Best Practice
Exchange Online
Synchronizer

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Welcome to the Best Practice for the Exchange Online Synchronizer

Introduction

In this document we will give you best practices on the most common issues we face here on support.

Although we do our best to describe the most common issues we also would like to hear from you about issues you face and which steps you follow to solve it. Please send us your best practice to support@infobridge.com

Best Practices for the Exchange Online Synchronizer

Migrating from Exchange 2003 to Exchange 2013

This chapter is for users who are still on Exchange 2003 and use the Exchange Synchronizer V2 version.
We advise to switch to the Exchange Online Synchronizer once the migration has taken place.

The correct steps are:

1	Migrate from Exchange 2003 to Exchange 2013
2	Install Outlook on the server (absolutely necessary). When you do not have a valid mapi profile please see this kb article on how to make the mapi profile: http://kb.infobridge.com/KnowledgebaseArticle10429.aspx
3	Confirm that the Exchange Synchronizer is working
4	Install the Exchange Online Synchronizer. Do not start it yet!
5	Run the Conversion Tool
6	Configure the Exchange Online Synchronizer in the Synchronizer Admin module
7	Uninstall the Exchange Synchronizer V2
8	Start the Exchange Online Synchronizer Service

Converting from Exchange Synchronizer V2 to the Exchange Online Synchronizer

When you are using Exchange 2007 (*SP1 or higher*), Exchange 2010 (*SP1 or higher*) or Exchange 2013 we advise you to upgrade to the Exchange Online Synchronizer.

These are the steps involved in such an upgrade:

1	Make sure the preparations from the preparation manual are done. The Preparation manual can be downloaded from crmplaza.com
2	Install the Exchange Online Synchronizer
3	Run the Conversion Tool
4	Configure the Exchange Online Synchronizer Admin
5	Uninstall the Exchange Synchronizer V2

Synchronize External Category to SuperOffice Follow-up

In the Synchronizer admin you can specify the desired Outlook category name which should be used for SuperOffice appointments. Check "use SuperOffice Value" if the SuperOffice appointment type must be used as the category description.

But did you know you can also synchronize your Outlook category name into SuperOffice. To use this option please follow the following steps:

1	In the Synchronizer admin – SuperOffice CRM Settings you need to check the option: *"Use External Category as Follow-up/Task type…"*
2	Restart the Synchronizer
3	Create a new Outlook appointment and choose a category (**NOTE**: This category needs to be available in SO also)
4	After the appointment has been synchronized into SuperOffice you can see that the SuperOffice appointment now has the same category as in Outlook

Synchronize contacts from Outlook to SuperOffice appointments

It is possible to synchronize contacts from Outlook to SuperOffice appointments. It is only possible for already synchronized contacts who originate in SuperOffice to be linked to synchronized appointments in SuperOffice.

You need to enable a setting in the Outlook options. As this is a different setting for each Outlook version here is an overview:

Outlook 2007	Tools-> Options…-> button Contact Options…-> select: Show Contact Linking on all Forms
Outlook 2010	File-> Options-> section Contacts-> select: Show contacts linked to the current item
Outlook 2013	In Outlook 2013 the interface option has been removed and support for Contact Linking can only be enabled via a Registry key. **Key:** HKEY_CURRENT_USER\Software\Microsoft\Office\15.0\Outlook\Preferences **Value name:** ShowContactFieldObsolete **Value type:** REG_DWORD **Value:** 1

The next step is to make a new appointment in Outlook. Down at the bottom of the appointment screen you can select a contact who also resides in SuperOffice.
Save and watch the appointment synchronize into your SuperOffice calendar, linked to the company of the contact and including the contact.

Synchronize with multiple Exchange Servers

Back in the days of the Exchange Synchronizer V2 it was possible to run the Synchronizer against multiple Exchange Servers. But it also required multiple installations on multiple servers. This was due to the fact that you could only choose 1 mapi profile per server.

Now with the Exchange Online Synchronizer you can setup multiple Exchange server connections from just 1 Exchange Online Synchronizer installation.

Within the Technical Settings you can configure different Exchange Server connections. To get that option you have to start the Exchange Online synchronizer admin with the parameters **/RANKED** and **/S<n>** (Where <n> stands for the server number, e.g.: /S1)

For a detailed description please see the attached manual to this knowledge base article: http://kb.infobridge.com/KnowledgebaseArticle10429.aspx

Throttling

InfoBridge released a new version of the Exchange Online Synchronizer (3.2.141) around the end of May 2014. This version resolves the infamous 'Exchange Server Down?' message which is usually caused by Exchange throttling. This DevNet article provides some background information, explanation of new settings and recommendations: http://devnet.superoffice.com/Technical/Blog/exchange-online-synchronizer-throttling/

Synchronize follow-up types in different languages

In SuperOffice you can use follow-up types with a different translation for different countries. For instance the follow-up type Visit: **GE:"Besuch";US:"Visit"**

The German users will see Besuch in their calendar, the English users will see Visit.

