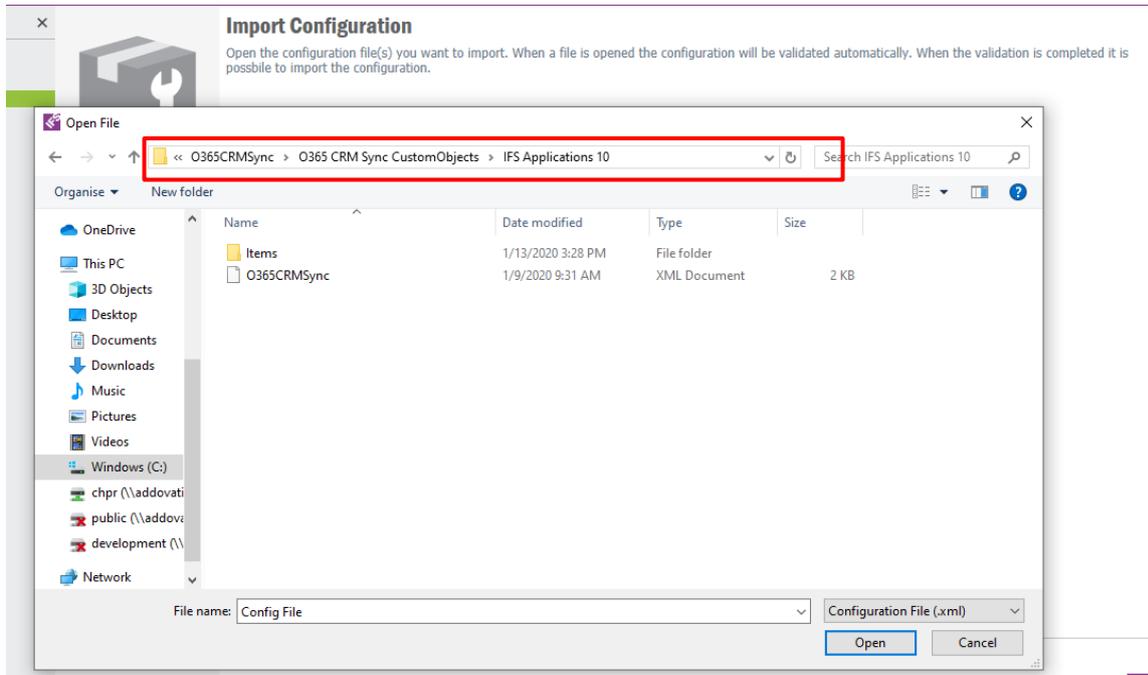


Figure 22 – Import Configuration

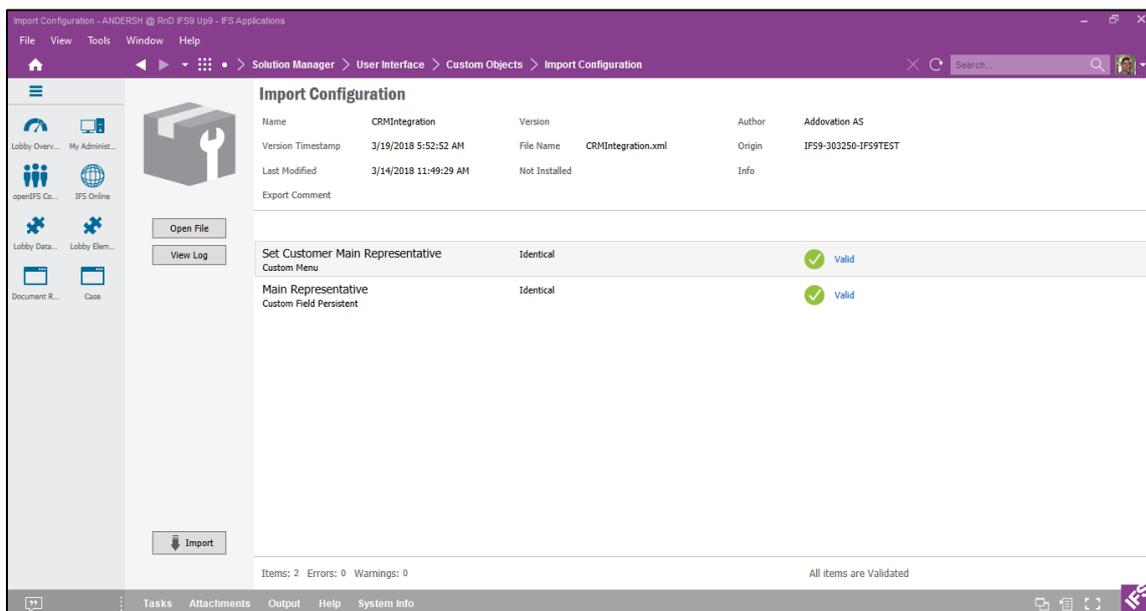


Figure 23 – Imported Configuration

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

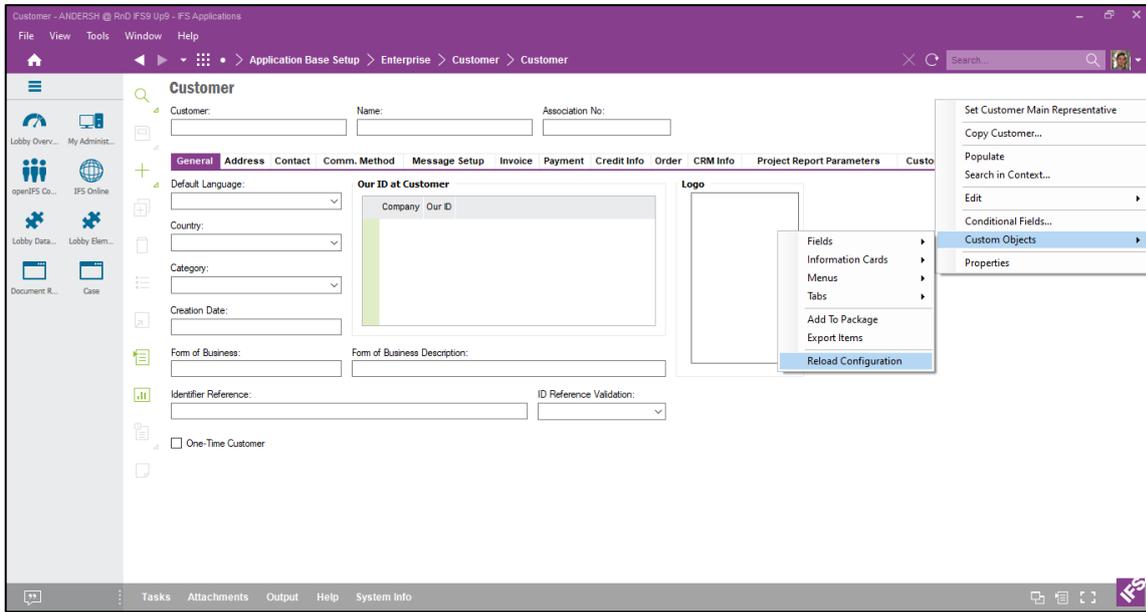


Figure 24 – Fetch custom fields

Right click in the window and select 'Properties'.

