

POWER TO RUN YOUR BUSINESS

sage

CRM Mid-Market Edition

Sage CRM MME 5.7

Lotus Domino Synchronization Guide

© Copyright 2004 ACCPAC International, Inc. All rights reserved.

ACCPAC International, Inc.
Publisher

No part of this documentation may be copied, photocopied, reproduced, translated, microfilmed, or otherwise duplicated on any medium without written consent of ACCPAC International, Inc.

Use of the software programs described herein and this documentation is subject to the ACCPAC International License Agreement enclosed in the software package.

ACCPAC, the ACCPAC logo, and Simply Accounting are either registered trademarks or trademarks of ACCPAC International, Inc. or its affiliates in the United States and/or other countries. All other marks are trademarks or registered trademarks of their respective companies.

ACCPAC International, Inc.
End User License Agreement for an
Evaluation, Demonstration or Retail Edition of ACCPAC CRM™

IMPORTANT— READ CAREFULLY BEFORE YOU INSTALL OR USE THIS SOFTWARE: This End User License Agreement (“EULA”) is a legal agreement between You (“You” and “Your” includes a person and/or an individual entity) and ACCPAC International, Inc. (“ACCPAC”) concerning the specified evaluation, demonstration and/or retail edition of the ACCPAC CRM software product (hereinafter respectively referred to as “**Evaluation Product**,” “**Demonstration Product**” and “**Retail Product**”; and collectively referred to as “**Software**”). The Software includes all component parts, the associated media, any printed materials, any updates, and any “online” or electronic documentation, as applicable. By accessing, installing, copying or otherwise using the Software, You agree to be bound by the terms of this EULA. If You do not agree to the terms of this EULA, ACCPAC is unwilling to license the Software to You. In such event, You may not access, use or copy the Software, and You should promptly contact ACCPAC for instructions on returning the Software. WRITTEN ASSENT IS NOT A PREREQUISITE TO THE VALIDITY OR ENFORCEABILITY OF THIS EULA.

1. License.

a. License Grant.

(i) Retail Product. If You licensed a Retail Product, subject to the payment of all applicable license fees, and the terms and conditions of this EULA, ACCPAC hereby grants to You a limited, non-sublicensable, non-exclusive, non-transferable right to install and run one copy of the specified version of the Software and the accompanying documentation, solely for Your individual use. This EULA authorizes You to make one copy of the Retail Product solely for backup or archival purposes, provided that the copy You make contains all of the proprietary notices set forth in or on the original version of the Software.

(ii) Demonstration Product. If You licensed a Demonstration Product, subject to the payment of all applicable license fees, and the terms and conditions of this EULA, ACCPAC hereby grants to You a limited, non-sublicensable, non-exclusive, non-transferable and revocable right to install and run copies of the Demonstration Product and the accompanying documentation, solely on computer(s) owned or controlled exclusively by You, for Your individual use and for demonstration, marketing, promotional, end user support, training and/or development purposes, each to the extent permitted and/or required under the applicable ACCPAC Solution Provider, Certified Consultant, Development Partner, Professional Accountant Recommender, Online Referral Partner, Hosting Partner, Recognized Training Center, Distribution Agreement or other applicable agreements between You and ACCPAC (collectively the “**Other ACCPAC Agreement**”). Use of the Demonstration Product is limited to not more than the number of concurrent users and/or seats as specified in the Other ACCPAC Agreement, multi-user license, product packaging or accompanying documentation. This EULA authorizes You to make one copy of the Demonstration Product solely for backup or archival purposes, provided that the copy You make contains all of the proprietary notices set forth in or on the original version of the Software. You may have additional rights as may be set forth in the applicable Other ACCPAC Agreement.

(iii) Evaluation Products. If You licensed an Evaluation Product, subject to the terms and conditions of this EULA, ACCPAC hereby grants to You a limited, non-sublicensable, non-exclusive, non-transferable and revocable right to install and run one copy of the Evaluation Product and the accompanying documentation, solely for Your individual use for evaluation purposes.

(iv) All Software. Upon receipt of the appropriate Software registration information, ACCPAC will provide You an alphanumeric key (the “**Activation Code**” or “**PAC Code**”) to enable You to use the Software pursuant to the terms of this EULA. Documentation shall include, but not be limited to, any printed materials, “online” or electronic data provided by or obtained from ACCPAC with regard to this Software (“**Documentation**”). The Software and Documentation are licensed, not sold. Even though copies of the Software may be provided on media of different formats, copies of the Software on different media formats do not constitute multiple licenses to the Software. If the Software is licensed as a suite or bundle with more than one specified Software product, this EULA applies to all such specified Software products, subject to any restrictions or usage terms specified on the applicable product packaging or accompanying documentation that applies to any of such Software products individually.

