Exchange Online Synchronizer for SuperOffice CRM

Preparation

Two way synchronization between
SuperOffice CRM and Microsoft Exchange

Contents

Welcome to the Exchange Online Synchronizer for SuperOffice CRM

Overview

The Exchange Online Synchronizer enables two way synchronization of SuperOffice with the Microsoft Exchange environment.
The Exchange Online Synchronizer will synchronize appointments, contacts, tasks and SuperOffice selections.

For more information about the difference between the Synchronizer products please follow this link http://kb.infobridge.com/Attachment58.aspx?AttachmentType=1

VERY IMPORTANT
*You can only install this version of the Exchange Online Synchronizer as a **NEW** installation. When you were previously using the Exchange Synchronizer V2 version you will have to convert the synchronization data. More information on this conversion can be found in this Knowledge base article: http://kb.infobridge.com/KnowledgebaseArticle10403.aspx*

IMPORTANT
*For the Exchange Online Synchronizer **EWS(Exchange Web Services)** and the **Offline Address Book (OAB)** need to be enabled and accessible for the SyncUser.*

Before you Begin

Before you start with the preperation please read the following knowledge base article about the system requirements for the Exchange Online Synchronizer for SuperOffice.
http://kb.infobridge.com/KnowledgebaseArticle10329.aspx

There is a lot of extra documentation available for the Exchange Online Synchronizer in our knowledgebase. Please have a look at these articles (see below) before you are going to install the Exchange Online Synchronizer.

Prepare Office 365
"Setting access rights for Office 365" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10370.aspx

"Impersonate accounts in Exchange Online for Office 365…" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10306.aspx

Prepare Hosted Exchange
"Configuring Hosted Exchange for Exchange Synchronizer" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10315.aspx

"Setting Impersonation on Hosted Exchange 2007" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10366.aspx

"Setting the delegate access rights for hosted Exchange 2007-2010" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10368.aspx

Prepare On-Premise Exchange 2007
"Exchange 2007 On Premise setting Impersonation access" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10363.aspx

"Exchange 2007 and Exchange 2010 On Premise setting Delegation…" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10364.aspx

Prepare On-Premise Exchange 2010
"Setup Domain users:
http://kb.infobridge.com/KnowledgebaseArticle10314.aspx

"Exchange 2010 On Premise setting Impersonation access" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10365.aspx

"Exchange 2007 and Exchange 2010 On Premise setting Delegation…" see this article:
http://kb.infobridge.com/KnowledgebaseArticle10364.aspx

Prepare Exchange 2013
"Setting Impersonation in Exchange 2013":
http://kb.infobridge.com/KnowledgebaseArticle10486.aspx

"Setting Delegation in Exchange 2013":
http://kb.infobridge.com/KnowledgebaseArticle10487.aspx

Registration
Registration is done over the internet. Therefore a working internet connection is required. Please read the following knowledge base article about the registration process.
http://kb.infobridge.com/KnowledgebaseArticle10294.aspx

Time zone settings
Please read the following knowledge base article about the system date and time zone settings that are very crucial for the Exchange Online Synchronizer.
http://kb.infobridge.com/KnowledgebaseArticle10294.aspx

Remote Travel and Satellite

The setup application creates several tables in the SuperOffice CRM central database. The new tables are replicated to Travel or Satellite databases. This means that after the installation the first time when the down files are generated, the down files will hold information about the newly created tables.

Exchange Online Synchronizer for SuperOffice CRM

When installing InfoBridge Exhange Online Synchronizer there are several preparations that have to be done:

1. Create an exchange mailbox (to be used in the Exchange Synchronizer)
2. Create a domain user with admin rights that is allowed to log on to the server where the Exchange Synchronizer is to be installed. The user must also be able to run services on the server.
3. Set the mailbox permissions so that the user has full mailbox access to all mailboxes that is to be synchronized with SuperOffice (see delegation section)
4. **Disable EWS throttling (see EWS throttling section)**
   With this throttling feature, Exchange tracks the resources that each user consumes and enforces connection bandwidth limits. This feature however can impact the performance of the synchronizer as it increases the load on the Microsoft Exchange Server. The default throttling policy assigned to the exchange users can be too restrictive for the synchronizer user, causing numerous errors and problems that drastically decrease performance and possibly prevent access to some content.