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

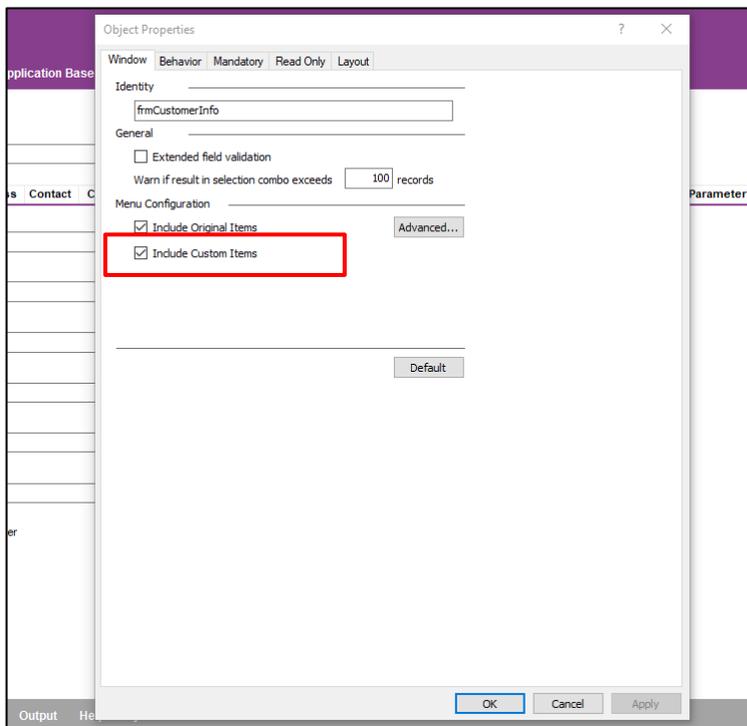
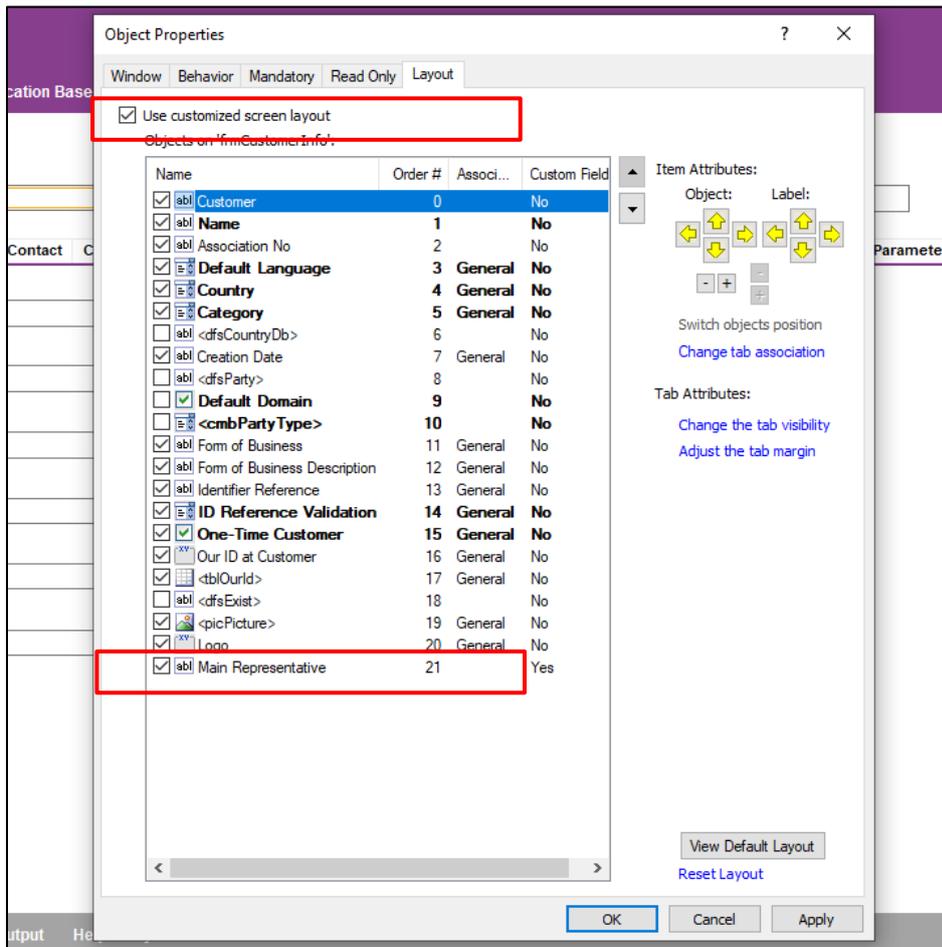


Figure 25 - Properties



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

Figure 26 – Object Properties

The custom field will be displayed in the window.

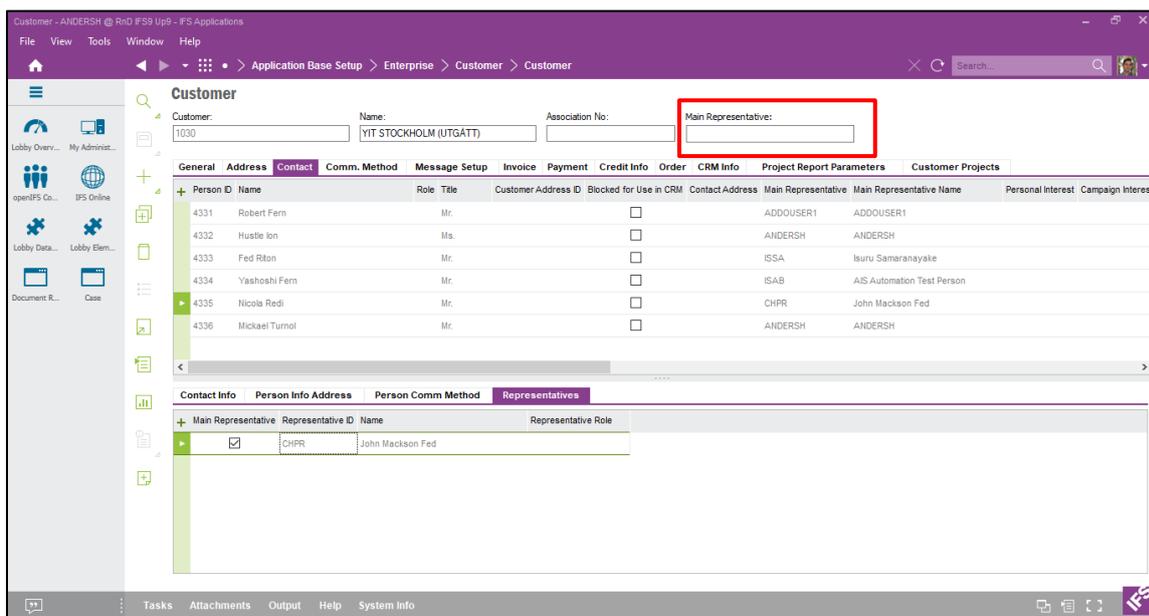


Figure 27 – Configured custom field

Select a main representative.

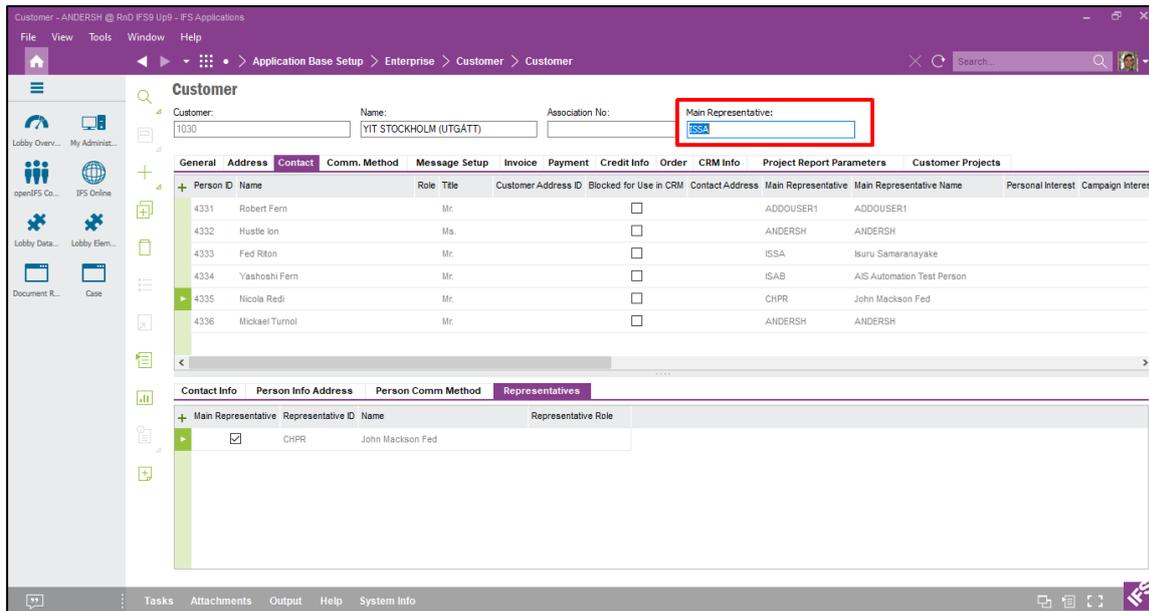


Figure 28 – Main Representative

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

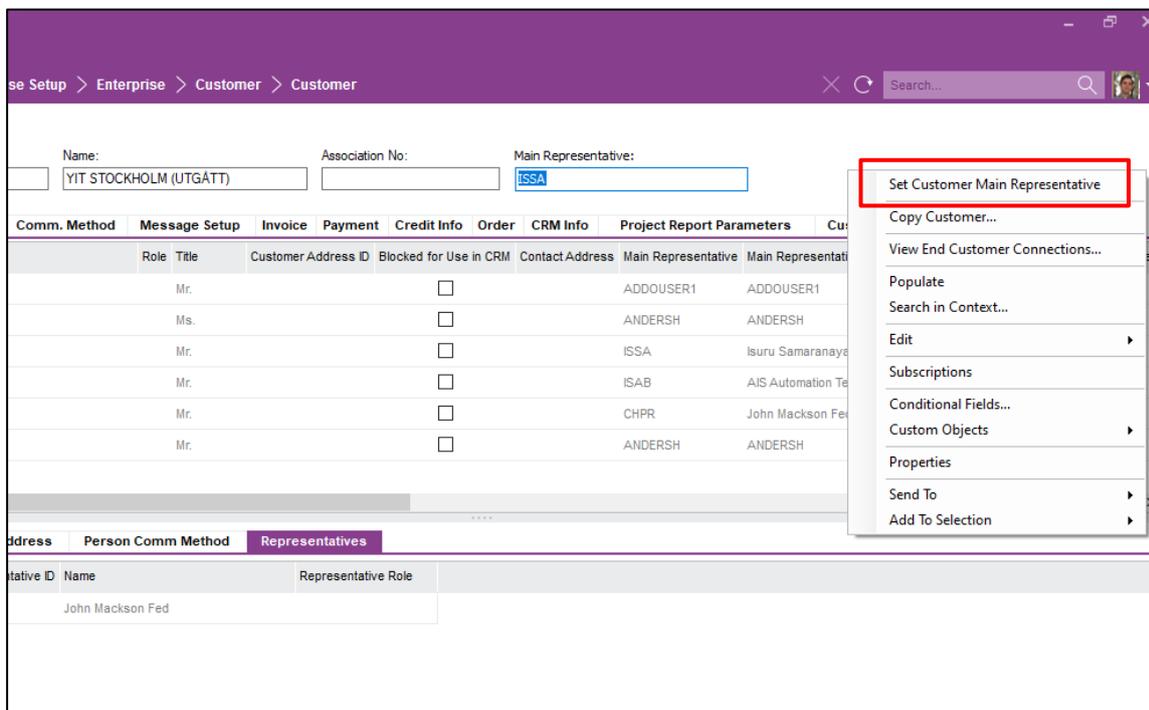


Figure 29 - Set Customer Main Representative

Application Base Setup > Enterprise > Customer > Customer

Customer

Customer: 1030 Name: YIT STOCKHOLM (UTGÄTT) Association No: Main Representative: ISSA

