Crm Customer Relationship Management

CRM.Web 15.25.2

ACRM Graph Connector Setup Guide

Aurea
Unlimited Possibility

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Table of Contents

Overview

This guide explains how to configure update.connector.graph to synchronize Microsoft 365 (Exchange Online) data with Aurea CRM using Microsoft Graph. This is the recommended approach for Microsoft 365 environments because it avoids per-user passwords and supports tenant-wide access via an Entra (Azure AD) app registration.

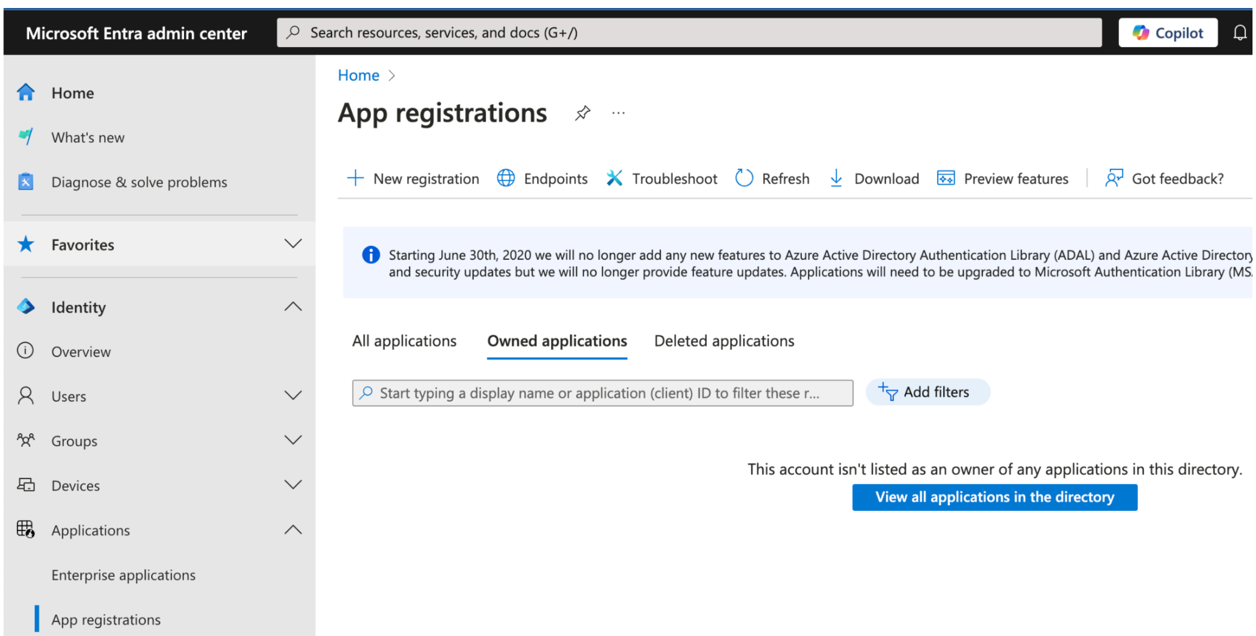
Before you begin

- You will need:
  - Aurea CRM 15.x or newer
  - At least one licensed Exchange Online mailbox
  - An administrator who can access Microsoft Entra admin center (to create an app registration and grant consent)
  - Access to your ACRM server where the Graph connector is installed/configured

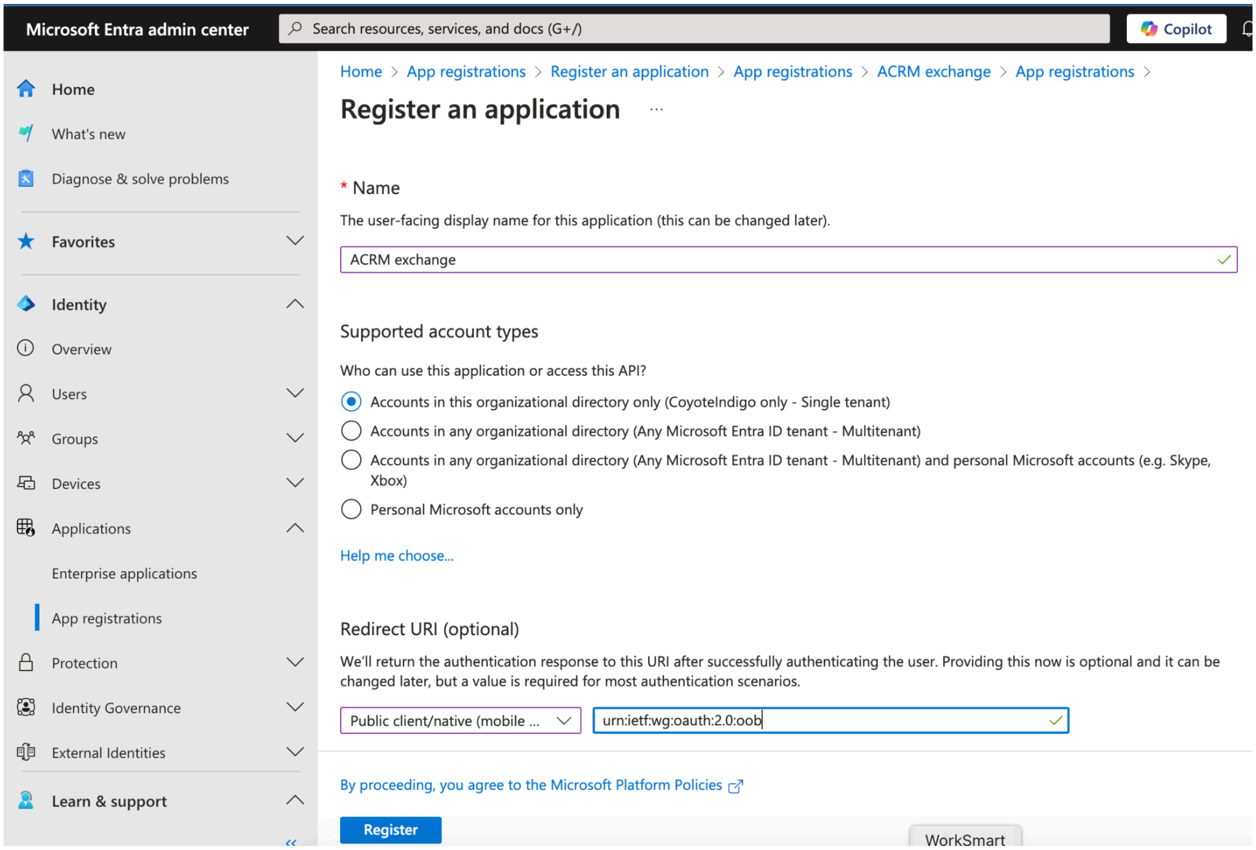
Part A : Microsoft Entra (Azure AD) setup

