User Guide

User Guide Automation AIS-M365 CRM Sync v2.1

Updated: Date 2020-09-29

Contents

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:

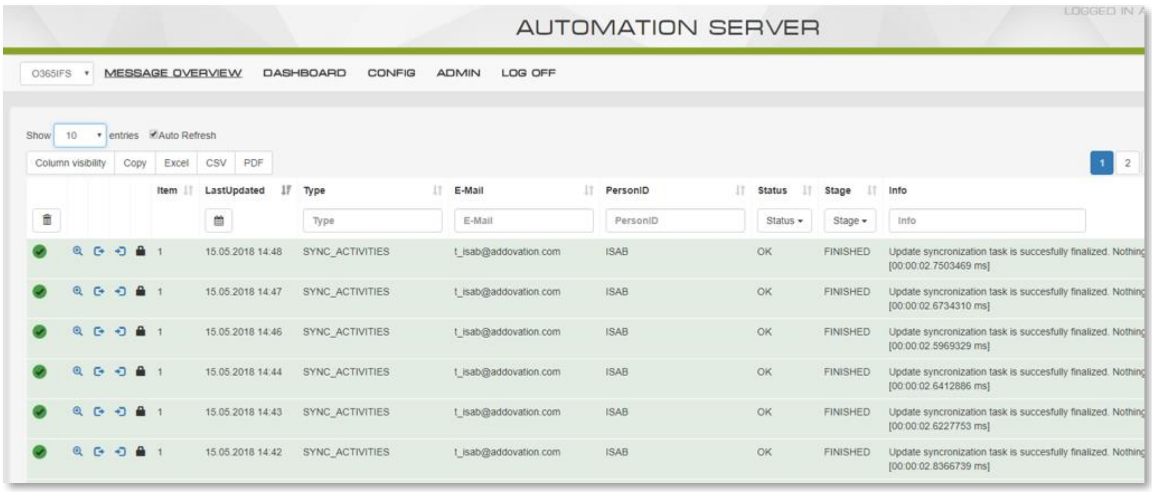


Figure 1 – Message Tracking Overview

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

Figure 2 – Person Email ID

Priority 2: User ID

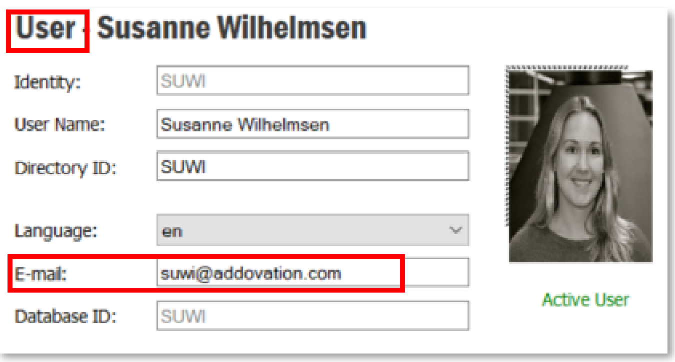


Figure 3- User ID in IFS

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.

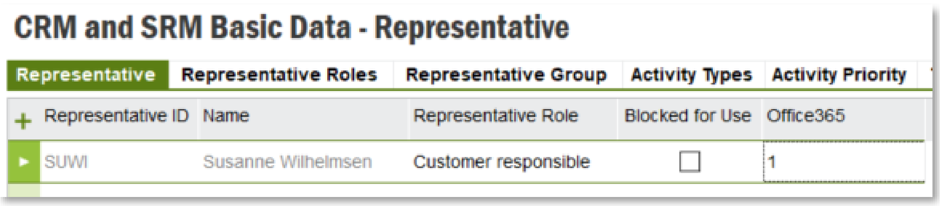


Figure 4 - Representative

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:

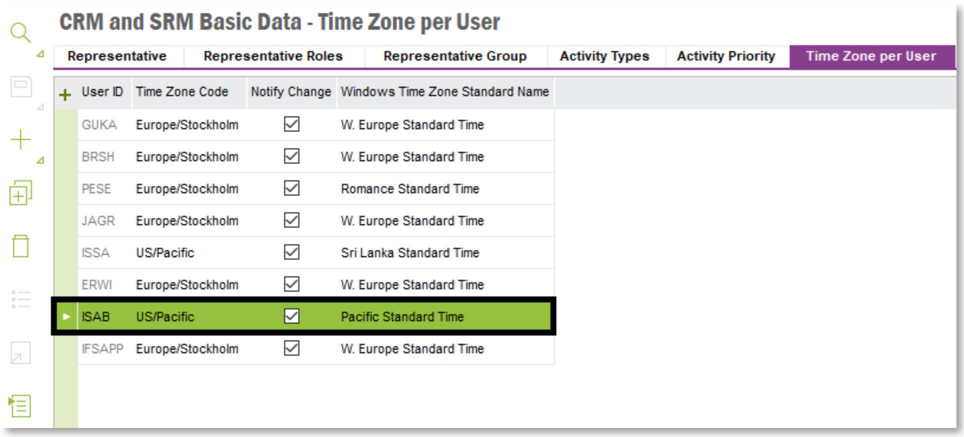
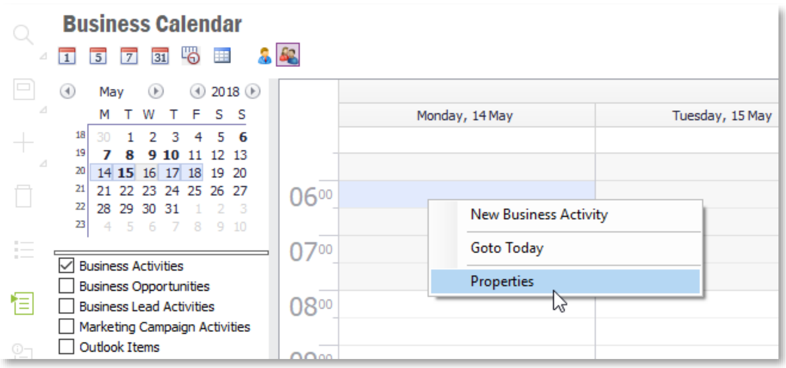


Figure 5 – Time Zone Per User



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

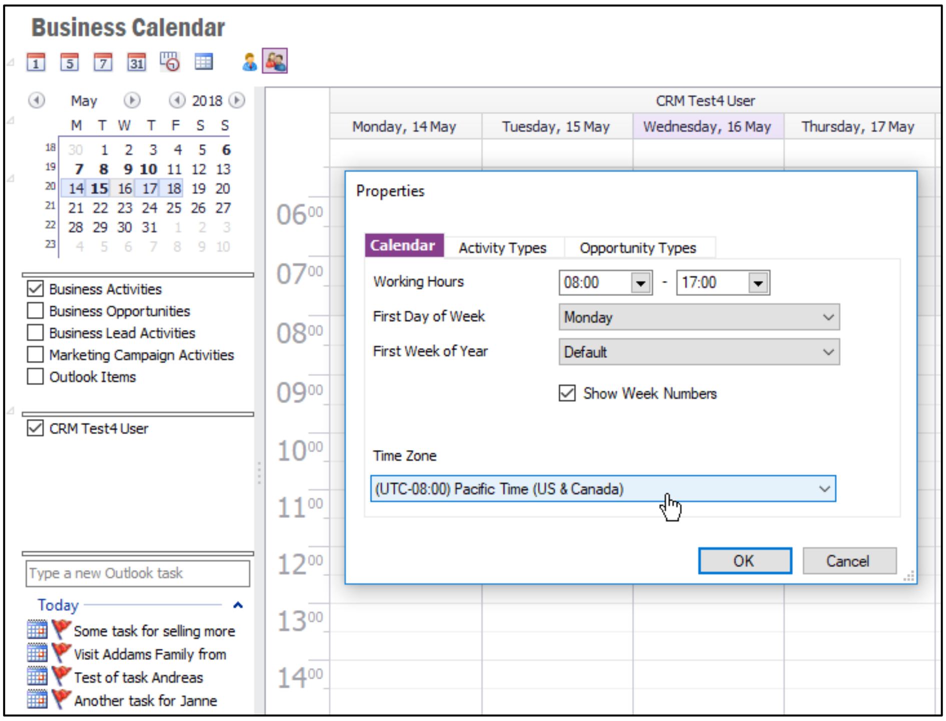


Figure 7 – Time Zone

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:

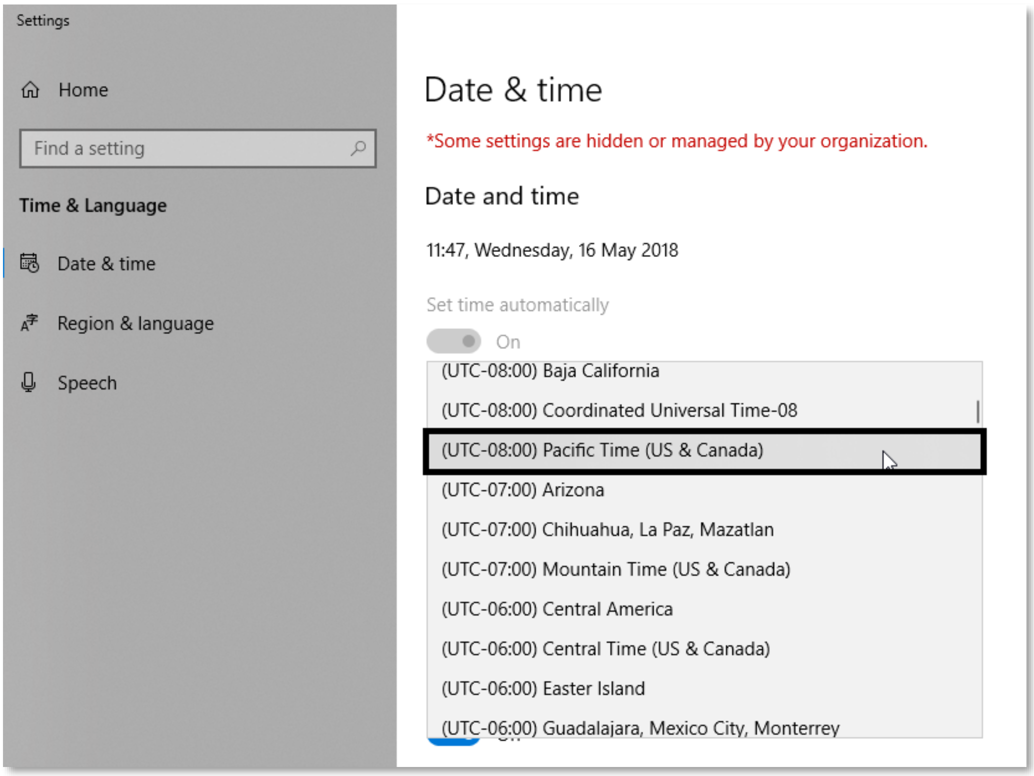


Figure 8 – Time Zone in PC settings

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.

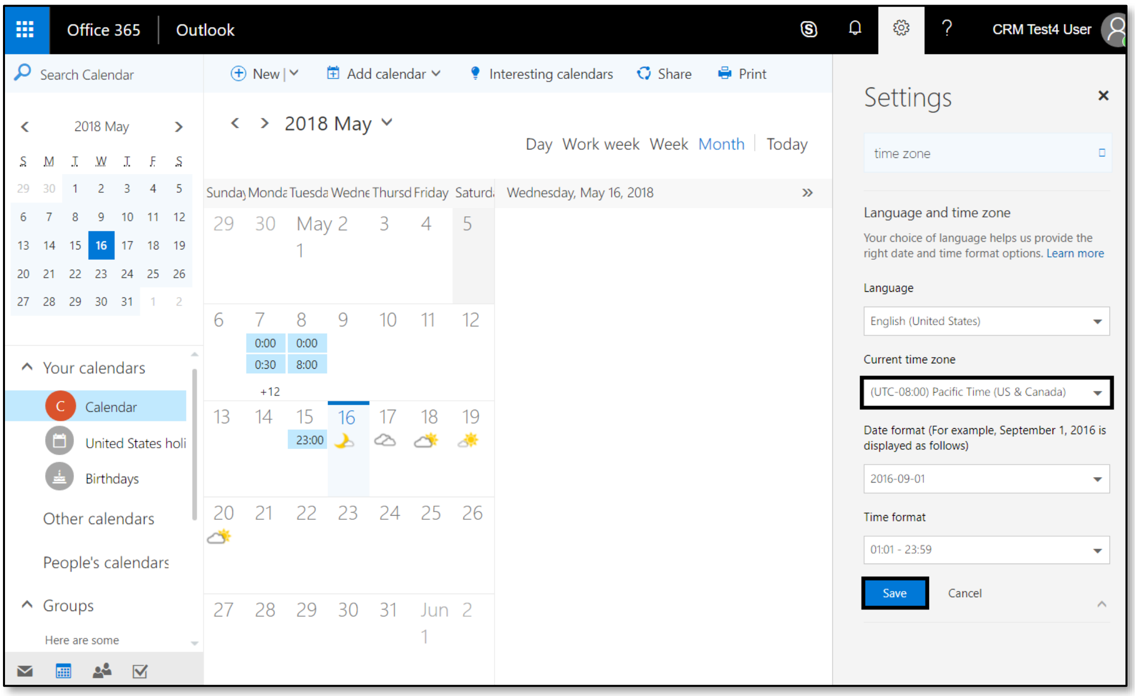


Figure 9- Time Zone in O365 Client

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.

