
Using

MiSync Personal for Beams

V4.3.1.0

by Metisc

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Getting Started

Overview

MiSync Personal for Beams is a tool that allows you to synchronize contacts between Outlook and Beams CRM.

You can synchronize Leads based on how many days old is the Leads.

Once you synchronize data, *MiSync Personal for Beams* stores a link between Beams CRM and Outlook so that changes made to leads in one system are reflected in the other.

What's New

New installer for x64.

System Requirements

Microsoft SQL Server or MSDE

Beams CRM

Microsoft Outlook 2003/2007/2010

Microsoft Exchange 2007/2010

Microsoft Exchange Web Services

Technical Support

For technical support, contact:

Metisc Computer Services

www.metisc.com.au

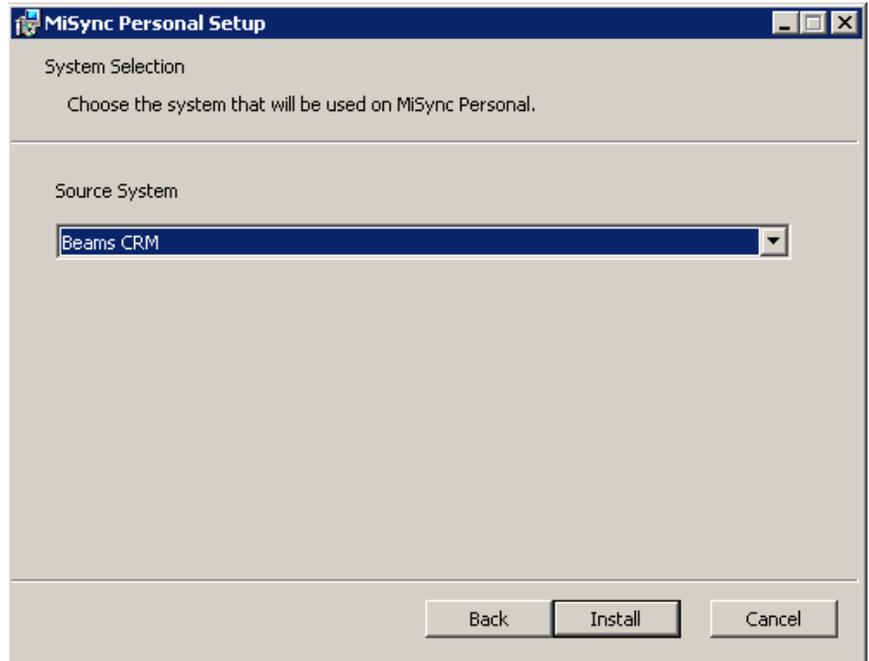
support@metisc.com.au

Installing *MiSync Personal for Beams*

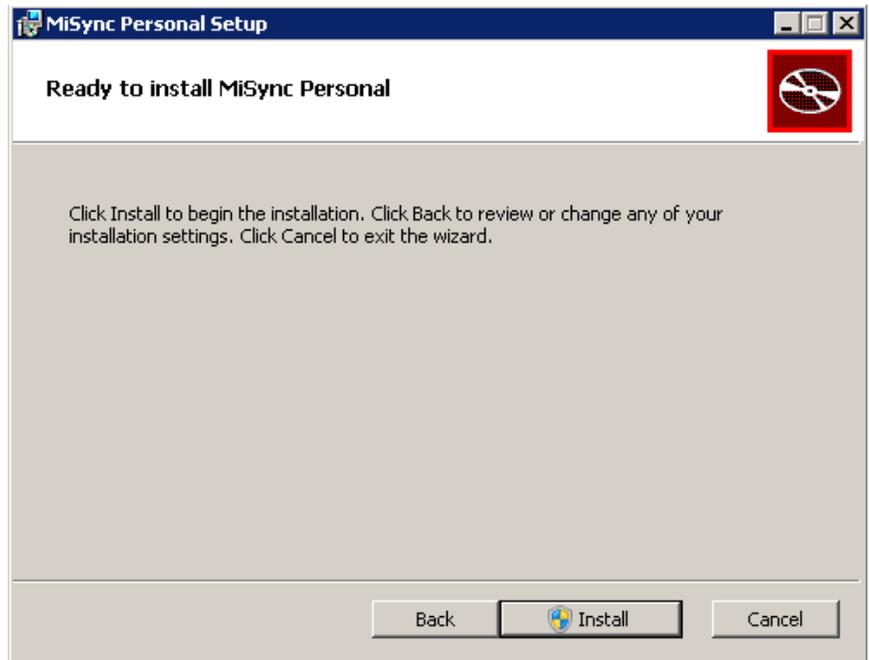
Run the installation program on the computer on which you wish to use *MiSync*. Click **Next >** to begin the installation.



