
Using

MiSync Personal for CRM

V4.3.1.0

by Metisc

Copyright

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Metisc

Unit 5, 800 Albany Highway
East Victoria Park WA 6101
Australia

Ph: +61 8 9355 5880

Fax: +61 8 9291 7893

Web: <http://www.metisc.com.au>

E-mail: support@metisc.com.au

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Getting Started

Overview

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

You can synchronize contacts based on the **SAVED Advanced Find** searches.

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

What's New

New installer for x64.

System Requirements

Microsoft SQL Server or MSDE

Microsoft Dynamics CRM 4.0 or Microsoft Dynamics CRM 2011

Microsoft Outlook 2003/2007/2010

Microsoft Exchange 2007/2010

Microsoft Exchange Web Services

Technical Support

For technical support, contact:

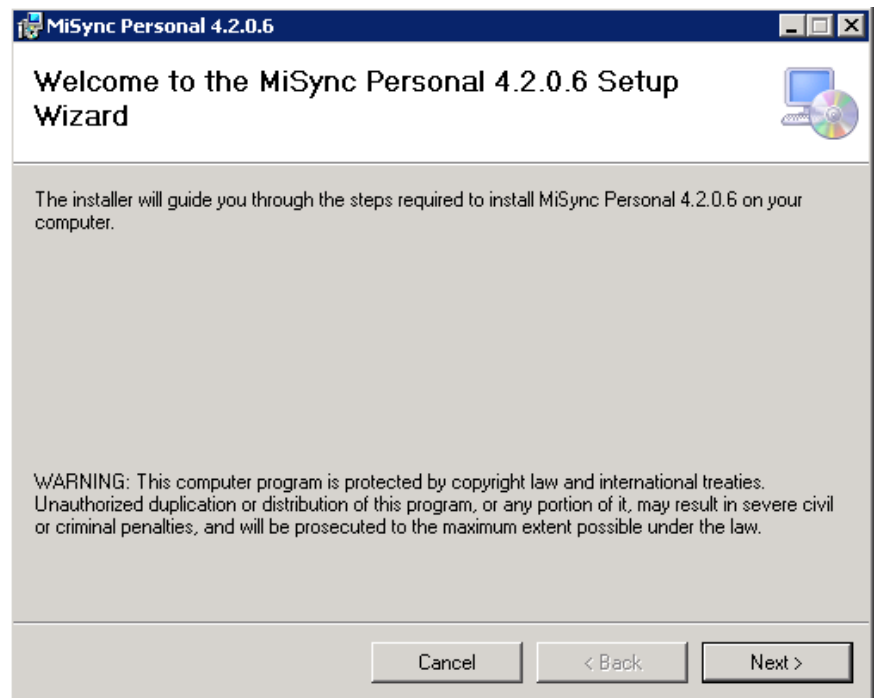
Metisc Computer Services

www.metisc.com.au

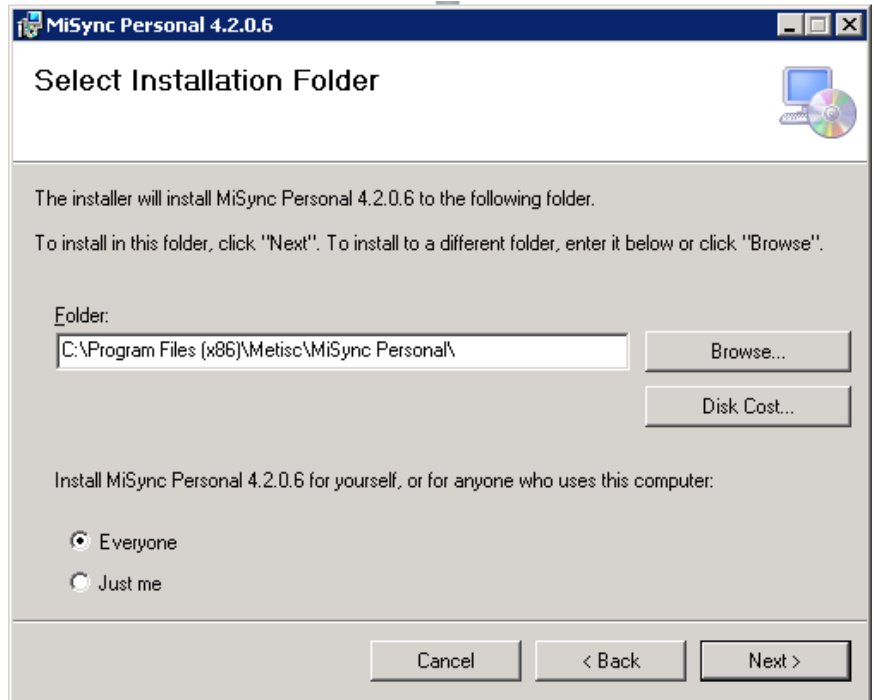
support@metisc.com.au

Installing *MiSync Personal for CRM*

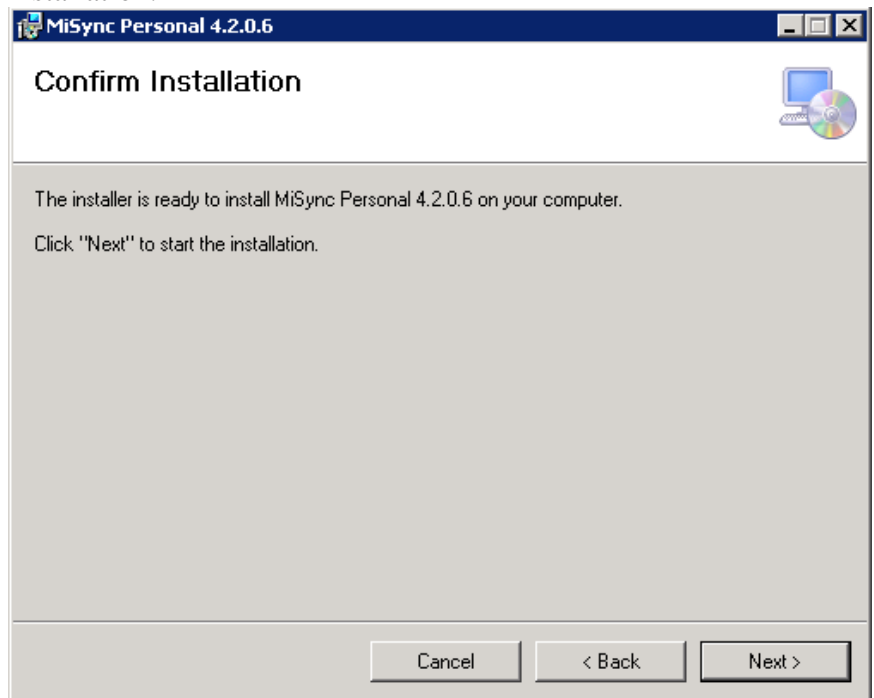
Run the installation program on the computer on which you wish to use *MiSync*. Click **Next >** to begin the installation.



