Architecture Series: Outlook Sync 101

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Developed by Saleslogix User Assistance

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Using Integrations

Integrations allow communication between Saleslogix and external applications and services. Each integration may communicate different information, or have different communication behavior.

After the administrator implements Outlook sync, Saleslogix communicates with Outlook automatically.

This document will address synchronizing contacts and calendar items between Saleslogix and Outlook.

Prerequisites

Saleslogix requires the following:

- Saleslogix versions 8.1 and the most recent updates
- Microsoft Outlook version Office 2007 and later
- Windows Authentication must be configured for the administrative user that will be designated as the SData Sync user. For example, the WebDLL user.
  For detailed steps, see the "Using Windows Authentication" topic in the Administrator Help.

What You Need to Know

This document is written for the administrator and assumes you:

- Have a working knowledge of Microsoft Windows operating systems.
- Understand the client/server computing environment, especially networking strategies for users.
- Have a strong working knowledge of Saleslogix, IIS, and Web deployments.

Additional Resources

- The *Getting Started with Google Integration for Saleslogix* describes to users how to get started with and use Saleslogix.
- The *Compatibility Checklist* outlines the hardware and software currently recommended for a Saleslogix implementation. The *Compatibility Checklist* is available on the Customer and Partner Support Portal web sites.
- The *Saleslogix Implementation Guide* provides step-by-step instructions for installing Saleslogix. The Saleslogix Implementation Guide is available on the Saleslogix DVD.

Limitations

Outlook sync and Exchange Link

Outlook sync and Exchange Link are not compatible. Only one of them should be used to synchronize data between Saleslogix and Outlook.

Outlook sync and Intellisync

Intellisync for SalesLogix is based on Nokia's discontinued Intellisync product, so it is not supported with Saleslogix v8.1 and later.

Schema

The following tables and fields are used for Outlook sync.

Tables

ADHOCGROUP

APPID

ERPEMAILADDRESS

ERPPHONENUMBER

GLOBALCHANGETRACKING

INTEGRATIONS

INTEGRATIONRESOURCE

OAUTHPROVIDER

OAUTHPROVIDERSCOPE

SYNCRESULT

USER_OAUTHTOKEN

Fields

ACTIVITY.APPID

ACTIVITY.CHANGEKEY

ACTIVITY.CREATESOURCE

ACTIVITY.GLOBALSYNCID

ACTIVITY.TICK

CONTACTAPPID

CONTACT.CHANGEKEY

CONTACT.CREATESOURCE

CONTACT.GLOBALSYNCID

CONTACT.TICK

HISTORY.GLOBALSYNCID

Views

CALENDARSYNCVIEW

CONTACTSYNCVIEW

TASKSYNCVIEW

Triggers

ACCOUNT_INTEGRATION_CHANGE

ACCOUNT_INTEGRATION_INSERT

ACCOUNT_TOMBSTONE

ACTIVITY_INTEGRATION_CHANGE

ACTIVITYATTENDEE_INTEGRATION_CHANGE

ADDRESS_INTEGRATION_CHANGE

ADHOCGROUP_INTEGRATION_INSERT

ADHOCGROUP_INTEGRATION_TOMBSTONE

CONTACT_INTEGRATION_CHANGE

CONTACT_INTEGRATION_INSERT

CONTACT_TOMBSTONE

USERACTIVITY_INTEGRATION_CHANGE

USERACTIVITY_TOMBSTONE

Understanding Calendar Synchronization with Outlook

Calendar integration allows you to synchronize your calendar between Saleslogix and Outlook. Your administrator must configure and grant permission before you can synchronize calendars with Outlook.

During a synchronization cycle, Saleslogix compares fields in both applications, and makes changes to ensure both applications contain the same information. Only data in mapped fields between the applications is transferred. The data is compared and changes are made to ensure the information matches. For example, if a record has been added to one application and not to the other, that record is added to the incomplete application.