Step 1: Register an application

1. Open the **Microsoft Entra admin center**.
2. Go to **Identity** → **Applications** → **App registrations**.

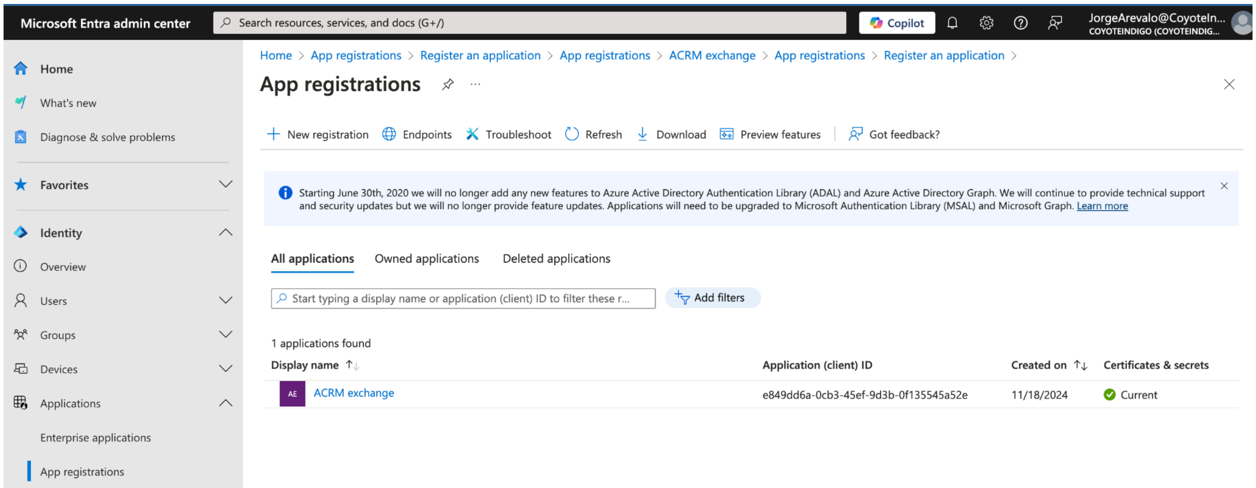


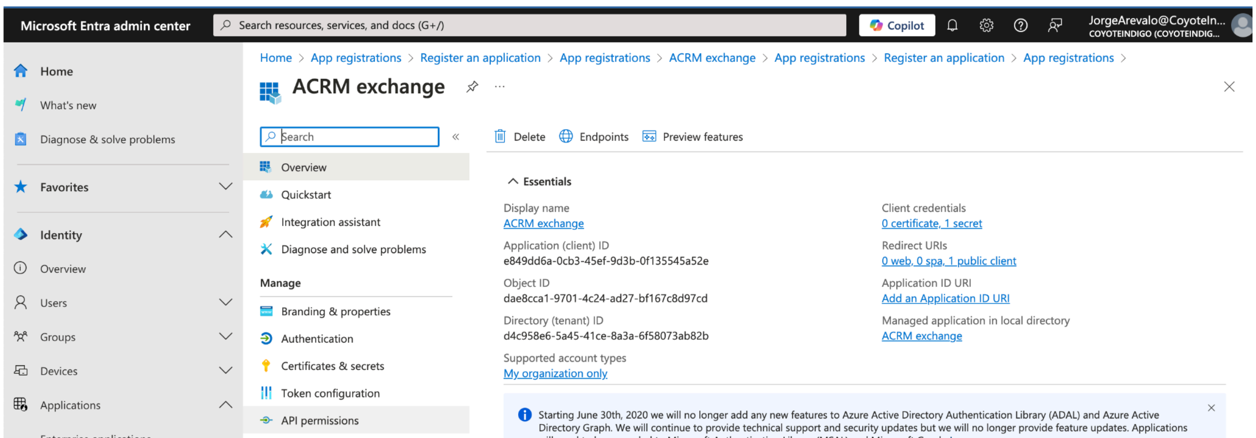
3. Select **New registration**.
4. Enter:
   - **Name**: e.g., `AureaCRM Graph Connector`
   - **Supported account types**: typically **Single tenant** (most common)
5. Select **Register**.



6. Record these values (you will use them later):
   - **Application (client) ID**
   - **Directory (tenant) ID**

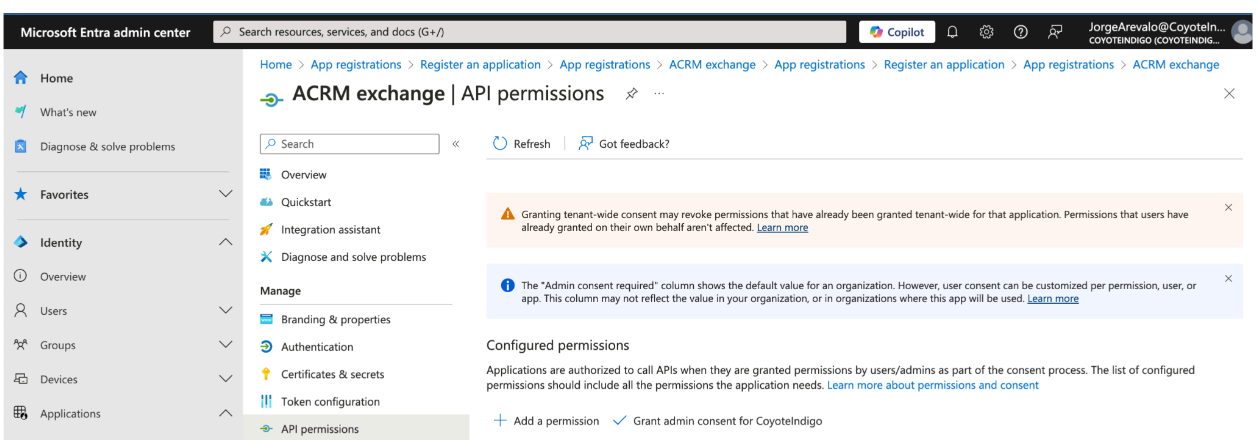
Note: For client-credentials (server-to-server) scenarios, a Redirect URI is typically not required.