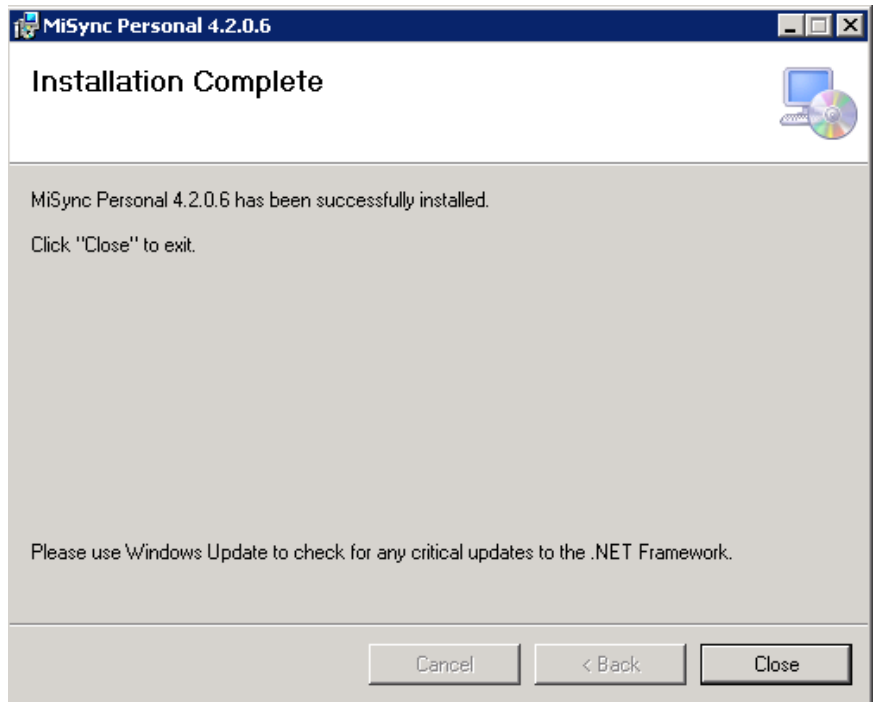
Choose the location you wish to install to and specify who will have access to the program. Then click **Next >** to continue the installation.



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



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

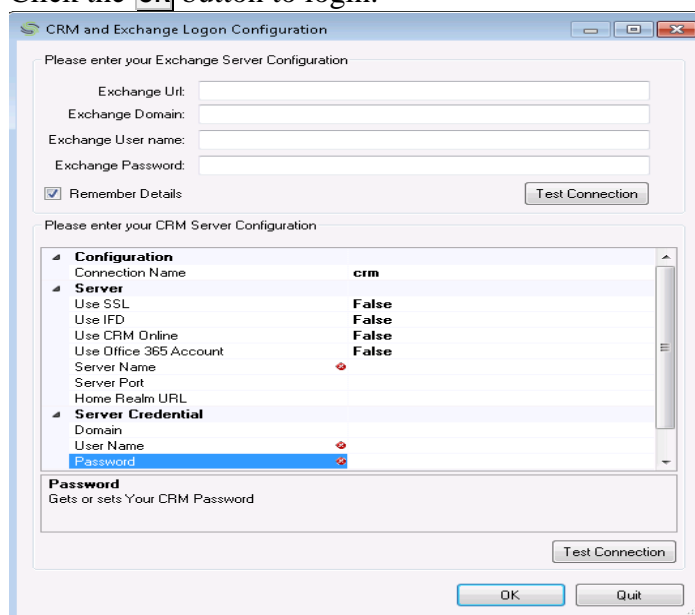


There should now be two shortcuts to *MiSync Personal* placed on your desktop, one for *MiSync Personal for CRM* and one for *MiSync Personal for iMIS*.

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

Running *MiSync Personal for CRM* for the First Time

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



Exchange Url – Enter the address of your exchange server, for example <https://20x.5x.13x.x/ews>

To test if this address works, simply add /Exchange.asmx on the end of it so it will look like:

<https://20x.5x.13x.x/ews/Exchange.asmx>

Exchange Domain – Enter the domain that is used for the exchange server.

Exchange User name – Enter the user name used for login to the exchange server

Exchange Password – Enter the password used for login to the exchange server

Connection Name – enter the connection name.

Use SSL (Secure Socket Layer) – check if the url is using SSL (HTTPS).

Use IFD (Internet Facing Deployment) – check if the CRM is deployed for internet connection. Uncheck if the CRM is only for internal use.

Use CRM Online – check if using CRM online.

Use Office 365 Account – check if the CRM is using Office 365 Account.

Server Name – enter the url of CRM server.

Server Port – enter the url port.

Home Realm URL – enter this field if only using ADFS Endpoint URL e.g.

‘<https://adfs.crmonline.ws/adfs/services/trust/mex>’

Domain – enter the domain the CRM is on.

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

Password – enter the password you use to get into CRM.

Server Organization – click browse icon to select the CRM organization you want to use.

The CRM logon information will be saved as xml file in C:\Users\

C:\Program Files (x86)\Metisc\MiSync Personal\MiSync.exe.config

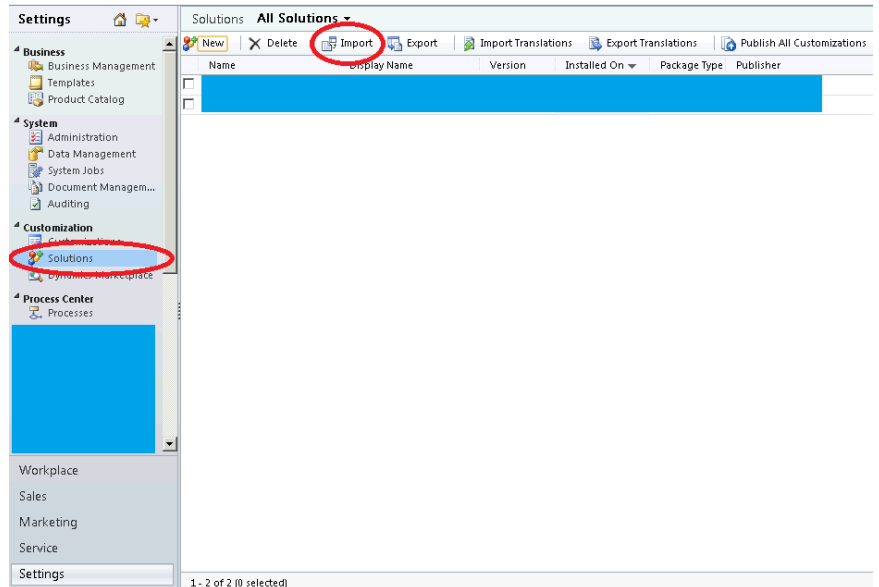
Installing CRM Solution

First time user will need to install the CRM solution to be able to register successfully.