Person ID	Name	Role	Title	Customer Address ID	Blocked for Use in CRM	Contact Address	Main Representative	Main Representative Name
4331	Robert Fern	Mr.			<input type="checkbox"/>		ISSA	Isuru Samaranayake
4332	Hustle Ion	Ms.			<input type="checkbox"/>		ISSA	Isuru Samaranayake
4333	Fed Riton	Mr.			<input type="checkbox"/>		ISSA	Isuru Samaranayake
4334	Yashoshi Fern	Mr.			<input type="checkbox"/>		ISSA	Isuru Samaranayake
4335	Nicola Redi	Mr.			<input type="checkbox"/>		ISSA	Isuru Samaranayake
4336	Mickael Turnol	Mr.			<input type="checkbox"/>		ISSA	Isuru Samaranayake

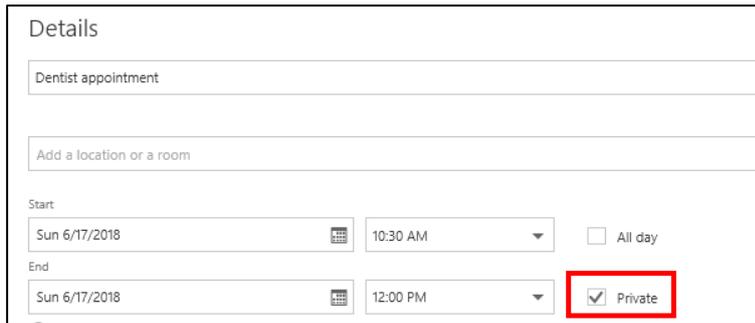
Figure 30 - Customer Main Representative

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.



The screenshot shows a 'Details' form for a calendar event. The subject is 'Dentist appointment'. There is a field for 'Add a location or a room'. The start time is 'Sun 6/17/2018' at '10:30 AM' with an 'All day' checkbox. The end time is 'Sun 6/17/2018' at '12:00 PM'. A 'Private' checkbox is checked and highlighted with a red box.

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

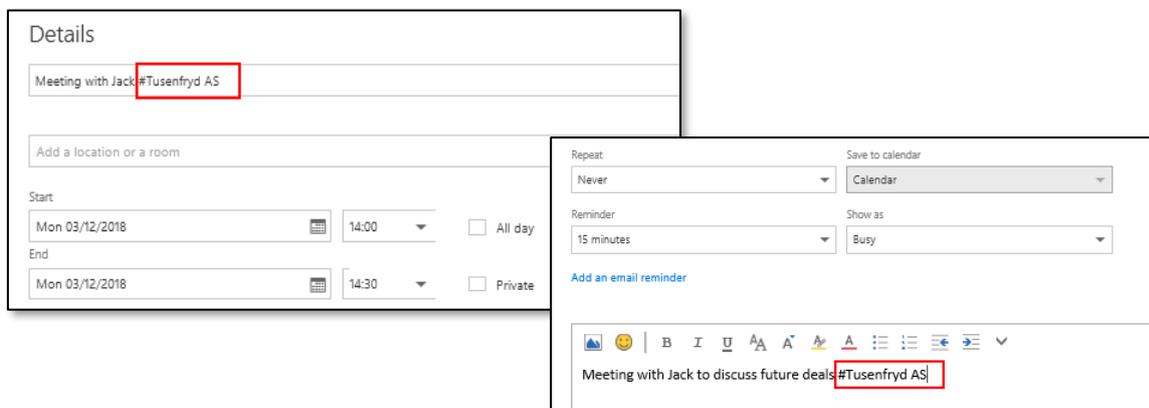
2. '#' tag in '(')' and customer id, or Name at any place in the subject field and/or the note field.

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)



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. O365).

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.

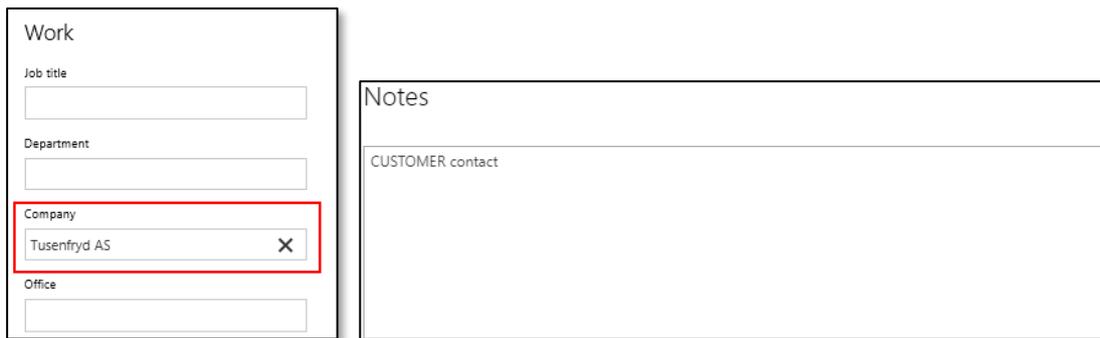
Example:

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



The image shows a screenshot of a contact management interface. On the left, there is a 'Work' section with several input fields: 'Job title', 'Department', 'Company', and 'Office'. The 'Company' field is highlighted with a red rectangular box and contains the text 'Tusenfryd AS' with a small 'X' icon to its right. To the right of the 'Work' section is a 'Notes' section, which is a large text area containing the text 'CUSTOMER contact'.

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.



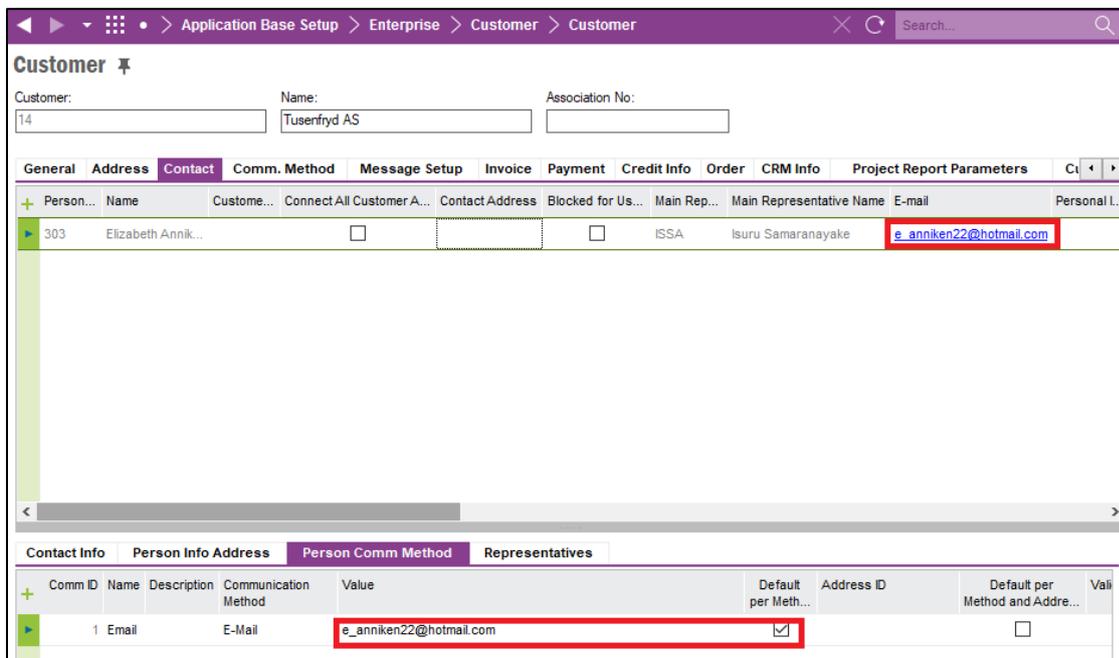
Figure 34 –Contact person’s Email

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’.