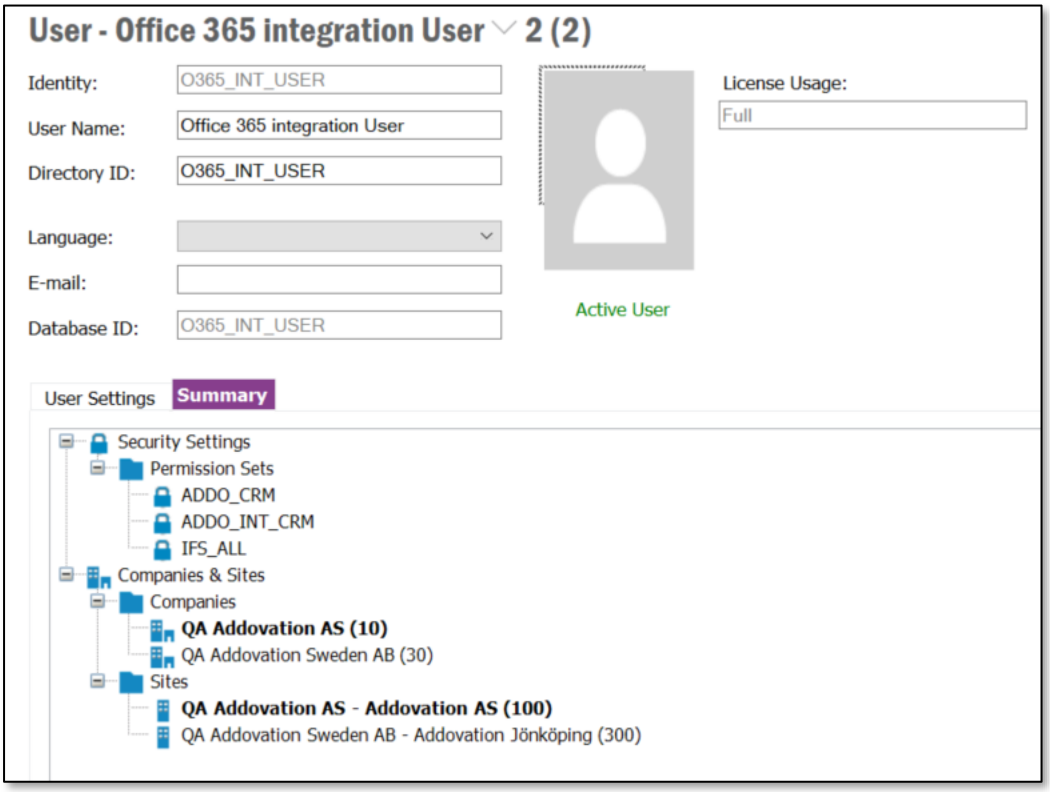


Figure 10- Integration User

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.

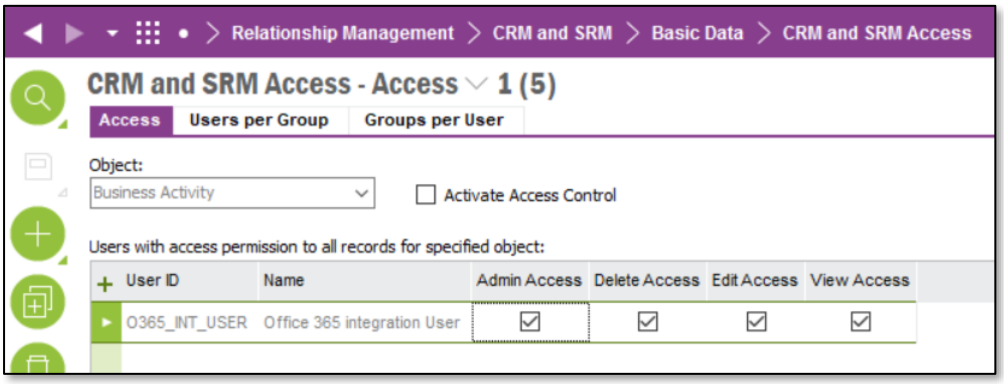


Figure 11 – CRM and SRM Access

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*

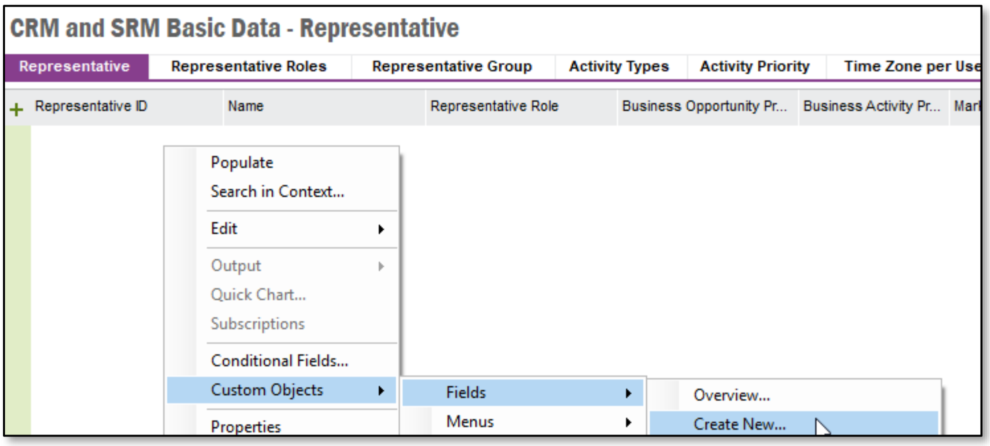
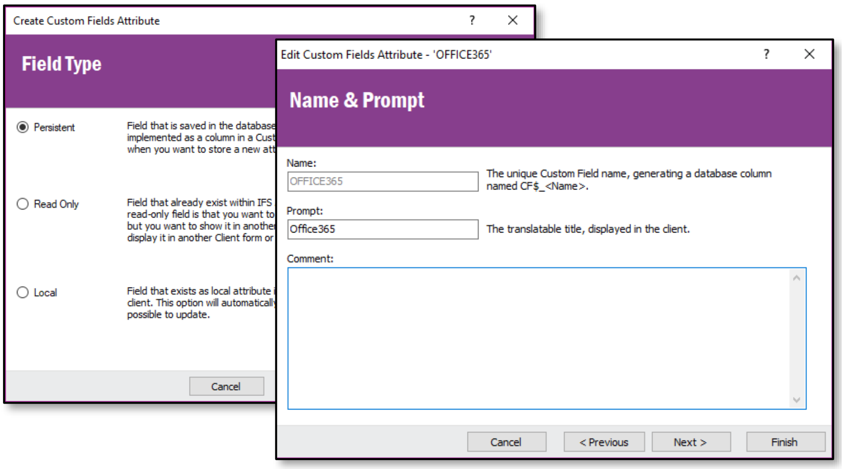


Figure 12 - CRM and SRM Basic Data window

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

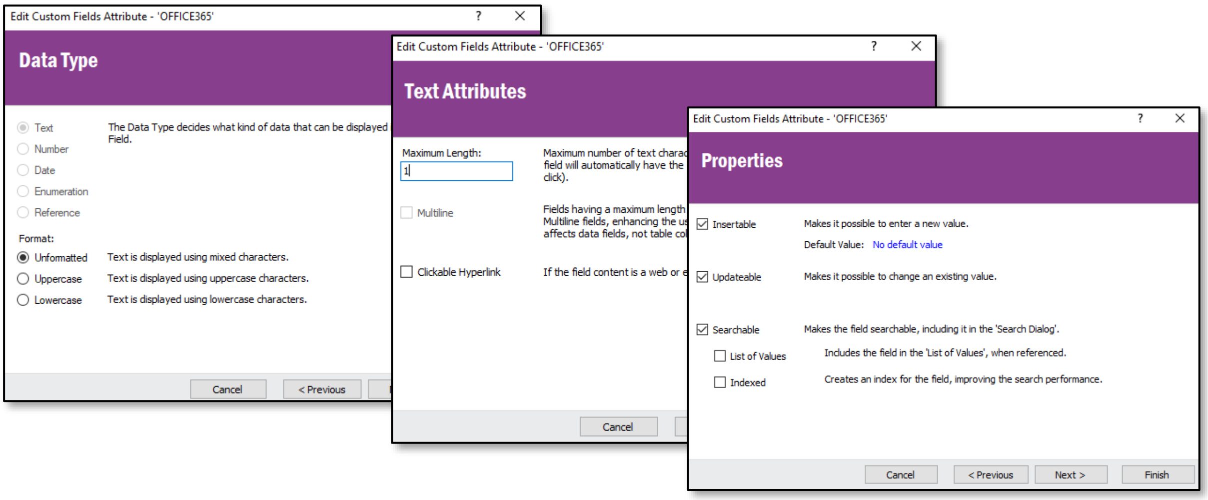


Figure 14 - Custom object settings

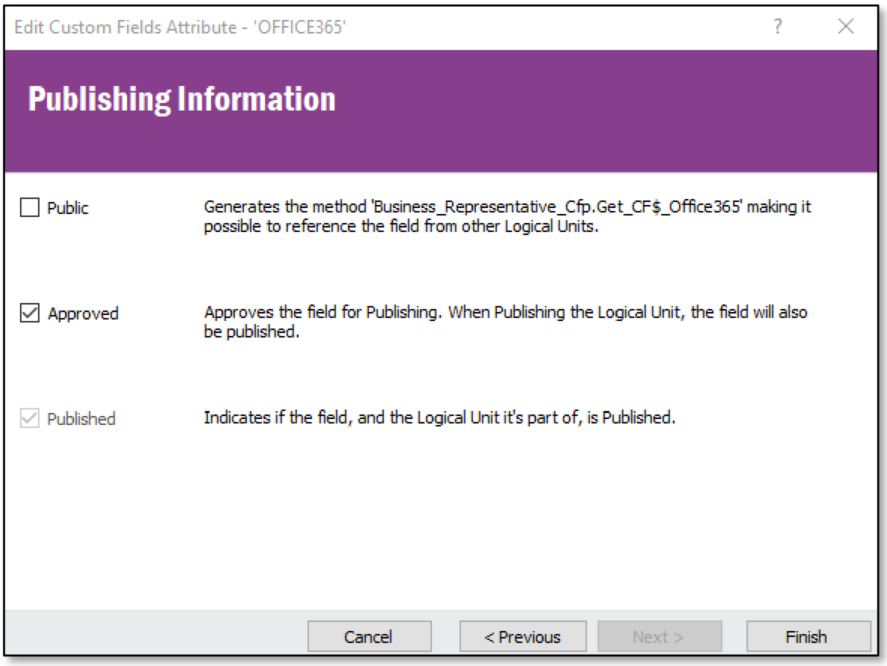


Figure 15 – Publishing Information

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

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

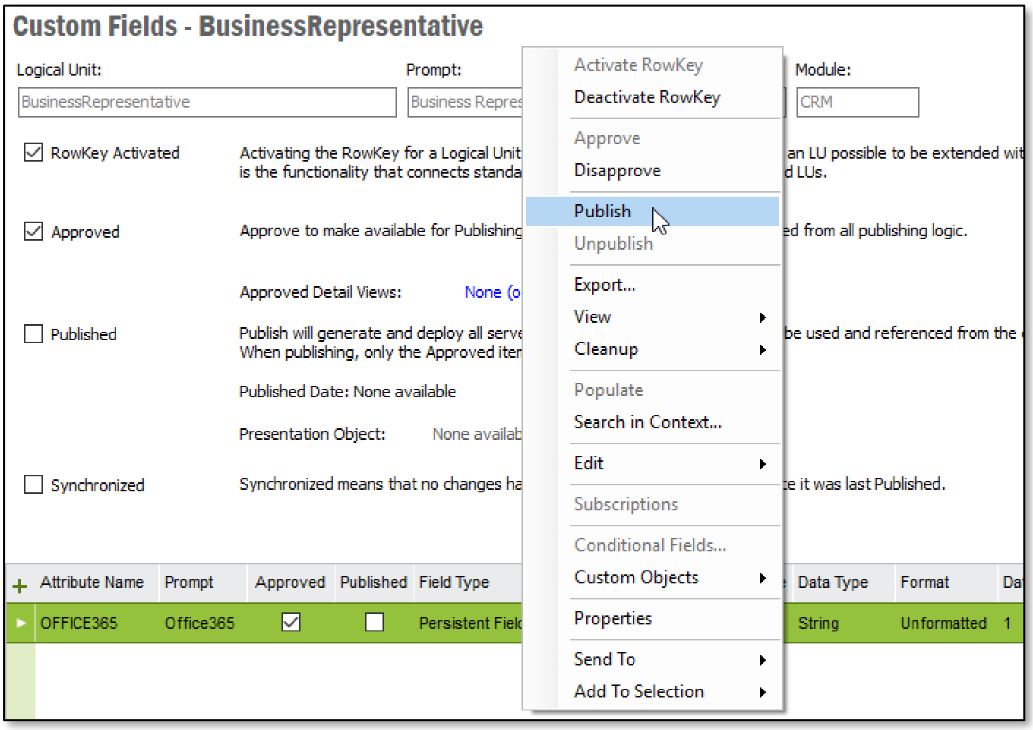


Figure 16 – Custom Fields

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.