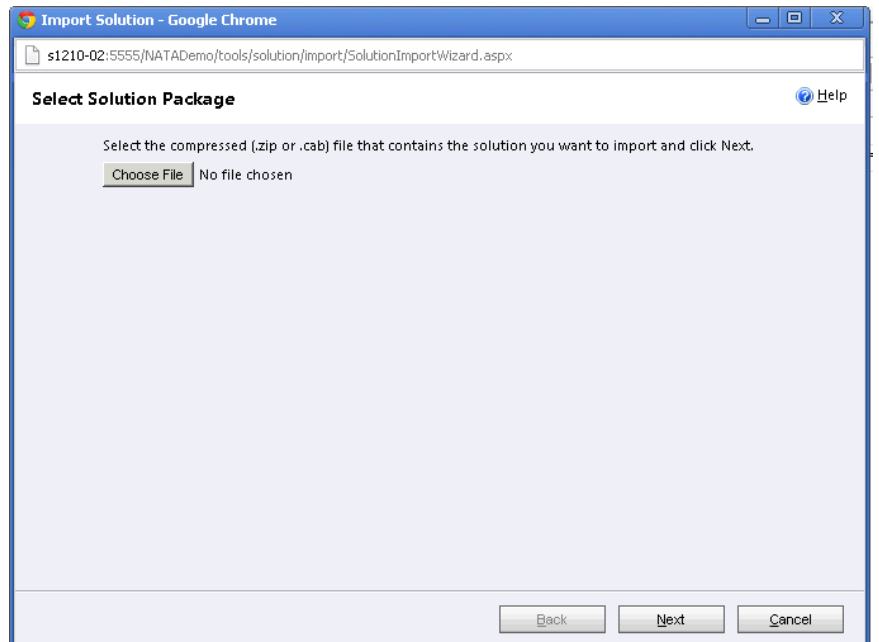
The CRM solution file can be located in the installation folder. This folder is usually in C:\Program Files(x86)\Metisc\Misync Personal\Solution

The file is called “KeysSolution_1_0_0_0_managed.zip”

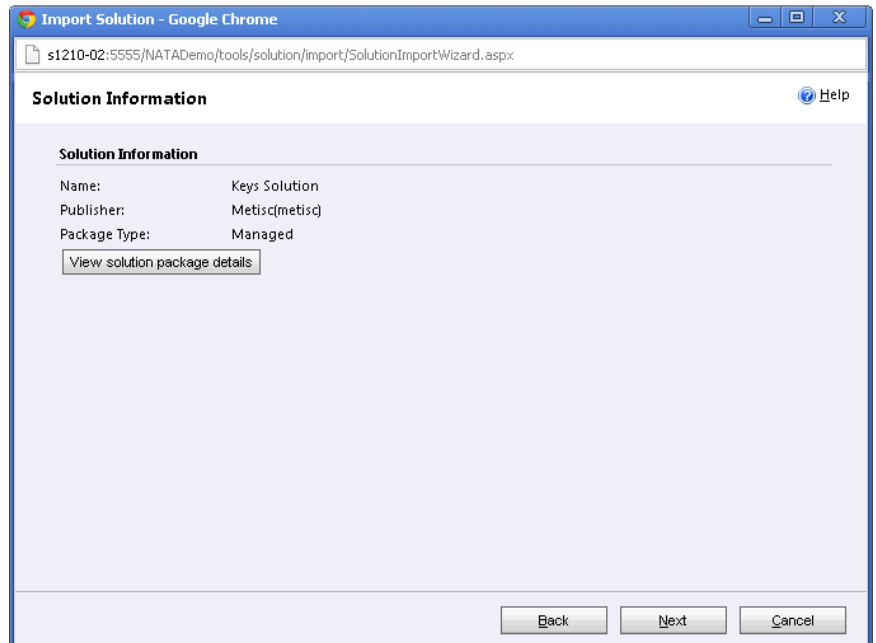
To install the solution, go to the CRM and navigate to sub menu of “Settings” > “Customization” > “Solutions”



Click on Import and you will see the next screen.



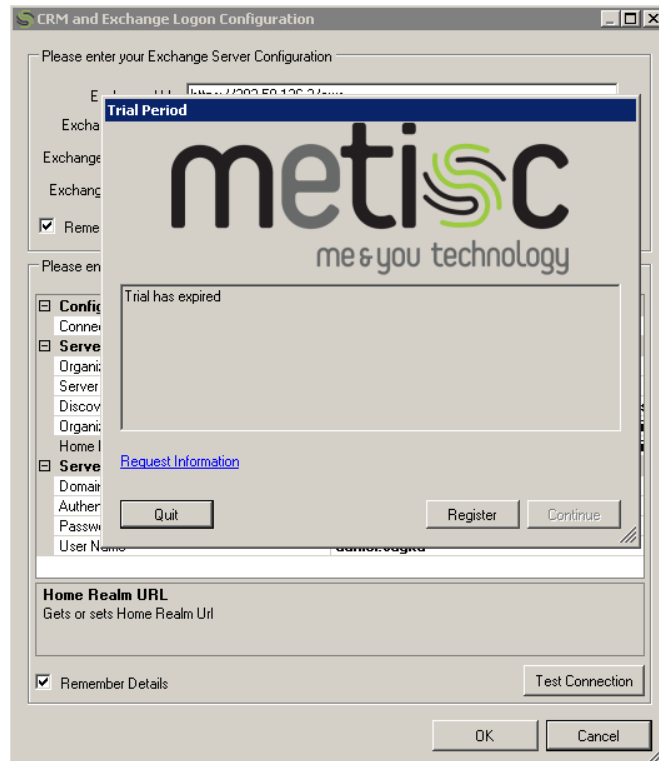
Choose the file and browse to the solution file that is located earlier. Click Next afterwards.



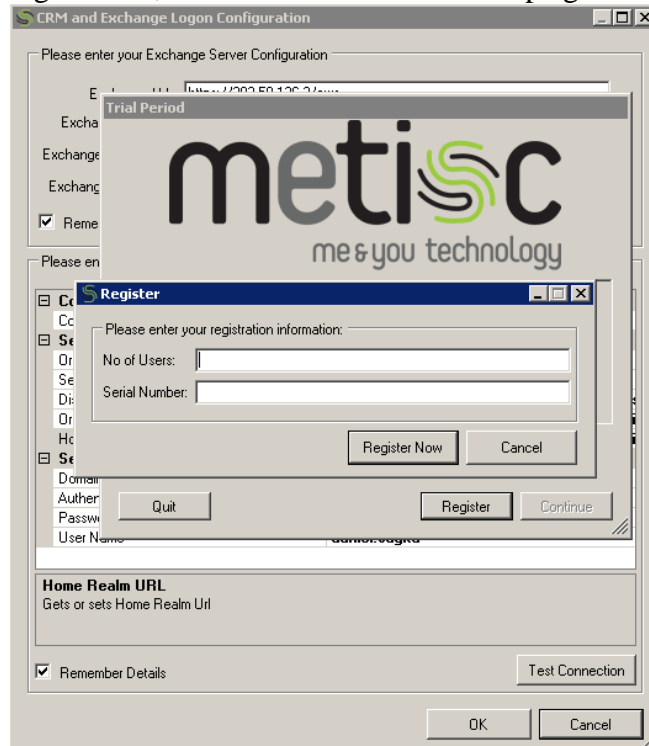
The solution will be uploaded and ready to be imported.
Click Next when you are ready to import and wait for CRM to finish importing.