Person...	Name	Custome...	Connect All Customer A...	Contact Address	Blocked for Us...	Main Rep...	Main Representative Name	E-mail	Personal L...
303	Elizabeth Annik...		<input type="checkbox"/>		<input type="checkbox"/>	ISSA	Isuru Samaranyake	e_anniken22@hotmail.com	

Comm ID	Name	Description	Communication Method	Value	Default per Meth...	Address ID	Default per Method and Addre...	Vali
1	Email	E-Mail		e_anniken22@hotmail.com	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

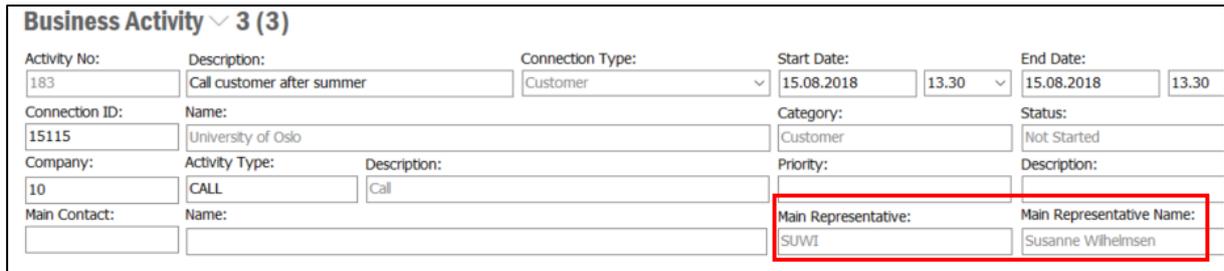
Figure 35 - Communication Method

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.

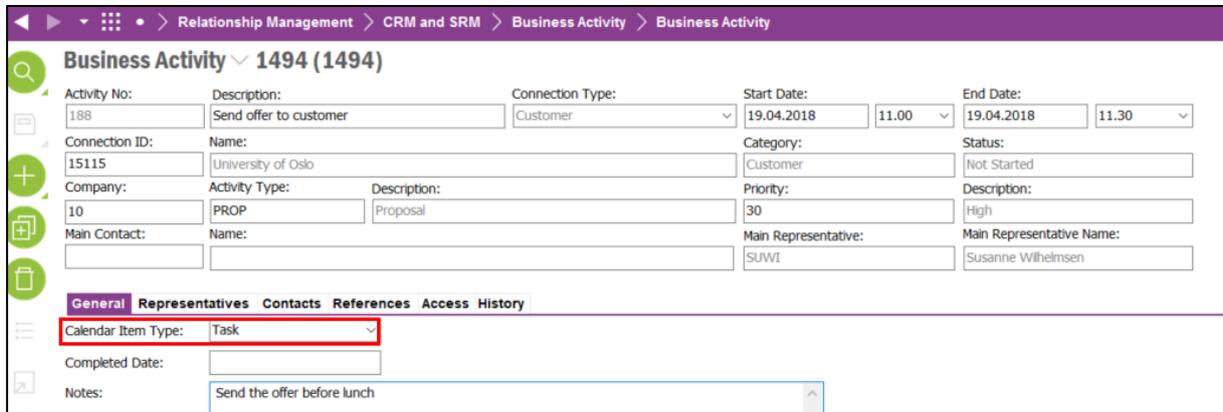


Business Activity 3 (3)					
Activity No:	Description:	Connection Type:	Start Date:	End Date:	
183	Call customer after summer	Customer	15.08.2018 13.30	15.08.2018 13.30	
Connection ID:	Name:	Category:	Status:		
15115	University of Oslo	Customer	Not Started		
Company:	Activity Type:	Description:	Priority:	Description:	
10	CALL	Call			
Main Contact:	Name:	Main Representative:	Main Representative Name:		
		SUWI	Susanne Wilhelmsen		

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*.



Business Activity 1494 (1494)					
Activity No:	Description:	Connection Type:	Start Date:	End Date:	
188	Send offer to customer	Customer	19.04.2018 11.00	19.04.2018 11.30	
Connection ID:	Name:	Category:	Status:		
15115	University of Oslo	Customer	Not Started		
Company:	Activity Type:	Description:	Priority:	Description:	
10	PROP	Proposal	30	High	
Main Contact:	Name:	Main Representative:	Main Representative Name:		
		SUWI	Susanne Wilhelmsen		
General Representatives Contacts References Access History					
Calendar Item Type:		Task			
Completed Date:					
Notes:		Send the offer before lunch			

Figure 37 - Task

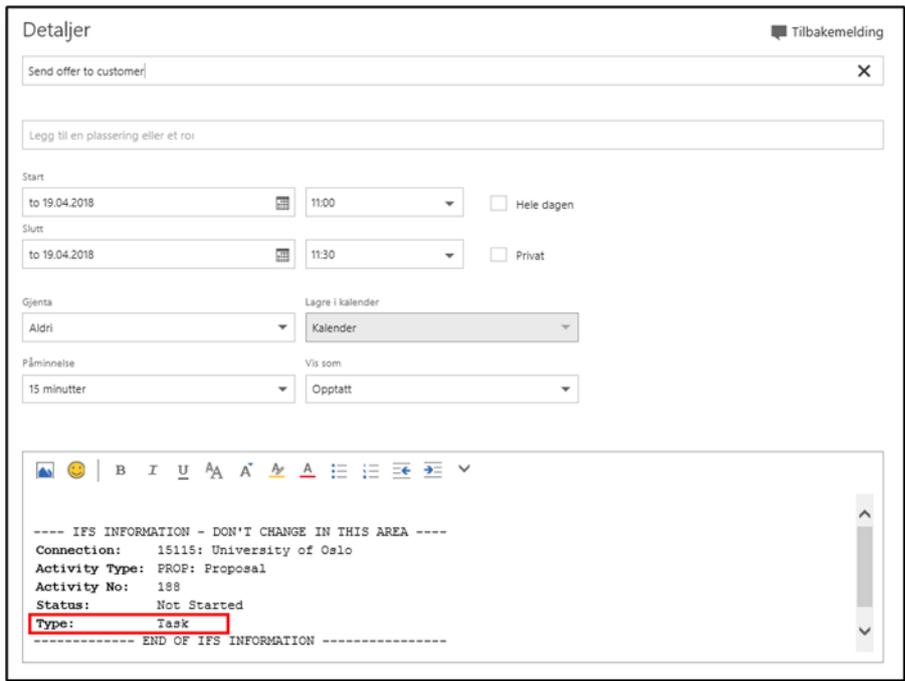


Figure 38 – Synced appointment

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.