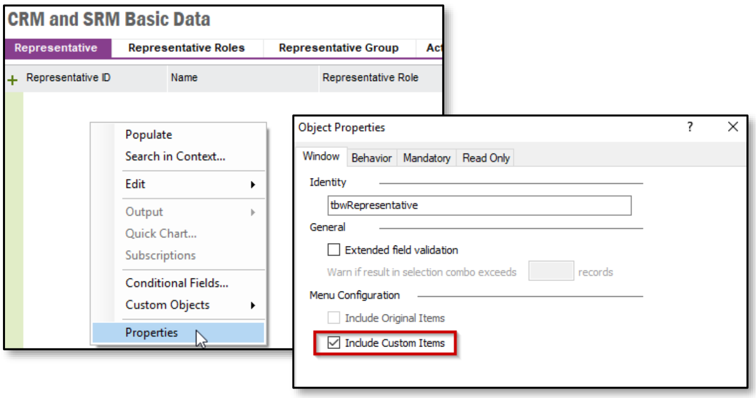


Figure 17 – Add custom feild

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

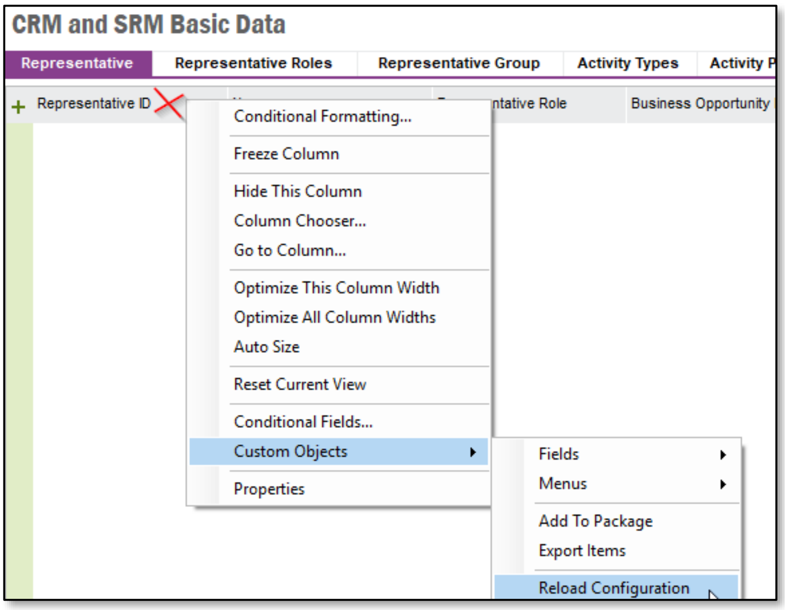


Figure 18 - Reload Configuration

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.

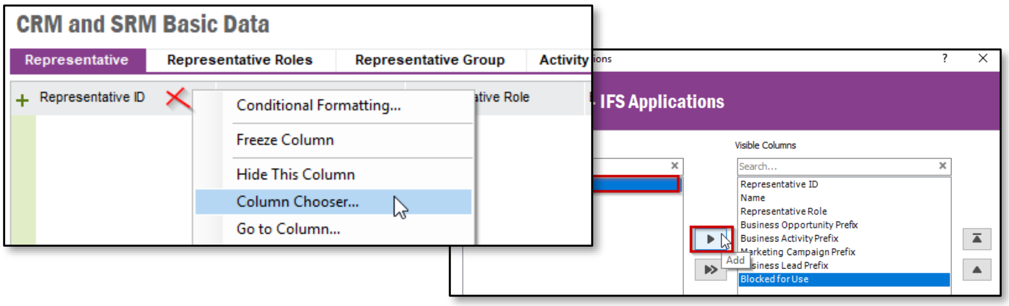


Figure 19 – Column Chooser

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

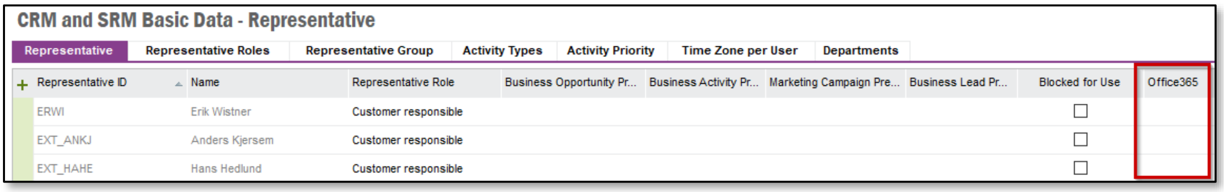


Figure 20 – Custom field in Representative tab

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

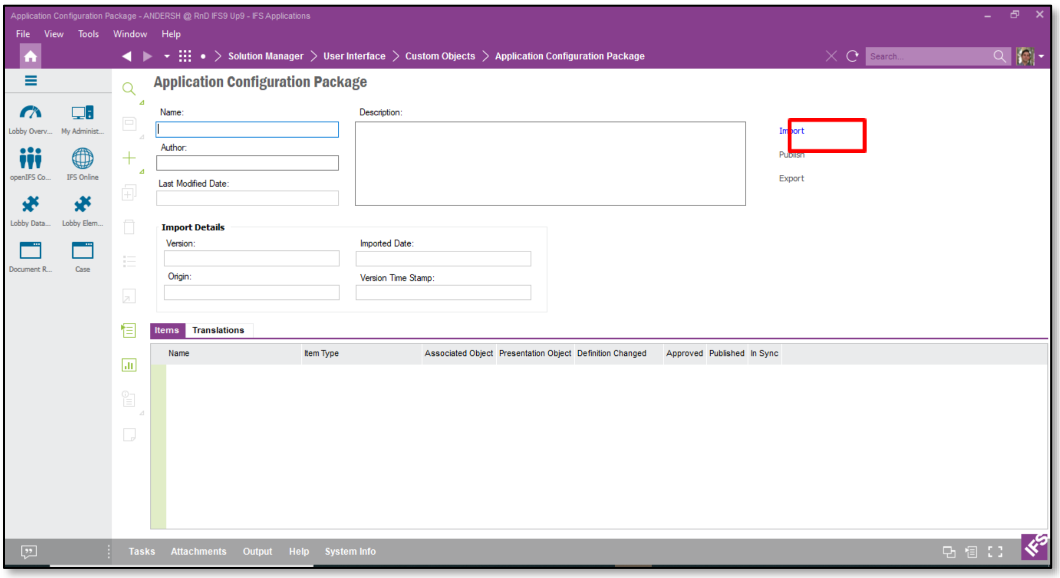


Figure 21 – Application Configuration Package

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.

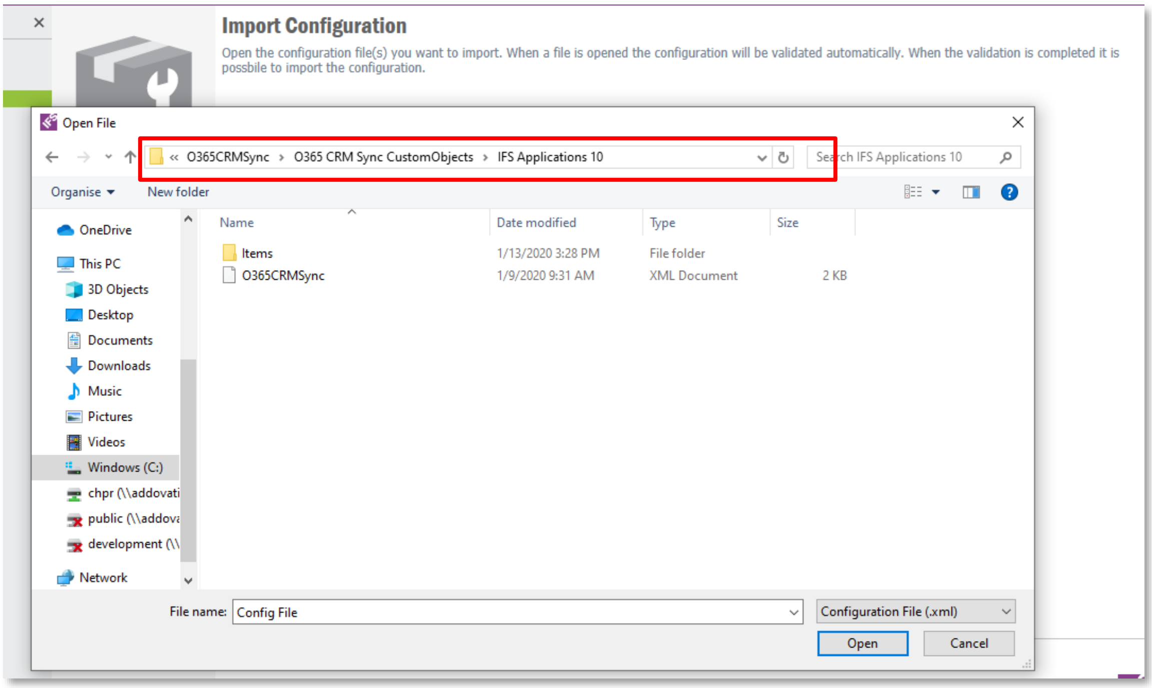


Figure 22 – Import Configuration

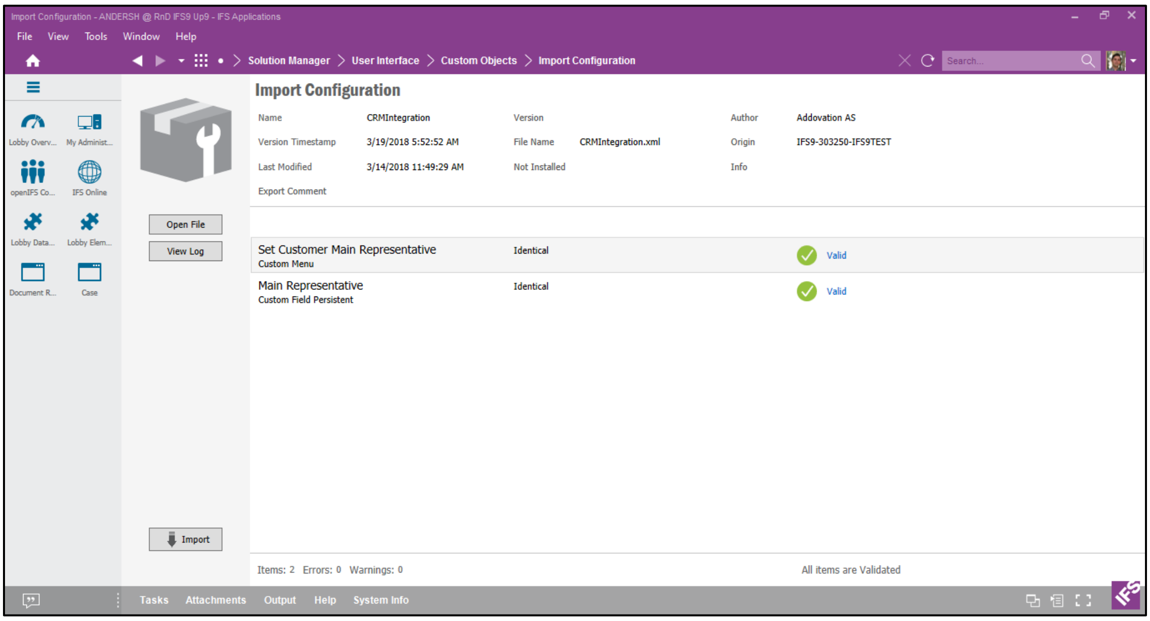


Figure 23 – Imported Configuration

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

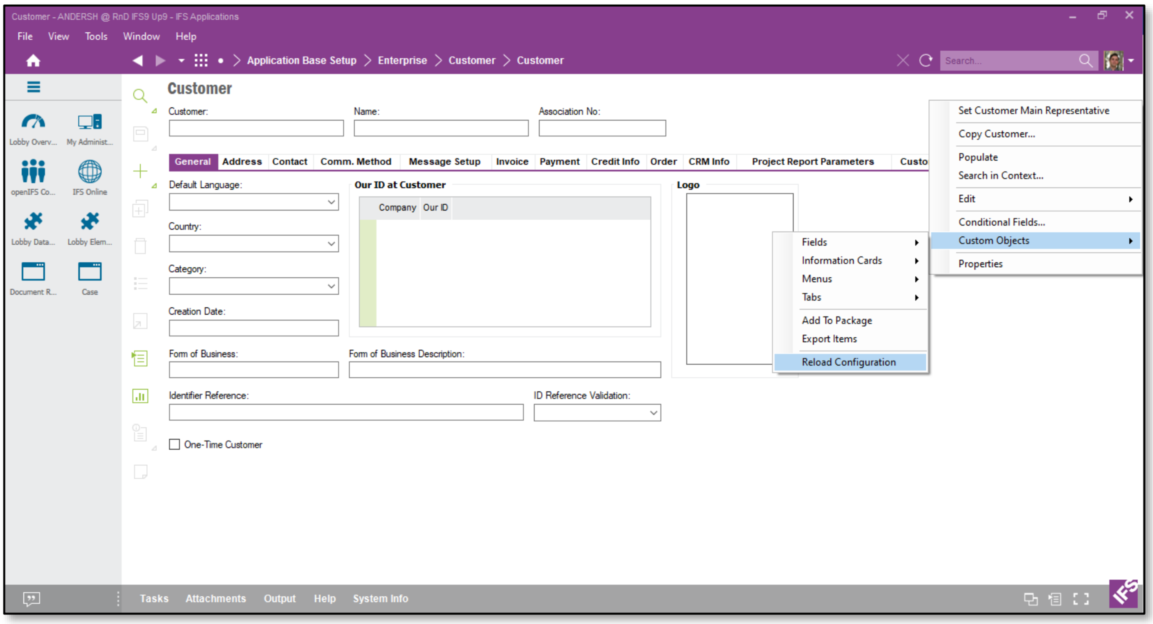


Figure 24 – Fetch custom fields

Right click in the window and select ‘Properties’.