Trial and Registration

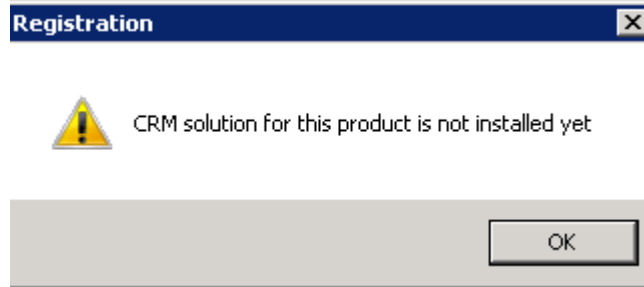
First time user will be prompted by a trial form. We can still use the application within 30 days after first installation.



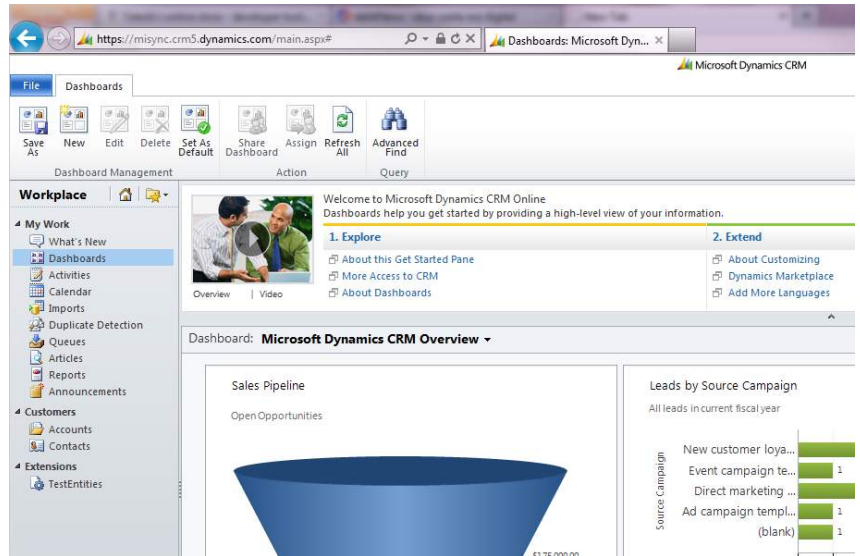
Registration can be done by clicking the “Register” button and will prompt for serial number. After doing a valid registration, these forms will not show up again.



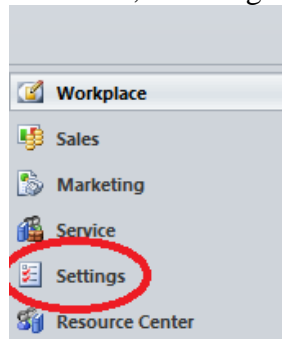
If the target CRM has not been installed with the required solution, the application can still continue by using trial.



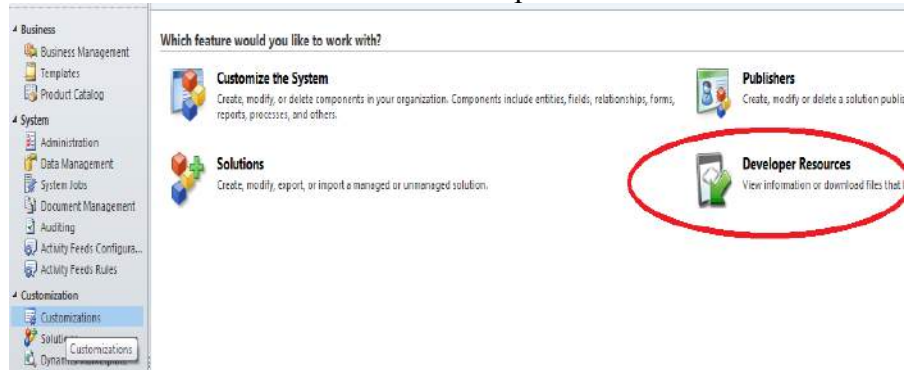
In order to fill up the required URL for Organization, Discovery, and Home Realm, we need to navigate to the CRM Online.



After that, we can go to the Settings



In the settings, there is the “Customization” menu. In the “Customization” menu choose “Developer Resources”




All the related information will be in that “Developer Resources” area

Developer Resources

Your Organization Information:

Organization Unique Name
misync

Windows Azure AppFabric Issuer Certificate
Issuer Name: crm5.dynamics.com

 [Download Certificate](#)

Developer Center

 [Download documentation, tools and sample code](#)

Service Endpoints:

Discovery Service

Protocol: SOAP


<https://disco.crm5.dynamics.com/XRMServices/2011/Discovery.svc>

 [Download WSDL](#)

Organization Service

Protocol: SOAP


<https://misync.api.crm5.dynamics.com/XRMServices/2011/Organization.svc>

 [Download WSDL](#)

Organization Data Service

Protocol: OData (REST)

<https://misync.crm5.dynamics.com/XRMServices/2011/OrganizationData.svc/>

 [Download CSDL](#)

We can then copy paste the link shown in the “**Discovery Service**” for the “**Discovery URL**”, “**Organization Service**” for the “**Organization URL**”, and “**Organization Data Service**” for the “**Home Realm URL**”.

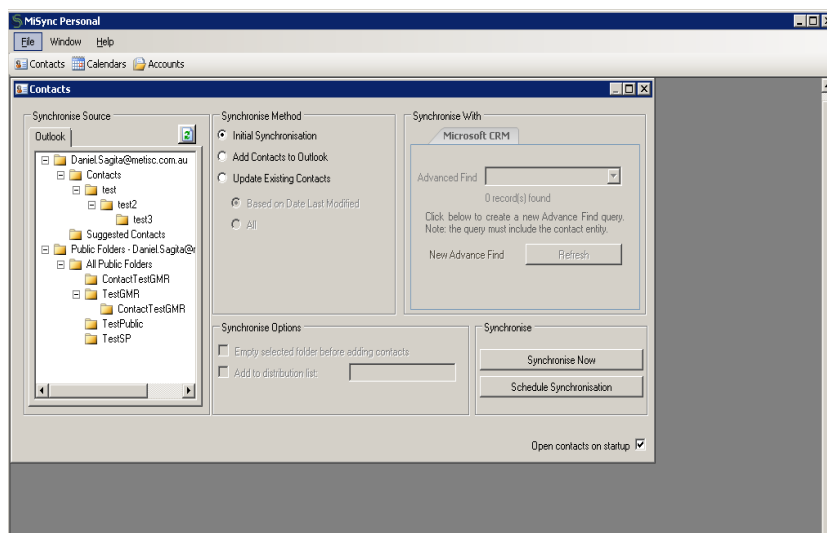
Using *MiSync Personal for CRM*

Starting *MiSync Personal for CRM*

To open *MiSync Personal for CRM*, select:

