# CRM Outlook Sync 2013

Current version:   2013.1.0.21 as of 8/1/2015

Website:              http://www.crmbusinessapps.com

Client download:   http://www.crmbusinessapps.com/downloads/CRMoutlookSync/2013/client/setup.exe

Server download:   http://www.crmbusinessapps.com/downloads/CRMoutlookSync/2013/server/wceAddonsServer2013.zip


Jump to:

## Install information:

### Server Install:

You will need to download the server component and place it in a directory of the server that wired contact can access.  You need to unzip the full wceAddons folder into the Wired Contact virtual IIS folder.  It should go in the same folder as your Wired Contact files.  For example, if Wired Contact is for http://www.testsite.com/wiredcontact has a virtual path of c:\inetpub\wiredcontact, then you should place the wceAddons folder and its contents in c:\inetpub\wiredcontact.   The path will then be visible to the web  as http://www.testsite.com/wiredcontact/wceAddons. If you are running *wce Outlook Conection Manager* for Outlook 2003, the server components will sit in the same directory.


The emailFields.cfg file is the configuration file.  Email addresses are pulled from the fields listed within the config file. The default value is *emailaddress* field.  If you have other email fields, you need to change the configuration file to list these.  The format is

    default:emailaddress

If you have other email addresses fields or emailaddress is not the emailaddress field, modify the emailFields.cfg file to reflect your email address fields.  The list must be comma delimited with no spaces. Example:

     default:emailaddress,homeemailaddress

If emailaddress is not the emailaddress field, modify the emailFields.cfg file to reflect your email address fields.  The list must be comma delimited with no spaces. For example, if you use **email** as your email field, you would change the emailFields.cfg to:

     default:email

.net 2.0 is required on the server.  To configure IIS, click here

**Client Install:** We recommend using the default settings during the install, however, you will need to configure your sent items folder.

Install CRM Outlook Sync 2013 from http://www.crmbusinessapps.com/downloads/CRMoutlookSync/2013/client/setup.exe.

**Registration:**

Open Microsoft Outlook. Before Outlook finishes opening, you will be prompted to register.
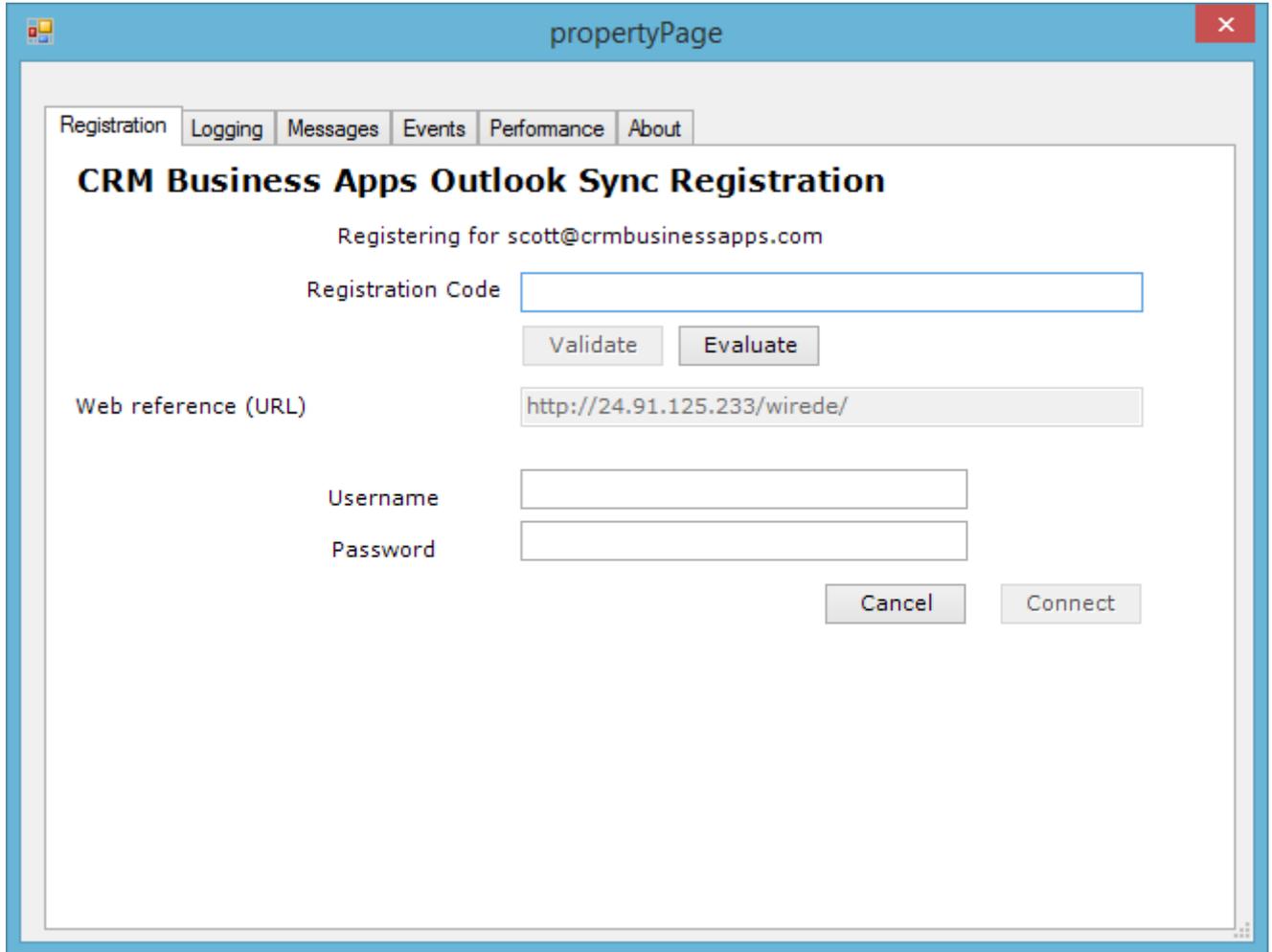