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

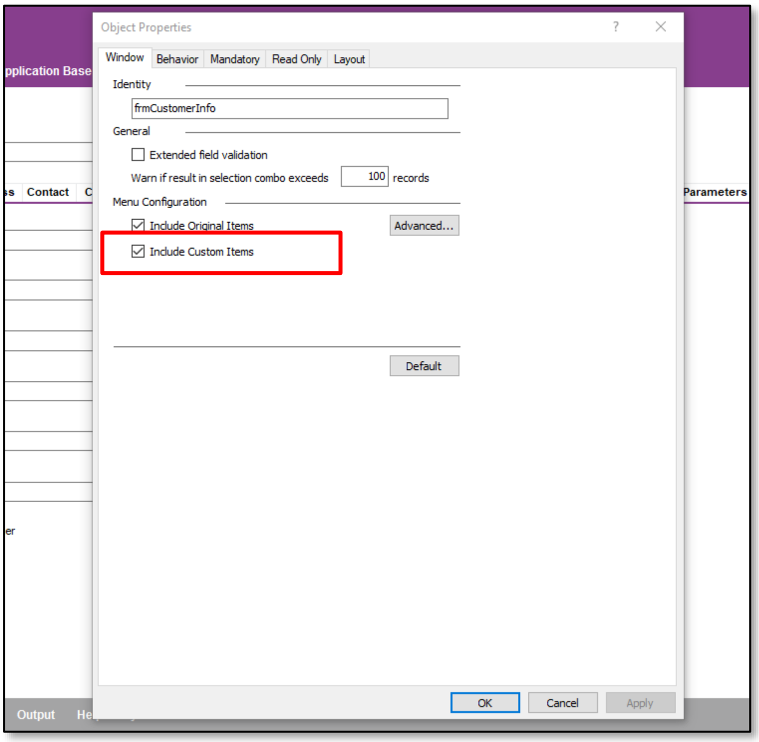
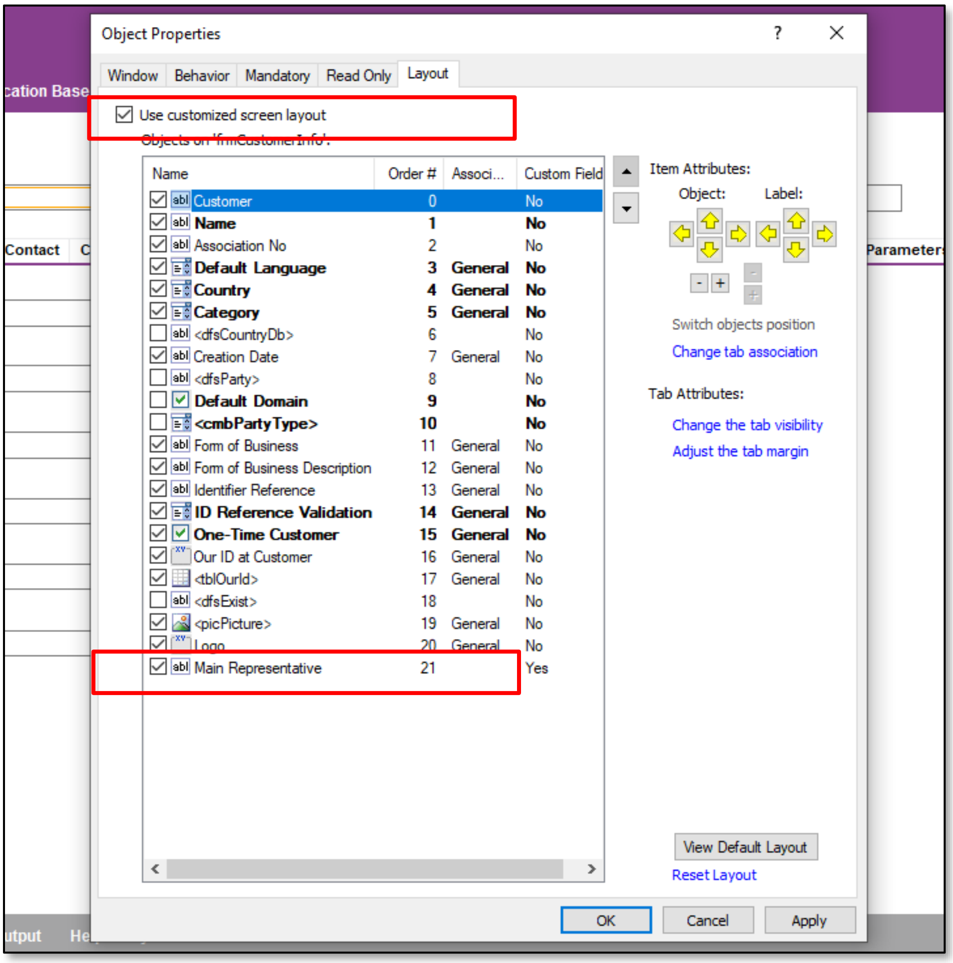


Figure 25 - Properties



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

Figure 26 – Object Properties

The custom field will be displayed in the window.

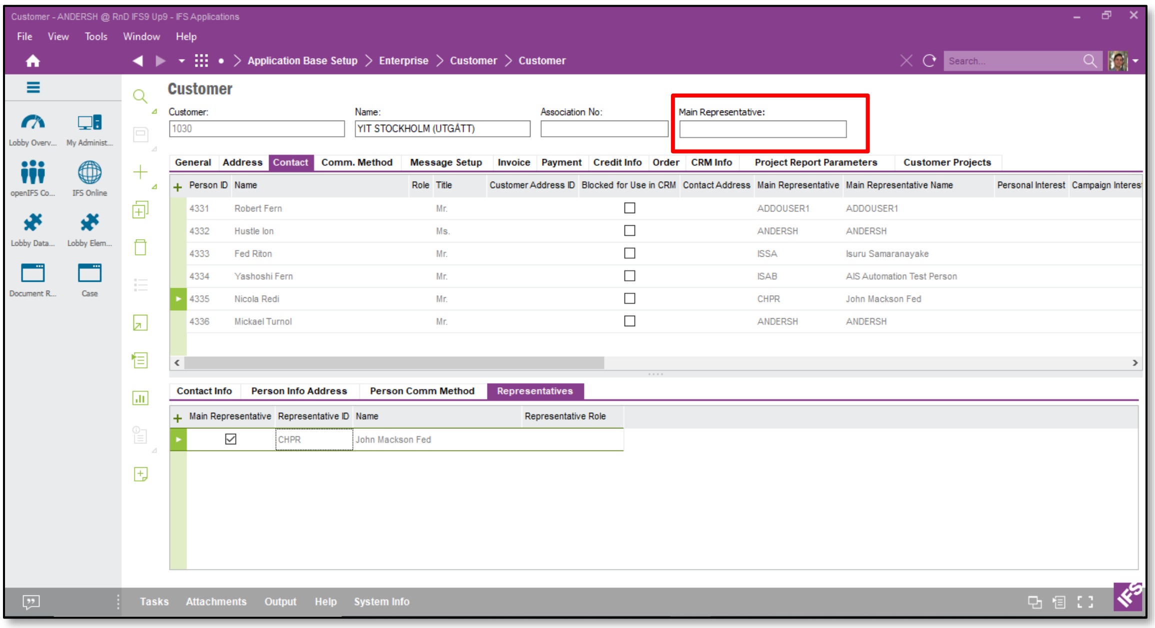


Figure 27 – Configured custom field

Select a main representative.

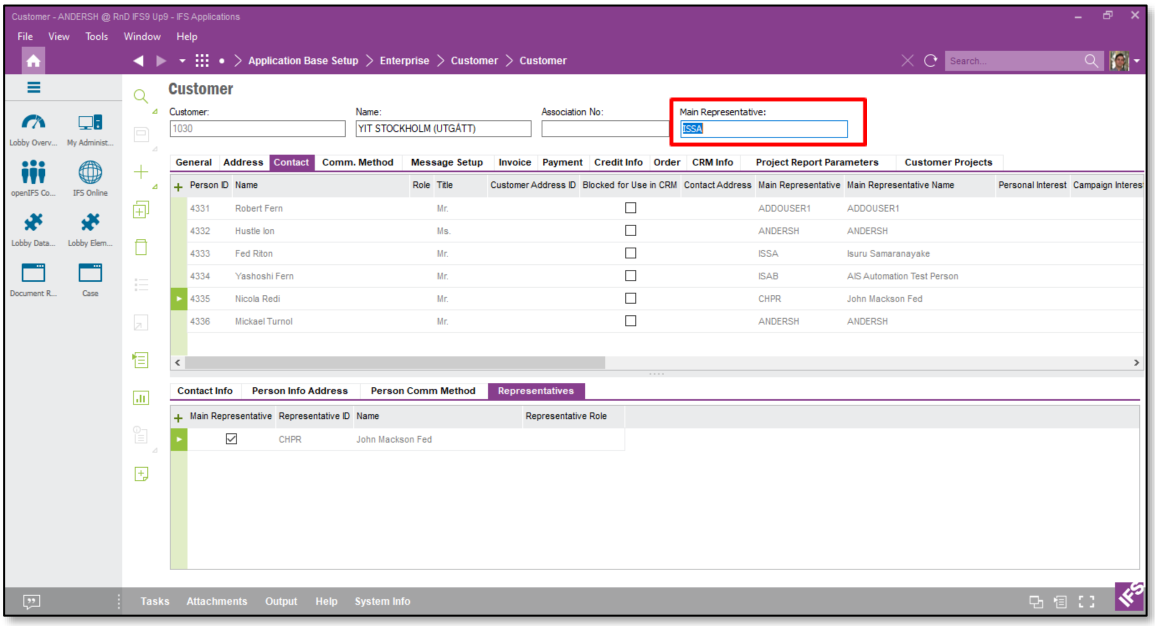


Figure 28 – Main Representative

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

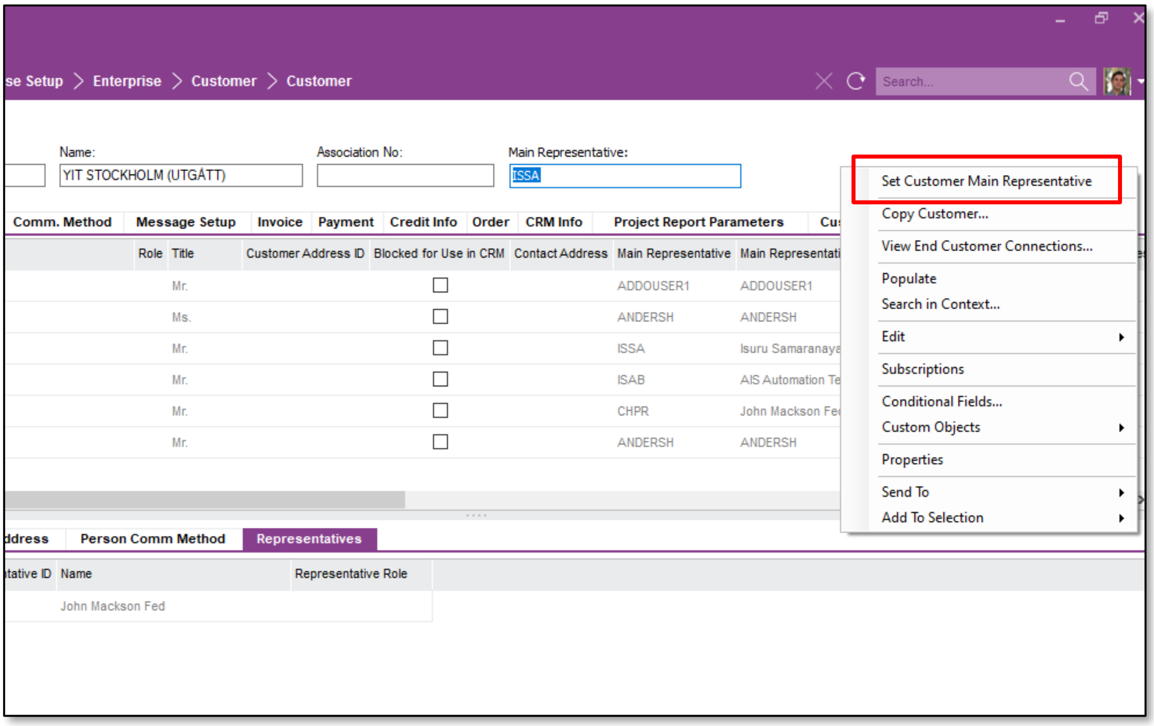


Figure 29 - Set Customer Main Representative

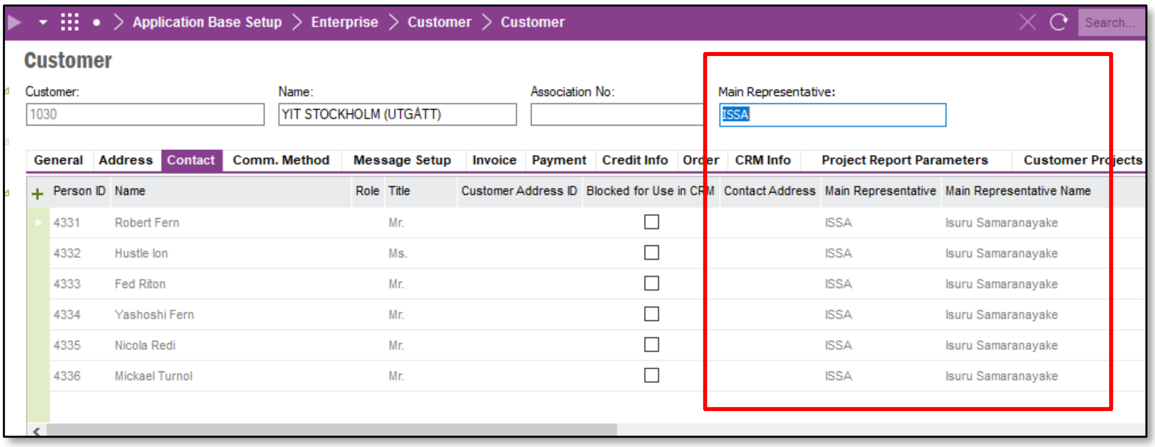


Figure 30 - Customer Main Representative

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.