Start>All Programs>Metisc>MiSync>MiSync For CRM

Alternatively, click on the *MiSync For CRM* icon on your desktop. Once you log in, the following screen will appear:

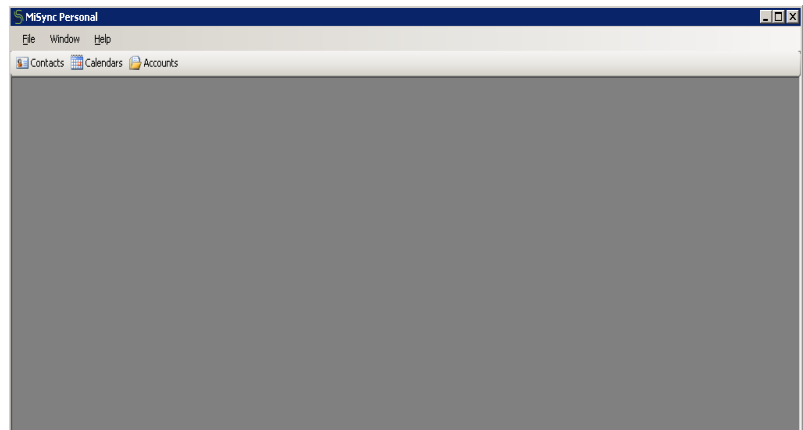


MiSync Personal for CRM will automatically log on to your Outlook or Outlook/Exchange system using either the default profile of the currently logged-on Windows user, or your selected profile if you have multiple profiles.

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

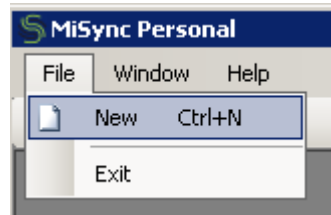
MiSync Personal for CRM Basics

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



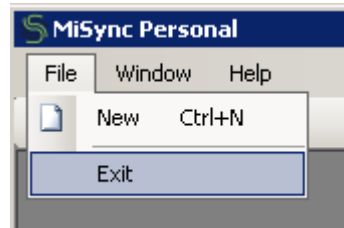
These are the available menus of the main screen:

File>New



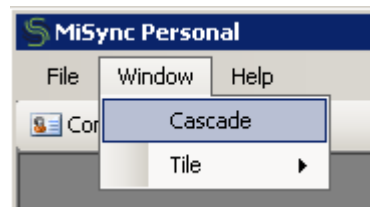
A new 'Contacts' window will open.

File>Exit



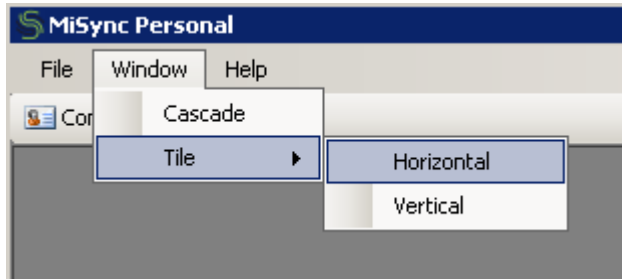
MiSync will be closed.

Window>Cascade



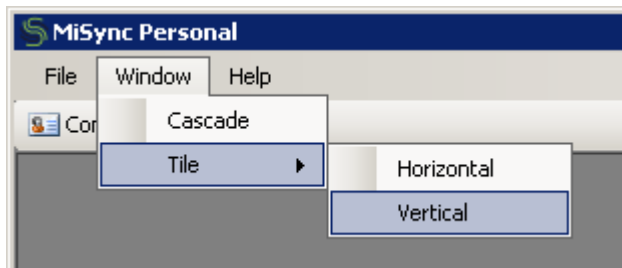
Arranges multiple 'Contacts' windows.

Window>Tile>Horizontal



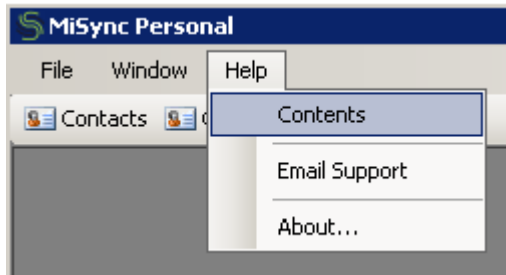
Arranges multiple 'Contacts' windows horizontally.

Window>Tile>Vertical



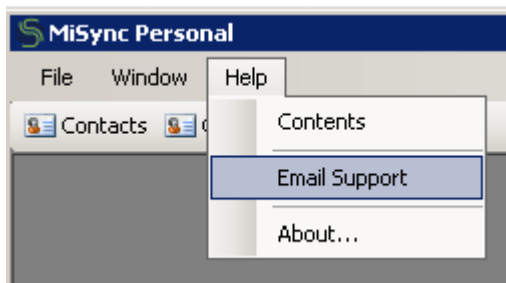
Arranges multiple 'Contacts' windows vertically.

Help>Contents



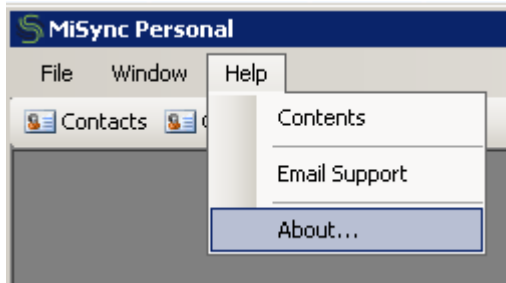
An application help window will open.

Help>Email Support



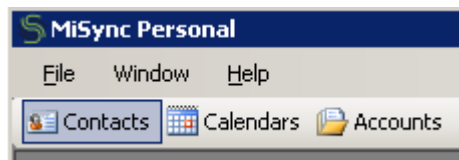
Send an email to Metisc support.

Help>About...



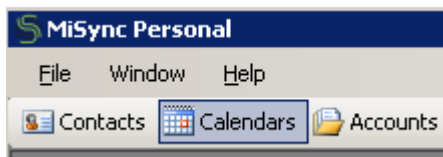
Display information regarding *MiSync* and contact information.

Contacts button



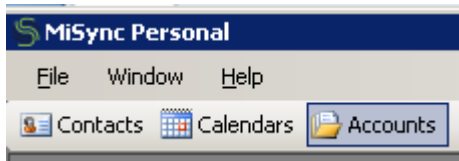
A new 'Contacts' window will open.

Calendars button



A new 'Calendars' window will open.