Registration Code: The registration code is provided at the time of purchase.

Evaluate: If you do not have a *Registration Code* you may evaluate wce Outlook Sync. Click the Evaluate button. And the *Web reference (URL)* prompt becomes active for your input. You must enter the URL to your web server instance of Wired Contact that is the parent to the wceAddons directory. From the server example above, you would enter http://www.testsite.com/wiredcontact.

Web reference (URL): This value is set for you when you register. If you are evaluating wce Outlook Contact Manager, you must supply a valid path. See *Evaluate* above.

Username: The username you use to logon to Wired Contact.

Password: The password you use to logon to Wired Contact. *Note: the username and password are not kept or stored by this application.*

Connect: Once you have completed all fields, click connect. Your username and password will be validated against Wired Contact. If valid, a red *Connection Successful*! Message will appear below the connect button.

**Configuring Client:**

1. Remain in the registration window, or click the wce Sync menu option in the main Outlook window and then click Properties. For Outlook 2010, this is found under the *Add-Ins* ribbon option.
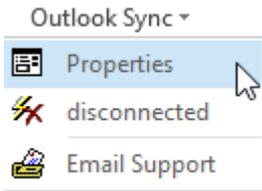


2. *Messages* tab.
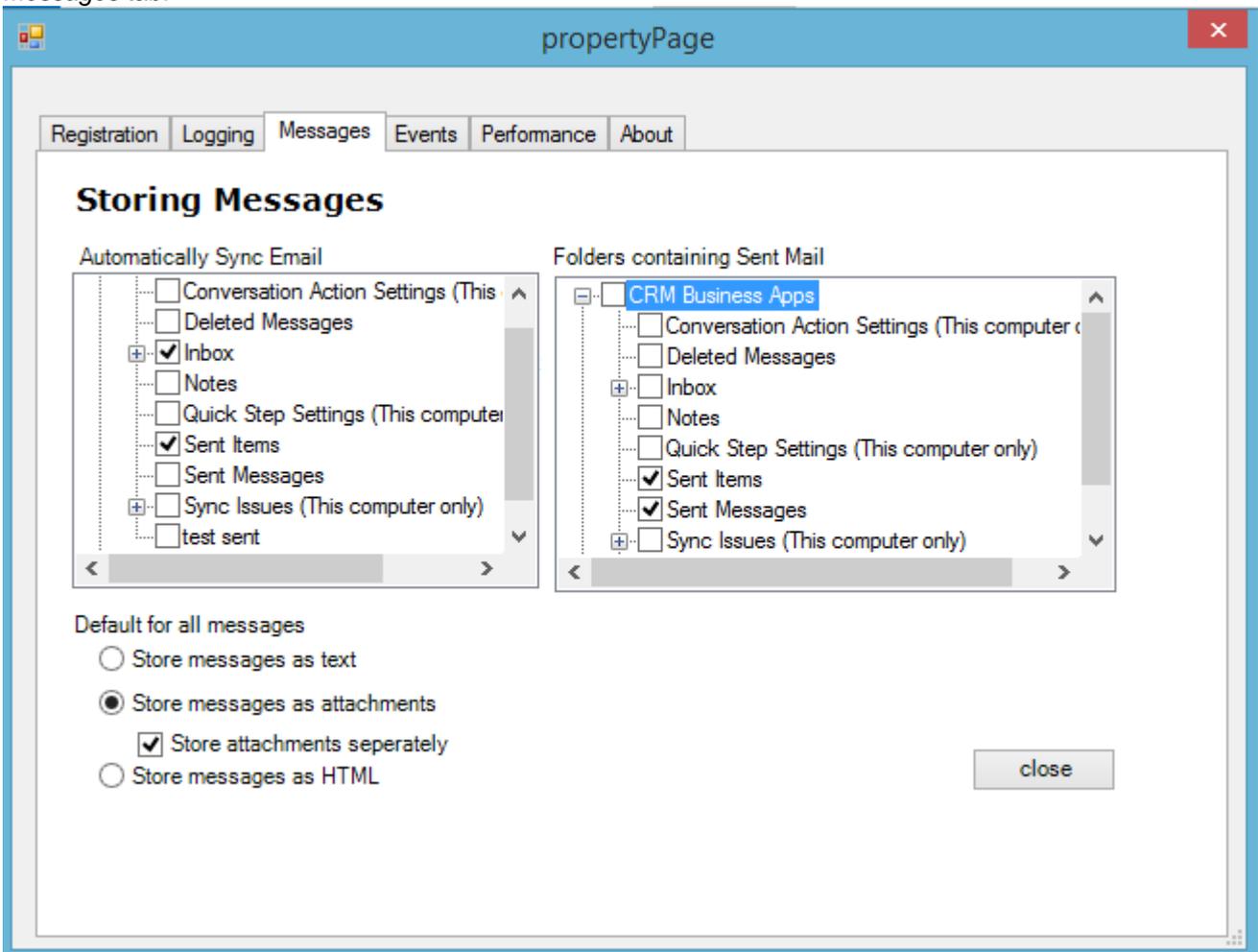


| Automatically Sync Email: | Click the folders in which you would like CRM Outlook Sync to search for new mail and automatically sync. The fewer folders that are checked, the quicker this process runs. Keep in mind that the items searched by this processed are only marked to be synchronized, they are actually stored to the database in a separate pass configured below in the *Performance* tab. |
|---|---|
| Folders containing Sent Mail: | In order to correctly identify sent email, all folders that contain sent mail should be checked. These will be identified in Wired Contact as "Email Sent." All other folders will be identified as "Email Received". |

| | |
|---|---|
| Store messages as text:: | When checked, the email messages will store as a plain text to the wired contact database. |
| Store messages as attachments: | When checked, the email messages will store as a message file to the wired contact database. |
| Store message as HTML: | When checked, messages will store in Wired Contact as HTML.  This provides existing text formatting however it is not compatible with the edit feature within Wired Contact. |