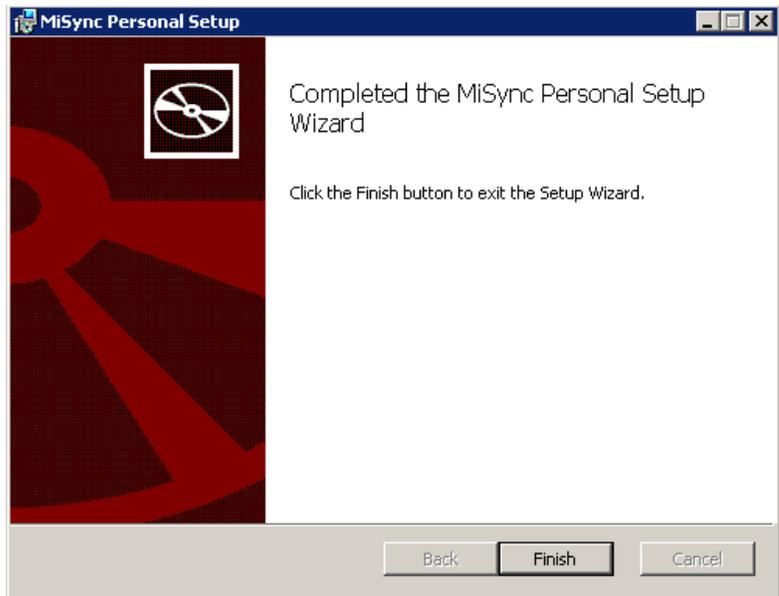
Choose the Source System that will be used for this *MiSync Personal*. Then click **Install** to continue the installation.



MiSync is now ready to be installed. If you are happy with your installation settings, click **Install** to commence the installation.



Once installation is complete, click **Finish** to end the installation process.



There should now be a shortcut to *MiSync Personal* placed on your desktop.

- ▶ To un-install, see “Installation Notes” section in the appendices.

Running *MiSync Personal for Beams* for the First Time

Enter all the required server, organization and user data.
Click the **OK** button to login

CRM and Exchange Logon Configuration	
Please enter your CRM Server Configuration	
Beams Document	
Document Folder	\\s1401-01\c\$\inetpub\BeamsCRM\App_Med
Beams Server	
Server Name	s1401-01\sqlexpress
Database Name	beamscrm1
Use Windows Authentication	True
User Name	
Password / PWD	
Configuration	
Connection Name	test
Impersonation for Document Path Access	
Domain (Impersonation)	
User Name (Impersonation)	
Password (Impersonation)	
Connection Name Gets or sets Server Connection Name	
Test Connection	
OK Cancel	

Connection Name – enter the connection name.

Server Name – enter the SQL Server server name.

Database Name – enter the SQL Server database name.

Use Windows Authentication – check if the SQL Server login is using windows authentication.

User Name – enter the username you use to get into the SQL Server.

Password – enter the password you use to get into SQL Server.

Document Folder – Enter the path where Beams web will store the documents (usually in

\\<servername>c\$\inetpub\BeamsCRM\App_Media\
\CompanyDocument)

Domain (Impersonation) – enter the domain for the impersonation user to use to access the document path

User Name (Impersonation) – enter the username for the impersonation user to use to access the document path.

Password (Impersonation) – enter the password for the impersonation user to use to access the document path.

The CRM logon information will be saved as xml file in
C:\Users\<username>\AppData\Roaming\Metisc\MiSync Personal

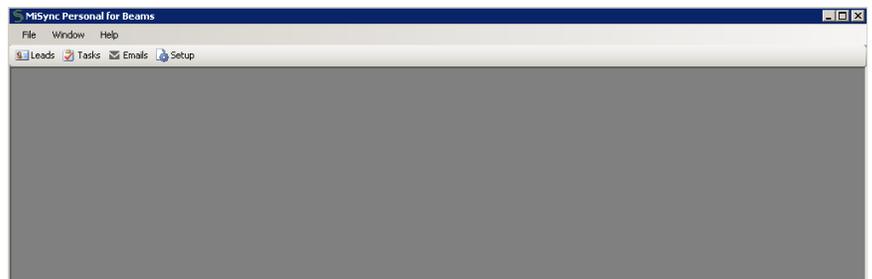
Using *MiSync Personal for Beams*

Starting *MiSync Personal for Beams*

To open *MiSync Personal for Beams*, select:

Start>All Programs>Metisc>MiSync Personal>MiSync Personal

Alternatively, click on the *MiSync Personal* icon on your desktop. The following screen will appear:



MiSync Personal for Beams will automatically log on to your Outlook or Outlook/Exchange system using either the default profile of the currently logged-on Windows user, or your selected profile if you have multiple profiles.

Once you have logged on, you can begin synchronizing information between Outlook and Beams CRM. The sections that follow provide details about using *MiSync Personal for Beams*.