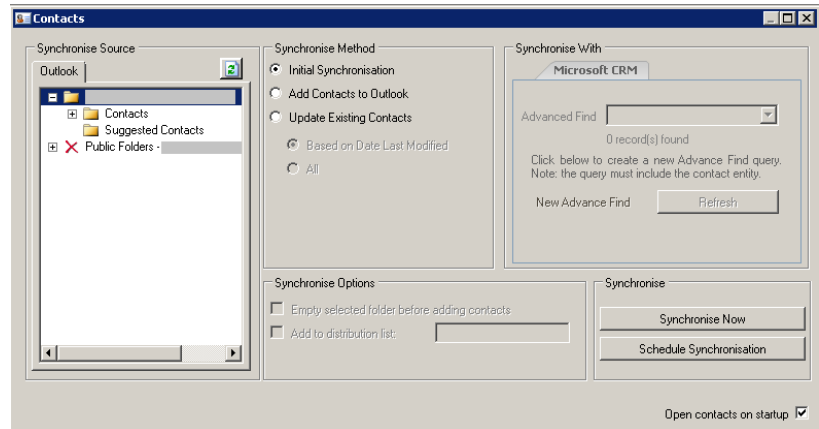
Accounts button




A new 'Accounts' window will open.


Synchronizing Contacts

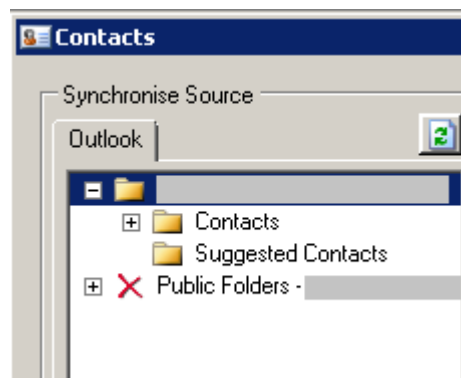
This is the main Contacts screen of *MiSync Personal for CRM*:



The **Contacts** icon  allows you to synchronize Outlook contacts with Microsoft Dynamics 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 contacts and from which you want to copy contacts. Refresh button  will refresh/update the display of all your Outlook files.



Synchronize Method

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

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

Once contacts in Outlook and Microsoft Dynamics 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 Contacts to Outlook – Select this option to add new (not already linked) contacts in Microsoft Dynamics CRM to Outlook using Advanced Find.

Update Existing Contacts – Select this option to apply changes from one system to the other, where the contact 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

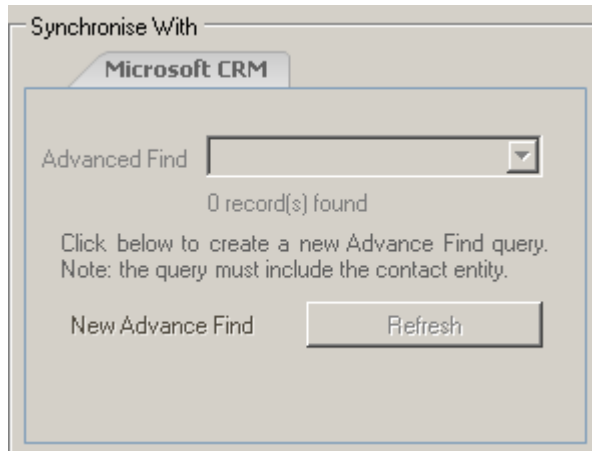
These options are available only if ‘Add Contacts to Outlook’ is selected.

Empty selected folder before adding contacts – Select this option if you want to add Microsoft Dynamics CRM contacts to Outlook. The system will empty the Outlook folder and then add all the selected Microsoft Dynamics CRM contacts. 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 contact records from Microsoft Dynamics CRM that have email address.

Synchronize With

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



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

Synchronize

Synchronize Now Click this button to synchronize the data between Outlook and Microsoft Dynamics 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 'Contacts' window. Un-tick this check box and *MiSync Personal for CRM* will start without the 'Contacts' window.

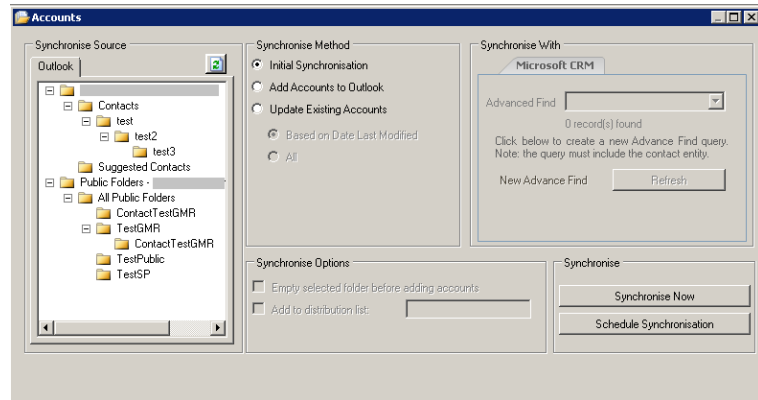
Field Mapping


CRM fields	Outlook fields
Prefix	Title
FirstName	First
MiddleName	Middle
LastName	Last
Suffix	Suffix

Account	Company
Title	Job Title
Account	Full Name
Home Phone	Home Phone
Work Phone	Business Phone
Fax	Business Fax
Mobile	Mobile Phone
Email	Email Address
Gender	Gender
Website	Web Page Address
Date of Birth	Birthday


Synchronizing Accounts

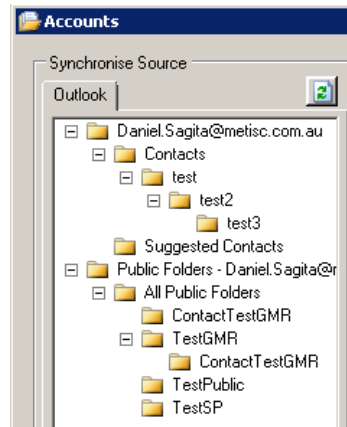
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-

Synchronize Options

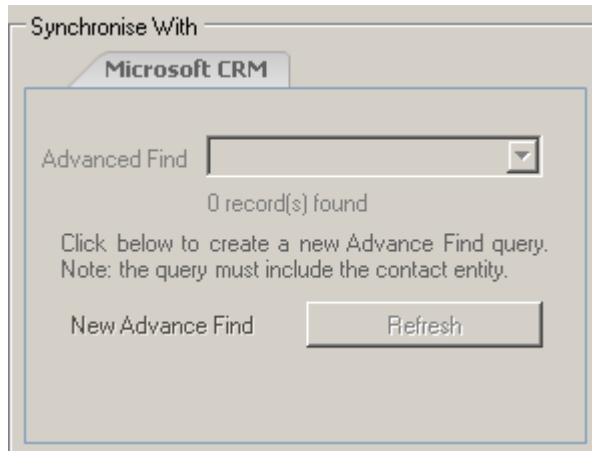
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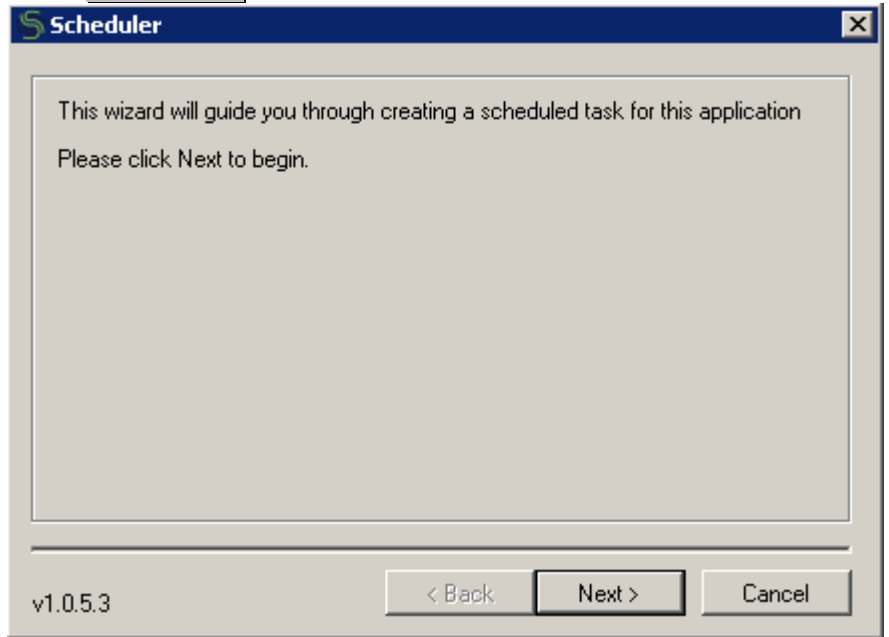
Schedule Synchronization Schedule the current chosen settings to run at defined times. This option allows you run synchronization at set times, for example every Monday and Friday, every 6 hours, or on the first day of each month. This option is only available in the E-mail, Contacts and Accounts window.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