   To prevent throttling issues you can disable it. Please see these articles for a detailed description:
   Exchange 2010: http://kb.infobridge.com/KnowledgebaseArticle10385.aspx
   Exchange 2013: http://kb.infobridge.com/KnowledgebaseArticle10434.aspx

   In Microsoft 365 we have no way of disabling the throttling policy. Good practise in these cases is to split the users in different ranks. See this knowledge base article for a desription on how to do this:
   http://kb.infobridge.com/KnowledgebaseArticle10457.aspx
5. Find URL for the Exchange Web Services (EWS) and the Offline Address Book (OAB)

There are several methods to set the correct Exchange rights needed to synchronize the Exchange calendar with the SuperOffice calendar, but our best practice is to use the "Impersonation" method.

Mailbox permissions

There are several methods to set the correct Exchange rights needed to synchronize the Exchange calendar with the SuperOffice calendar, but our best practice is to use the "Impersonation" method.

First Exchange requires that you apply two rights to be able to get Exchange Impersonation working:
1. Open Exchange Management Shell on the Exchange Server and type the following command:
2. **ms-Exch-EPI-Impersonation** – This right is applied to the Client Access Server and grants the Service Account permission to function as an Exchange Impersonation account on that CAS
3. **ms-Exch-EPI-May-Impersonate** – This right is applied on either a user-by-user basis for each of the users that require impersonation to be enabled, or it can be applied on a mailbox database

Setting Impersonation on Hosted Exchange

To make sure we have the right setting for the Client Access Server, type the following command (replacing CAS-Server-Name with your own CAS server name and Service-Account with the name of your own Service Account):

(Note that those cmdlets are typed on a single line. The examples above have been word wrapped)

- **Add-ADPermission -Identity (Get-ExchangeServer -Identity CAS-Server-Name).DistinguishedName -User (Get-User -Identity "Service-Account").Identity -extendedRight ms-Exch-EPI-Impersonation**
- **Add-ADPermission -Identity (Get-ExchangeServer -Identity MailServerCAS1).DistinguishedName -User (Get-User -Identity " Service-Account ").Identity -extendedRight ms-Exch-EPI-Impersonation**

It is possible is to set the permissions on all users in a mailbox database for which we want to enable Exchange Impersonation. Again, from the command line, use the Add-ADPermission cmdlet:

- **Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.DistinguishedName -User Service-Account -ExtendedRights ms-Exch-EPI-May-Impersonate}**

Delegation

When security policies dictate that full access permissions can only be granted to specific mailboxes, use the Add-MailboxPermission. This is an Exchange permission that is restricted to mailboxes only. This permission is not inheritable, so it cannot be assigned to Storage Servers, Storage Groups, or Storage Databases.
A Windows Powershell script can be used in EMS to apply this permission when a mailbox is created, or to bulk assign the permission to multiple mailboxes.

In the Exchange Management Shell run the following command to grant full access permissions for a single mailbox:

- **Add-MailboxPermission -Identity "targetmailbox" -User "Trusted User" -AccessRights FullAccess**
- **Add-MailboxPermission -Identity "jdoe" -User "DOMAIN\syncuser" -AccessRights FullAccess**

To confirm that what permissions are assigned to a mailbox:

- **Get-MailboxPermission -Identity "targetmailbox" | Format-List**
- **Get-MailboxPermission -Identity "jdoe" | Format-List**

EWS Throttling

EWS throttling can also result in synchronization errors, so we are better off creating a policy that disables throttling. Run the following PowerShell command to create this policy:

- **New-ThrottlingPolicy IBSyncPolicy**
- **Set-ThrottlingPolicy IBSyncPolicy -EWSMaxConcurrency $null -EWSPercentTimeInAD $null -EWSPercentTimeInCAS $null -EWSPercentTimeInMailboxRPC $null -EWSMaxSubscriptions $null -EWSFastSearchTimeoutInSeconds $null -EWSFindCountLimit $null -CPUStartPercent $null**
- **Set-Mailbox "superoffice" -ThrottlingPolicy IBSyncPolicy**

EWS and OAB

In the Exchange Online Synchronizer we use the EWS and the OAB to access the exchange server. (This information should be provided by the Customer's technical resources)
If this information isn't provided, you can find this on the IIS on the Exchange Server.
The URL's might look something like this:
https://outlook.customer.com/EWS/exchange.asmx
https://outlook.customer.com/oab/0c1a313f-272f-473b-addf-5221c64e60ff

Installation & Configuration

Please use the Installation- and User manual.

www.crmplaza.com/Apps/Exchange Online Synchronizer

home page   :   www.infobridge.com
knowledge base   :   http://kb.infobridge.com
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