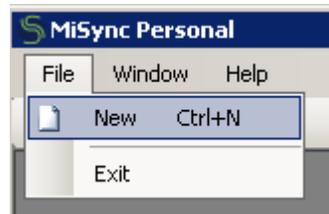
MiSync Personal for Beams Basics

This is the main *MiSync Personal for Beams* screen:



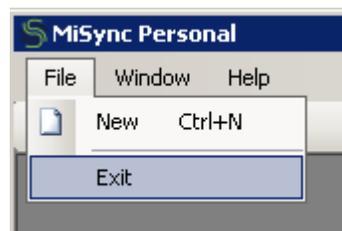
These are the available menus of the main screen:

File>New



A new 'Leads' window will open.

File>Exit



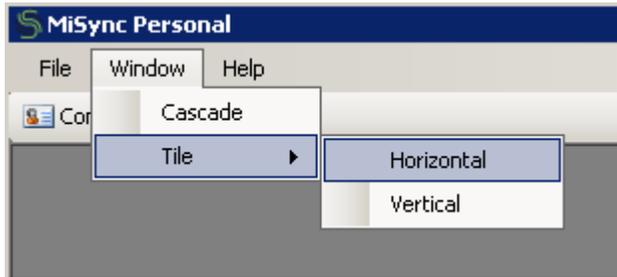
MiSync will be closed.

Window>Cascade



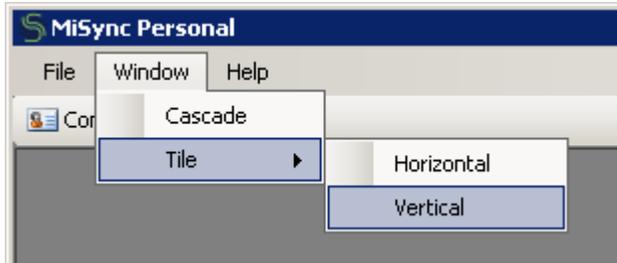
Arranges multiple 'Contacts' windows.

Window>Tile>Horizontal



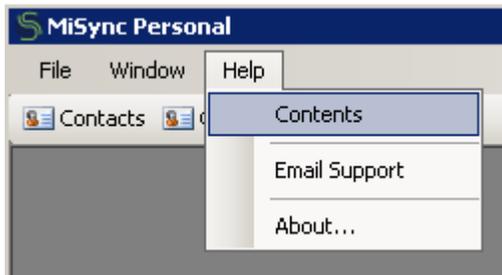
Arranges multiple 'Contacts' windows horizontally.

Window>Tile>Vertical



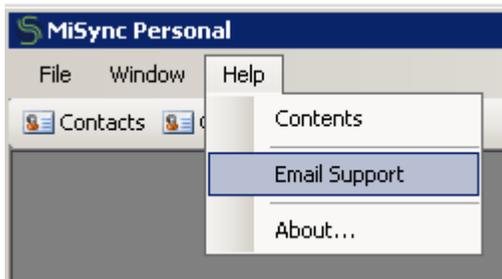
Arranges multiple 'Contacts' windows vertically.

Help>Contents



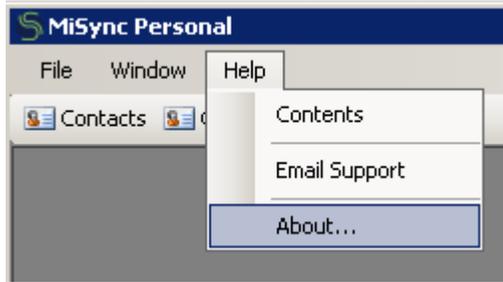
An application help window will open.

Help>Email Support



Send an email to Metisc support.

Help>About...



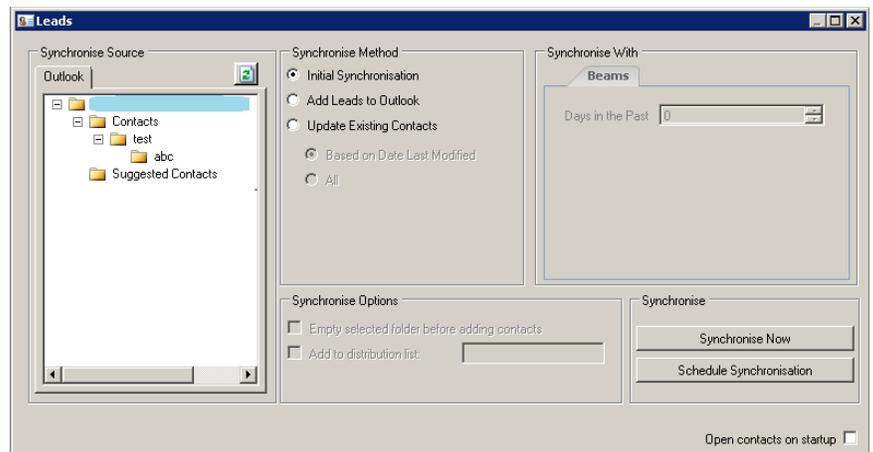
Several sync process are available through the menu buttons