3. *Events* Tab
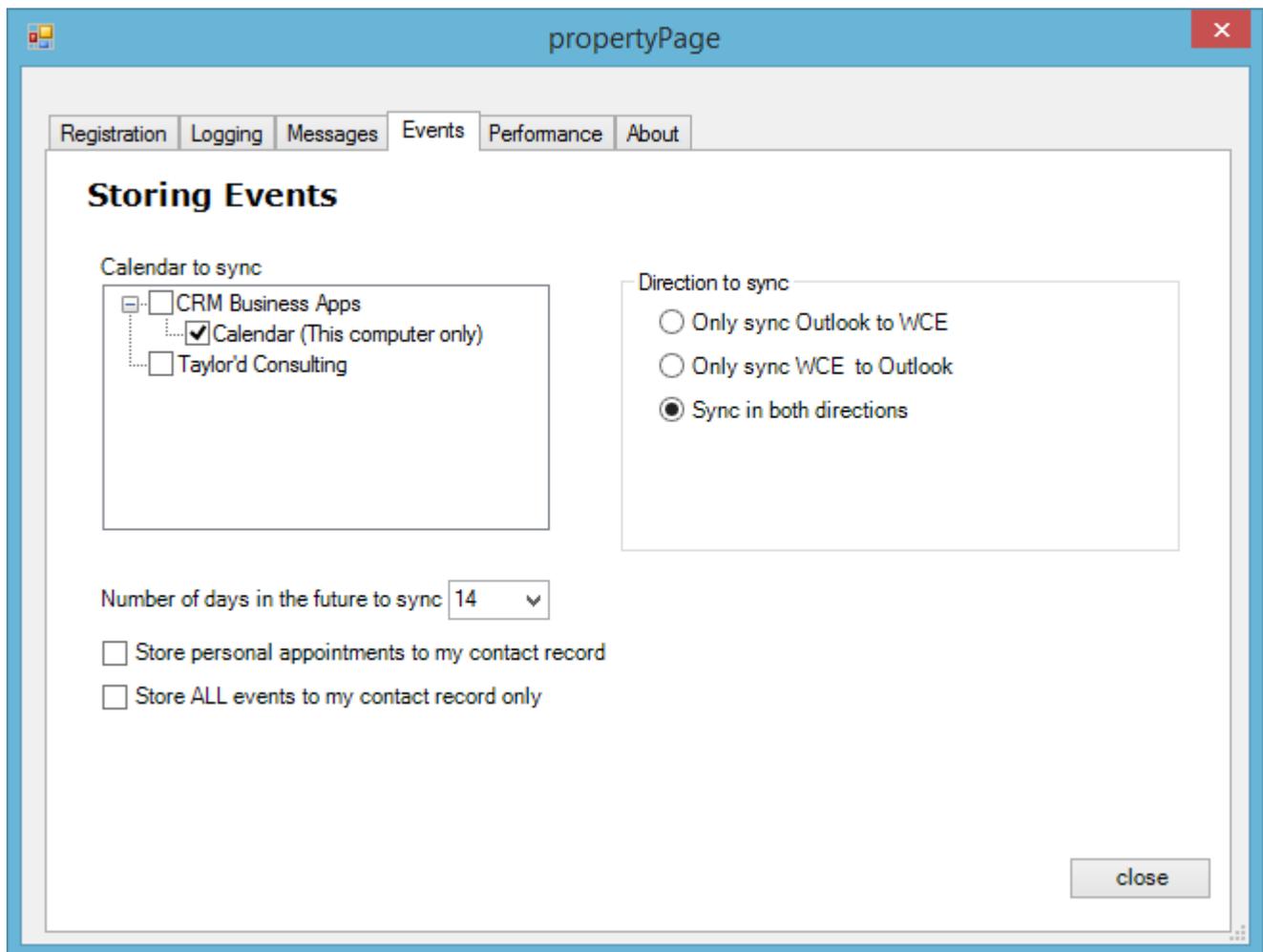


| | |
|---|---|
| Calendar to sync: | Choose the Outlook calendars you would like synchronized with Wired Contact |
| Direction to sync: | You can choose to only push events from Outlook to Wired Contact, choose to only push events from Wired Contact to Outlook, or synchronize in both directions.  If you choose to synchronize in both directions, the events are owned by the source.  Therefore, events that originate in Outlook should be modified and deleted in Outlook as needed and events that originate in Wired Contact should be maintained in Wired Contact. |
| Number of days in the future to sync: | Syncing too far in the future can cause performance issues. There is a hard limit of 60 days. |

Store personal appointments to my
contact record:

Events in Outlook can be meetings, but they can also be appointments where there are no other contacts on the event. Those messages can be stored to your own contact record in Wired Contact

Store ALL events to my contact record only:

You can choose to store all Outlook events to your own record instead of to the recipient records. This can be helpful if you have many events with multiple recipients and you don't want the events to appear multiple times.