Field Mapping

CRM fields	Outlook fields
Account Name	Last Name, Company, File As
Home Phone	Home Phone
Work Phone	Business Phone
Fax	Business Fax
Mobile	Mobile Phone
Email	Email Address
Website	Web Page Address

Schedule Synchronization

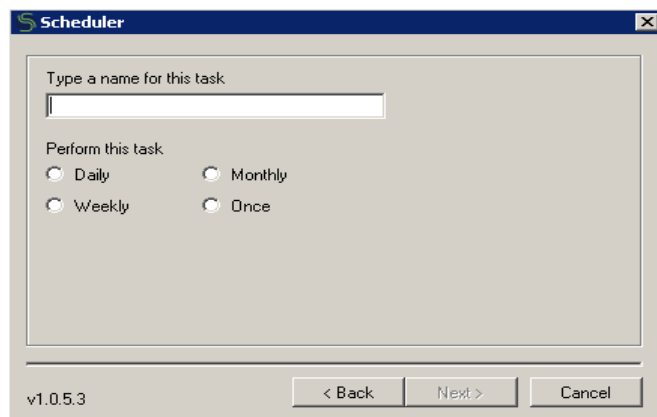
MiSync gives you the ability to schedule Contact and Account synchronizations using the Windows scheduler. First select the type of Synchronization as you would normally and then press the **Schedule Synchronization** button. You will be presented with a 'Scheduler' screen which allows you to choose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



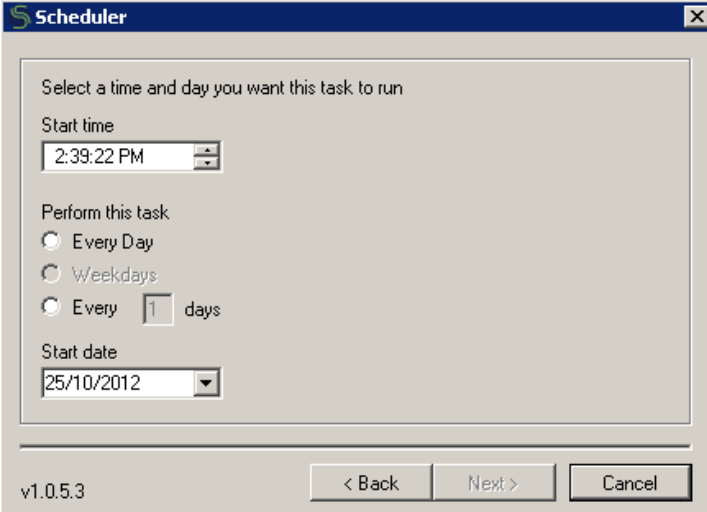
When scheduling tasks you have three different types of recursion:

- 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



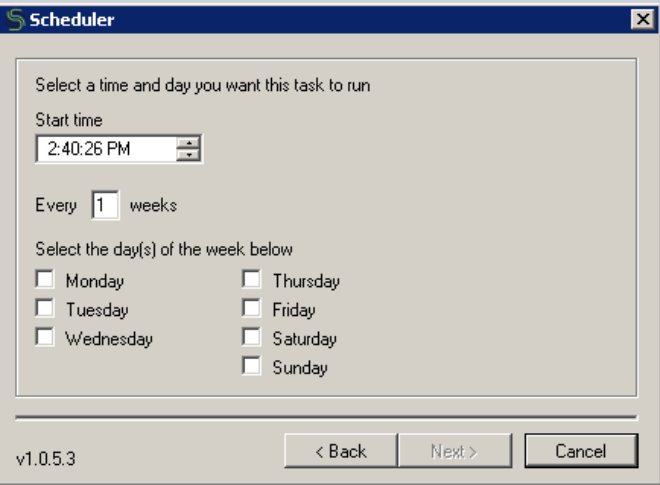
The screenshot shows the 'Scheduler' dialog box with the following settings:

- Start time: 2:39:22 PM
- Perform this task:
 - Every Day
 - Weekdays
 - Every 1 days
- Start date: 25/10/2012

Buttons at the bottom: < Back, Next >, Cancel. Version: v1.0.5.3

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



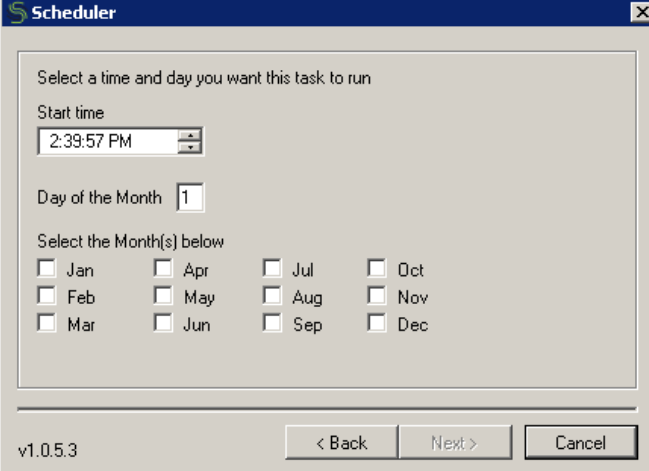
The screenshot shows the 'Scheduler' dialog box with the following settings:

- Start time: 2:40:26 PM
- Every 1 weeks
- Select the day(s) of the week below:
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday

Buttons at the bottom: < Back, Next >, Cancel. Version: v1.0.5.3

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.