- Leads
Sync Beams' Leads into Outlook.
- Tasks
Sync Beams' Task into Outlook.
Sync Task/Reminder status between both system
- Emails
Sync Outlook Emails into Beams
- Setup
Change setup configuration for Beams and Outlook system

Synchronizing Leads

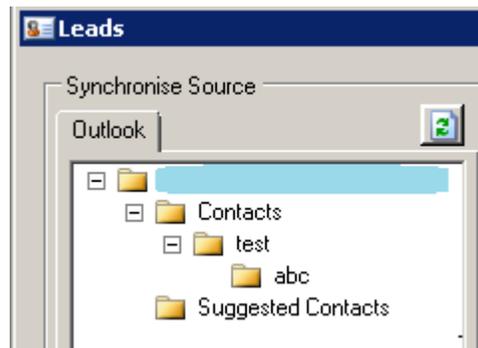
This is the main Leads screen of *MiSync Personal for Beams*:



The **Leads** icon  allows you to synchronize Outlook contacts with Beams CRM Name records. You must select one or more options from each of the three selection areas before you can synchronize records. The three selection areas include **Synchronize Source**, **Synchronize Method**, and **Synchronize With**.

Synchronize Source

This area displays the available Outlook folders. Select the folder to which you want to add leads and from which you want to copy leads. Refresh button  will refresh/update the display of all your Outlook folders.



Synchronize Method

Use the options in this area to specify how you want *MiSync Personal for Beams* to synchronize your leads.

Initial Synchronization – Select this option to establish links between matching record in both Outlook and Beams CRM. *MiSync Personal for Beams* matches contacts based on first name and last name.

Once leads in Outlook and Beams CRM are linked, updates made in either system can be sent to the other system, or date based updates can be performed.

-
- ▶ **Note:** Due to the way dates are stored in Outlook, your PC's regional settings should be correct. If the settings are not correct, the dates that *MiSync* compares against in SQL Server and Exchange may result in incorrect updates and incorrect data being considered the most recent update.
-

Add Leads to Outlook – Select this option to add new (not already linked) contacts in Beams CRM to Outlook

Update Existing Contacts – Select this option to apply changes from one system to the other, where the leads records are already linked. The option “Based on Date last Modified” allows updates to occur in both systems based on the most recent update from either system. The option “All” will update all existing contacts.

- ▶ Note: Due to the way dates are stored in Outlook, your PC’s regional settings must be correct. If the settings are not correct, the dates that *MiSync* compares against in SQL Server and Exchange may result in incorrect updates and incorrect data being considered the most recent update.

Synchronize Options

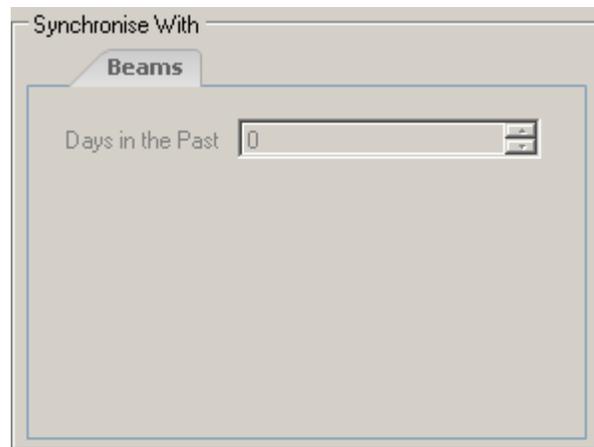
These options are available only if ‘Add Contacts to Outlook’ is selected.

Empty selected folder before adding contacts – Select this option if you want to remove existing Contacts in Outlook. This option is useful if you are using Folders to store meeting registrants or Committee Members and the registrants cancel, or committee members leave. If they are not deleted, you may have committee members that are not current.

Add to distribution list: When this option is selected, it is possible to create Distribution Lists which include leads records from Beams CRM that have email address.

Synchronize With

Specify which leads to synchronize with Outlook by selecting how many days back to look for.



These options are available only if ‘Add Leads to Outlook’ is selected.

Synchronize

Synchronize Now Click this button to synchronize the data between Outlook and Beams CRM. A progress bar displays the progress of the operation. When the process is complete, a message displays informing you of how many records were synchronized. The synchronize process can be interrupted/stopped by clicking on the **Cancel** button which will appear during synchronization next to the progress bar.

Schedule Synchronization Schedule the current chosen settings to run at defined times. This option allows you run synchronization at set times, for example every Monday and Friday, every 6 hours, or on the first day of each month. This option is only available in the E-mail and Contacts window. For more information see the sections **Scheduling Synchronization**.

Open contacts on startup – Tick this check box for *MiSync* to start with a ‘Leads’ window. Un-tick this check box and *MiSync Personal for Beams* will start without the ‘Leads’ window.