4.  *Performance* tab
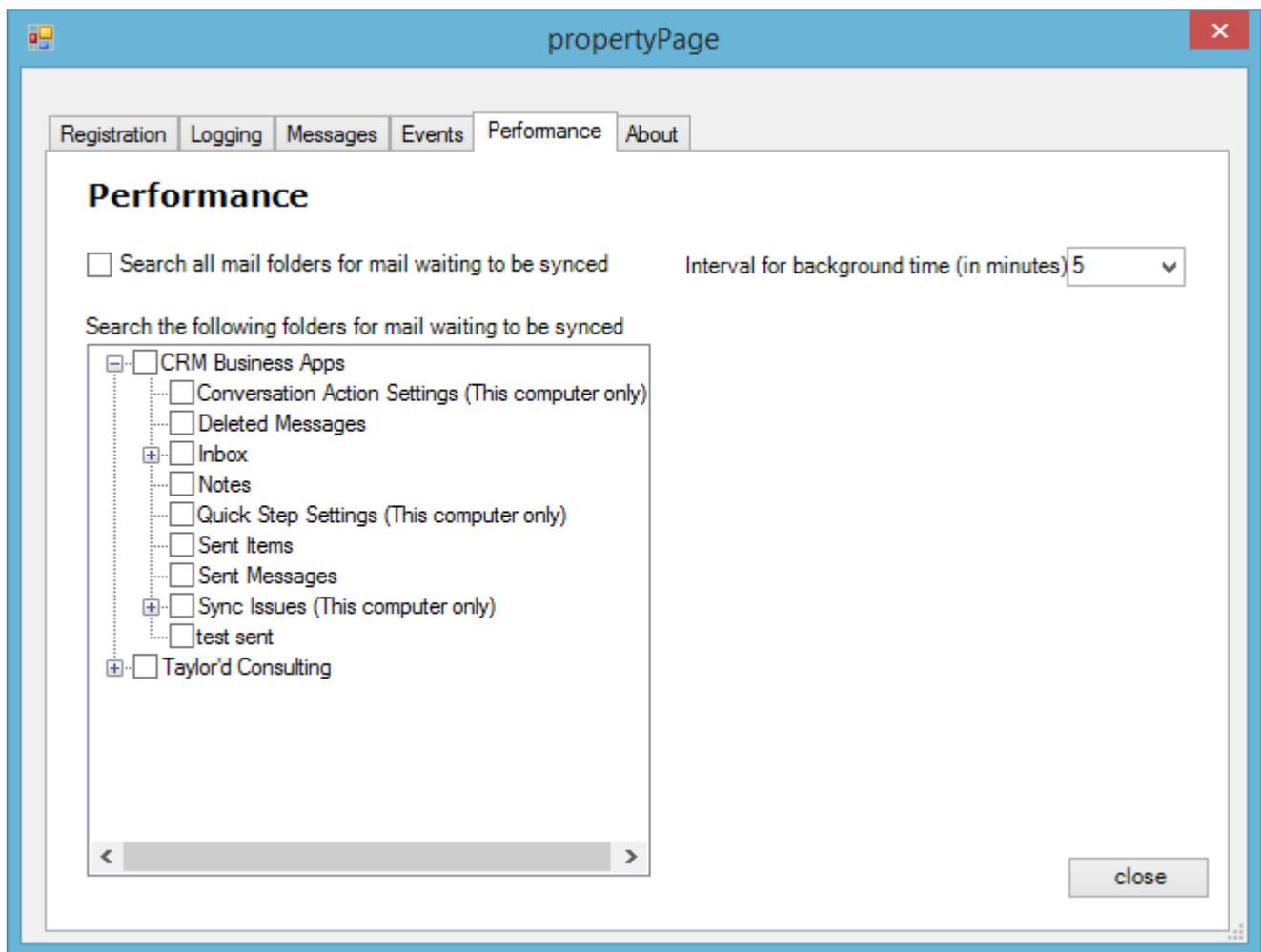


Search all mail folders for mail
waiting to be synced

This is the default value. If you have many folders, typically in your inbox, or many subfolders, this process can take a long time. By unchecking this box, you can choose which folders to process. This is the second pass that looks for any items that are waiting to be synchronized. The waiting items may have been auto marked as waiting or manually marked.

Search the following folders for
Mail waiting to be synced

If the above checkbox is unchecked, you must select all folders that will possibly have items waiting to be synchronized.  This includes all folders marked for auto sync in the *Messages* tab along with any folders you may be manually syncing items.  The fewer folders checked, the better your performance will be.

Interval for background time

The background process makes three passes through your messages.  The first is to look through the auto sync folders to mark new messages as waiting to be synced.  The second is to find any messages that failed in previous passes.  The third is to actually store the messages in Wired Contact.  Network bandwidth and server performance will be best with fewer passes per day.  The default is to run every 5 minutes, however, if your workflow allows for less frequent syncing, changing this value to a longer wait time can help with performance issues.