Step 2: Add Graph API permissions

1. In the App Registration, go to **API permissions** → **Add a permission**.



2. Choose **Microsoft Graph** and add **Application permissions** (tenant-wide):
   - `Calendars.ReadWrite`
   - `Contacts.ReadWrite`
   - `Directory.Read.All`
   - `Mail.ReadWrite`
   - `Tasks.ReadWrite.All`
   - `User.ReadWrite.All`

3. Select **Grant admin consent** and confirm.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. Learn more about permissions and consent

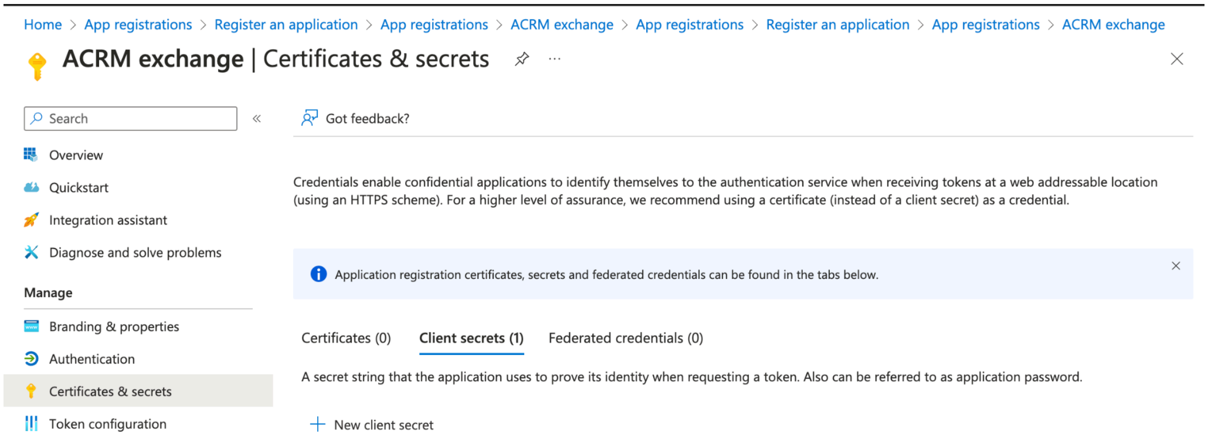
+ Add a permission ✓ Grant admin consent for Trilogy

API / Permissions name	Type	Description	Admin consent req...	Status	
Microsoft Graph (6)					...
Calendars.ReadWr	Application	Read and write calendars in all mailboxes	Yes	Granted for Trilogy	...
Contacts.ReadWrit	Application	Read and write contacts in all mailboxes	Yes	Granted for Trilogy	...
Directory.Read.All	Application	Read directory data	Yes	Granted for Trilogy	...
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	Granted for Trilogy	...
Tasks.ReadWrite.Al	Application	Read and write all users' tasks and tasklists	Yes	Granted for Trilogy	...
User.ReadWrite.All	Application	Read and write all users' full profiles	Yes	Granted for Trilogy	...

Security note (recommended for customers): Review these permissions with your security/Entra admin team. Use a dedicated app registration for this connector and restrict who can manage it.

Step 3: Create a client secret

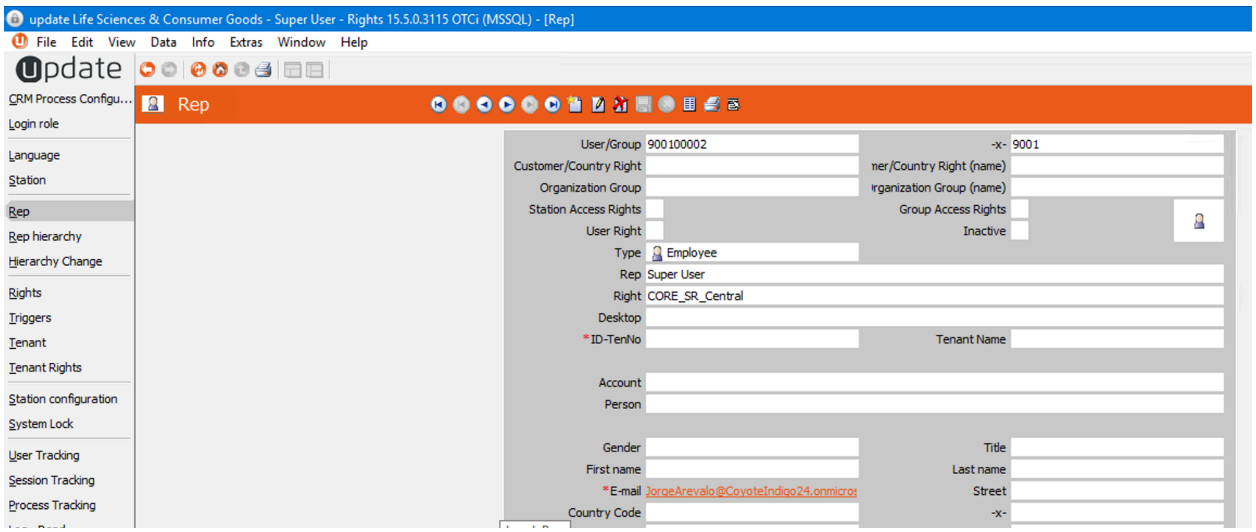
1. Go to **Certificates & secrets** → **New client secret**.
2. Add a description and choose an expiration period aligned with your security policy.
3. **Copy and securely store** the secret value immediately.



You cannot retrieve the secret value again later. If it's lost, you must create a new secret and update the connector configuration.

Part B : Configure Aurea CRM

Step 1: Confirm required catalog values exist



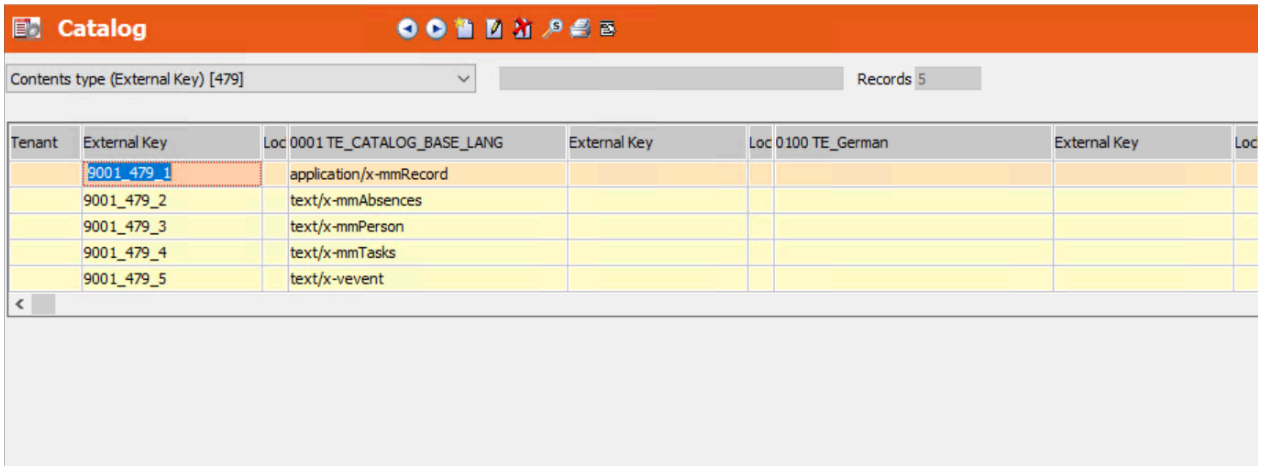
In the Data Model module, ensure the following catalog entries exist.