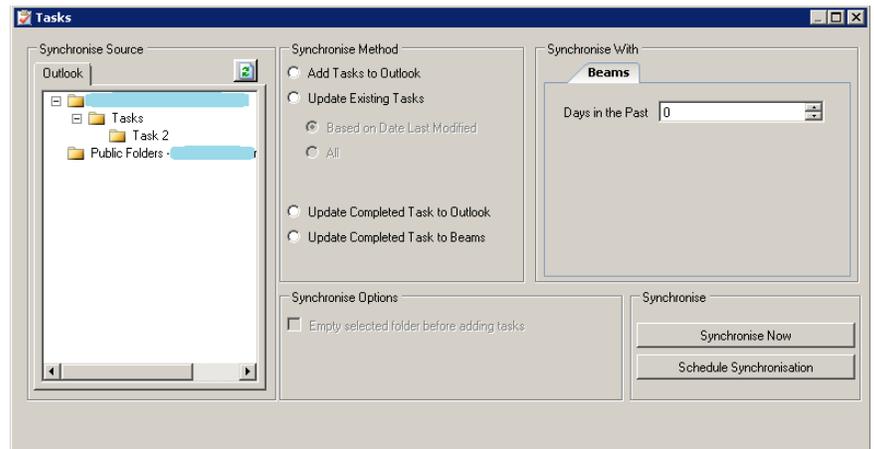
Field Mapping

CRM fields	Outlook fields
Name	First
Name	Middle
Name	Last
AccountName	CompanyName
Phone Home	Home Phone
Phone Work	Business Phone
Fax	Business Fax
Mobile	Mobile Phone
Email	Email Address
Birth Date	Birthday
Address Primary	Business Address Street
City Primary	Business Address City
State Primary	Business Address State
Zip Code Primary	Business Address Postal Code
Country Primary	Business Address Country
Address Secondary	Other Address Street
City Secondary	Other Address City

State Secondary	Other Address State
Zip Code Secondary	Other Address Postal Code
Country Secondary	Other Address Country

Synchronizing Tasks

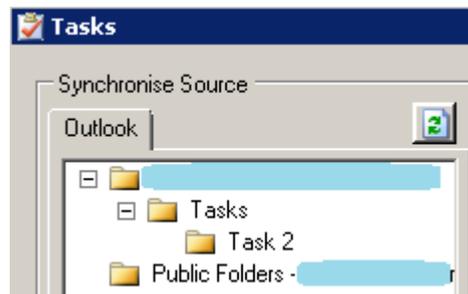
This is the main Tasks screen of *MiSync Personal for Beams*:



You must select one or more options from each of the three selection areas before you can synchronize records. The three selection areas include **Synchronize Source**, **Synchronize Method**, and **Synchronize With**.

Synchronize Source

This area displays the available Outlook folders. Select the folder to which you want to add tasks. Refresh button  will refresh/update the display of all your Outlook folders.



Synchronize Method

Use the options in this area to specify how you want *MiSync Personal for Beams* to synchronize your tasks.

Add Tasks to Outlook – Select this option to add new tasks in Beams CRM to Outlook.

Update Existing Tasks – Select this option to update changes from Beams to Outlook. The option “Based on Date last Modified” allows updates to occur in both systems based on the most recent update from either system. The option “All” will update all existing tasks.

-
- ▶ Note: Due to the way dates are stored in Outlook, your PC's regional settings must be correct. If the settings are not correct, the dates that *MiSync* compares against in SQL Server and Exchange may result in incorrect updates and incorrect data being considered the most recent update.
-

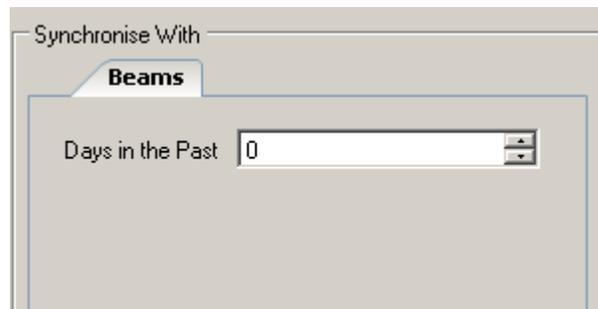
Synchronize Options

These options are available only if 'Add Tasks to Outlook' is selected.

Empty selected folder before adding tasks – Select this option if you want to add Beams CRM Tasks to Outlook. The system will empty the Outlook folder and then add all the selected Beams CRM Tasks.

Synchronize With

Specify which tasks to synchronize with Outlook by selecting from all the available searches. Click 'New Advanced Find' to create a new search in Beams CRM. Click the **Refresh** button to refresh/update the display of all your searches.



These options are available only if 'Add Tasks to Outlook' is selected.

Synchronize

Synchronize Now Click this button to synchronize the data between Outlook and Beams CRM. A progress bar displays the progress of the operation. When the process is complete, a message displays informing you of how many records were synchronized. The synchronize process can be interrupted/stopped by clicking on the **Cancel** button which will appear during synchronization next to the progress bar.