Figure 39 - References

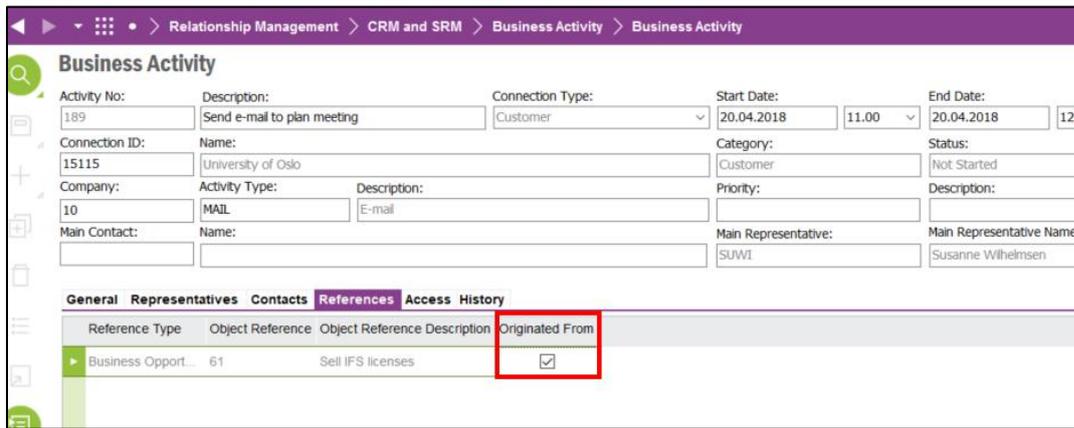


Figure 40 - Reference

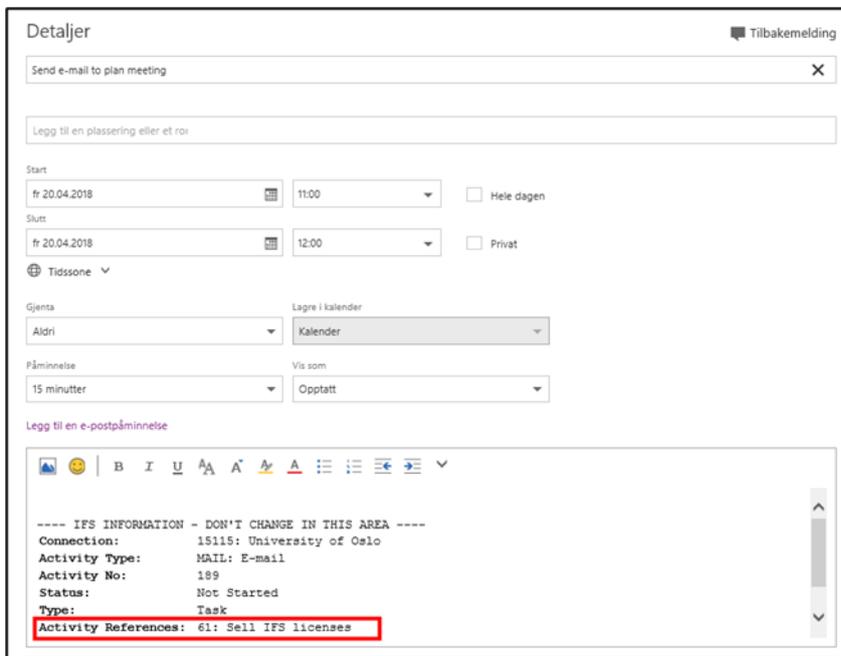


Figure 41 – Synced activity

6.1.4 Fields from IFS to O365

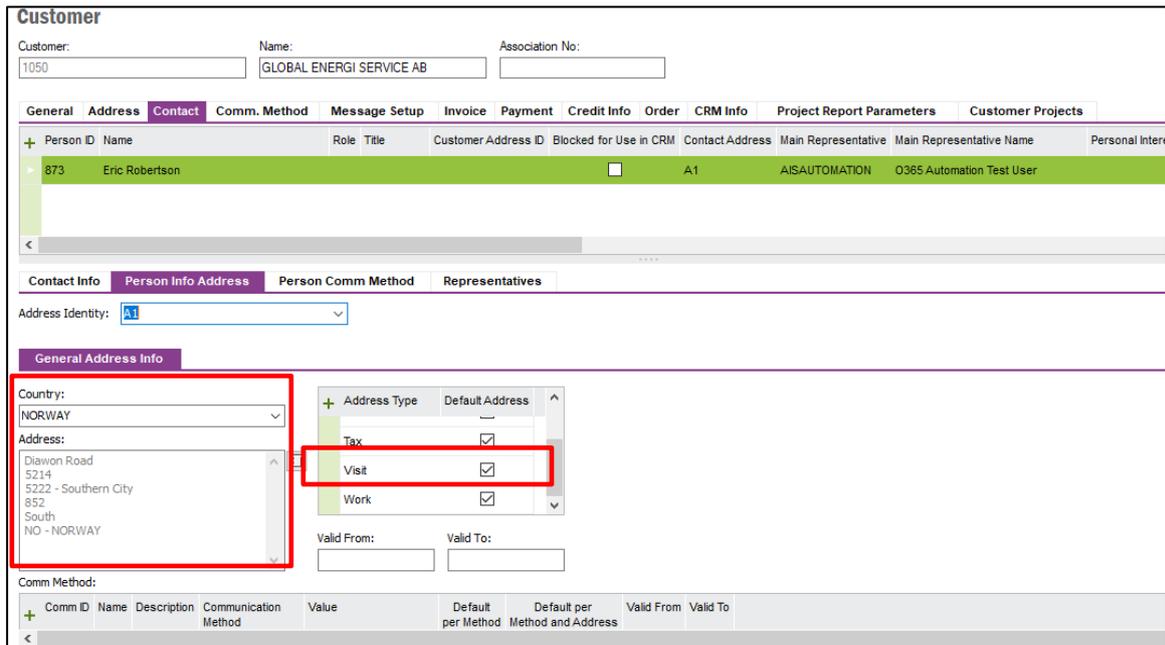
Following fields will be updated on created Appointment in O365 from IFS.

- 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: 1050 Name: GLOBAL ENERGI SERVICE AB Association No:

General Address **Contact** Comm. Method Message Setup Invoice Payment Credit Info Order CRM Info Project Report Parameters Customer Projects

Person ID	Name	Role	Title	Customer Address ID	Blocked for Use in CRM	Contact Address	Main Representative	Main Representative Name	Personal Inter
873	Eric Robertson				<input type="checkbox"/>	A1	AISAUTOMATION	O365 Automation Test User	

Contact Info **Person Info Address** Person Comm Method Representatives

Address Identity: A1

General Address Info

Country: NORWAY

Address: Diawon Road 5214 5222 - Southern City 852 South NO - NORWAY

Address Type	Default Address
Tax	<input checked="" type="checkbox"/>
Visit	<input checked="" type="checkbox"/>
Work	<input checked="" type="checkbox"/>

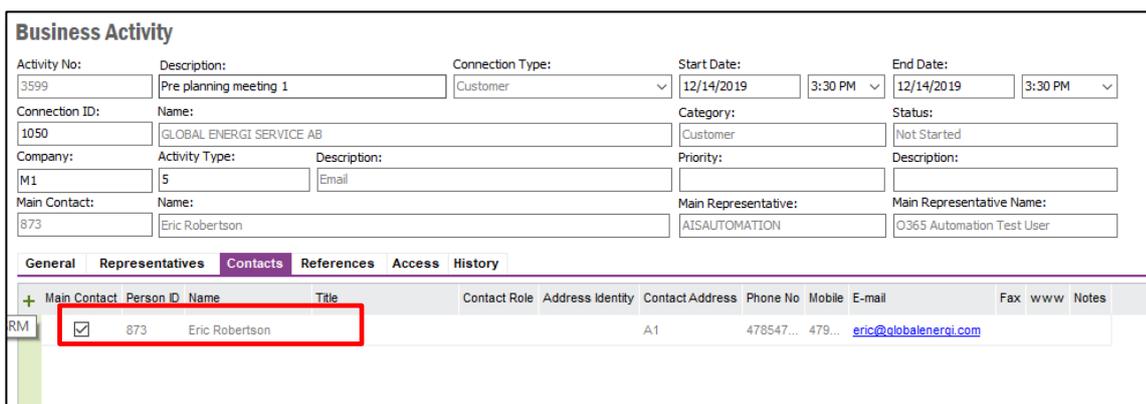
Valid From: Valid To:

Comm Method:

Comm ID	Name	Description	Communication Method	Value	Default per Method	Default per Method and Address	Valid From	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 Activity

Activity No: 3599 Description: Pre planning meeting 1 Connection Type: Customer Start Date: 12/14/2019 3:30 PM End Date: 12/14/2019 3:30 PM

Connection ID: 1050 Name: GLOBAL ENERGI SERVICE AB Category: Customer Status: Not Started

Company: M1 Activity Type: 5 Description: Email Priority: Description:

Main Contact: 873 Name: Eric Robertson Main Representative: AISAUTOMATION Main Representative Name: O365 Automation Test User

General Representatives **Contacts** References Access History

Main Contact	Person ID	Name	Title	Contact Role	Address Identity	Contact Address	Phone No	Mobile	E-mail	Fax	www	Notes
<input checked="" type="checkbox"/>	873	Eric Robertson			A1		478547...	479...	eric@globalenergi.com			

Figure 43 – Contacts in business activity

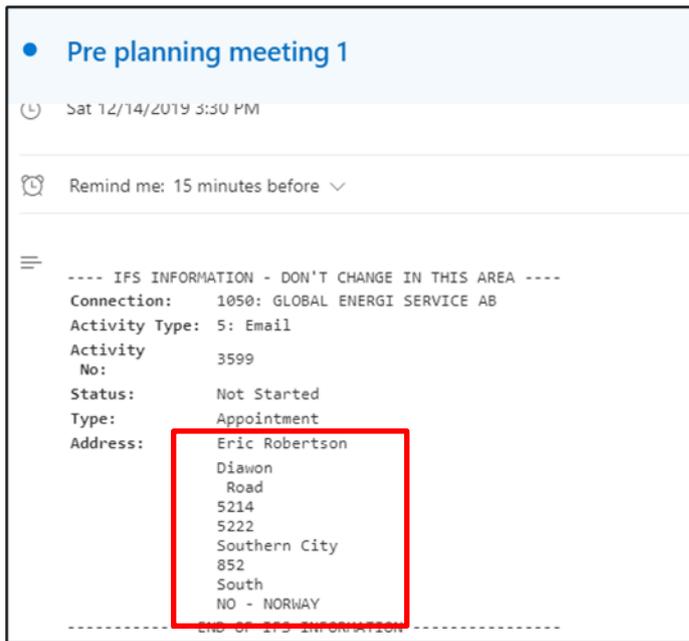


Figure 44 – Synced activity

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.