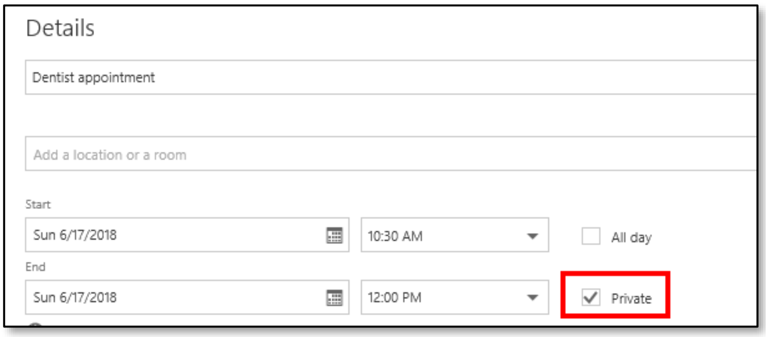


Figure 31 – Private Activities

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)

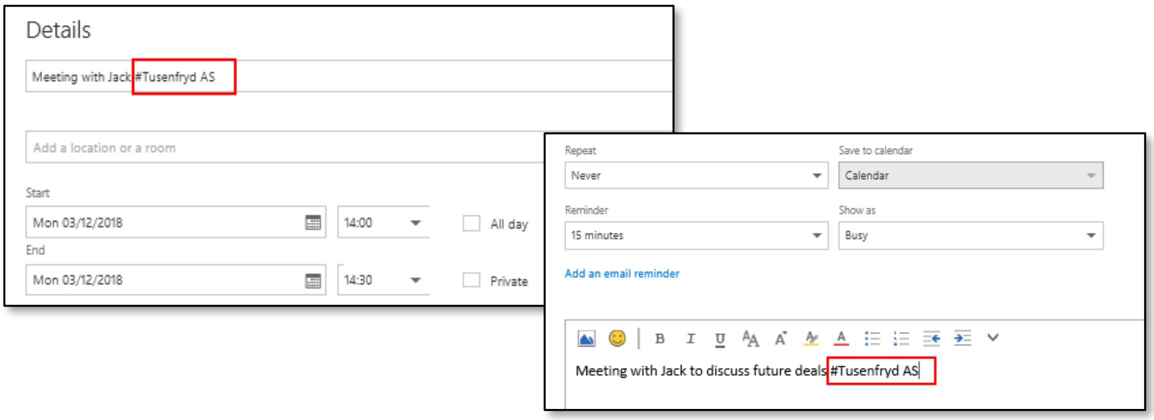


Figure 32 – Example business activity

5.1.3 Activity type

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

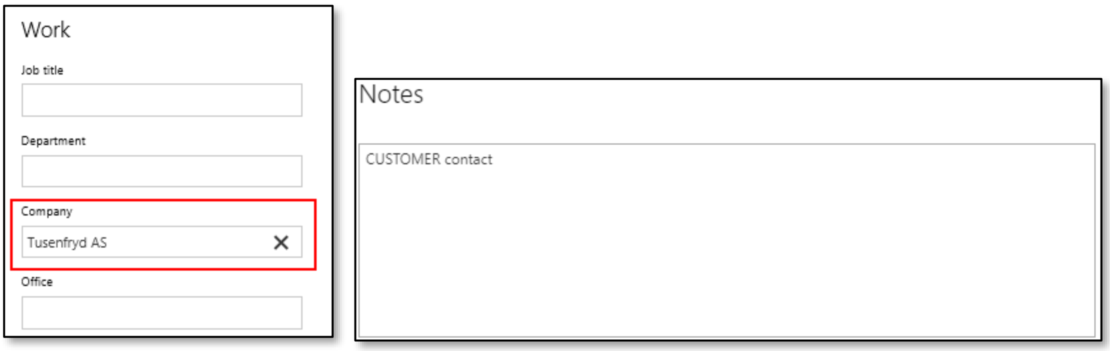


Figure 33 – Company field

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'.

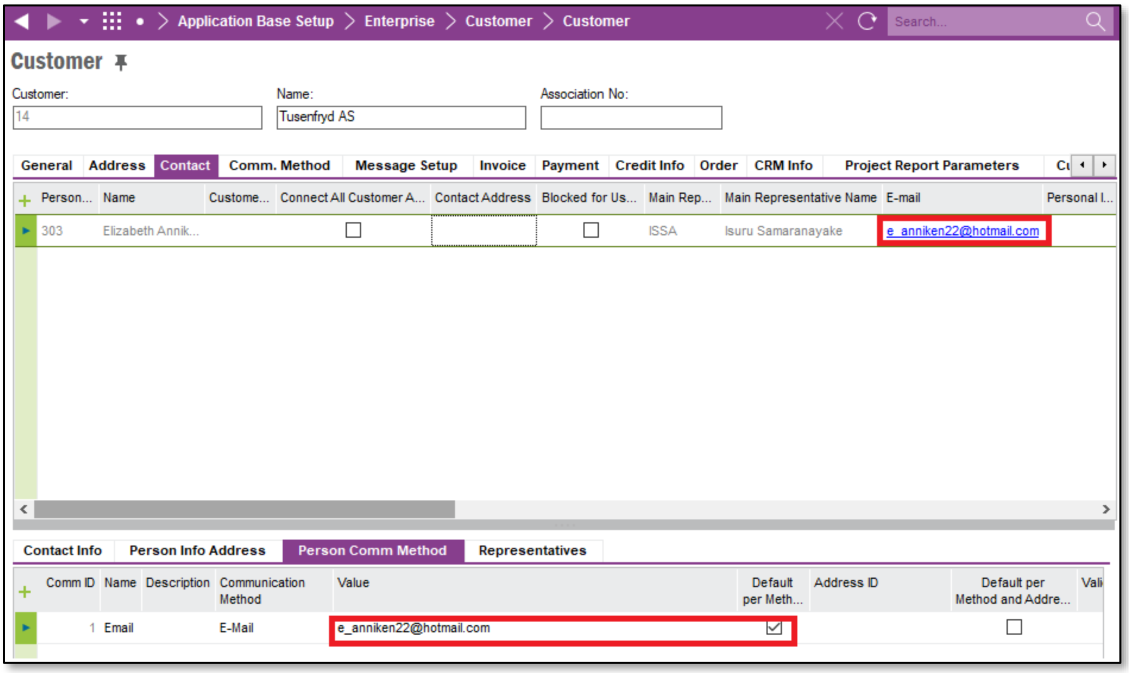


Figure 35 - Communication Method

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.

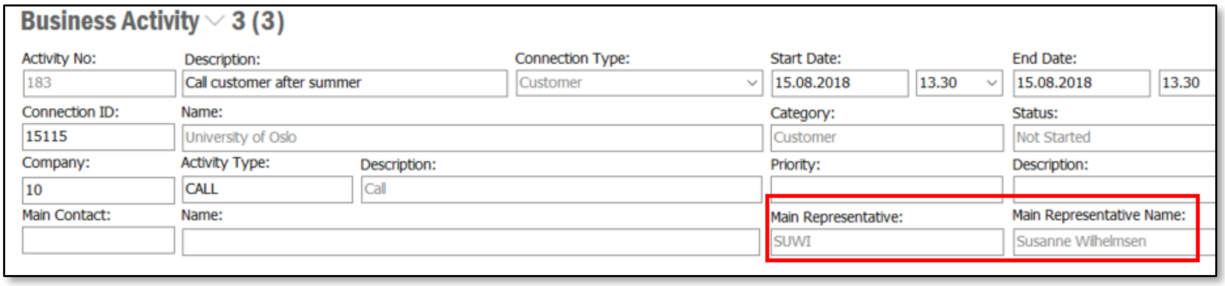


Figure 36 - Business activity

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.

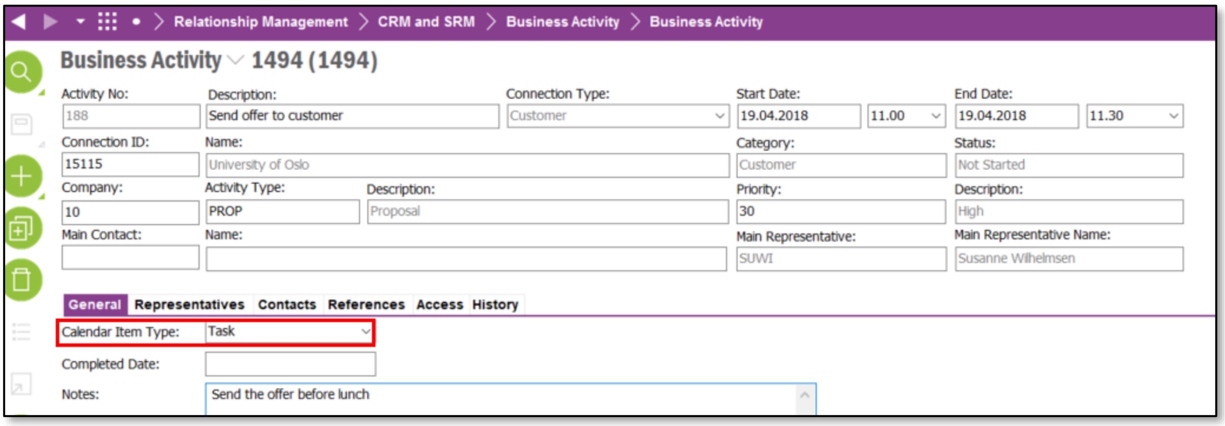


Figure 37 - Task

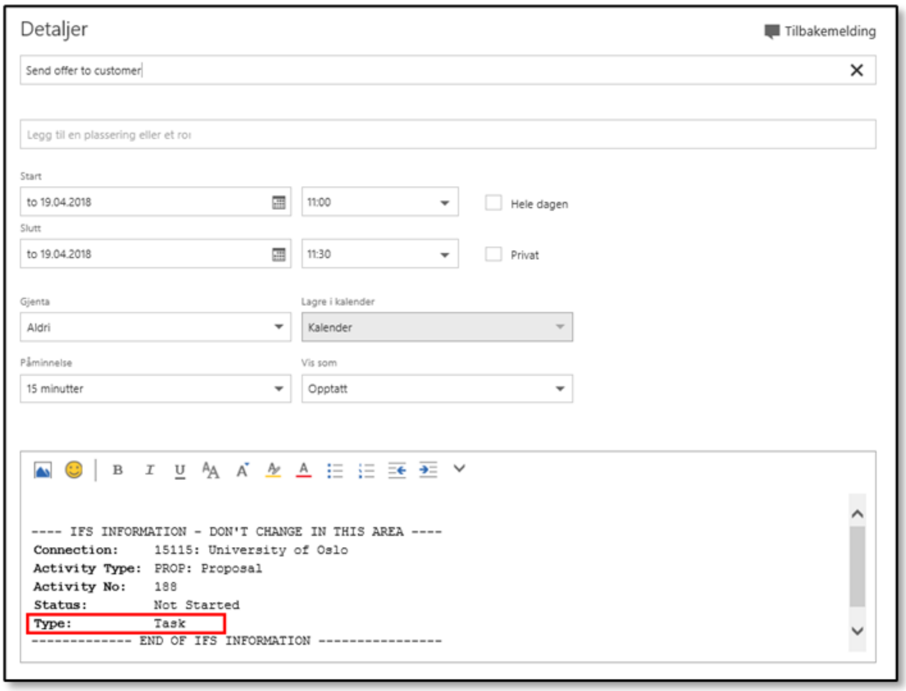


Figure 38 – Synced appointment

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.