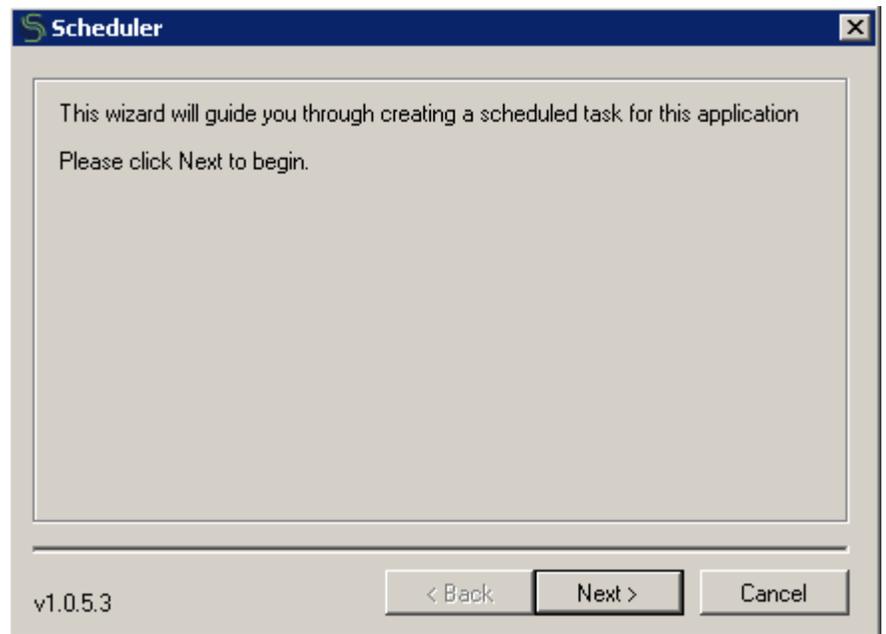
Schedule Synchronization Schedule the current chosen settings to run at defined times. This option allows you run synchronization at set times, for example every Monday and Friday, every 6 hours, or on the first day of each month. For more information see the sections **Scheduling Synchronization**.

Field Mapping

CRM fields	Outlook fields
Title	Subject
Detail	Body
Time	Start Date
Time	Due Date

Schedule Synchronization

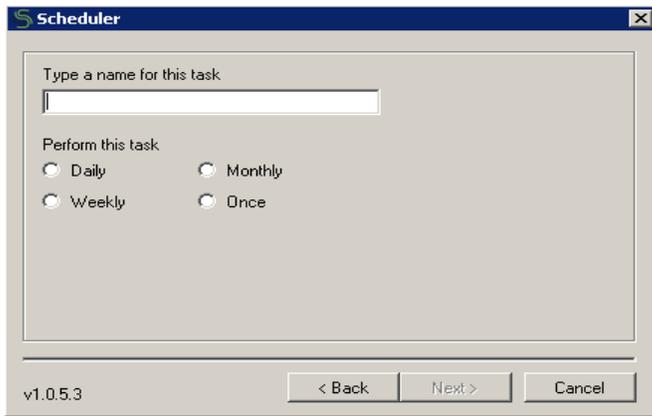
MiSync gives you the ability to schedule Leads and Tasks synchronizations using the Windows scheduler. First select the type of Synchronization as you would normally and then press the **Schedule Synchronization** button. You will be presented with a 'Scheduler' screen which allows you to choose the recurrence type of the schedule. Click **Next >** to continue.



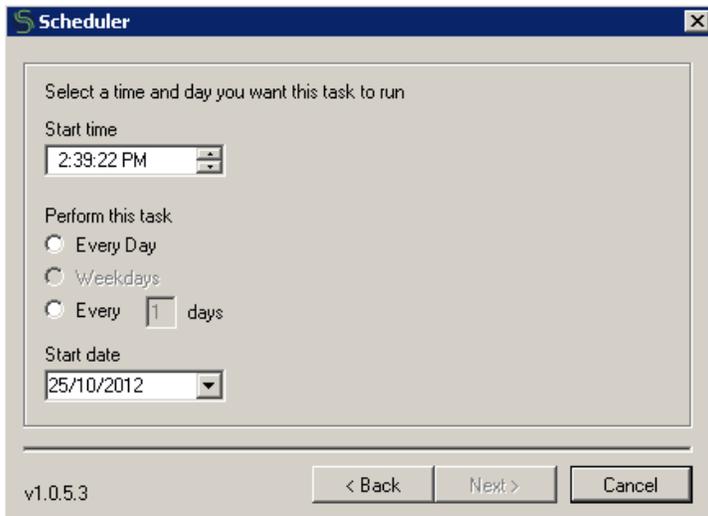
When scheduling tasks you have three different types of recursion:

- Daily
- Weekly
- Monthly
- Once

Each has its own set of parameters that must be set for the schedule to be constructed. Pick an option and enter a name for the task. Click **Next >** to continue.