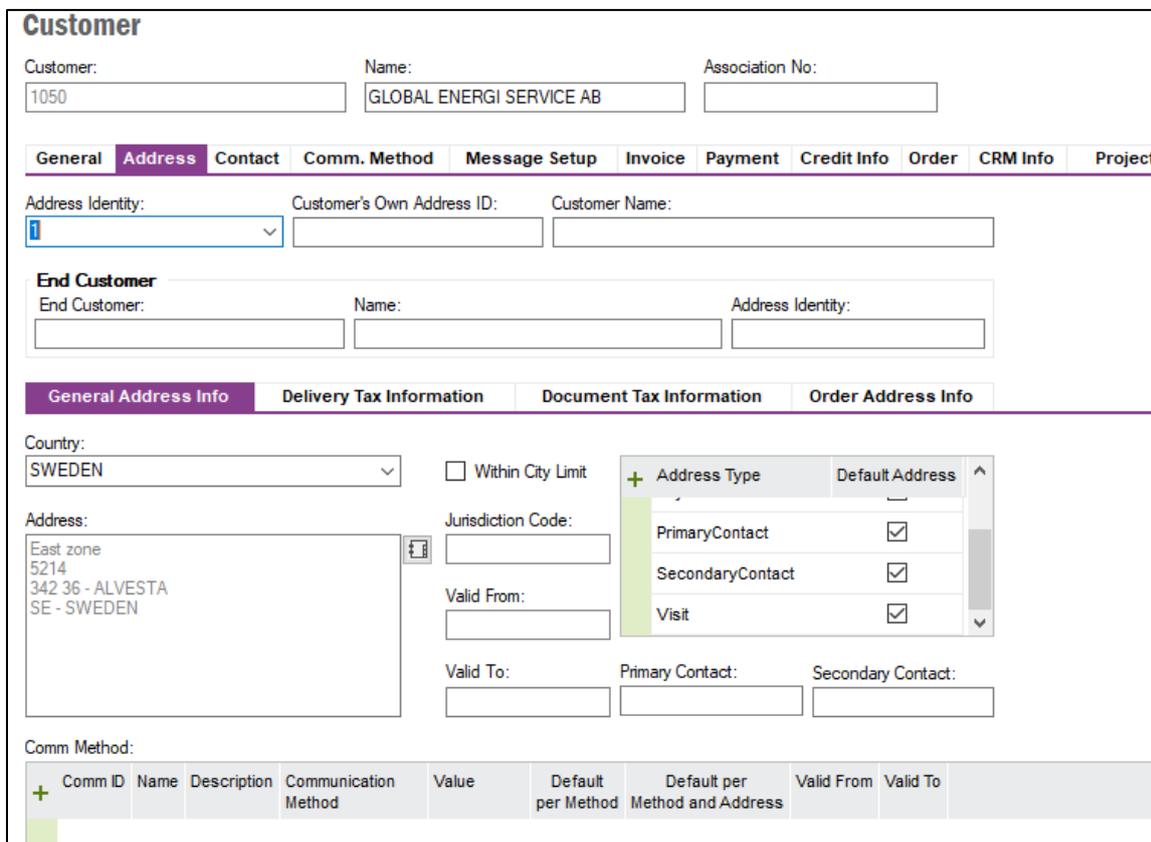


Figure 45 – Default visit address

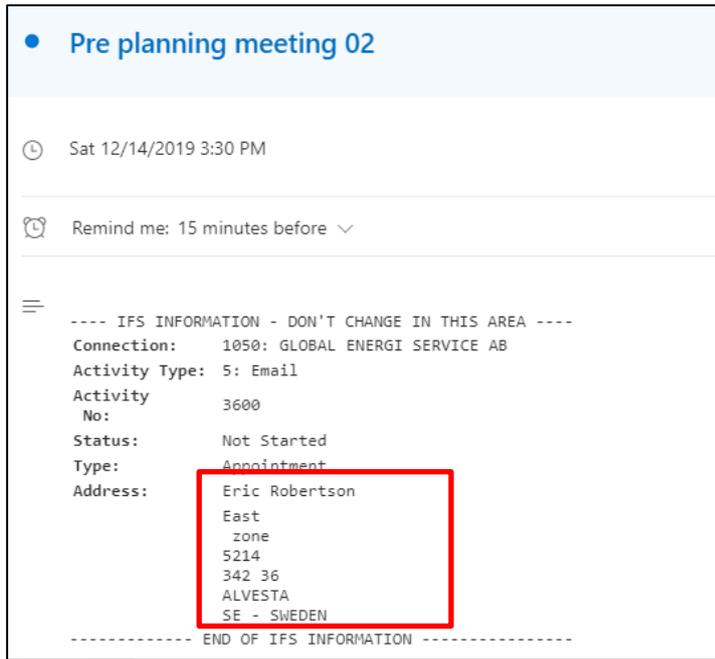


Figure 46 – Example synced activity

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.

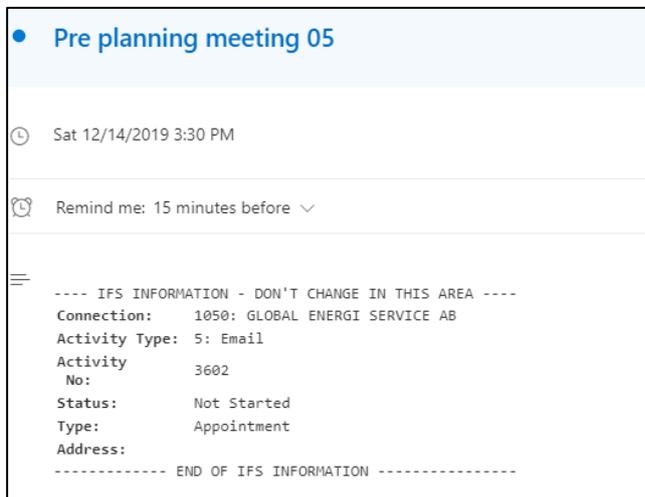


Figure 47 - Example synced activity

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).

Business Activity

Activity No: 8601 Description: Pre planning meeting 04 Connection Type: Customer Start Date: 12/14/2019 3:30 PM End Date: 12/14/2019 3:30 PM

Connection ID: 1050 Name: GLOBAL ENERGI SERVICE AB Category: Customer Status: Not Started

Company: M1 Activity Type: 5 Description: Email Priority: Description:

Main Contact: Name: Main Representative: AISAUTOMATION Main Representative Name: O365 Automation Test User

General Representatives **Contacts** References Access History

Main Contact	Person ID	Name	Title	Contact Role	Address Identity	Contact Address	Phone No	Mobile	E-mail	Fax	www	Notes

Figure 48 – Main Contact of business activity

● Pre planning meeting 04

Sat 12/14/2019 3:30 PM

Remind me: 15 minutes before

---- IFS INFORMATION - DON'T CHANGE IN THIS AREA ----

Connection: 1050: GLOBAL ENERGI SERVICE AB

Activity Type: 5: Email

Activity No: 3601

Status: Not Started

Type: Appointment

Address: East zone
5214
342 36
ALVESTA
SE
- SWEDEN

----- END OF IFS INFORMATION -----

Figure 49 -Main contact details

Summary for above sync methods

	<i>Condition (on Business Activity in IFS)</i>	<i>Output (in O365)</i>
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.

Customer ▾ 1 (2)

Customer: 10152 Name: Unilabs AB Association No: 556118-7179

General	Address	Contact	Comm. Method	Message Setup	Invoice	Payment	Credit Info	Order	CRM Info
+	Person ID	Name	Main Representative	Main Representative Name	Title				
	197	Ylva Petterson	SUWI	Susanne Wilhelmsen					
	199	Henrik Gjertsen	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.

SYNC ONLY MAIN REPRESENTATIVE CONTACTS: ON

Customer ▾ 135 (143)

Customer: 15114 Name: Asker Bryggen Association No:

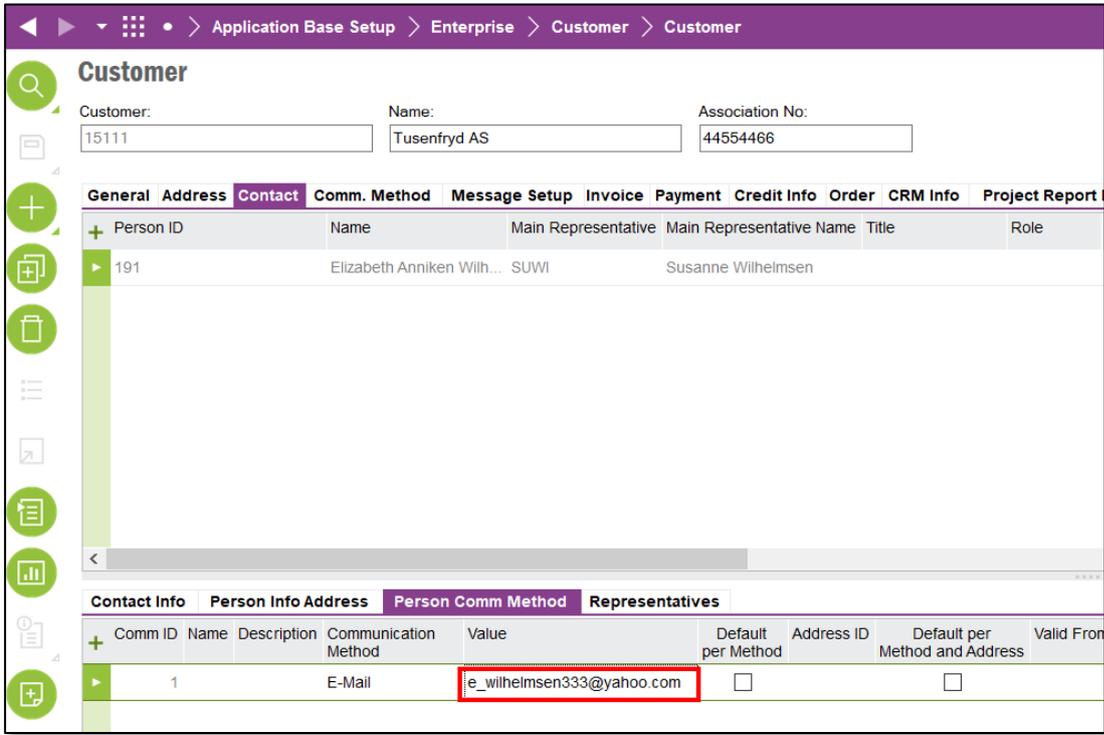
General	Address	Contact	Comm. Method	Message Setup	Invoice	Payment	Credit Info	Order
+	Person ID	Name	Title					
	232	Gerd Tranby Fredriksen	Fru					
	234	Peter Grieg						
	235	Simen Young	Mr					
	237	Petra Lyng						
	238	Harry Hole						
	239	Grace Hubbard						

Contact Info	Person Info	Address	Person Comm Method	Representatives
+	Main Representative	Representative ID	Name	Representative Role
	<input type="checkbox"/>	SUWI	Susanne Wilhelmsen	Customer responsible
	<input checked="" type="checkbox"/>	KANO	Karl 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.



