Outlook and Server Side Sync
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PowerUp Echo Webinar Series
Meet Your Presenter

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- Options for outbound email processing
- Options for inbound email processing
- Options for synchronizing contacts/tasks/appts
- SSS – What is it and its Evolution
- SSS vs Outlook CRM Client synchronization
- Outlook Client Synchronization
  - What’s new in 2015 vs 2013/2011
- SSS Folder Tracking (CRM 2015 Update 1/Carina)
- SSS Debugging
- Outlook CRM 2015 – what’s new
- Client Sync Settings best practices
OUTBOUND EMAIL PROCESSING

- CRM will generate emails to be sent (workflows).

How do we send the emails?

A. Outlook CRM client
   - Copies of emails stored in your outlook sent items
   - Emails ONLY sent when outlook running

B. Email router
   - Most commonly used option
   - Needs email router installed

C. Server Side Sync
   - Nothing extra to install
   - Configure in crm (Server profile / Mailbox Profile)

What we typically recommend:
- CRM 2011/2013 – email router
- CRM 2015 OnPrem – email router
- CRM 2015 Online \ O365 Exchange – Server Side Sync
INBOUND EMAIL SETUP

- There are inbound emails we want to track in crm. How do we set this up?

  A. Outlook CRM Client (most common setup)
     - More work for your pc
     - More chances for glitches
     - Needs outlook to be running
     - Granularly select when to track

  B. Email Router
     - Email router goes into the mailbox
     - Offload work from outlook

  C. Forward Mailbox
     - Widely used in crm 3.0
     - Needs forward rules in all mailboxes

  D. Server Side Sync
     - Work done server side

• What we recommend?
  • Most Clients using Outlook
  • Beginning to shift to Server Side Sync
  • Depends
SYNC CONTACTS/TASKS/APPOINTMENTS

- Synchronization of Contacts/Tasks/Appointments

Two options:

A. Outlook CRM Client
   - Outlook does the heavy lifting
   - Outlook not running = no sync (not good for mobile)

B. Server Side Sync
   - Server does work
   - CRM 2013 – first released
   - CRM 2015 – More options
   - CRM 2015 Update 1 – Folder Tracking!!!! (Online Only)
   - CRM 2016
     - Folder Tracking Online/OnPrem
     - SSS available in hybrid mode
WHAT IS SSS?

- **SSS – Server Side Sync**
  - Move the ‘work’ from outlook to server side process
  - Does NOT require outlook to be running

- **Why SSS vs Outlook CRM Client?**
  - Can get your contacts/tasks/appointments in mobile without need of outlook
  - Less reliance on outlook client
  - Less work for outlook crm client == happier outlook crm client == less crashes
  - More and more work being done on with mobile clients
SERVER SIDE SYNC EVOLUTION

- CRM 2011 – NO SSS
- CRM 2013 – SSS is introduced
  - CRM Onprem to Exchange Onprem
  - NO CRM Online to Exchange Online
  - No Hybrid support

<table>
<thead>
<tr>
<th>CRM Deployment</th>
<th>Email System</th>
<th>Email Sync</th>
<th>Appointments, Tasks, Contacts Sync</th>
<th>Protocol</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM (on-premises)</td>
<td>- Exchange Server 2010</td>
<td>Yes</td>
<td>Yes</td>
<td>Exchange Web Services</td>
</tr>
<tr>
<td></td>
<td>- Exchange Server 2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRM (on-premises)</td>
<td>- Gmail</td>
<td>Yes</td>
<td>No</td>
<td>POP3/SMTP</td>
</tr>
<tr>
<td></td>
<td>- MSN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Outlook.com</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Windows Live Mail</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Yahoo! Mail</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

SERVER SIDE SYNC EVOLUTION

- CRM 2013 SP1 – Addition Online to Online
  - CRM Online to Exchange Online Support
  - CRM Onprem to Exchange Onprem

  - No Hybrid support
  - Still no control of synchronizing additional fields OR direction

http://www.powerobjects.com/2013/10/04/synchronizing-shared-crm-contacts-outlook/
SERVER SIDE SYNC EVOLUTION

- CRM 2015
  - Sync Field Configuration
  - Synchronize attachments
  - Synchronize all 3 addresses
  - Synchronize tasks assigned in outlook
  - All organization wide setting
  - Affects New items only