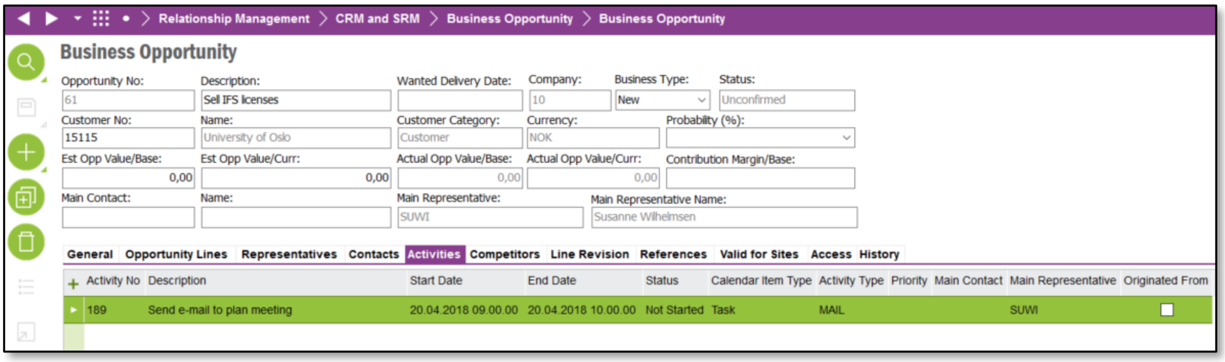


Figure 39 - References

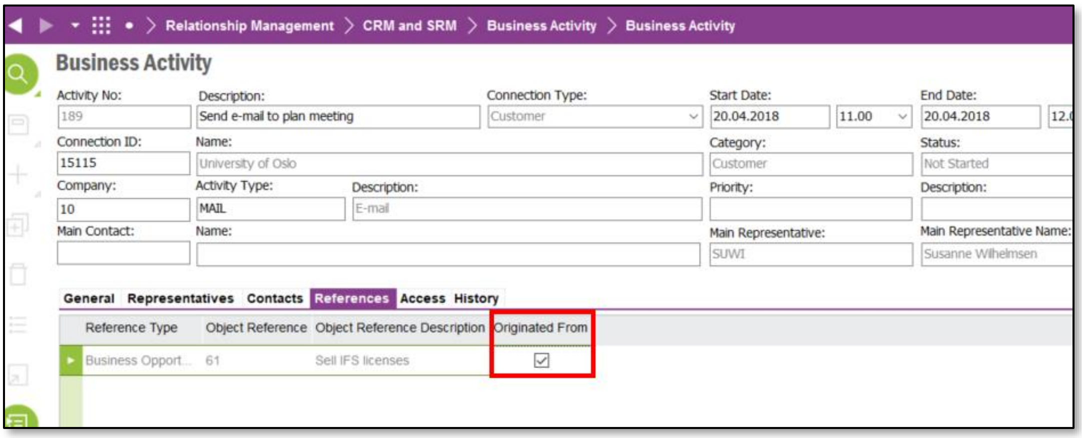


Figure 40 - Reference

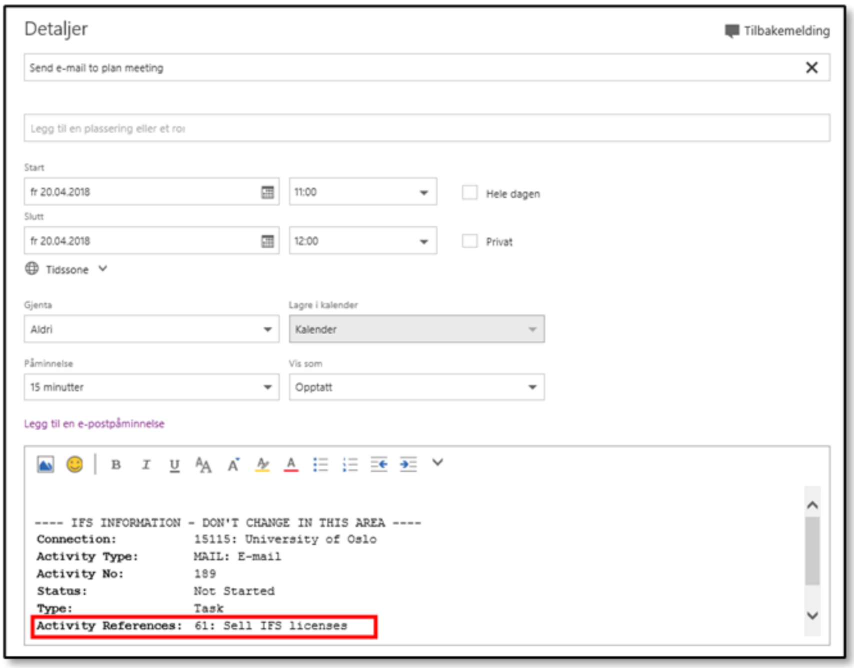


Figure 41 – Synced activity

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.

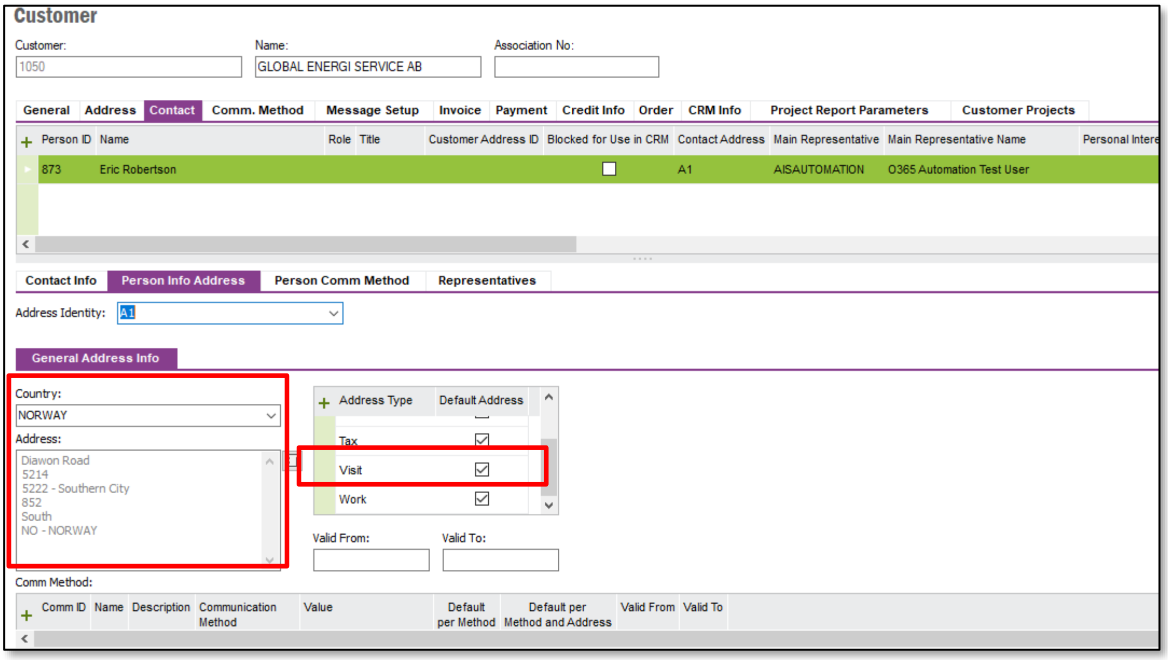


Figure 42 – Default visit address

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.

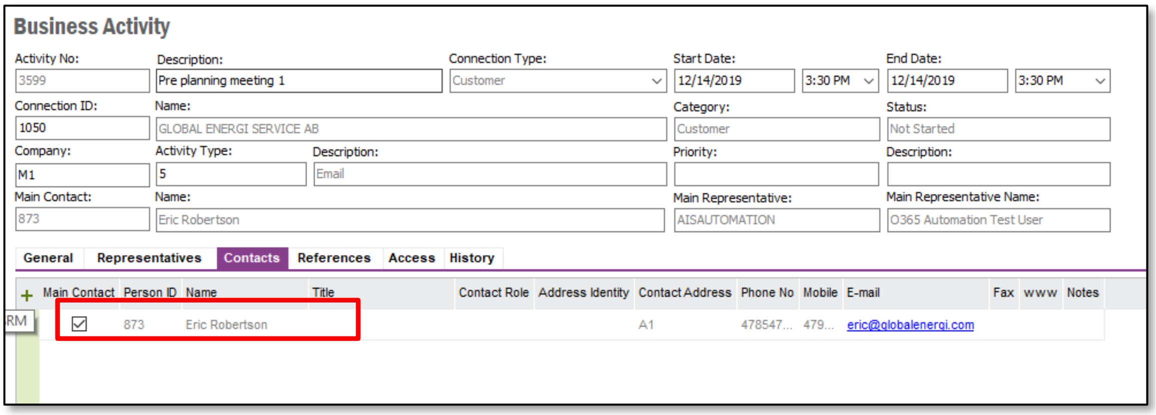


Figure 43 – Contacts in business activity

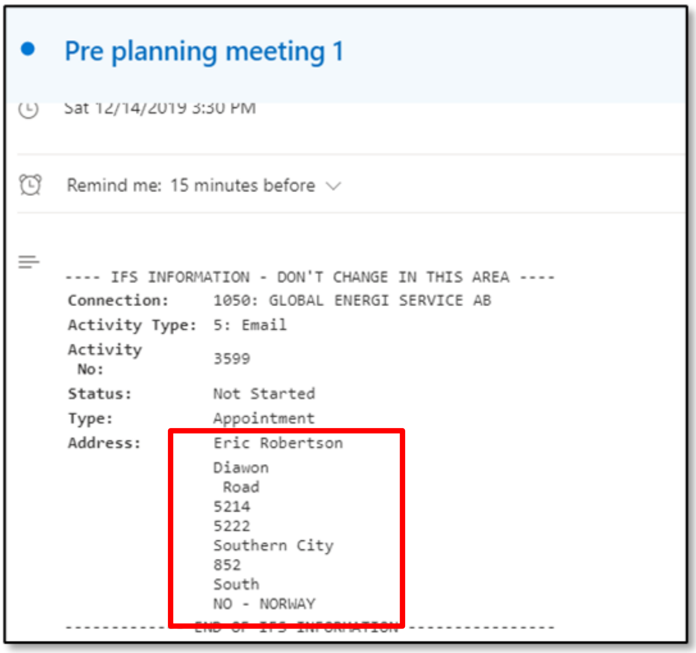


Figure 44 – Synced activity

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.

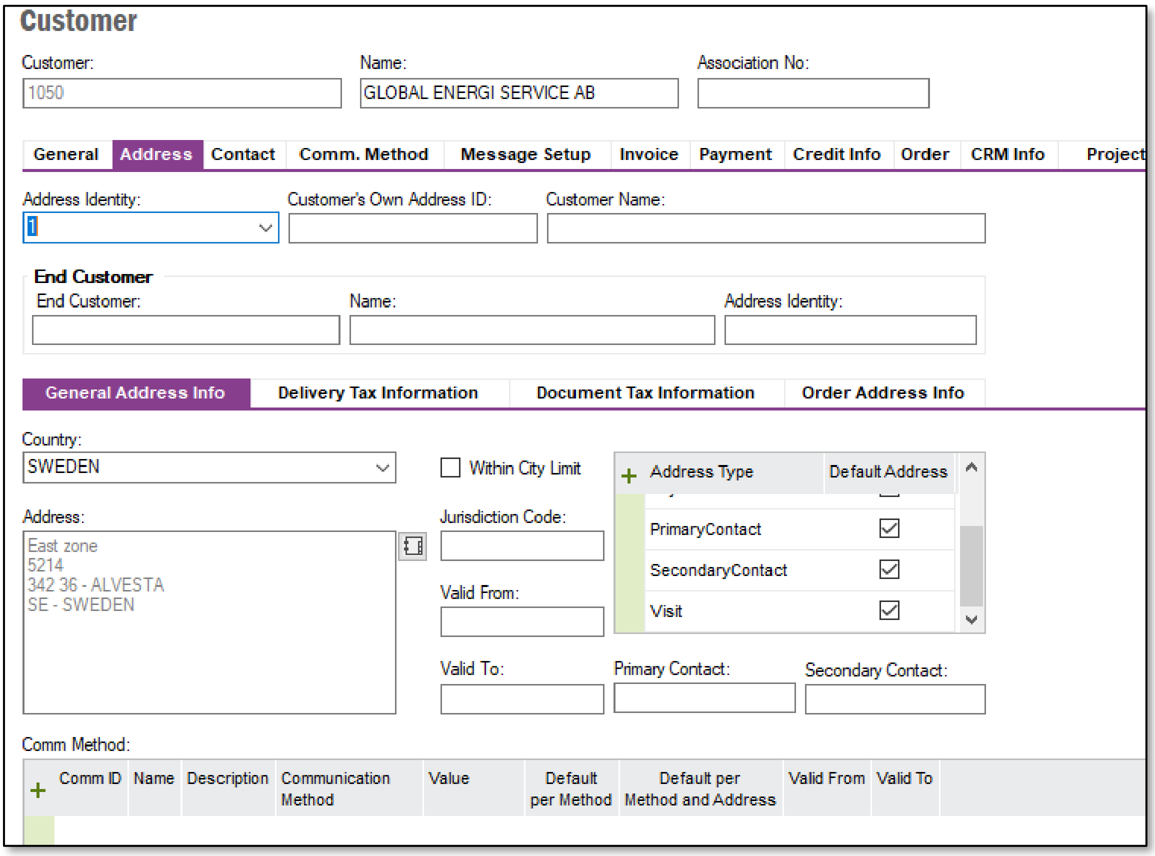


Figure 45 – Default visit address

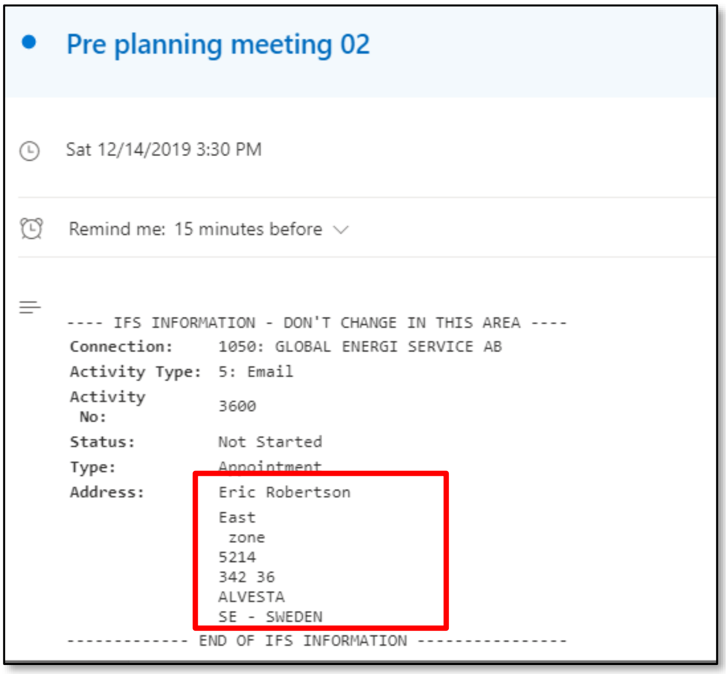


Figure 46 – Example synced activity

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.