The screenshot shows the 'Customer' interface with the following data:

Customer: 15111 Name: Tusenfryd AS Association No: 44554466

Navigation tabs: General, Address, **Contact**, Comm. Method, Message Setup, Invoice, Payment, Credit Info, Order, CRM Info, Project Report

Person ID	Name	Main Representative	Main Representative Name	Title	Role
191	Elizabeth Anniken Wilh...	SUWI	Susanne Wilhelmsen		

Sub-section tabs: Contact Info, Person Info Address, **Person Comm Method**, Representatives

Comm ID	Name	Description	Communication Method	Value	Default per Method	Address ID	Default per Method and Address	Valid Fron
1		E-Mail		e_wilhelmsen333@yahoo.com	<input type="checkbox"/>		<input type="checkbox"/>	

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.

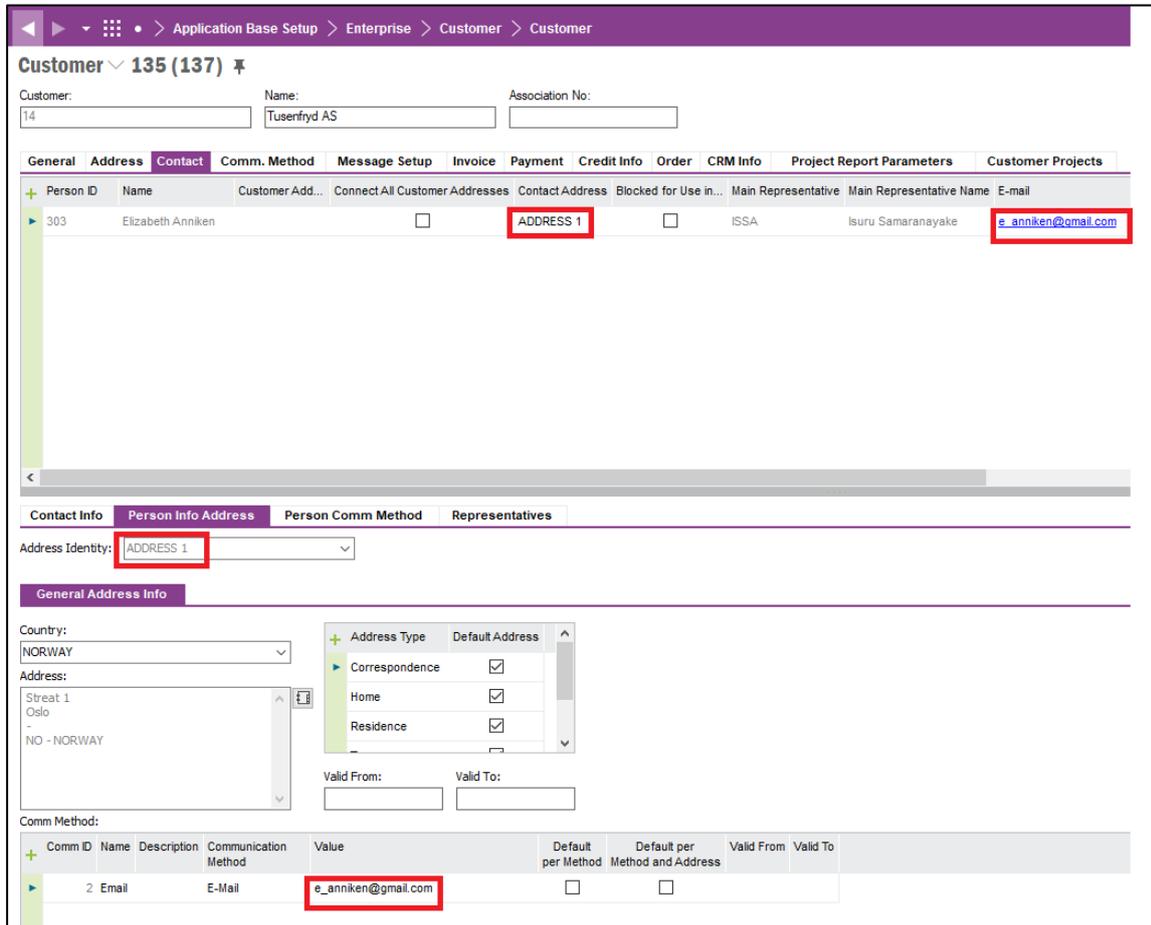
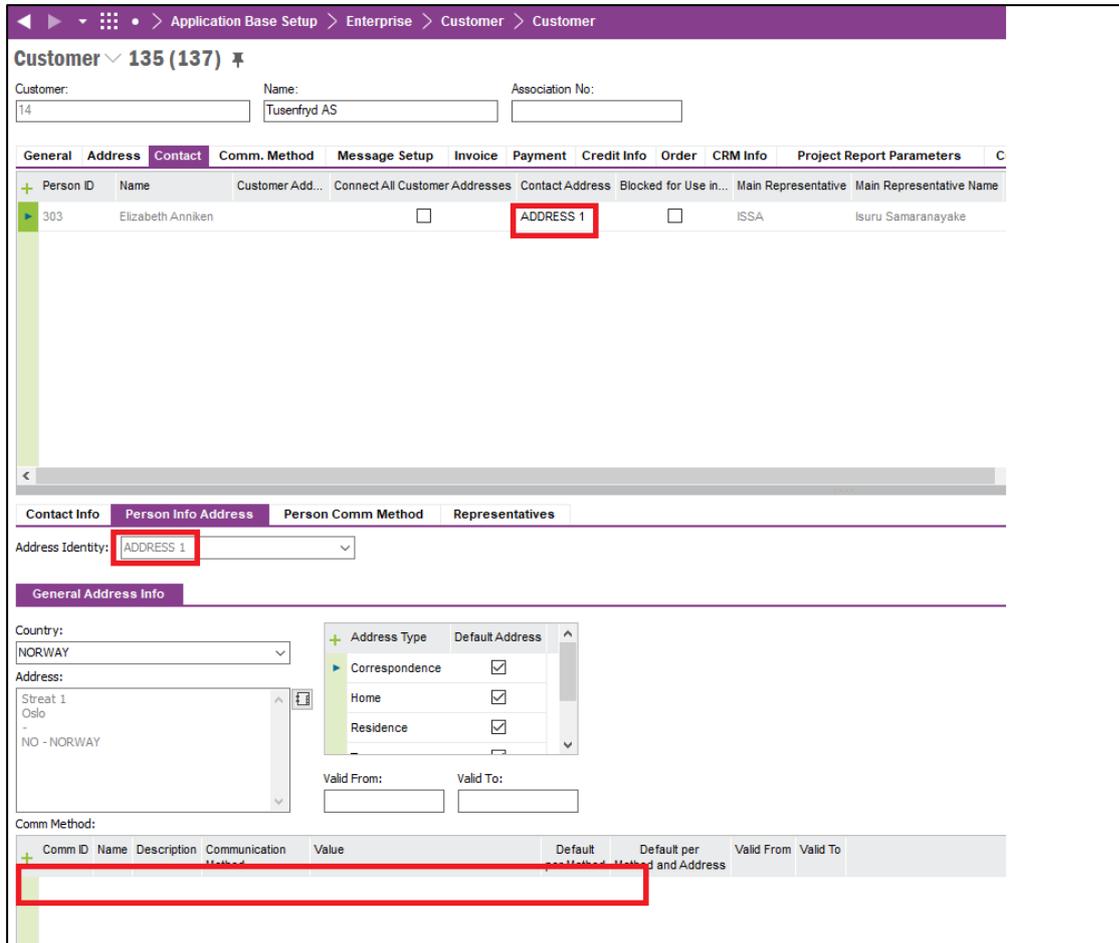


Figure 53 – Communication method

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)



Customer: 135 (137) **137**

Customer: 14 Name: Tusenfyrd AS Association No:

General **Address** **Contact** Comm. Method Message Setup Invoice Payment Credit Info Order CRM Info Project Report Parameters C

Person ID	Name	Customer Add...	Connect All Customer Addresses	Contact Address	Blocked for Use in...	Main Representative	Main Representative Name
303	Elizabeth Anniken		<input type="checkbox"/>	ADDRESS 1	<input type="checkbox"/>	ISSA	Isuru Samaranayake