- No Hybrid support
- No tracking assigning tasks multiple users
- No tracking re-occurring tasks in outlook

http://www.powerobjects.com/2013/10/04/synchronizing-shared-crm-contacts-outlook/
SERVER SIDE SYNC EVOLUTION

- CRM 2015 Update 1 (not the 0.1)
  AKA SP1 / Carina / The Spring (In North Hemisphere)
  - CRM Online new orgs starting May 4th 2015 (live now)
  - CRM Online schedule upgrade (shortly)
  - CRM OnPremises – in the Fall release
  - No hybrid support
  - New Feature – Folder Tracking Option
    - We live in our mobile devices
    - Track emails with precision
    - Decide which emails should be tracked
    - Easy setup
    - SDK avail for group configuration

- CRM 2016
  - CRM Online and Onprem – Parity
  - Hybrid support
  - Folder level tracking available for on premises
Create folders under in your inbox (must be inside inbox)

- Create a mapping in CRM
  This is user specific
SERVER SIDE SYNC EVOLUTION
FOLDER TRACKING

- Enable in System Settings / Email tab
- Must use Server Side Sync for this functionality to work
- Must have enabled mailbox with approved email
- Must test and enable mailbox

My Active Mailboxes

<table>
<thead>
<tr>
<th>Name</th>
<th>Email Address</th>
<th>Regarding</th>
<th>Incoming Email</th>
<th>Outgoing Email</th>
<th>Appointments, C.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td><a href="mailto:sales@xyz.com">sales@xyz.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User 1</td>
<td><a href="mailto:user1@xyz.com">user1@xyz.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User 2</td>
<td><a href="mailto:user2@xyz.com">user2@xyz.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User 3</td>
<td><a href="mailto:user3@xyz.com">user3@xyz.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Show Folder tracking
- Setting up and using folder tracking
Tips & Info

- Folders must be subfolder inside Inbox.
- You CAN map multiple folders to same record
- Does not auto include additional sub folders (you CAN map it)
- Folders do not show up right away. Force a test to show up or wait.
- Sync occurs periodically. Force a test to sync right away.
- Max 25 mappings per user
- Create a track all folder by mapping to nothing
- Create mappings for specific account or projects or opp, etc

- There is an SDK - globally rollout common rules?
What do we recommend most of the time

CRM 2013/2015 Online with O365 Exchange
- Outbound - Server side sync
- Inbound - Server side sync OR outlook if need granular tracking control

CRM 2013/2015 OnPrem with Exchange onPrem
- Outbound - email router
- Inbound - outlook and some server side sync

CRM 2015 Update 1 and O365 Exchange
- Outbound – Server Side Sync
- Inbound – Server Side Sync

CRM 2016
- Server Side Sync
Trouble shooting server side sync

- If exchange or mail server down for long time SSS will ‘deactivate the mailbox’ – must test and re-enable
- Algorithm that slows down processing
  - Mailboxes with low volume
  - Inactive mailboxes
  - Mailboxes with bad uid/pwd
  - Mailboxes that get errors
  - Eventually flags the mailbox as bad
  - Look at sync logs for info
- Debugging Server Side Sync – We now have log files 😊
- Time in file is UTC
SERVER SIDE SYNC – FOLDER TRACKING

- **Performance Dashboard**

1. Mailboxes are configured for server-side synchronization.
2. Mailboxes are healthy and running.
3. Mailboxes need your attention.
4. Mailboxes are having continuous processing issues.
5. Mailboxes are having intermittent processing issues.
6. Mailboxes are no longer processing or are not enabled yet.
7. Mailboxes are scheduled or running test and enable.
8. Some of them are taking over a long time.

- **Mailbox Process History**
  - Sync Cycle Processing
  - Data: 5/5/2015
  - Count: 200
  - Success: 1
  - Failure: 0

- **Mailbox Process Duration**
  - Sync Cycle Processing
  - Data: 5/5/2015
  - Min: 0
  - Max: 20.3

- **CRM Items Remaining To Be Processed**
  - Sync Cycle Processing
  - Data: 5/5/2015
  - Count: 0

- **Items Processed or Failed**
  - Sync Cycle Processing
  - Data: 5/5/2015
  - Failures: 0
  - Successes: 219

There is no data to create the Top 5 Errors Over Last 3 Days chart.
OUTLOOK 2015\2016 CRM CLIENT

- Anything new?
- Is it more stable?
- Are you using it?