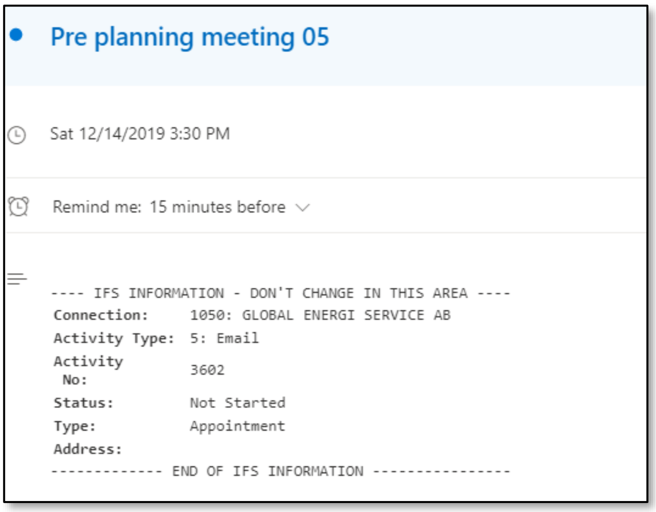


Figure 47 - Example synced activity

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).

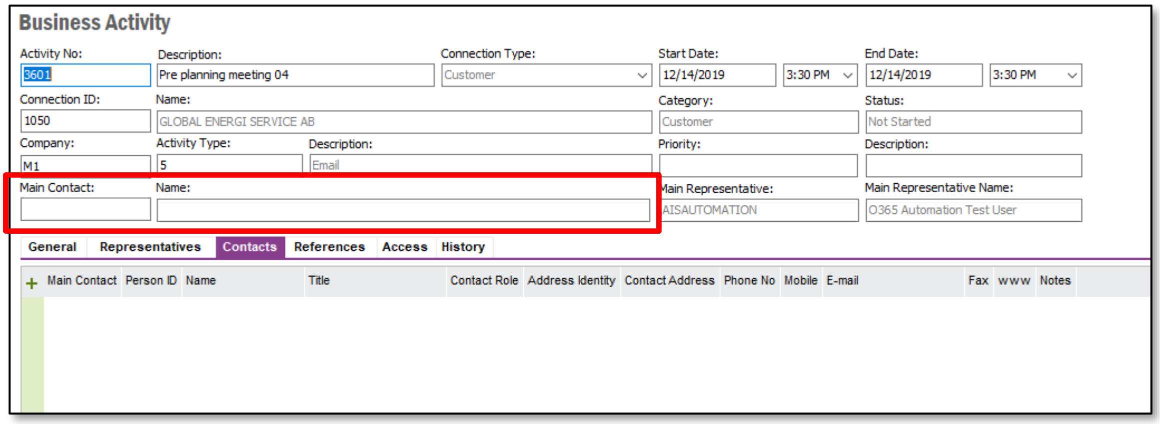


Figure 48 – Main Contact of business activity

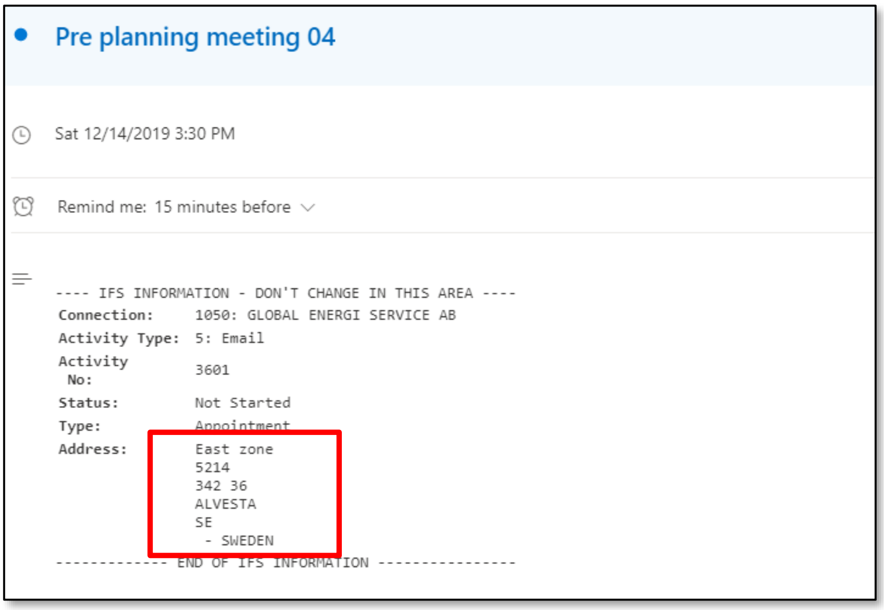


Figure 49 -Main contact details

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.

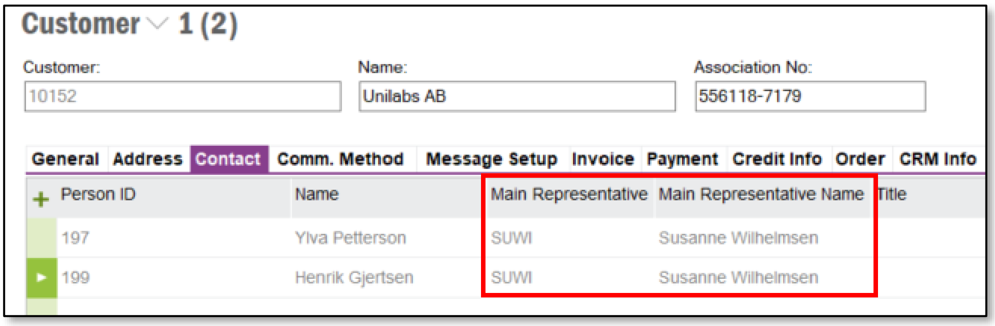


Figure 50 – Contacts of main representative

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.

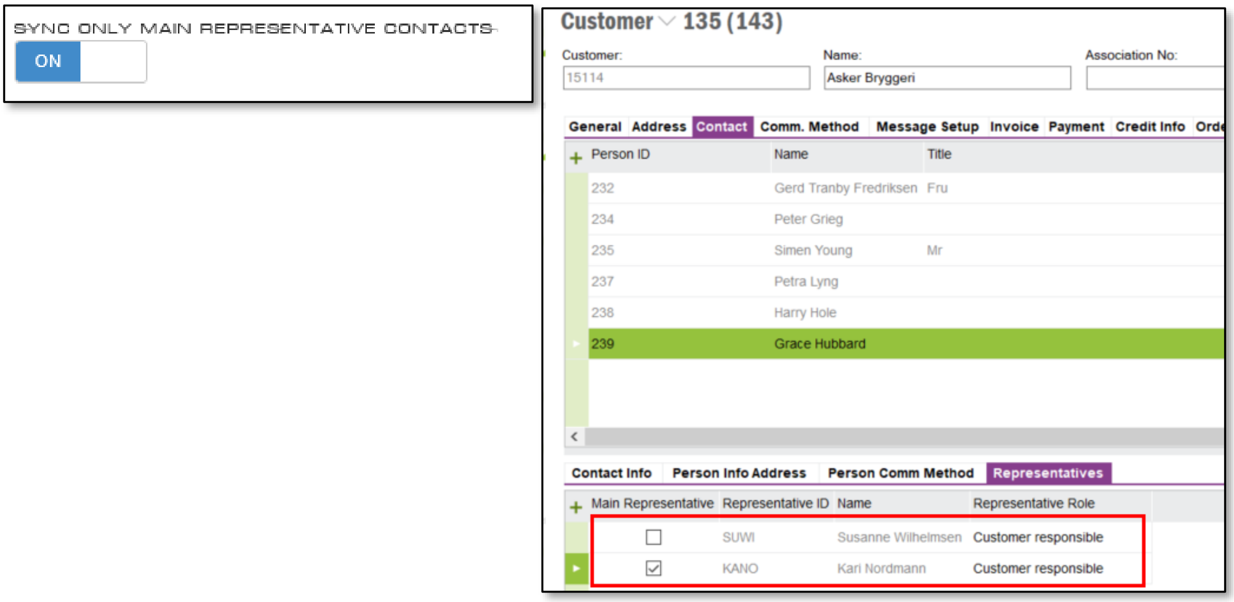


Figure 51 – Sync only main representative's contact

6.2.1 E-mail required

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

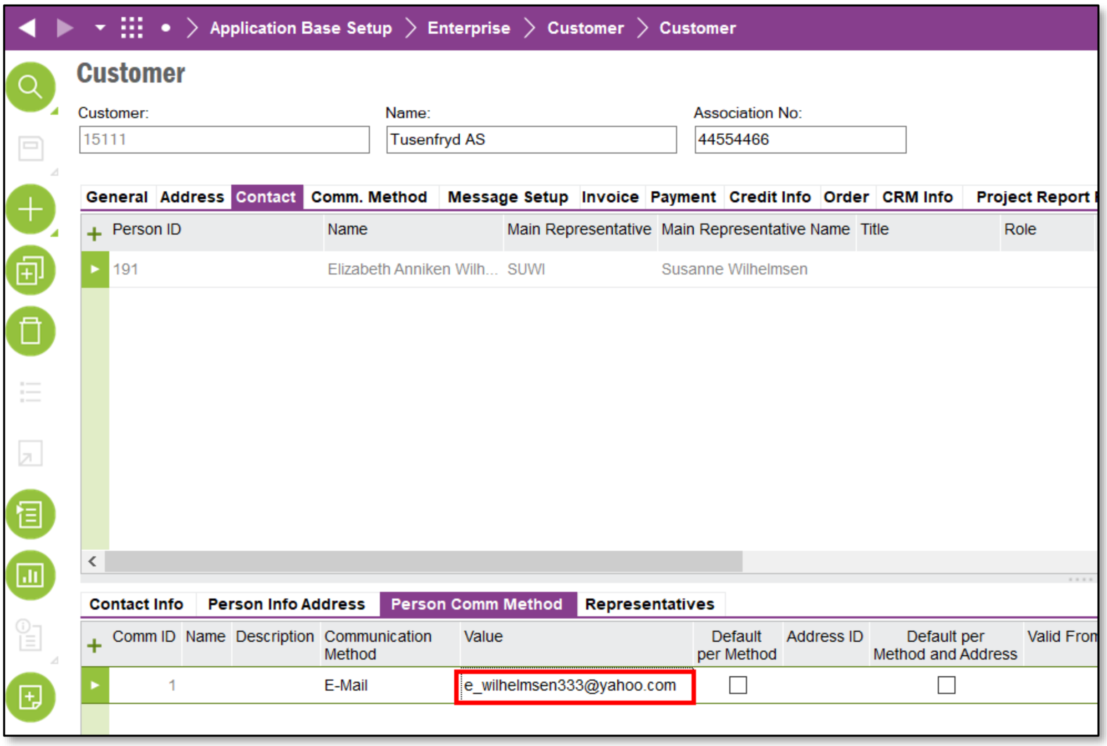


Figure 52 – Email of the contact

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.