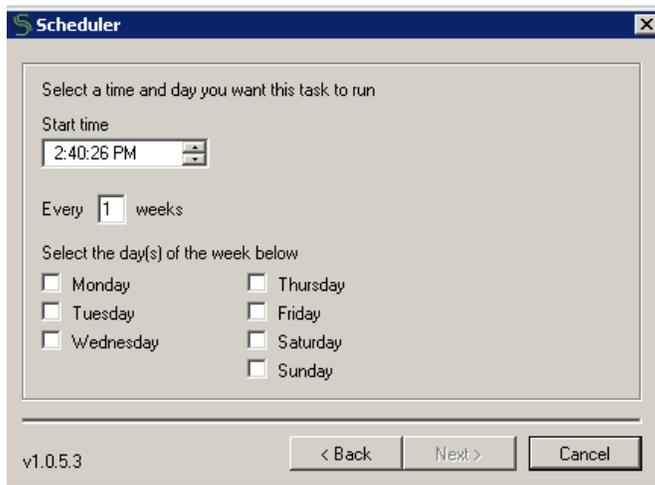


Daily



The first option is 'Daily'. This allows you to schedule synchronizations for every 'x' number of minutes or hours on a specific day or days. To schedule this type simply enter the start time and start date you wish the schedule to kick off, and tick the option you wish it to recur on.

Weekly



The second option is ‘Weekly’. This allows you to schedule synchronizations for every ‘x’ number of weeks on a specific day or days and at a specified time. To schedule this type simply enter the start time you wish the schedule to kick off, enter the weeks you wish it to recur on and tick the day or days you wish the synchronization to run on.

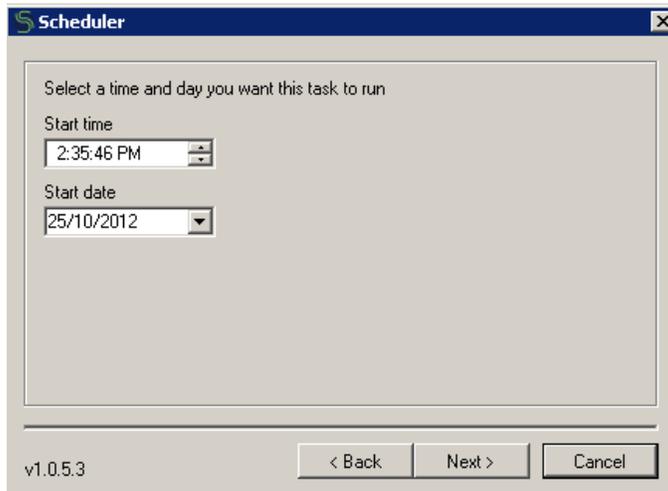
Monthly



The screenshot shows the 'Scheduler' dialog box with the title bar 'Scheduler' and a close button. The main area contains the text 'Select a time and day you want this task to run'. Below this, there is a 'Start time' field with a dropdown arrow, showing '2:39:57 PM'. Underneath is a 'Day of the Month' field with a dropdown arrow, showing '1'. The next section is 'Select the Month(s) below', followed by a grid of checkboxes for each month: Jan, Apr, Jul, Oct, Feb, May, Aug, Nov, Mar, Jun, Sep, Dec. At the bottom left, the version 'v1.0.5.3' is displayed. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

The third option is ‘Monthly’. This allows you to schedule synchronizations on the ‘x’th day of specific month or months and at a specified time. To schedule this type simply enter the start time and day of the month you wish the schedule to kick off, and tick the month or months you wish the synchronization to run on.

Once



The screenshot shows the 'Scheduler' dialog box with the title bar 'Scheduler' and a close button. The main area contains the text 'Select a time and day you want this task to run'. Below this, there is a 'Start time' field with a dropdown arrow, showing '2:35:46 PM'. Underneath is a 'Start date' field with a dropdown arrow, showing '25/10/2012'. At the bottom left, the version 'v1.0.5.3' is displayed. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

The final option is ‘Once’. This allows you to schedule synchronizations just once for a specific time and day. To schedule this type simply enter the time and day on which you wish the schedule to kick off.

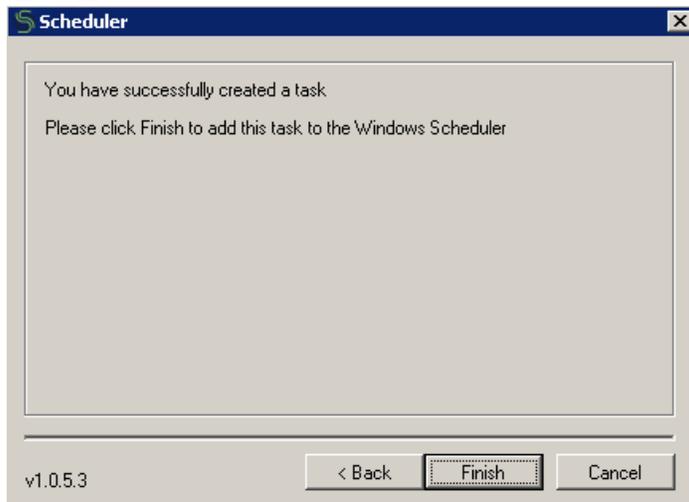
Once you adjust your schedule, click **Next >**.