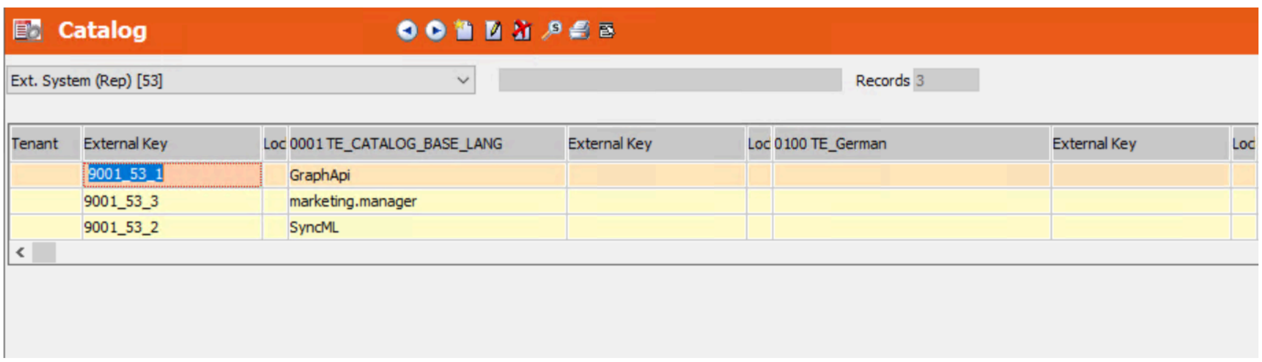
Catalog: *Content Type (groupware) (ExternalKey)*
Add (if missing):

- `application/x-mmRecord`
- `text/x-mmAbsences`
- `text/x-mmPerson`
- `text/x-mmTasks`
- `text/x-vevent`

Catalog: *Ext. System (Rep)*
Add (if missing):

- `marketing.manager`
- `GraphApi`
- `SyncML`



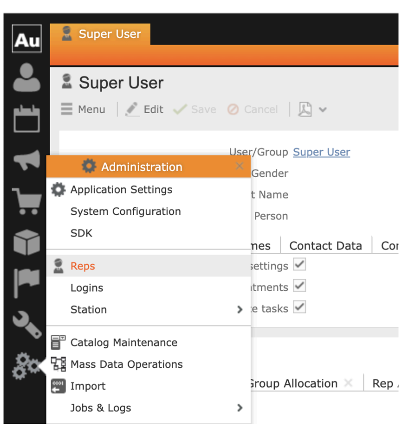


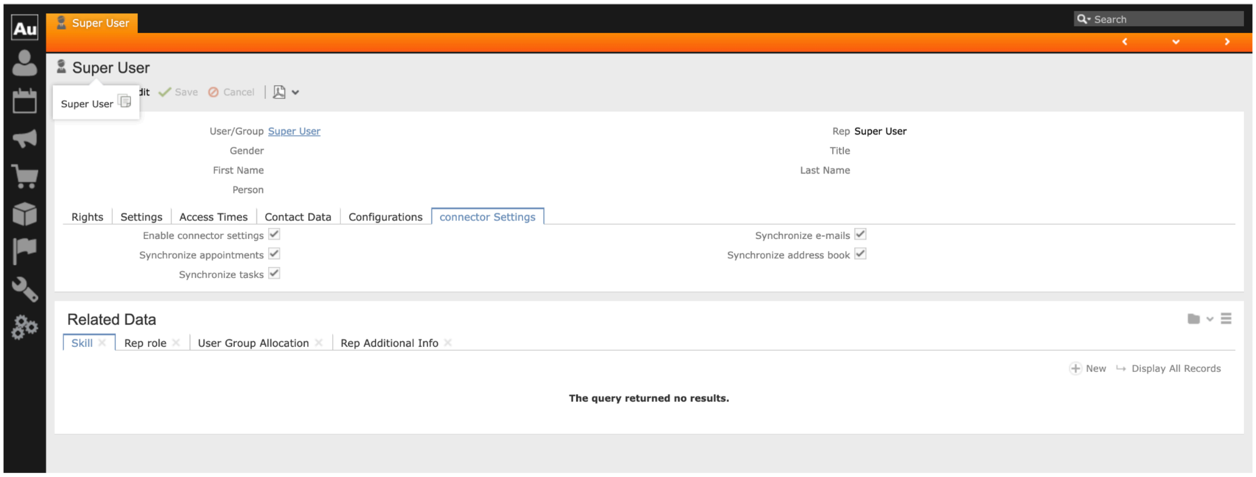
Step 2: Enable synchronization for the required users (Reps)

The connector synchronizes only the mailboxes for users who are enabled for connector sync in Aurea CRM.

1. In **CRM.Web**, open the Rep/User administration area.
2. Set the user's **Enable Connector settings** flag (or equivalent connector enablement option).
3. Repeat for each mailbox user that should be synchronized.