Manually Storing Sent and Received Messages:

- Right click on a message or a group of highlighted messages to open the context menu.
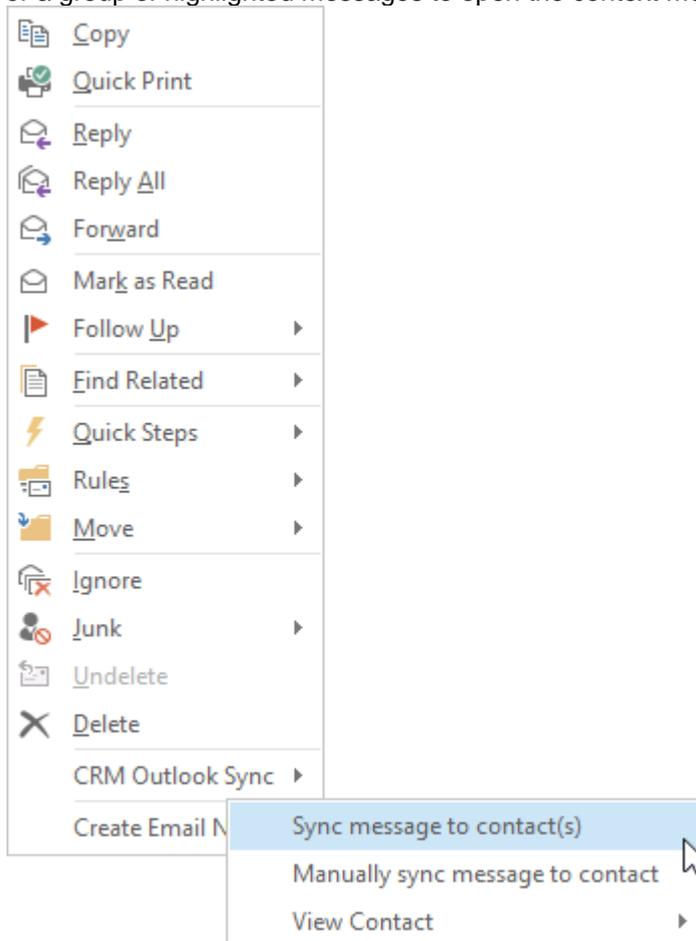


- Move your mouse over *CRM Outlook Sync* at or near the bottom of the context menu.
- You will see 3 choices

Sync message to contact(s):
Will store the message to Wired Contact using the sender as the contact (or the recipient if you are in the sent folder).  Will store to all CC'd contacts as well.

Manually sync message to contact:
Will allow you to select a contact from the Wired Contact database to store this message.

View Contact:
Will provide the option to view the contact record in Wired Contact for one of the email recipients or give you the ability to add the contact if it does not exist.

Configure Categories:

- In order to keep you informed of the message storage state, we have created 5 categories that may be applied to a message.


☐ ▨ OutlookSync.doNotStore
☐ ▨ OutlookSync.errorStoring
☐ ▨ OutlookSync.notInDatabase
☐ ▨ OutlookSync.stored
☐ ▨ OutlookSync.waiting

    OutlookSync.doNotStore denotes that a message was manually set not to be stored

    OutlookSync.errorStoring denotes trouble storing the message

    OutlookSync.notInWCEDatabase indicates the sender or recipient, depending on received or sent messages, is not in the Wired Contact database as a contact

    OutlookSync.stored indicates the message has been stored to Wired Contact

    OutlookSync.waiting indicates the message has been queued to be stored but has not been stored.