Calendar Sync Behavior

- If the same record is updated in both applications during the same sync cycle, the latest change wins.
- Deleting an activity in either application deletes the activity in both applications.
- Activity leaders, members and resources:
    - Member and resource information is not synchronized.
    - If the user is a member or a leader of an activity, when the activity is synchronized the user will get their own activity record.
- Unconfirmed and confirmed activities will sync.
- Declined activities:
    - Activities that are declined before a synchronization cycle are not synchronized.
    - Activities that are declined after a synchronization cycle are removed from the user's calendar in both applications.
- Activity types in Saleslogix may synchronize to different activity types in Outlook. See the Understanding Calendar Data Exchange table for details.
- Activity attachments are not synchronized between Saleslogix and Outlook.
- There are Outlook sync options in Outlook that prevent appointments and tasks that are scheduled prior to a selected date from synchronizing. However, activities that are edited (including snoozing or dismissing an alarm) after the selected date and any past occurrences of a current recurring activity will synchronize.

The following table lists how Saleslogix calendar data is synchronized with Outlook:

Saleslogix	Sync As	Outlook
Meetings	sync as	Appointments
Phone Calls	sync as	Appointments
Personal Activities	sync as	Appointments, flagged as Private
To-Dos	sync as	Tasks
Events	sync as	do not synchronize
Timeless Phone Call, Meeting or Personal Activity	sync as	All day event*

*Event does not refer to Saleslogix Events, which are not synchronized with Outlook.

Outlook Sync Mapping - Calendar Activities and Tasks

Use the following tables to determine how the fields in the ACTIVITIES table are mapped between Saleslogix and Outlook sync using the third-party integration contract.

Calendar Activities (Phone Calls, Meetings, Personal Activities)

Saleslogix Mapping	Contract	Outlook Mapping	Notes
Activity.Description	summary	Subject	
Activity.LongNotes	description	Description/Notes	
Activity.StartDate	start	Start time	
Activity.Location	location	Location	
Activity.StartDate+Activity.Duration	end	End time	
Activity.Timeless	timeless	All day event	EventDateTime.DateTime is null AND EventDateTime is not null.
User_Activity.Reminder	reminder	Reminder	
User_Activity.AlarmTime	reminderDateTime		
Activity.StartDate - User_Activity.AlarmTime	reminderMinutes		
Activity.Recurring/RecurIterations/ RecurPeriod/RecurPeriodSpec/RecurSkip	recurrence	Recurrence	
Activity.ActivityBasedOnGlobalSyncId	recurringParent		Used to correlate an exception to the master appointment.
	exDate	Recurrence	
Activity.OriginalDate	originalStart		
Activity.UserId	creator		
Activity.CreateSource	createSource		
Activity.UserActivities	members		Activity member information is not synchronized.
Activity.Type	type	Mapped	Sets the Private flag.
Activity.ChangeKey	ChangeKey		The ChangeKey is used during synchronization, but is not copied to the activity.

Tasks-ToDos (Interactions)

Saleslogix Mapping	Contract	Outlook Mapping	Default Value	Notes
Activity. Description	name	Subject		
Activity.LongNotes	description	Description/Notes		
Activity.StartDate	date	Start date		The date and time are combined for StartDate.
Activity.StartDate	time	Start date		
	endDate			• If endDate has a value, or Completed equals True, then the activity must be completed. • Search for UUID in the History table .
	endTime			endTime is combined with endDate above.
Activity.UserId	user			
Activity.CreateSource	createSource		"OutlookSync"	This value designates where the tasks originated.
	Completed			See endDate notes above.
Activity.Type	ToDo			
User_Activity.Alarm	reminder	Reminder		
User_ Activity.AlarmTime	reminder Minutes	Reminder		
	reminderDateTime	Reminder		
Activity.Timeless	timeless			
	exDate			
	RecurringParent			
	SupportsTime			
Activity.ChangeKey	changeKey			The ChangeKey is used during synchronization, but is not copied to the activity.
	Recurrence	Recurrence		Recurring To-Dos are not synchronized

Calendar History

Saleslogix Mapping	Contract	Outlook Mapping	Notes
History.Description	summary	Subject	
History.LongNotes	description	Description/Notes	
History.CompletedDate	start	Start time	
History.Location	location	Location	
history.CompletedDate + History.Duration	end	Duration	
History.Timeless	timeless	All day	
History.OriginalDate	originalStart	n/a	
	Completed		"Completed" is added to the subject of a completed activity.