b. Installation and Use. This Software is licensed for use on a single computer within a multi-user or networked environment where the Software installed on such computer (the “**Server**”) may be made available for access by other computers, workstations, personal digital assistants, pagers, “smart phones,” or such other electronic device for which the Software was designed (“**Client Devices**”). You may use and install only one copy of the Software on one Server and may not make access to the Software available to more than the number of specifically named users, utilizing the networked Client Devices, for which you have obtained a license; provided, however, with the ACCPAC CRM Web Self Service and ACCPAC CRM Wireless Self Service options You may make access to the Software available to an unlimited number of client, partner and anonymous users, utilizing the networked Client Devices, nevertheless, you may not make access to the Software available to more than the number of specifically named employee users, utilizing the networked Client Devices, for which you have obtained a license. The component parts of the Software may not be installed individually or jointly in full or in part on more than one Server. Except as provided herein, the Software may only be used by specifically named users, each operating a networked Client Device with an installed and separately licensed third-party browser. For purposes of this EULA, a “**browser**” is a software application installed on a computer networked to other computers or the Internet, and used to locate and display web pages, Internet sites, and other electronic materials stored at remote locations, e.g. Netscape Navigator or Microsoft Internet Explorer. Except as provided herein, use of software, hardware or services that bypass any Software license restrictions and/or permit non-licensed users to access or utilize the Software (e.g., “multiplexing,” “pooling,” or third party add on software or hardware) expressly does not reduce the number of licenses required (i.e., the required number of licenses would equal the number of named user inputs to the multiplexing or pooling software or hardware “front end”). If the number of users operating Client Devices that can potentially connect to the Software exceeds or has the potential to exceed the number of licenses You have obtained, then You must have a reasonable self-enforcing automatic mechanism in place to ensure that Your use of the Software does not exceed the use limits specified for the license You have obtained.

2. Term. Regardless of the location of the Software, You are responsible for strict compliance with any and all of the terms and conditions of this EULA. This EULA will terminate automatically if You fail to comply with any of the limitations or other requirements described herein, and such termination shall be in addition to and not in lieu of any criminal, civil or other remedies available to ACCPAC. When this EULA terminates, You must immediately cease using the Software and destroy all copies of the Software and the Documentation. You may terminate this EULA at any point by destroying all copies of the Software and the Documentation.

a. Retail Product. If You licensed a Retail Product, this EULA is effective unless and until You or ACCPAC terminates the EULA earlier, in accordance with the terms set forth herein.

b. Demonstration Product. If You licensed a Demonstration Product, this EULA is effective unless and until You or ACCPAC terminates the EULA earlier, in accordance with the terms set forth herein or the terms set forth in Your Other ACCPAC Agreement or upon the earlier termination or expiration of Your Other ACCPAC Agreement.

c. Evaluation Product. If You licensed an Evaluation Product, this EULA is effective for a period commencing on the earliest date this Evaluation Software is downloaded, installed or first run and thereafter continuing for the period specified in the product packaging or accompanying documentation, unless sooner terminated by You or ACCPAC in accordance with the terms set forth herein, but in no event shall such term exceed one hundred and eighty (180) days.

3. Updates. ACCPAC may, at its sole discretion, make bug fixes, updates and/or service packs available. ACCPAC's maintenance service, if applicable and offered, is available for Retail Product at an additional cost to You, as Licensee, under a separate written agreement. ACCPAC's maintenance service is not available for Evaluation Product.

4. Ownership Rights.

a. Ownership of Software. The Software and Documentation are protected by United States patent, copyright laws and other intellectual property laws, and international treaty provisions. ACCPAC and its third party licensors, if any, retain all title to and, except as expressly and unambiguously licensed herein, all rights and interest in (a) the Software, including, but not limited to, all copies, versions, customizations, compilations and derivative works thereof (by whomever produced) and all related Documentation; (b) the ACCPAC trademarks, service marks, trade names, icons and logos; (c) any and all copyright rights, patent rights, trade secret rights and other intellectual property and proprietary rights throughout the world in the foregoing; and (d) all Confidential Information (as defined in Section 14 below). You acknowledge that Your possession, installation, or use of the Software does not transfer to You any ownership, title, or registrable interest of any kind to the intellectual property in the Software, and that You will not acquire any rights to the Software except as expressly set forth in this EULA. You agree that all backup, archival, or any other type of copies of the Software and Documentation will contain the same proprietary notices that appear on and in the Software and Documentation.

b. Submissions. Should You decide to submit any materials to ACCPAC via electronic mail, through or to ACCPAC website(s), or otherwise, whether as feedback, data, questions, comments, ideas, concepts, techniques, suggestions or the like, You agree that such submissions are unrestricted and shall be deemed non-confidential upon submission. You grant to ACCPAC and its assigns a non-exclusive, royalty-free, worldwide, perpetual, irrevocable license, with the right to sublicense, to use, copy, transmit, distribute, create derivative works of, commercialize, display and perform such submissions.

