

SyncMe Module

1.0.2

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Contents

Glossary of Terms	3
<hr/>	
Introduction	1
<hr/>	
Installing the Syncme Module	3
<hr/>	
Licensing your SyncMe Module	5
<hr/>	
Configuring your Syncml Client	7
<hr/>	
Index	13
<hr/>	

Glossary of Terms

F

Funambol

Open source project that implements a syncml server and a range of client applications.

S

Syncml

Open protocol that is used to synchronize contacts, tasks, calendar and many other object types. The protocol allows for incremental synchronization, so is a very efficient tool for synchronizing data.

Introduction

This document covers the installation and configuration of the Syncme module for info@hand. The module implements a Syncml server that allows users to synchronize their contacts, tasks and calendar directly with any of the following devices or applications:

- 1) All phones that run the S60 operating system, including most Nokia models
- 2) Microsoft Outlook (via 3rd party plugin)
- 3) iPhone (via 3rd party plugin)
- 4) Windows Mobile (via 3rd party plugin)
- 5) Blackberry (via 3rd party plugin)

Since the protocol is an open standard, there are many free software clients that allow synchronization with your phone or groupware. The above options are only some of the devices supported.

In This Chapter

Typographical Conventions.....1

1. Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

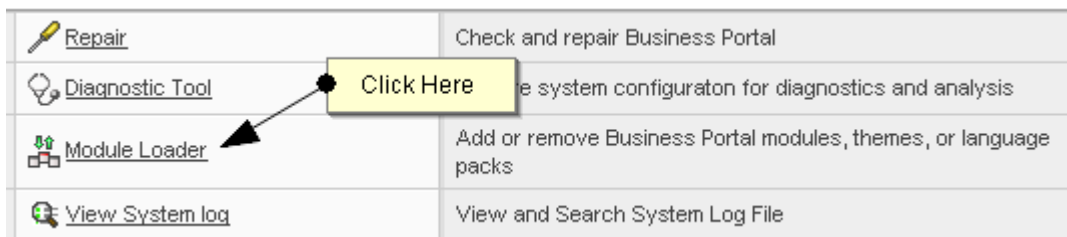
The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Numerical Lists (1., 2. etc)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
<i>Emphasis</i>	Use to emphasize the importance of a point or for variable expressions such as parameters.

Installing the Syncme Module

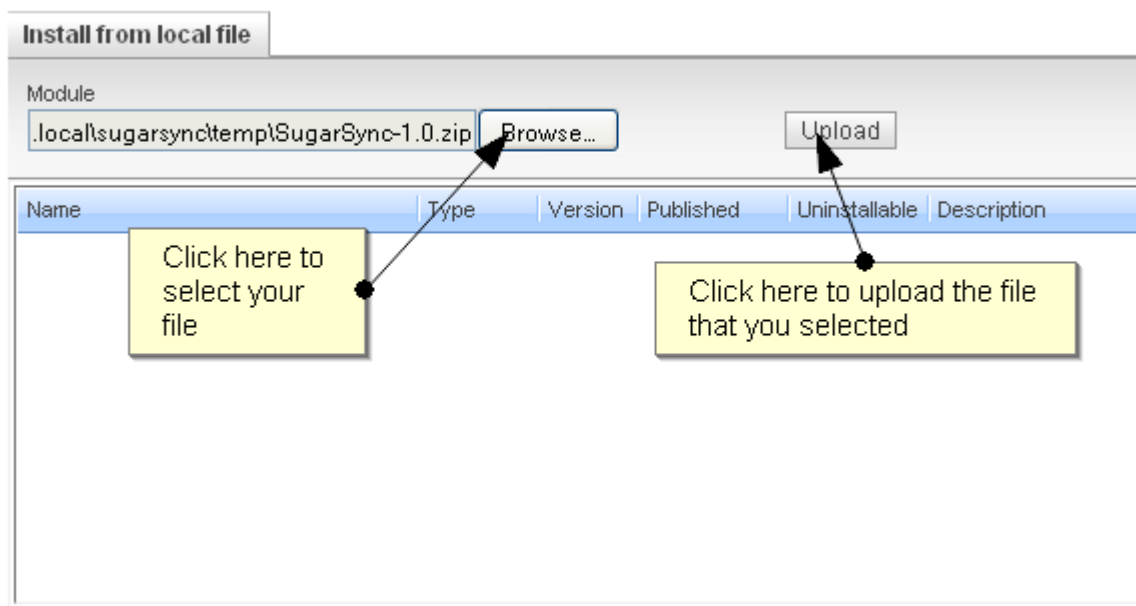
The Syncme module is distributed as an installable module. You can install the module by following the following steps:

- 1) Log into your info@hand system and navigate to the admin section. Click on the link "Module Loaded" as shown below.