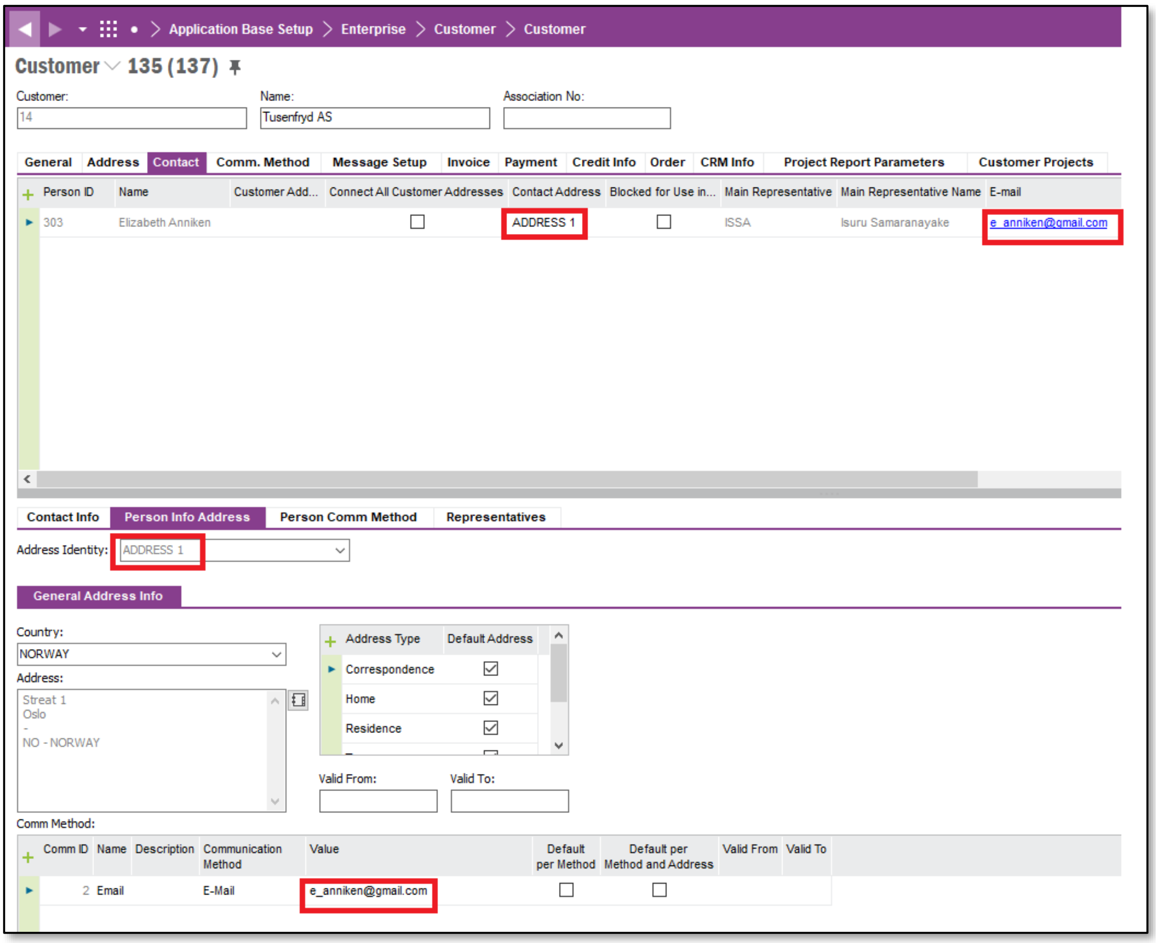


Figure 53 – Communication method

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)

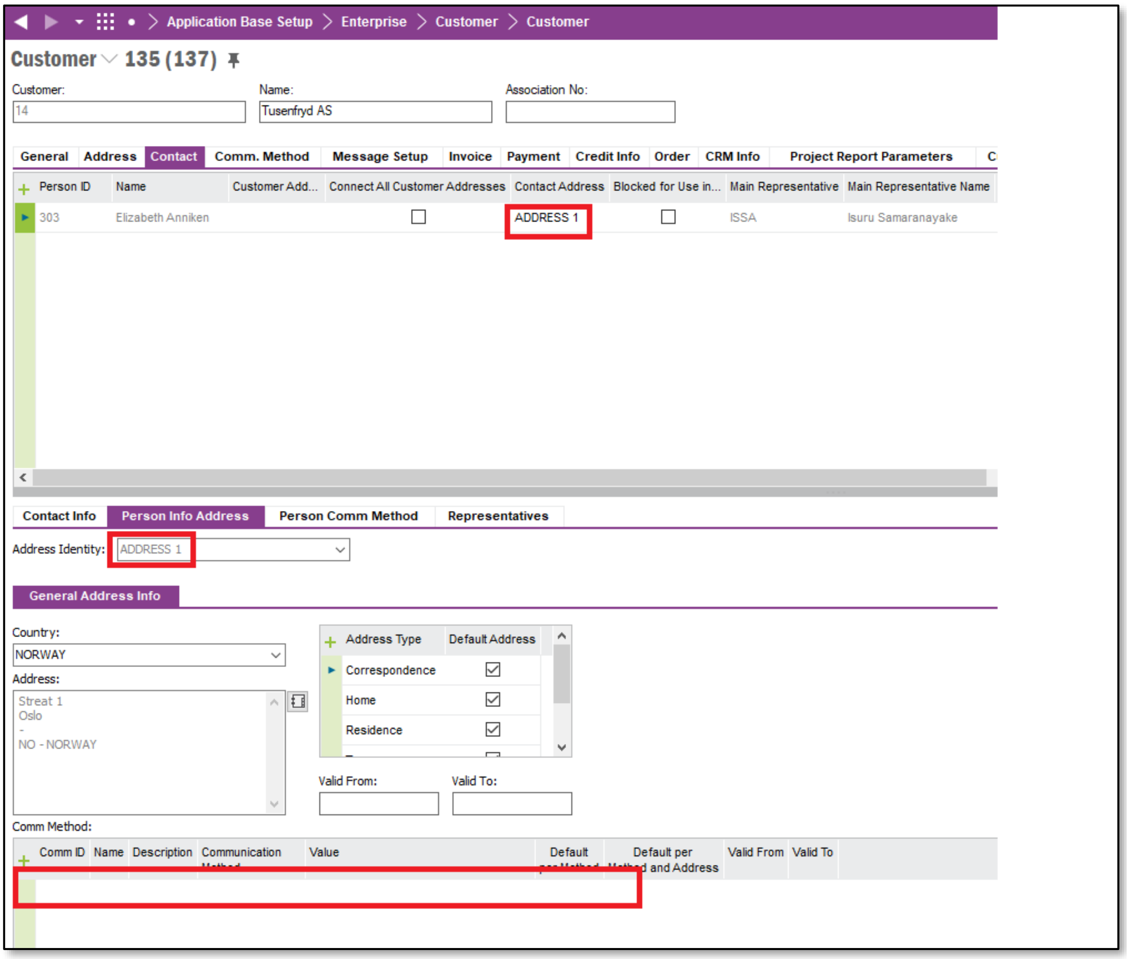


Figure 54 - Communication method

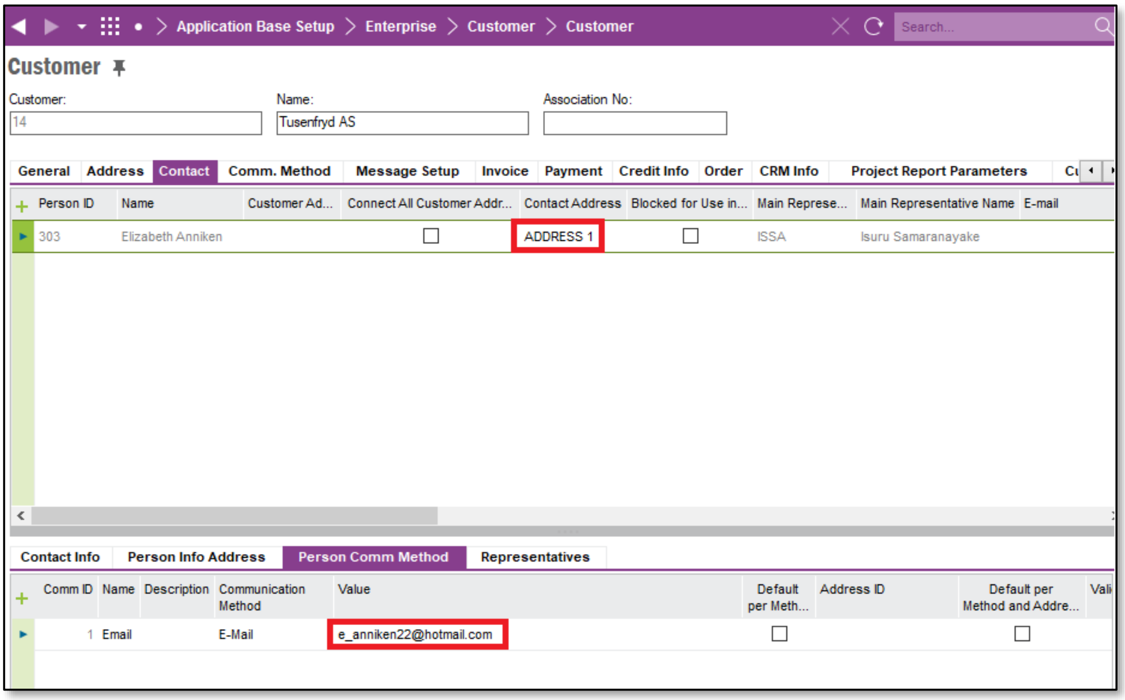


Figure 55 – Address ID of customer's contact

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.

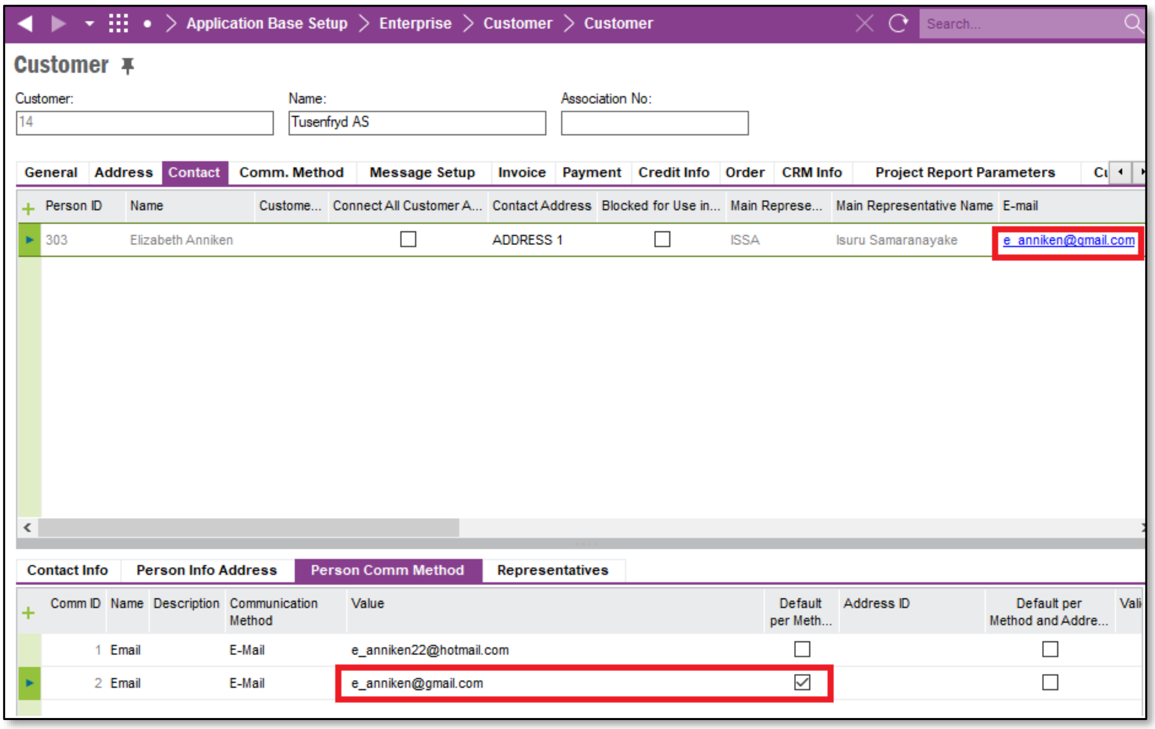


Figure 56 - Default per method

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.

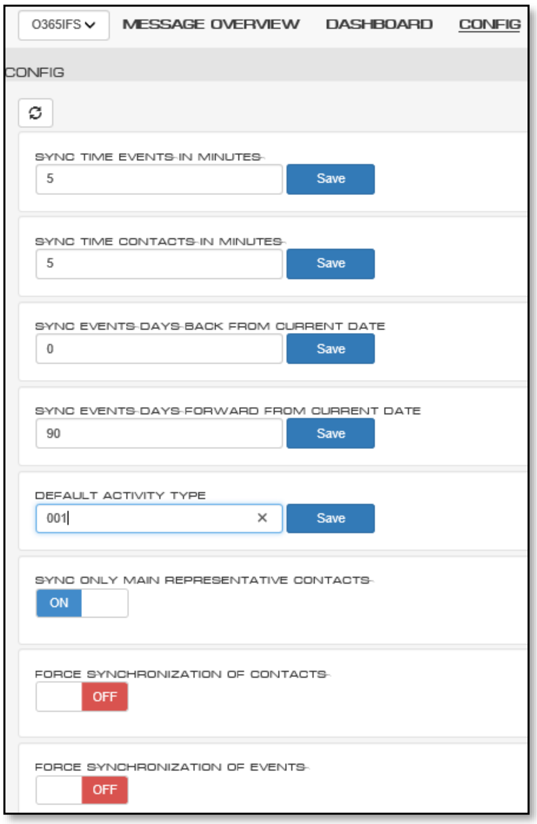


Figure 57 - Configuration parameters

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.

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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