Understanding Contact Synchronization with Outlook

Synchronizing contacts between Saleslogix and a Outlook enables you to change a contact record in either application and have the change reflected in both applications. Your administrator must configure and grant permission before you can synchronize contacts with Outlook.

During a synchronization cycle, Saleslogix compares fields in both applications, and makes changes to ensure both applications contain the same information. Only data in mapped fields between the applications is transferred. The data is compared and changes are made to ensure the information matches. For example, if a record has been added to one application and not to the other, that record is added to the incomplete application.

Contact Sync Behavior

- Contacts are linked based on the e-mail address. See "Matching Records Between Saleslogix and Outlook" on page 8 for details.
- If the same record is updated in both applications during the same sync cycle, the latest change wins.
- Deleting a contact in Saleslogix will move the contact from the contact sync folder to a deleted items folder.
- Deleting a contact in Outlook will remove the contact from the contact sync group, but will not delete the contact from Saleslogix.

Matching Records Between Saleslogix and Outlook

To avoid duplicate records and find matching records in either application, Saleslogix searches for matching records based on the following key fields:

Address Book/Contacts	Accounts	Appointment/Activity	To-Do's
e-mail address (EMAIL1, EMAIL2, EMAIL3)	Account/Company	Date/Start Date	Date/Start Date
		Description/Subject	Description/Subject
		Duration	Duration

Key fields are case-sensitive. For example, if you have a record for Lee Hogan in Saleslogix and one for lee hogan in Outlook, the records are not equal. Both records are added to each application during synchronization.

Contact Matching

Contacts are matched using an e-mail address. If a match cannot be found, then a new record is created. To avoid creating duplicate records Saleslogix recommends making sure contact records to be synchronized have a unique e-mail address in both applications.

If an exact e-mail address match cannot be found, the following happens:

- In Saleslogix if the e-mail address cannot be found, then a new contact is created.
- In Saleslogix if multiple records in Saleslogix have the same e-mail address, then:
  a. Saleslogix tries to match using the contact's last name and first name.
  b. If a match still cannot be found, then a new contact is created in Saleslogix.
- In Outlook if multiple records have the same e-mail address, then the contact is linked to the first contact found with a matching e-mail address.

Understanding Data Truncation

In some fields, Outlook allows more characters than Saleslogix allows. When information is synchronized to Saleslogix, the additional characters will be truncated to meet the Saleslogix character limit. If the field is not edited in Saleslogix, then the field will retain the truncated characters in Outlook, so no data is lost. If the field is edited in Saleslogix, then the edited field information will synchronize back to Outlook as expected.

If you are concerned about data truncation, you can change the Saleslogix string field lengths to accommodate more data. See the Saleslogix Database Manager help topic "Field Properties" for details.

Commonly Truncated Fields

Data truncation can occur in any string or Unicode field, but some fields are more likely to exceed the limit than others. For example, the ContactName field.

Changing the ContactName Field Length

The ContactName field is calculated by adding the Contact LastName and the Contact FirstName, separated by a comma and a space. The Contact FirstName has a limit of 32 characters. The Contact LastName also has a limit of 32 characters.

32 (FirstName) + 32 (LastName) + 2 (comma and space) = 66 characters.

The ContactName field is used in the ACTIVITY, HISTORY, and LITREQUEST tables and may also be used in custom tables.

If either or both of the Contact FirstName and Contact LastName field lengths are increased, the ContactName field in other tables will need to be increased to accommodate the change.

> If the ContactName field is not increased to accommodate the larger FirstName and LastName lengths an error will occur when the contact is updated.