- 2) From the module loader screen, you'll need to upload your new module. You can do this by selecting your module file and clicking "Upload" as shown.

ADMINISTRATION: MODULE LOADER



- 3) Once you've uploaded your file, it should appear in the list of available modules as shown. Click in the "Install" button to install the module onto your info@hand system.

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Name	Type	Version	Published	Uninstallable	Description	Install	Delete
SugarSync Module	Module	1.0.0	2009-05-04	Yes	Tool to your CRM contacts, tasks and calendar with your mobile device.	Install	Delete Pack

Click here to install your module

- Once you've agreed to the license agreement, the system will install the module. If all goes well, you should have a screen as shown below. Once you've completed this step, your module has been installed correctly. If you have any issues, ensure that you're CRM application directory is writable and that you don't already have any syncml tables in your database.

100%

[Display Log](#)
Including: /home/sp/spo/spottedfrog.com.au/public/fah/cache/upload//upgrades/temp/x1dazt/scripts/post_install.php
Module Install Successful

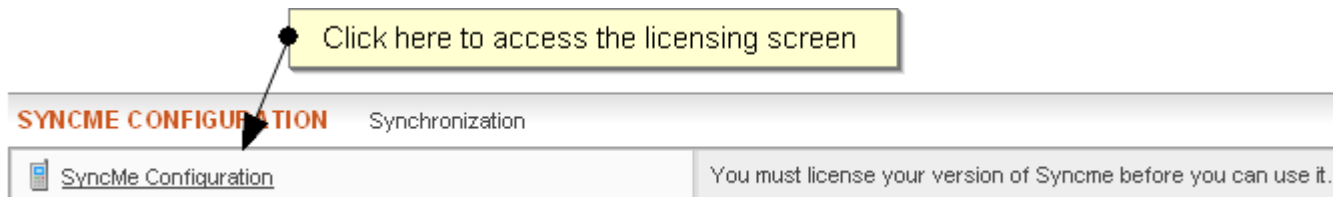
[Back to Module Loader](#)

Once the above screen is displayed, your installation has been successful.

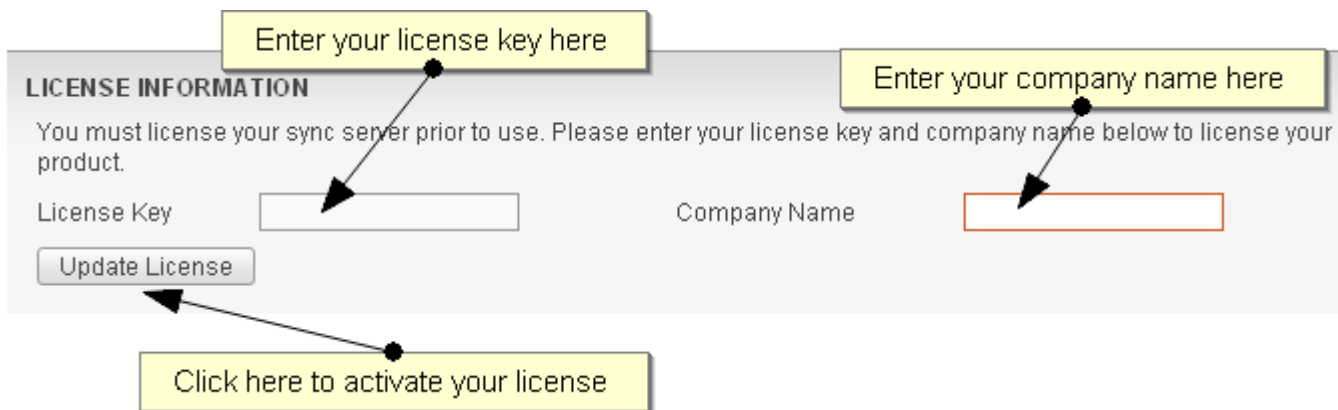
Licensing your SyncMe Module

Before you can use your SyncMe server, you need to apply a valid license. Each license is tied to your company name and can be obtained from your vendor or directly from CRM online. You can access your licensing screen by following these steps:

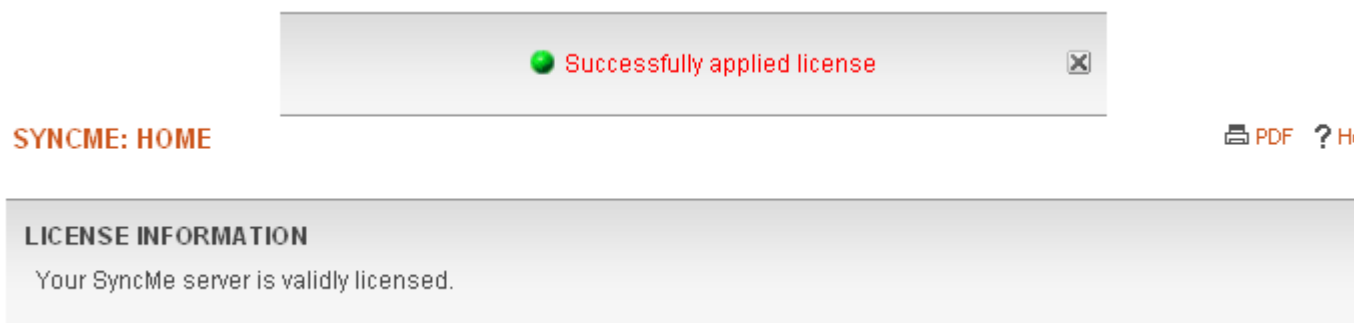
- 1) Navigate to Admin->SyncMe Configuration as shown below.



- 2) Enter your license and company name details as shown below.



- 3) Click on "Update License". This will attempt to validate the license against our server. Note that you can only apply each license once.
- 4) If successful, you will see the screen shown below.



Configuring your Syncml Client

This chapter covers the installation and configuration of your syncml client.

In This Chapter

Microsoft Outlook	7
S60 / Symbian.....	11

2. Microsoft Outlook

The Microsoft Outlook Syncml client requires the installation of the Funambol synchronization client. You can download this from:

Funambol Download Page <http://www.funambol.com/opensource/downloads.php>

Once you have downloaded the Outlook connector, following these steps:

- 1) Install the connector double clicking on the downloaded file and following the installation Wizard.

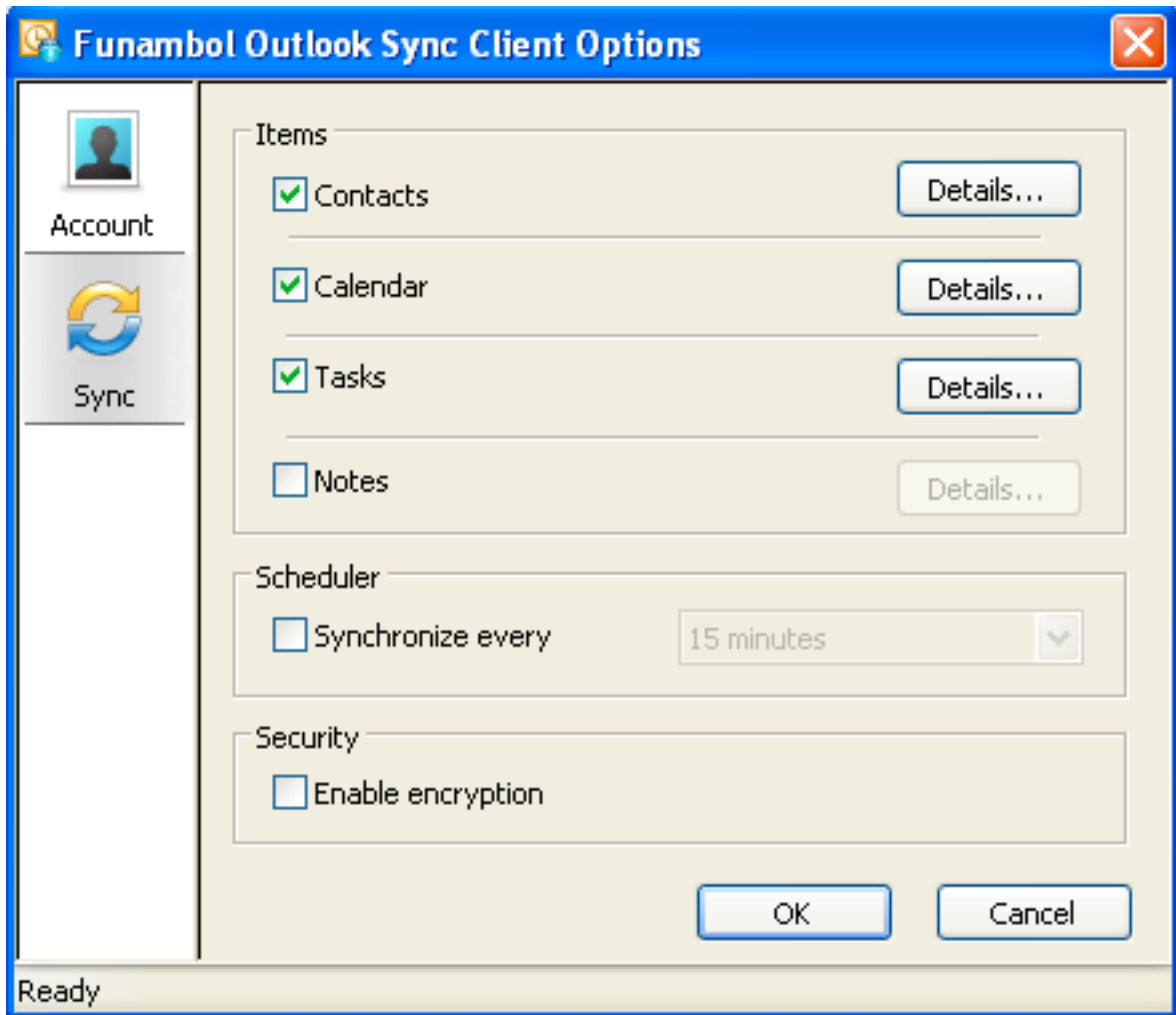
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- 2) Once you have installed the connector, open the application. You should see a screen similar to that shown below.