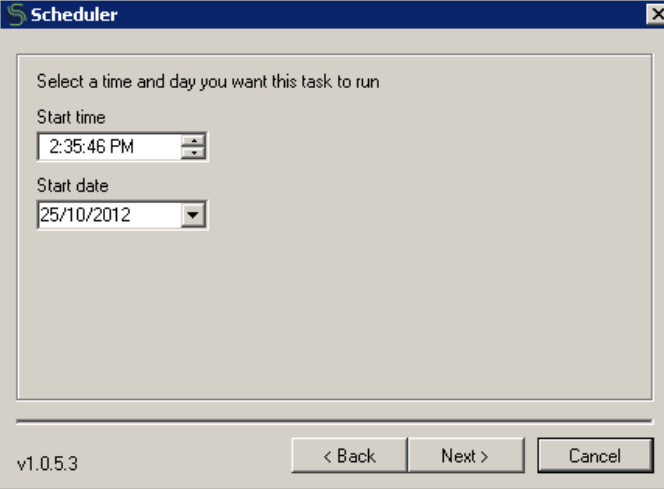
Monthly



The screenshot shows the 'Scheduler' dialog box with the 'Monthly' option selected. The 'Start time' is set to 2:39:57 PM. The 'Day of the Month' is set to 1. The 'Select the Month(s) below' section has checkboxes for Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, and Dec, all of which are currently unchecked. The version number 'v1.0.5.3' is displayed at the bottom left. Navigation buttons '< Back', 'Next >', and 'Cancel' are at the bottom right.

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

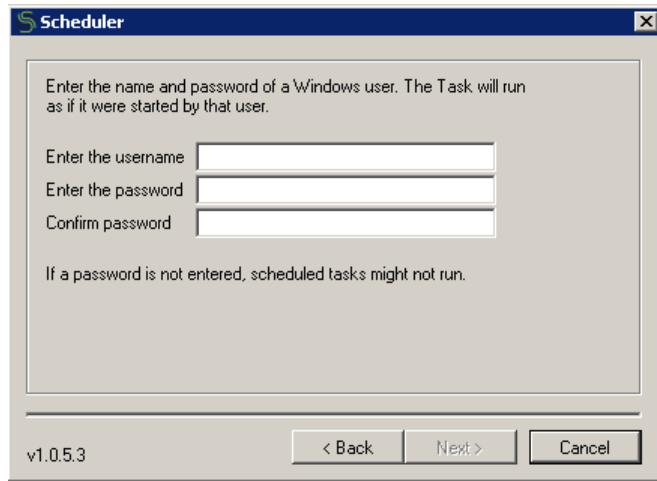


The screenshot shows the 'Scheduler' dialog box with the 'Once' option selected. The 'Start time' is set to 2:35:46 PM. The 'Start date' is set to 25/10/2012. The version number 'v1.0.5.3' is displayed at the bottom left. Navigation buttons '< Back', 'Next >', and 'Cancel' are at the bottom right.

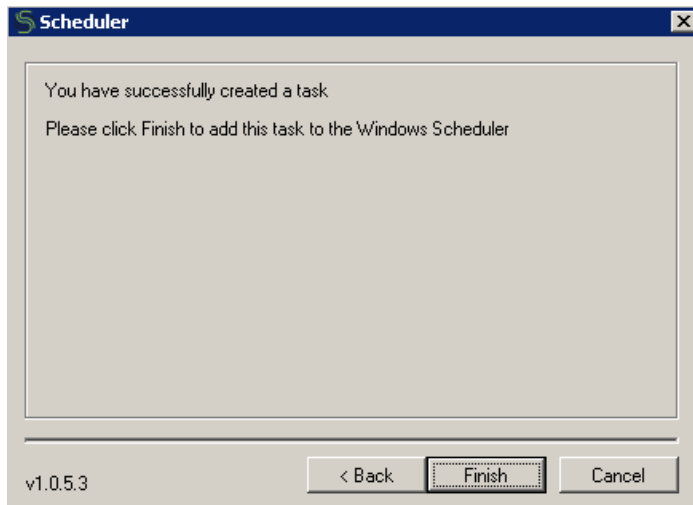
The final option is 'Once'. This allows you to schedule synchronizations just once for a specific time and day. To schedule this type simply enter the time and day on which you wish the schedule to kick off.

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.



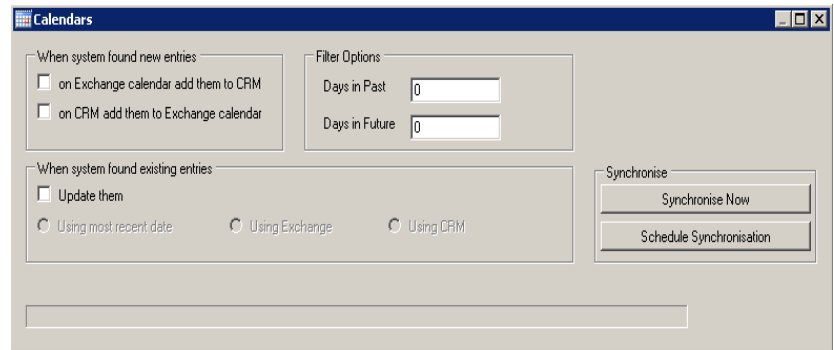
You schedule is now set, click the **Finish** button to close the window.




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

Synchronizing Calendar

This is the main Calendars screen of *MiSync Personal for CRM*:



The **Calendars** icon  allows you to synchronize Outlook appointments and service activities with Microsoft Dynamics CRM. Select one or more options from each of the two selection areas before you synchronize records. The selection areas include **Synchronize Method** and **Filter Options**.

Synchronize Method

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

New on Exchange Calendar add them to Crm – Select this option to move appointments and service activities from Outlook to Microsoft Dynamics CRM

New on Crm add them to Exchange Calendar – Select this option to move appointments and service activities from Microsoft Dynamics CRM to Outlook

Update using most recent date – Select this option to update appointments and service activities using whichever data is the recent one (CRM or Exchange)

Update using Exchange (as base) – Select this option to update appointments and service activities from Outlook to Microsoft Dynamics CRM

Update using CRM (as base) – Select this option to update appointments and service activities from Microsoft Dynamics CRM to Outlook

Filter Options

Use the options in this area to specify the number of days you wish to synchronize into the past or the future.

Days in Past – Enter the number of days you wish to synchronize into the past. For example, enter five days to synchronize all appointments and service activities that have happened in those days

Days in Future – Enter the number of days you wish to synchronize into the future. For example, enter five days to synchronize any available appointments or service activities that will happen in those five days

Synchronize

Synchronize Now Click this button to synchronize the data between Outlook and Microsoft Dynamics 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, Contacts and Accounts window. For more information see the sections **Scheduling Synchronization**.

Field Mapping

CRM fields	Outlook fields
Subject	Subject
Location	Location
Regarding	
Required	Required Attendee
Optional	Optional Attendee
Start Time	Start Time
End Time	End Time
All Day Event	All Day Event
Description	Body

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 *Microsoft Dynamics 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 Microsoft Dynamics 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)

Known Issues

Outlook Connection

- Can only connect to the default profile setup in the machine
- 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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