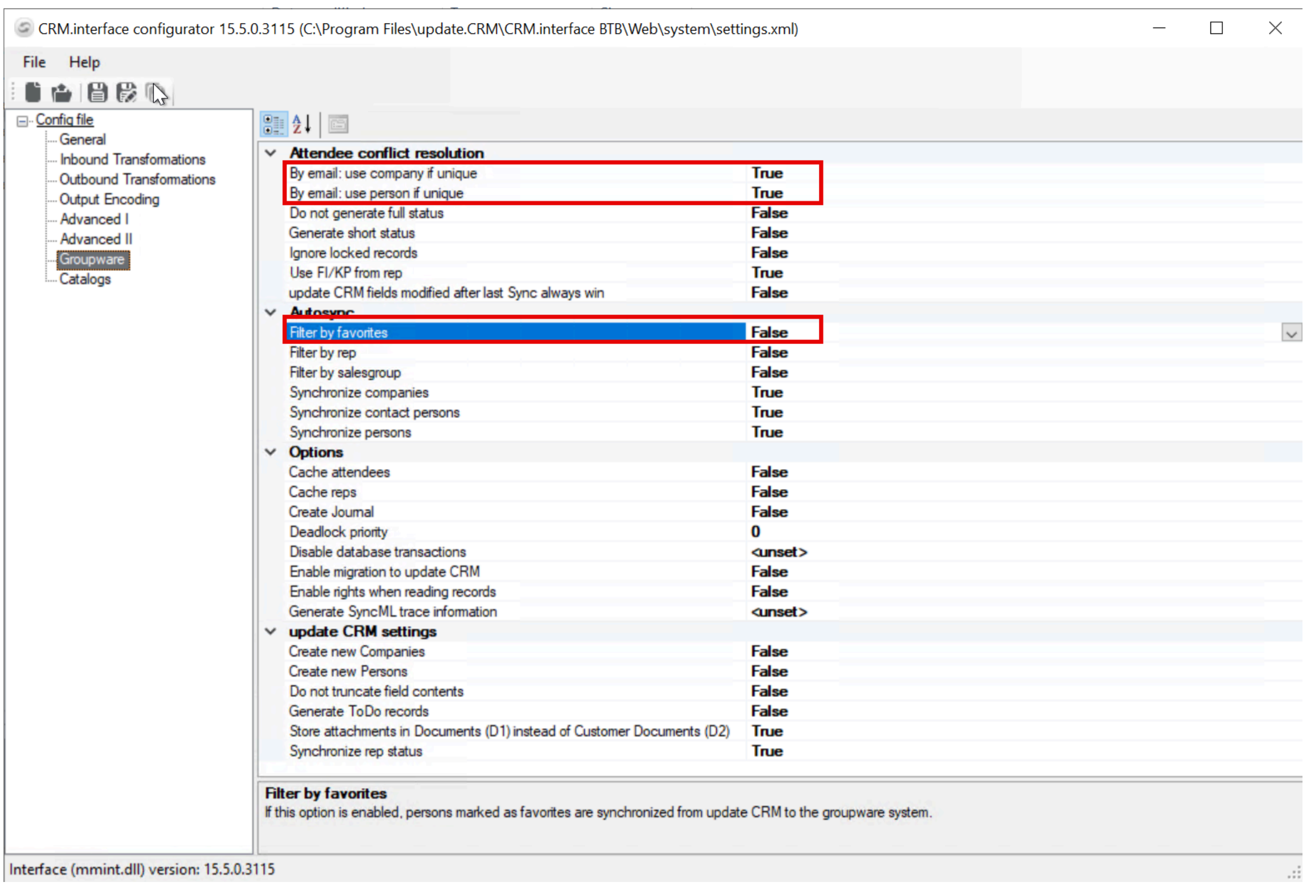
   The connector refreshes the user/mailbox list periodically (commonly once per day), depending on your connector configuration.





Step 3: Update CRM.Interface authentication configuration

To allow Graph connector authentication through CRM.Interface, add the **GraphApi** master user entry in your `forms.xml`.



1. Locate your **CRM.Interface** configuration file:
    - `.../Web/system/xml/forms.xml` (exact path depends on your installation)
2. In the `<authentication>` section, add a master user entry for GraphApi (example):

```
<authentication>
  <masterUser client="outlook"
login="Principal,ClientID">OCSU</masterUser>
  <masterUser client="notes"
login="Principal,ClientID">OCSU</masterUser>
  <masterUser client="GraphApi"
login="Principal,ClientID">OCSU</masterUser>
</authentication>
```

*Also, notice that the if the *Connector* fields are intended to be used, these need to be added to the forms.xml (if they haven't already been added for the previous connector) and notice that the field names may differ between the templates used. Below are the changes for the ISI template.*

Event filters:

```
<SyncHandler type="ExchangeConnector_VeventFilter">
    <condition>
        <lop value="and">
            <cond tablename="Contact" fieldname="ConnectorDeleted" op="!="
value="true"/>
        </lop>
        <lop value="and">
            <cond tablename="Contact" fieldname="ConnectorPublished" op="!="
value="true"/>
        </lop>
    </condition>
  </SyncHandler>
```

Event deletion:

```
  <options>
    <vevent>
    <!-- missing attendees will be append to the textfield or written in a seperate field -->
    <!-- possible values for mode are replace and append -->
    <!-- Without email_seperator the adresses will be written linewise, if the tag exist they will
be written in one line -->
    <missing_attendees>
        <Contact>
```

```
                    <ConnectorMissingparticipants>true</ConnectorMissingparticipants>
            </Contact>
            <summary>
                <field fieldname='MissingParticipants' mode='replace'/>
                <!--field fieldname='Text' mode='append'/-->          <!-- SN some
customers prefer the use of the default text field, so just put it disabled ready for user -->
                <!--<separator></separator>-->
                <header lang='en'>Unassigned participants:</header>
                <required lang='en'>To: </required>
                <optional lang='en'>CC: </optional>
                <informational lang='en'>BCC: </informational>
                <unknown lang='en'>Unknown: </unknown>
                <header lang='de'>Fehlende Teilnehmer:</header>
                <required lang='de'>To: </required>
                <optional lang='de'>CC: </optional>
                <informational lang='de'>BCC: </informational>
                <unknown lang='de'>Unbekannt: </unknown>
                <email_separator>, </email_separator>
            </summary>
        </missing_attendees>

        <!-- Customised - Deletion from Outlook to update -->
        <!-- Customised: Deactivated, as not used for connector-->
        <!--This line enables the deletion event to work with the sync process -->
        <key name='delete_sync_process_410' value='true'/>

        </vevent>
      </options>
```

Contact events:

```
<form type='vevent'>
    <table tablename='Contact'>
        <field fieldname='StatNo'/>
        <field fieldname='SeqNo'/>
        <field fieldname='CoGrp'/>
```