- Two different items
  a. Outlook CRM Client (the plugin we are all familiar with)
  b. Outlook CRM App - New Light weight client (not a plugin) works in outlook and owa

O365 Only

http://www.powerobjects.com/microsoft-dynamics-crm-education/webinars-on-demand/
OUTLOOK CLIENT 2015\2016 – WHAT’S NEW?

- Configuration wizard easier
- Enter either org url or discovery service url (copy and paste url from web)
- Check box to use current credentials – CRM Online Azure AD only
New synchronization items (same as in server side sync)
- Sync Field Configuration
- Synchronize attachments
- Synchronize all 3 addresses
- Synchronize tasks assigned in outlook
OUTLOOK CLIENT 2015\2016 – WHAT’S NEW?

- OAuth for authentication from outlook crm client (Requires Win2012 R2 ADFS)
  - Enables multi-factor authentication
  - Custom login screen (graphics)
  - No more live sign in assistant required
- New/better error messages
OUTLOOK CLIENT 2015\2016 – WHAT’S NEW?

- Outlook CRM 2015 client – Compatibility

  Drops support for:
  - IE 8/9
  - IE 10 is now deprecated too. Jan 12 2016
  - Office 2007
  - Windows Server 2008 Desktop services (will run, but not supported)
  - Windows Server 2008 R2 Desktop services (will run, but not supported)
  - Office 2010 – official supports end 10/13/2015
• Outlook CRM 2013 WILL connect to 2015
  – Any patch
  – Online mode only
  – Can NOT go offline
  – It IS very stable!!

• In place upgrade
  – Not while offline

• Outlook CRM 2011 will NOT connect to 2015 server
OUTLOOK CRM CLIENT SYNC SETTINGS (BEST PRACTICES)

System Settings
Set system-level settings for Microsoft Dynamics CRM.

- **Set email promotion options for Microsoft Dynamics CRM for Outlook**
  - Perform checks as new email is received: [Yes] [No]
  - Promote incoming email every: 10 minutes
  - Send pending CRM email every: 10 minutes

- **Set whether users can schedule synchronization in Microsoft Dynamics CRM for Outlook**
  - Users can schedule synchronization: [Yes] [No]
  - Minimum Time between synchronizations: 15 minutes

- **Set whether users can update their local data in the background in Microsoft Dynamics CRM for Outlook**
  - Users can schedule background local data synchronization: [Yes] [No]
  - Minimum time between background local data synchronizations: 15 minutes

- **Set schedule for address book synchronization in Microsoft Dynamics CRM for Outlook**
  - Users can schedule background address book synchronization: [Yes] [No]
  - Minimum time between address book synchronizations: 1 hour

Set whether users see CRM for Outlook message

- 60 min
- 24 hrs
- A small inbox is a happy inbox
  - Use folders if you must have a gigantic mailboxes
  - Inbound tracking and large nbr of items to scan affects performance

- The OST file
  - A local copy of all of your email
  - Outlook 2013 – control if you want all, last 2 weeks, etc
  - OST will get fragmented – Close outlook, delete it and it re-creates

- What out for other Outlook Plugins
  - Old skype, adobe, avg, phone integrations, etc

- Registry keys
  - [http://support.microsoft.com/kb/2585157](http://support.microsoft.com/kb/2585157)

- Antivirus
  - Macafee – must white list
  - Others – should white list crm’s url if JS scanner
BEST PRACTICES – OUTLOOK - TROUBLESHOOTING

- Slow performance?
  - Switch to SSS if you can
  - Disable Automatic Email Tagging
BEST PRACTICES – OUTLOOK - TROUBLESHOOTING

- Outlook CRM Client crashing?
- Get a log file
  - Don’t leave tracing on all the time
- Trace file location
  %UserProfile% \AppData\Local\Microsoft\MSCRM\Traces
- Trace file viewer
  https://pfecrmtracetool.codeplex.com/
Questions?