The synchronizer does not detect which language SuperOffice uses. It will use US by default. But by using special parameters you are able to use a different language.

Start by creating new shortcuts to your Synchronizer admin. Create a shortcut for each language you want to use.
The Exchange Online Synchronizer Admin needs to be started with extra parameters in the start command of the shortcut. The parameters to use are **/RANKED** and **/S<n>** (Where <n> stands for the service number, e.g.: /S1)

"C:\Program Files (x86)\InfoBridge\Exchange Online Synchronizer\InfoBridge Synchronizer Administrator.exe" /RANKED /S1

The moment you start the Exchange Online Synchronizer admin a new folder is created in your local user folder. This folder will hold the logfile and the service options. A separate folder for each rank is created.
C:\Users\syncuser\AppData\Roaming\InfoBridge SuperOffice Exchange Synchronizer EWS-0001

After all the folders have been created in the local Roaming folder you need to start one of the Synchronizer Admins. Open the User Synchronization Settings.
In the 'Linked-User' part you need to add a rank number to your users, for each language a rank.
In the Service Options panel you have to set the correct Server rank id. This is the same number you use in the /S parameter

Services
During the installation of the Exchange Online Synchronizer one service is installed.
Copy the file 'Install Extra Service.cmd' from the Prerequisites folder to the Exchange Online
Synchronizer folder and run the command file to create another service.
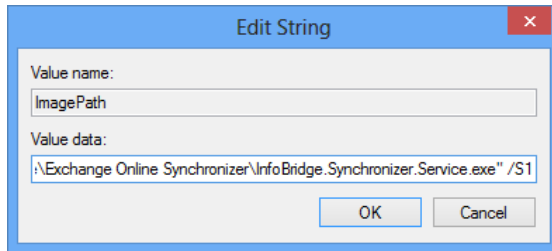Note: When you need to create a 3rd service a restart of the server is needed.

After the extra service is created, new parameters need to be added to the services in the
registry.
In the registry go to: *HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services*
Select the InfoBridge Synchronizer Service and open the ImagePath.
In the Value Data field add the parameter /S<n>

Once the parameters have been added to all the services you are ready to start the Exchange
Online Synchronizer.

What is synchronized and to where

From SuperOffice	To Outlook/Exchange	From Outlook/Exchange	To SuperOffice
Appointment	Fully synchronized both ways.	Appointment	Fully synchronized both ways.
Tasks	Fully synchronized both ways.	Tasks	Fully synchronized both ways.
Contacts	One way synchronization only. From SuperOffice to Outlook/Exchange	Contacts	Changes/deletions/ additions Are not synchronized to SuperOffice
Selections	One way synchronization only. From SuperOffice to Outlook/Exchange	See contacts	

Logfile

The logfile will be saved in the local user folder, for example:
- *C:\Documents and Settings\<Synchronizer User>\Local Settings\Application Data\InfoBridge SuperOffice Exchange Synchronizer*
- *C:\Users\<Synchronizer User>\AppData\Roaming\InfoBridge SuperOffice Exchange Synchronizer*

The Exchange Online Synchronizer has 3 levels of logging.
- Save warning messages to logfile
- Save warning and informational messages to logfile
- Save warning, informational and debugging messages to logfile

We recommend to use the 3rd level (debugging) only when you experience issues with the
synchronizer. This way the problems are logged and the logfile can be send to
support@infobridge.com for inspection.

Automatic recovery of Windows Service

In most cases the Synchronizer Service can perform a recovery on its own, in cases where the downtime of the network exceeds a certain amount of time the Synchronizer will shutdown. In situations like this it could be useful to use the automatic recovery of Windows Services.

However it is more useful to resolve the specific network issues rather than using this 'patch' feature of Microsoft Windows.

To use the automatic recovery of Windows Services follow the steps below.

1	Go to Start > Run > Services.msc > OK
2	Double click the InfoBridge Synchronizer Service
3	Select the Recovery tab
4	Set the First and Second failure to Restart the Service
5	Subsequent failures Take no Action
6	Restart service after 30
7	Click Apply and OK when finished

Scheduled restart of the Synchronizer service

As an extra safety precaution you can schedule the synchronizer service to be restarted every morning or weekly.
Create 2 batch files and schedule these to run each morning. The command you can use is a simple NET STOP/START
NET STOP InfoBridge.Synchronizer.Service
NET START InfoBridge.Synchronizer.Service

'StopSynchronizerService.bat' and schedule this to run at 05:00
'StartSynchronizerService.bat' which you can schedule at 05:30

Run the Application instead of the Service

In normal conditions running the synchronizer service is the way to go.
After a new installation we advise you to run the application instead. This way you can keep track of the amount of queued items.

Secret keystrokes

In the Synchronizer application there are some secret keystrokes

Open the Logfile	Press Alt and left-mouseclick on the versionnumber
Change the level of logging	Press Ctrl and left-mouseclick on the versionnumber
Open the Live Log Viewer	Press Alt, Ctrl and left-mouseclick on the versionnumber

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