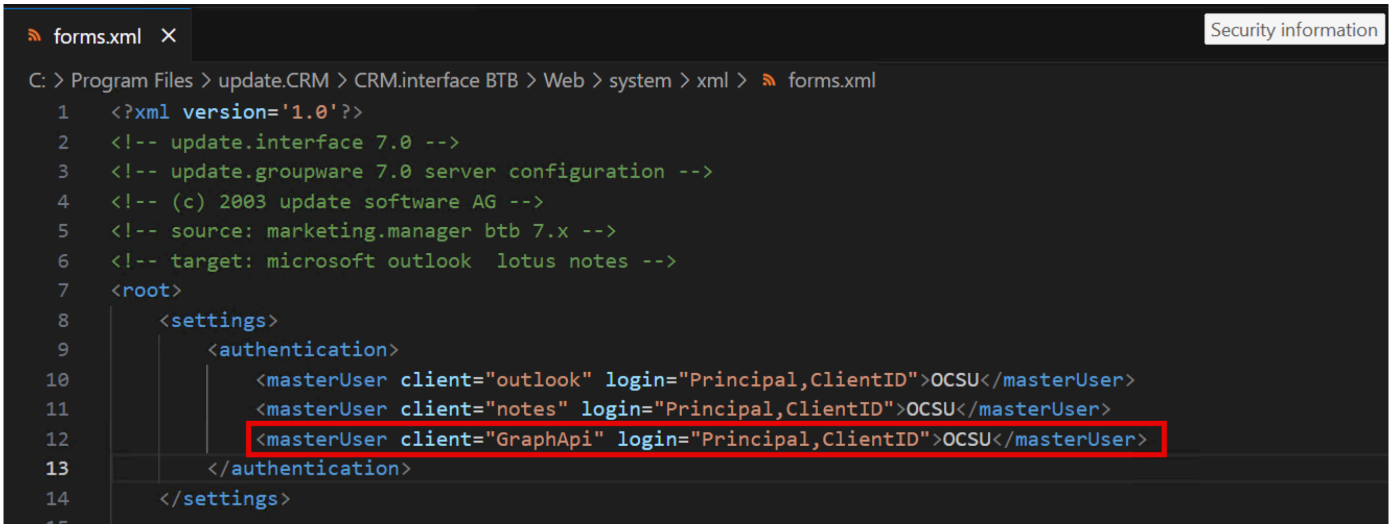
```
<field fieldname='CoNo'/>
<field fieldname='PeGrp'/>
<field fieldname='PeNo'/>
<field fieldname='Company'/>
<field fieldname='Person'/>
<field fieldname='Contact'/>
<field fieldname='Status'/>
<field fieldname='Date'/>
<field fieldname='Time'/>
<field fieldname='Duration'/>
<field fieldname='Unit'/>
<field fieldname='EndDate'/>
<field fieldname='EndTime'/>
<field fieldname='Subject'/>
<field fieldname='Text'/>
<field fieldname='Priority'/>
<field fieldname='RepID'/>
<field fieldname='Rep'/>
<field fieldname='ContactByID'/>
<field fieldname='ContactBy'/>
<field fieldname='Private'/>
<field fieldname='ParticipantID'/>
<field fieldname='Participants'/>
<field fieldname='Document1'/>
<field fieldname='Document2'/>
<field fieldname='FreeC4'/>
<field fieldname='FreeC5'/>
<field fieldname='FreeC6'/>
<field fieldname='IsMasterContact'/>
<field fieldname='IsSerialContact'/>
<field fieldname='ContactStatNo'/>
<field fieldname='ContactSeqNo'/>
<!-- vertical specific -->
<field fieldname='ProjectsStatNo'/>
```

```
<field fieldname='ProjectsSeqNo'/>
<!-- Reminder fields -->
<field fieldname='ReminderDur'/>
<field fieldname='ReminderUnit'/>
<!-- new Cataloge ShowAs -->
<field fieldname='ShowAs'/>
<!-- Customised -->
<field fieldname='OpportunityStatNo'/><!-- Y1 -->
<field fieldname='OpportunitySeqNo'/>
<field fieldname='ConnectorMissingparticipants'/>
<field fieldname='ConnectorPublished'/>
<field fieldname='ConnectorDeleted'/>
<field fieldname='A031Location' />

<!--SN make sure all needed fields are initialized-->
<field fieldname='MissingParticipants'/>
<field fieldname='F5021'/> <!-- New From Connector -->
<field fieldname='Todo'/>
<!-- This field is used for the rich text -->
<field fieldname='F5044' />
<!-- End customisation -->
</table>
```

3. Restart the CRM web application (for IIS deployments: recycle the application pool) so the change takes effect.

Use the appropriate ACRM “master”/service user for your environment (often `OCSU` by default).




```xml
<?xml version='1.0'?>
<!-- update.interface 7.0 -->
<!-- update.groupware 7.0 server configuration -->
<!-- (c) 2003 update software AG -->
<!-- source: marketing.manager btb 7.x -->
<!-- target: microsoft outlook  lotus notes -->
<root>
    <settings>
        <authentication>
            <masterUser client="outlook" login="Principal,ClientID">OCSU</masterUser>
            <masterUser client="notes" login="Principal,ClientID">OCSU</masterUser>
            <masterUser client="GraphApi" login="Principal,ClientID">OCSU</masterUser>
        </authentication>
    </settings>
```

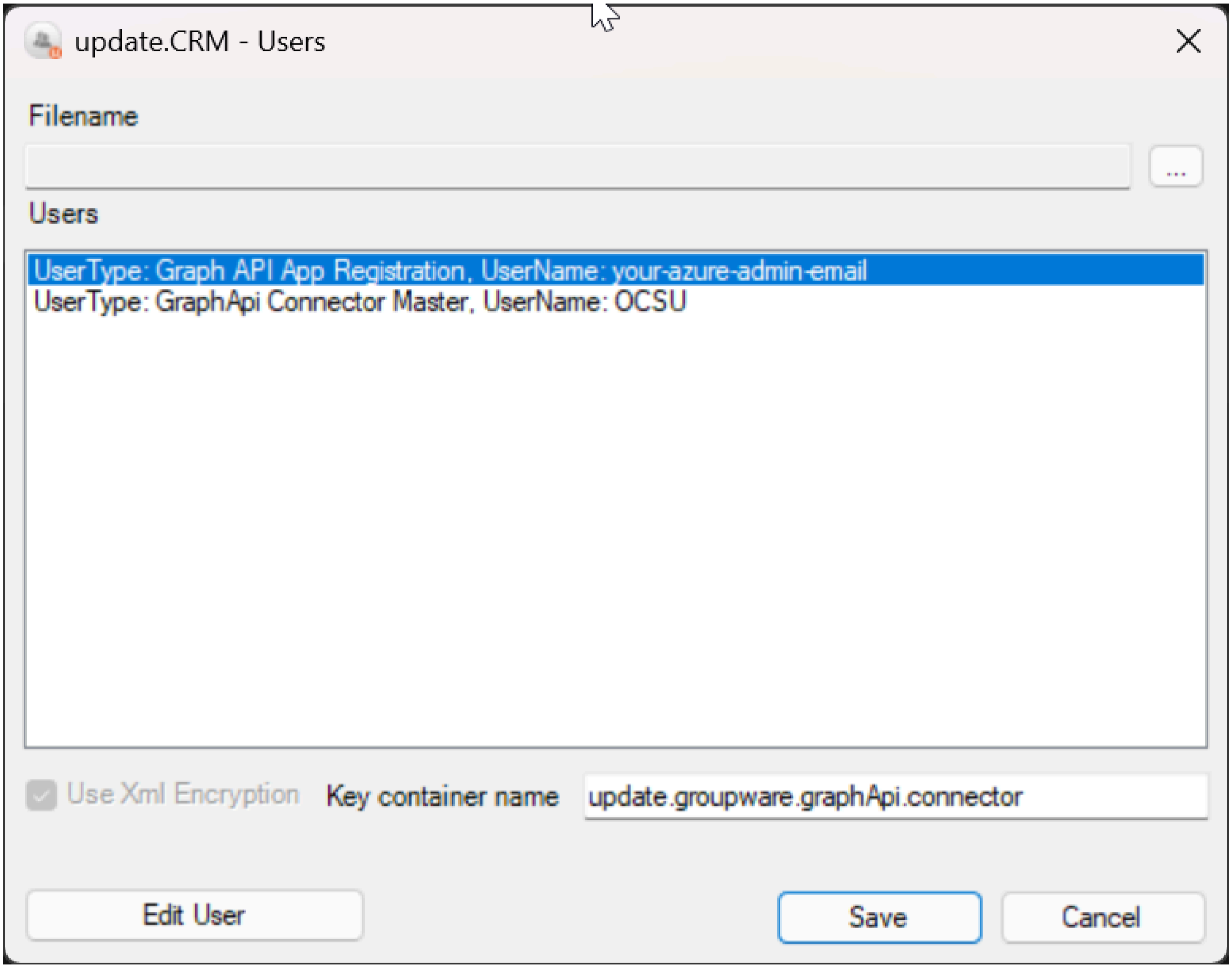
Step 4: Install the Graph connector

On the connector host/server:

1. Run `setup.exe` for **update.connector.graph**
2. Complete the installation wizard

Step 5: Configure ACRM + Entra credentials (users.xml)

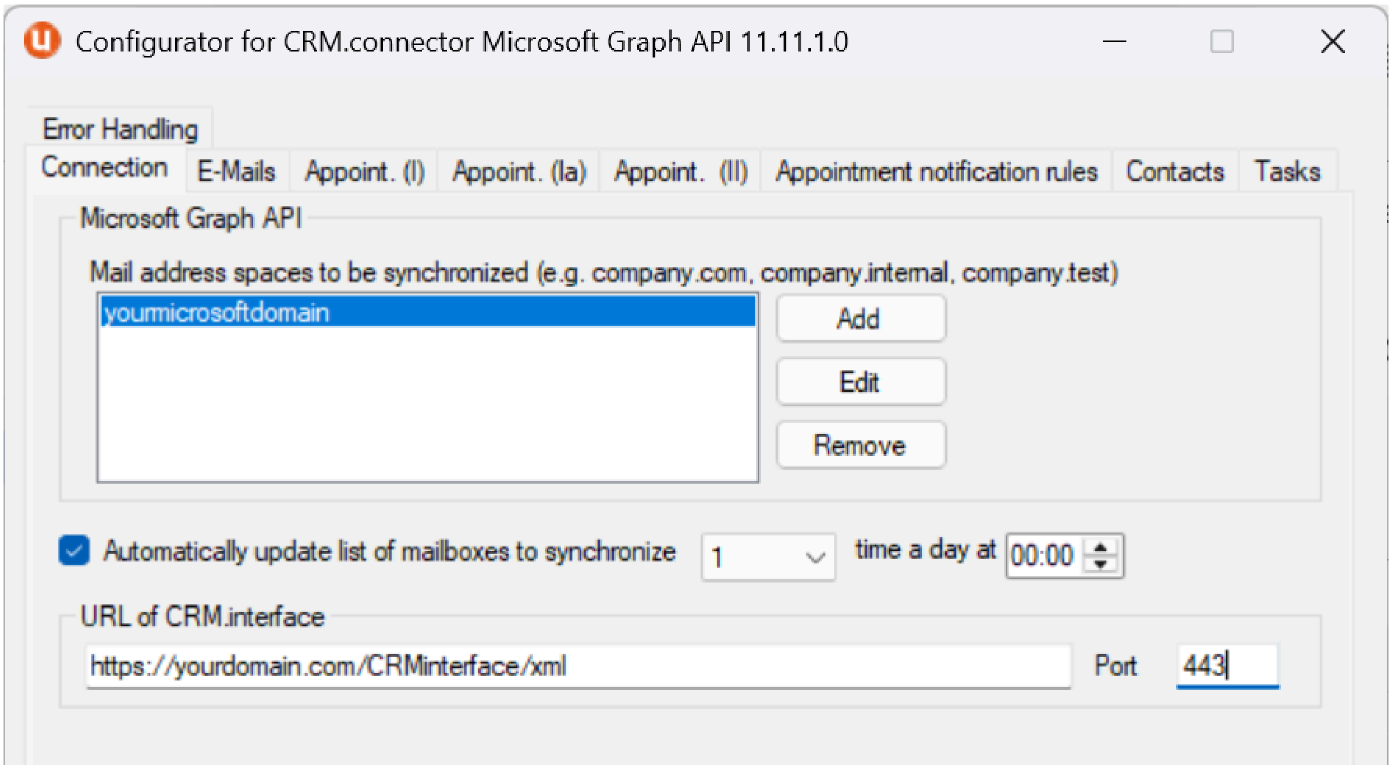
1. Open `update.users.exe`
2. Open the `users.xml` in the same directory.
3. Update the following entries:
    - **GraphApi Connector Master**: set to your ACRM master/service user (e.g., `OCSU`)
    - **Graph API App Registration**:
        - Tenant ID
        - Client ID
        - Client Secret
        - Admin email address (password is not required for Graph client-credentials flow)