This final screen requires your Windows name and password. You can enter another user's name and password so that the schedule will run as if it were started by that user. When you are satisfied with your options, click the **Next >** button to complete your schedule.



The screenshot shows a dialog box titled "Scheduler" with a close button (X) in the top right corner. The main text reads: "Enter the name and password of a Windows user. The Task will run as if it were started by that user." Below this text are three input fields: "Enter the username", "Enter the password", and "Confirm password". A note below the fields states: "If a password is not entered, scheduled tasks might not run." At the bottom left, the version number "v1.0.5.3" is displayed. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Your schedule is now set, click the **Finish** button to close the window.

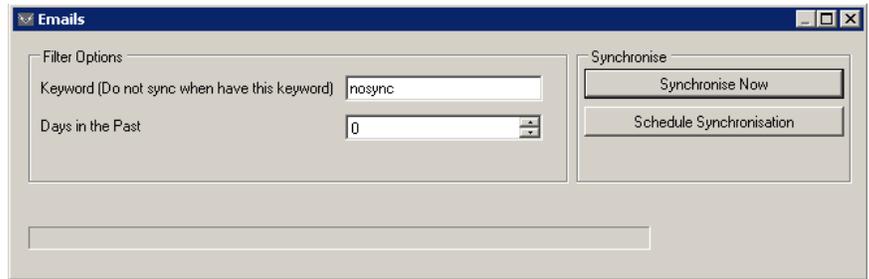


The screenshot shows the same "Scheduler" dialog box. The main text now reads: "You have successfully created a task" followed by "Please click Finish to add this task to the Windows Scheduler". The "Finish" button at the bottom right is now highlighted with a dotted border. The version number "v1.0.5.3" and the "< Back" and "Cancel" buttons remain visible.

You can view and make changes to your scheduled tasks in the Windows Scheduler by going to **Start > All Programs > Accessories > System Tools > Schedule Tasks**

Synchronizing Emails

This is the main Emails screen of *MiSync Personal for Beams*:



This allows you to synchronize Outlook emails to Beams CRM. The emails in Beams will be related to Leads records.

Filter Options

The keyword can be used to filter out which emails that will not be synchronized. If the keyword exist in the Subject of the Outlook email, it will not by synchronized.

Days in the Past can be used to filter email that sent on how many days before.

Synchronize

Synchronize Now Click this button to synchronize the data between Outlook and Beams CRM. A progress bar displays the progress of the operation. When the process is complete, a message displays informing you of how many records were synchronized. The synchronize process can be interrupted/stopped by clicking on the **Cancel** button which will appear during synchronization next to the progress bar.

Schedule Synchronization Schedule the current chosen settings to run at defined times. This option allows you run synchronization at set times, for example every Monday and Friday, every 6 hours, or on the first day of each month. For more information see the sections **Scheduling Synchronization**.

Field Mapping

CRM fields	Outlook fields
Subject	Subject
Description	Body
From Email	Sender
To Email	Email
Sent On	Sent On

Communicating with Outlook

MiSync Personal communicates with Outlook using:

- MAPI
- Outlook Object Model

Appendices

Using Command-Line Parameters

Using command-line parameters allows you to automate some operations in *MiSync*. The automation is normally performed using the Windows Scheduler.

At the command line, type the path of the *MiSync* executable, followed by your *Beams CRM* user name and password, the command line options.

Frequently Asked Questions

Q. *MiSync* gives me a message saying the evaluation period has expired.

A. If this message appears, contact your reseller to obtain a new serial number.

Q. A new version of Beams CRM has been installed. Do I need to do anything to *MiSync*?

A. No, as the database has not changed, *MiSync* is not affected at all.

Q. Where can I find the log files?

A. You can find it in
“C:\Users\<<username>\AppData\Roaming\Metisc\MiSync Personal\LogFiles”

Q. Why does my folder not exist in the folder tree

A. Make sure that the parent’s folder is also defined as the same type (e.g. folder is for contact items than parent also need to be defined for contact items)

Q. Where is my embedded message attachment ?

A. *MiSync* currently doesn’t sync embedded message

Known Issues

Outlook Connection

- Cannot connect to different Outlook with different username than what is installed in current computer
- There are occasions of unable to open Outlook after Synchronisation process and closing Outlook

Installation Notes

This section is provided for users who have installed *MiSync Personal* version 4.0.1.1 or above.

To un-install *MiSync Personal*

1. Make sure that Microsoft Outlook is not running prior to un-installing.
Open the **Control Panel** (under **Start -> Settings**).
Select the **Add Remove Programs** icon.
Find the entry for *MiSync* & select.
Click on the **Remove** button.

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