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- 3) Before you can synchronize Outlook with your CRM, you must first configure the connection. You can achieve this by clicking on Tools->Options in the menu. Once you have, you will see the screen shown below. You must ensure that the option for Contacts, Tasks and Meetings is selected, or if you only want to synchronize some of these record types, select a subset of these.



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- 4) For each of the items, you must map the local to the remove database. You do this by clicking on the Details button for each item.

- 5) The sync direction should be set to two-way for all items and the remote database and type should be set to match the table shown below.

Type	Remote database	Data Format
Contacts	contacts	vCard
Calendar	calendar	vCalendar
Tasks	task	vCalendar

- 6) Once you have saved the settings, navigate to the "Account" screen and configure the connection to the CRM. The settings are as follows:
- ▶ Location: This is the address of your installation with syncml.php on the end. For example, <http://demo.infoathand.com/syncml.php>.
 - ▶ Username: This is your CRM username

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- ▶ Password: This is your CRM password
- 7) Once you have configured the link to the CRM, save your changes and initiate a sync. You can do this by clicking on any active items panel in the main application.



- 8) Once you have successfully synchronized, you can set the application to synchronize on a scheduled basis in the Tools->Options menu. If you have any issues the system contains a log of any errors that occur in the Tools->Logging menu option.

3. S60 / Symbian

All S60 devices typically support synchronization via the Syncml protocol. In order to configure your device for synchronization, your device must meet the following pre-requisites.

- 1) Your device must be running an S60 operating system that supports Syncml v1.2
- 2) You must have a connection from your device to your CRM (either via 3G or wireless network)

In order to configure your devices, do the following:

- 1) Access your "Sync" configuration (typically located at Home->Tools->Sync)

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- 2) Create a new Sync profile and set the profile name to something like "CRM Sync"
- 3) Under applications, configure your applications as shown in the table below:

Type	Include in Sync	Remote Database	Synchronization Type
Contacts	Yes	contacts	Both Ways
Calendar / Tasks	Yes	caltask	Both Ways

- 4) Under connection settings:
 - ▶ Set the server version to 1.2
 - ▶ Server ID: non
 - ▶ Data bearer: Internet
 - ▶ Access point: Always ask, set to your preferred option
 - ▶ Host address: Set to CRM address, followed by syncml.php. For example, <http://demo.infoathand.com/syncml.php>
 - ▶ Port: Usually 80, but dependent on your server configuration
 - ▶ Username: Your CRM username
 - ▶ Password: Your CRM password
 - ▶ Allow sync requests: Yes
- 5) Once you have configured the settings as above, save the configuration, select options->synchronize. Once the sync has completed, you can select options->view log.

Index

C

Configuring your Syncml Client • 7

F

Funambol • 3

I

Installing the Syncme Module • 3

Introduction • 1

L

Licensing your SyncMe Module • 5

M

Microsoft Outlook • 7

S

S60 / Symbian • 11

Syncml • 3

T

Typographical Conventions • 1