Outlook Sync Mapping - Contacts and Related Tables

Use the following tables to determine how the fields in the CONTACT and related tables are mapped between Saleslogix and Outlook sync using the third-party integration contract.

Contact

Saleslogix Mapping	Contract	Outlook Mapping	Default Value	Notes
Contact.Status	status			
Contact.Type	type			
Contact.FirstName	firstName	First Name		
Contact.LastName	familyName	Last Name		
Contact.Prefix	title	Title		
Contact.MiddleName	middleName	Middle Name		
Contact.Suffix	suffix	Suffix		
Contact.WebAddress	webSite	Web page address		
Contact.Title	jobTitle	Job title		
Contact.IsPrimary	primacyIndicator			
Contact.Fullname (->)	fullName	Full Name		Calculated from Title, First Name, Middle Name, Last Name and Suffix.
Account.Account	company	Company		This is stored in the Saleslogix Account table which is related to the Contact table.
Contact.ErpEmailAddresses	emails	Uses ColumnMap		See the E-mail table
Contact.ErpPhoneNumbers	phones	Uses ColumnMap		See the Phone Numbers table
Contact.Address	postalAddresses	Uses ColumnMap		See the Postal Address table
Contact.CreateSource (<-)	CreateSource		"OutlookSync"	This value designates where the contact originated.
Contact.Owner				

E-mail

Saleslogix Mapping	Contract	Outlook Mapping	Notes
ErpEmailAddress.Type	type	Uses ColumnMap	
ErpEmailAddress.Address	address		
ErpEmailAddress.PrimacyIndicator	primacyIndicator		
ErpEmailAddress.CreateSource	CreateSource		
ErpEmailAddress.ColumnMap	columnMap		
Contact.ErpEmailAddresses	EMAILS	Uses ColumnMap	ColumnMap is used to decide how e-mail addresses are mapped.
	EMAIL	email1	
	SECONDARYEMAIL	email2	
	EMAIL3	email3	

Phone Numbers

Saleslogix Mapping	Contract	Outlook Mapping	Default Value	Notes
ErpPhoneNumber.Type	type	Uses columnMap		
ErpPhoneNumber.Text	text	Phone		
ErpEmailAddress.Uri	uRi			
ErpPhoneNumber.CreateSource	createSource		"OutlookSync"	This value designates where the phone number originated.
ErpPhoneNumber.ColumnMap		columnMap		
Contact.ErpPhoneNumbers	phones			ColumnMap is used to decide how phone numbers are mapped.
Contact.WorkPhone		BusinessPhone		
Contact.Fax		BusinessFax		
Contact.Mobile		BusinessMobile		
Contact.HomePhone		Home		
Contact.Pager		Pager		
TollFree		Other		

Postal Address

Saleslogix Mapping	Contract	Outlook Mapping	Default Value	Notes
Address.Description	name			Address default is Mailing
Address.Address1	address1	Address		
Address.Address2	address2	Address		
Address.Address3	address3	Combined with address2		
Address.Address4	address4	Combined with address2		
Address.FullAddress	FullAddress			
Address.City	townCity	City		
Address.County	county			
Address.State	stateRegion	State/Province		
Address.PostalCode	zipPostalCode	Zip/Postal code		
Address.Country	country	Country/Region		
Address.CodeMapping	country (ISO Code)			
Address.CreateSource	createSource		"OutlookSync"	This value designates where the address originated.
Address.AddressType	type			
Contact.Address		postalAddresses	Contact.PostalAddresses	
Office		Business		
WorkSite				
Billing				
Correspondence				
Billing & Shipping				
Shipping				
Home		Home		
Other		Other		

Troubleshooting

Enable Logging for Outlook Sync

If a user is experiencing synchronization problems, logging can be enabled from within Microsoft Outlook to help troubleshoot problems.

To set options

1. Click the Saleslogix **Options** button, and, if necessary, click **Logging**.

2. Select **Enable logging**.

3. View logging information in the **Latest errors** box.

4. Click **OK** if you are finished setting all of your options, or select another options tab.