Contact Info **Person Info Address** Person Comm Method Representatives

Address Identity: **ADDRESS 1**

General Address Info

Country: NORWAY

Address: Street 1, Oslo, NO - NORWAY

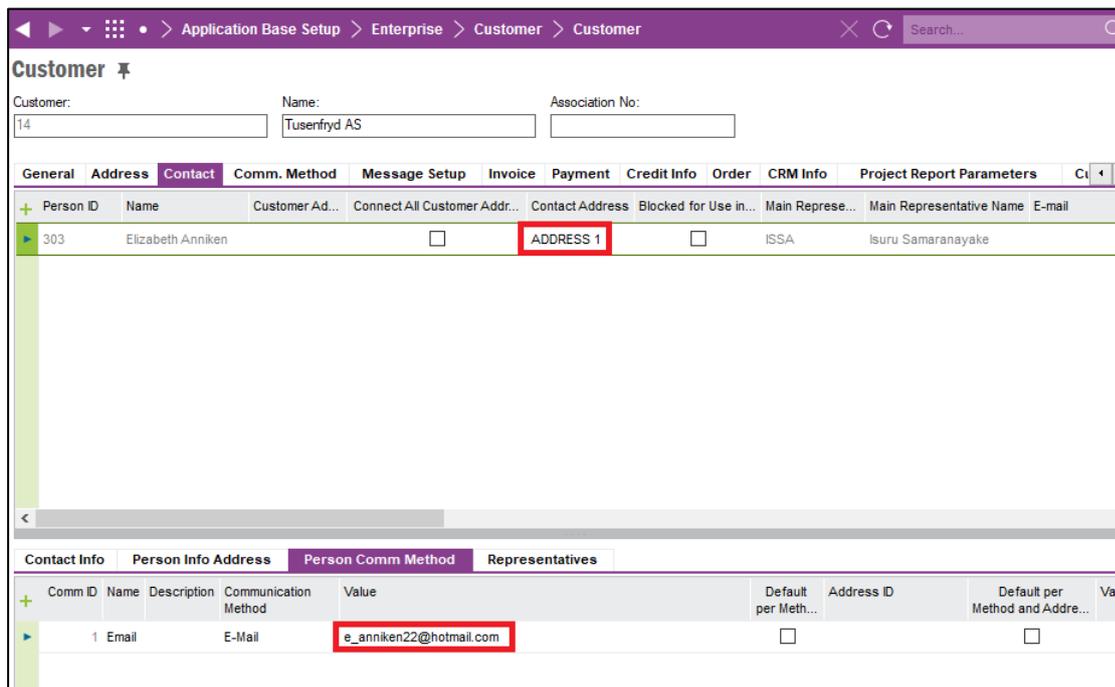
Address Type	Default Address
Correspondence	<input checked="" type="checkbox"/>
Home	<input checked="" type="checkbox"/>
Residence	<input checked="" type="checkbox"/>

Valid From: Valid To:

Comm Method:

Comm ID	Name	Description	Communication Method	Value	Default per Method	Default per Method and Address	Valid From	Valid To

Figure 54 - Communication method



The screenshot shows the 'Customer' form in the Addovation system. The breadcrumb trail is 'Application Base Setup > Enterprise > Customer > Customer'. The form is titled 'Customer' and has several tabs: 'General', 'Address', 'Contact', 'Comm. Method', 'Message Setup', 'Invoice', 'Payment', 'Credit Info', 'Order', 'CRM Info', and 'Project Report Parameters'. The 'Contact' tab is active. Below the tabs, there is a table with columns: 'Person ID', 'Name', 'Customer Ad...', 'Connect All Customer Addr...', 'Contact Address', 'Blocked for Use in...', 'Main Represe...', 'Main Representative Name', and 'E-mail'. A single row is visible with Person ID '303', Name 'Elizabeth Anniken', and Contact Address 'ADDRESS 1'. Below this table, there are more tabs: 'Contact Info', 'Person Info Address', 'Person Comm Method', and 'Representatives'. The 'Person Comm Method' tab is active, showing a table with columns: 'Comm ID', 'Name', 'Description', 'Communication Method', 'Value', 'Default per Meth...', 'Address ID', 'Default per Method and Addre...', and 'Vali'. A single row is visible with Comm ID '1', Name 'Email', Description 'E-Mail', and Value 'e_anniken22@hotmail.com'.

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.

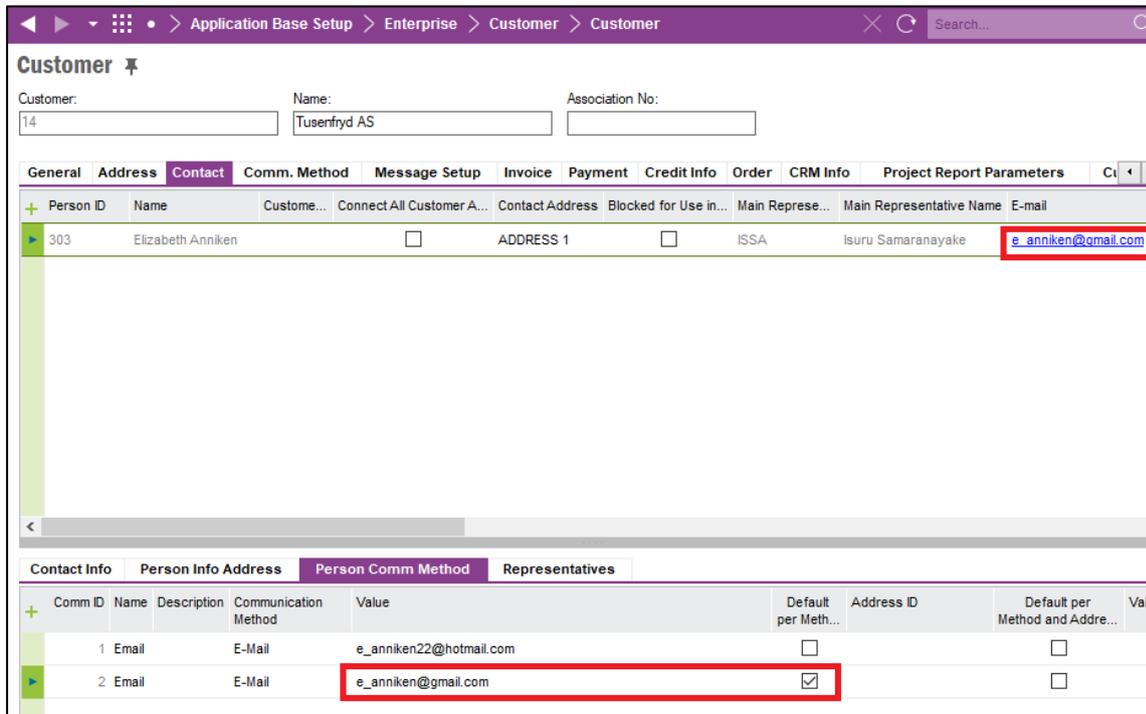


Figure 56 - Default per method

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)

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.

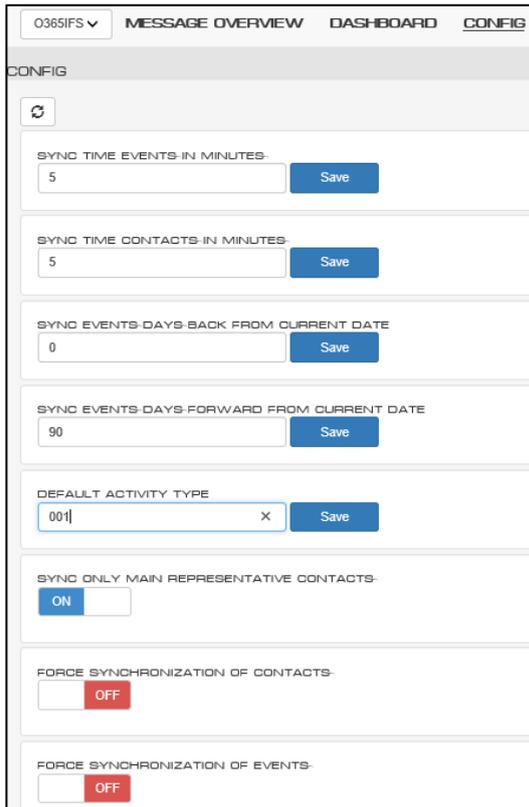


Figure 57 - Configuration parameters

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.

	  	1	3/13/2018 3:45 PM	O365IFS	SYNC_ACTIVITIES	t_test15@addovation.com	OLNO	OK	FINISHED	Update synchronization task is successfully finalized. 1 event is updated in Office365. [00:00:01.6482283 ms]
	  	1	3/13/2018 3:44 PM	O365IFS	SYNC_CONTACTS	t_test15@addovation.com	OLNO	OK	FINISHED	Update synchronization task is successfully finalized. Nothing is created or updated. [00:00:01.6543907 ms]
	  	1	3/13/2018 3:44 PM	O365IFS	SYNC_ACTIVITIES	t_test15@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

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