- I have chose to manually change the colors of my categories. You can do the same by right-clicking on the category square in the main Outlook window to the right of the subject. This is indicated in purple in this diagram. Click the *All Categories* option from the bottom.
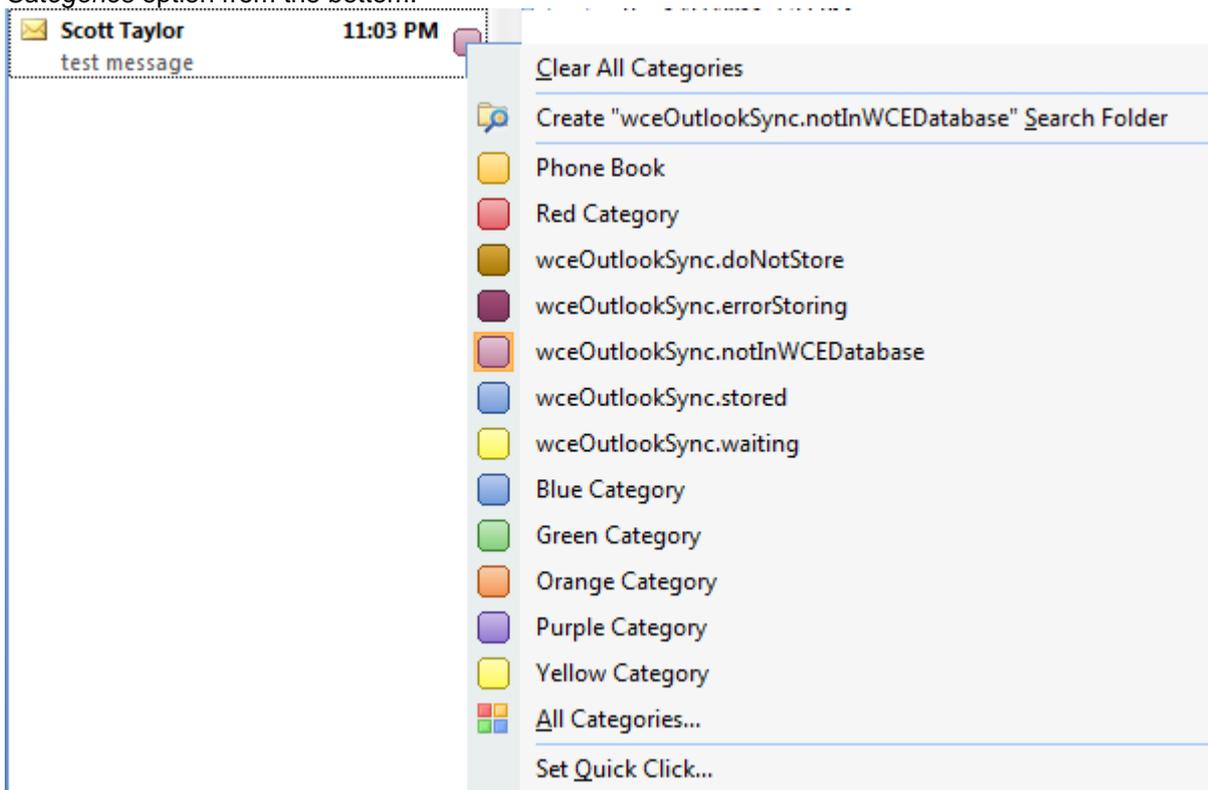


- Right click on the category square as indicated in the bullet above and click Set Quick Click… Set the category to *No category*. If this value is set to any other value, then every time you click on the category square, it will toggle between the category set here or clear all categories. This will make it difficult to manage the state of messages.
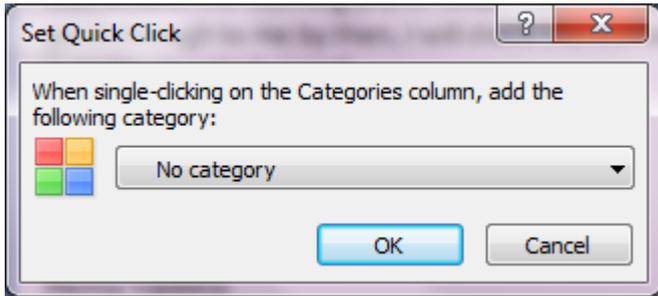
**Connection State:**

Click the *OutlookSync* menu option in the main Outlook window. For Outlook 2010, this is found under the *Add-Ins* ribbon option. The second line will indicate the connection state and how many messages are waiting in the queue to be stored.
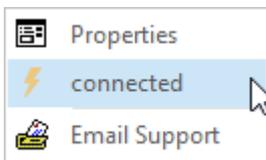


**Contacting Support:**

Click the *OutlookSync* menu option in the main Outlook window. For Outlook 2010, this is found under the *Add-Ins* ribbon option. Click *Email Support* to open a message to wco@crmbusinessapps.com. This will create a ticket in our ticketing system and send an email to our support team. You may also use support@crmbusinessapps.com.