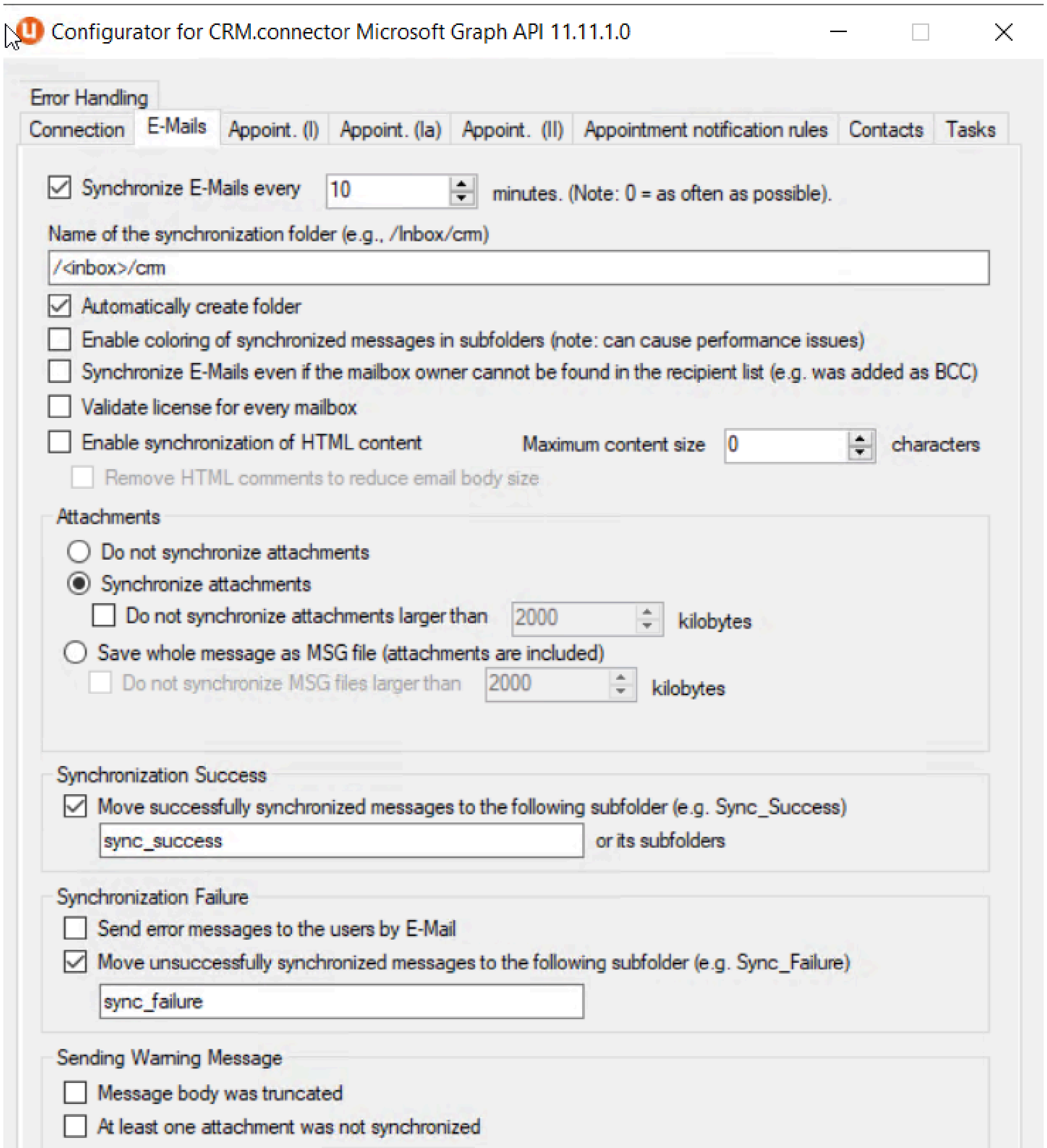
Recommendation: Use a dedicated service account and follow your organization's secret storage/rotation policy.

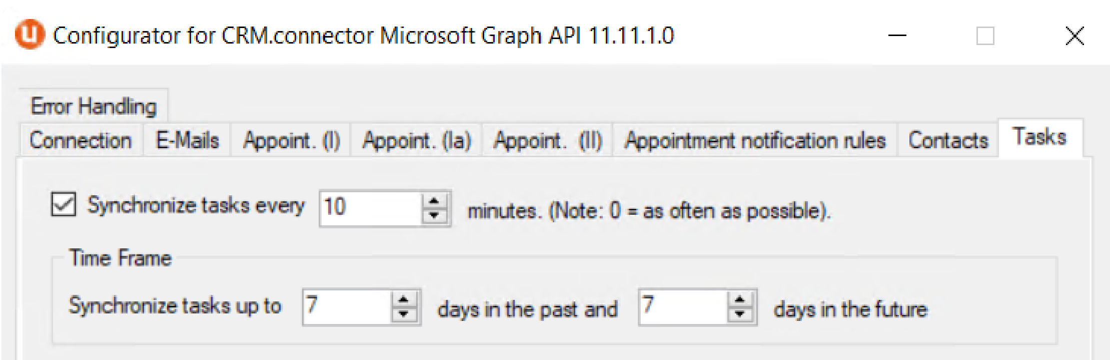
Step 6: Configure the connector (Configurator)

1. Open `SynchroConnectorConfigurator.exe` in the `update.connector.graph` installation folder.
2. In **Connection**:
    - Add your Microsoft 365 managed domain(s) (e.g., `company.com`) **without** the `@`
    - Set the **CRM.Interface URL**
    - (Optional) Enable automatic mailbox list refresh (commonly once per day)



3. Recommended baseline sync settings (adjust to your business needs):
    - **E-Mails**: every **10** minutes
    - **Appointments**: every **10** minutes; timeframe **7 days past / 7 days future**
    - **Tasks**: every **10** minutes; timeframe **7 days past / 7 days future**
    - **Contacts**: every **1440** minutes (24 hours)
4. Save changes and start the connector service.


Configurator for CRM.connector Microsoft Graph API 11.11.1.0
Error Handling
Connection
E-Mails
Appoint. (I)
Appoint. (Ia)
Appoint. (II)
Appointment notification rules
Contacts
Tasks
Synchronize E-Mails every
10
minutes. (Note: 0 = as often as possible).
Name of the synchronization folder (e.g., /Inbox/crm)
/<inbox>/crm
Automatically create folder
Enable coloring of synchronized messages in subfolders (note: can cause performance issues)
Synchronize E-Mails even if the mailbox owner cannot be found in the recipient list (e.g. was added as BCC)
Validate license for every mailbox
Enable synchronization of HTML content
Maximum content size
0
characters
Remove HTML comments to reduce email body size
Attachments
Do not synchronize attachments
Synchronize attachments
Do not synchronize attachments larger than
2000
kilobytes
Save whole message as MSG file (attachments are included)
Do not synchronize MSG files larger than
2000
kilobytes
Synchronization Success
Move successfully synchronized messages to the following subfolder (e.g. Sync_Success)
sync_success
or its subfolders
Synchronization Failure
Send error messages to the users by E-Mail
Move unsuccessfully synchronized messages to the following subfolder (e.g. Sync_Failure)
sync_failure
Sending Warning Message
Message body was truncated
At least one attachment was not synchronized


Configurator for CRM.connector Microsoft Graph API 11.11.1.0
Error Handling
Connection
E-Mails
Appoint. (I)
Appoint. (Ia)
Appoint. (II)
Appointment notification rules
Contacts
Tasks
Synchronize tasks every
10
minutes. (Note: 0 = as often as possible).
Time Frame
Synchronize tasks up to
7
days in the past and
7
days in the future

Validation checklist

After configuration, verify:

- The connector service starts successfully
- Enabled users in CRM are recognized for mailbox sync
- Email / appointment / task / contact changes in Microsoft 365 appear in Aurea CRM (and vice versa if configured)
- No “permission/consent” errors appear in connector logs

Common issues

- **No users are synchronized**: confirm the user is enabled for connector sync in CRM and the mailbox exists in Microsoft 365.
- **Authentication/consent errors**: confirm admin consent was granted and the Tenant/Client IDs + Secret match the app registration.
- **Secret expired**: create a new secret and update the connector configuration.
- **Duplicated records:** due to incompatibilities between the Microsoft EWS and Microsoft Graph APIs, records processed by the previous connector may get duplicated. It is recommended to follow one of these practices:
    - Process only new records for a few days so that no old records are processed.
    - Remove duplicate records manually.