5. Restrictions. You may not rent, lease, sublicense, loan, sell, distribute, market or commercialize any portion of the Software or its components. You may only install and use the Software on hardware which is (a) under Your exclusive control and (b) in the case of hardware performing any server functions, located at premises where You normally conduct day-to-day business operations. Notwithstanding the foregoing, if the Software is hosted under the auspices of an authorized ACCPAC Hosting Partner, it may be installed on server hardware located at premises under the exclusive or primary control of such Hosting Partner or its agent. You may not permit any parent, affiliate, subsidiary or any other third parties to benefit from the use or functionality of the Software, either directly or via a facility management, timesharing, service bureau or any other arrangement; provided, however, that You may use the Software, as provided herein, to process the data of an affiliate or subsidiary of which You own more than fifty percent (50%); provided, however, You may not exceed the number of datasets specified on the applicable product packaging or accompanying documentation. You may not use the Software as part of a facility management, timesharing, or service bureau arrangement. You may not transfer any or all of the rights granted to You under this EULA. To the maximum extent this restriction is permitted under applicable law, You may not rename files of, modify, translate, localize, decompile, disassemble, decrypt, reverse engineer, attempt to derive source code from, remove any proprietary notices from, or create derivative works based upon the Software, in whole or in part. You may not duplicate or copy any portion of the Software or Documentation, unless otherwise set forth herein. You may not remove any proprietary notices or labels on the Software, including, but not limited to, the ACCPAC and product names wherever they may appear. All rights not expressly set forth hereunder are reserved by ACCPAC. ACCPAC reserves the right to periodically conduct audits upon advance written notice to verify compliance with the terms of this EULA.

6. Warranty and Disclaimer.

a. Limited Warranty. ACCPAC warrants that for ninety (90) days from the date of original purchase the media on which the Software is contained will be free from defects in materials and workmanship.

b. Customer Remedies. ACCPAC's entire liability and Your exclusive remedy shall be replacement of the defective media. To receive replacement of defective media, You must receive a return authorization number from ACCPAC and return the defective media to ACCPAC at Your expense with a copy of Your receipt. This limited warranty is void if the defect has resulted from accident, abuse, or misapplication. Any replacement media will be warranted for the remainder of the original warranty period. This remedy is not available to the extent it is prohibited under United States export control laws and regulations.

c. Warranty Disclaimer. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, AND EXCEPT FOR THE LIMITED WARRANTY SET FORTH HEREIN, THE SOFTWARE (AND ACCOMPANYING DOCUMENTATION) IS PROVIDED ON AN "AS IS" BASIS WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. WITHOUT LIMITING THE FOREGOING PROVISIONS, YOU ASSUME SOLE RESPONSIBILITY FOR SELECTING THE SOFTWARE TO ACHIEVE YOUR INTENDED RESULTS, AND SOLE RESPONSIBILITY FOR THE INSTALLATION OF, USE OF, AND RESULTS OBTAINED FROM THE SOFTWARE. WITHOUT LIMITING THE FOREGOING PROVISIONS, ACCPAC MAKES NO WARRANTY THAT THE SOFTWARE WILL BE ERROR-FREE, VIRUS FREE, OR FREE FROM INTERRUPTIONS OR OTHER FAILURES OR THAT THE SOFTWARE WILL SATISFY YOUR SPECIFIC REQUIREMENTS. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, ACCPAC DISCLAIMS ALL WARRANTIES AND CONDITIONS, EITHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING BUT NOT LIMITED TO ANY (IF ANY) IMPLIED WARRANTIES OR CONDITIONS OF MERCHANTABILITY, OF FITNESS FOR A PARTICULAR PURPOSE, OF LACK OF VIRUSES, OF LACK OF ACCURACY OR COMPLETENESS OF RESPONSES, OF RESULTS, AND LACK OF NEGLIGENCE OR LACK OF WORKMANLIKE EFFORT, ALL WITH REGARD TO THE SOFTWARE AND ASSOCIATED DOCUMENTATION. THERE IS NO WARRANTY OR CONDITION OF TITLE, QUIET ENJOYMENT, QUIET POSSESSION, CORRESPONDENCE TO DESCRIPTION, OR NON-INFRINGEMENT WITH REGARD TO THE SOFTWARE. THE ENTIRE RISK OF THE QUALITY OF OR ARISING OUT OF USE OR PERFORMANCE OF THE SOFTWARE, IF ANY, REMAINS SOLELY WITH YOU. SOME STATES AND JURISDICTIONS DO NOT ALLOW LIMITATIONS ON IMPLIED WARRANTIES, SO THE ABOVE LIMITATION MAY NOT APPLY TO YOU. THE FOREGOING PROVISIONS SHALL BE ENFORCEABLE TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

d. Indemnification. You agree to defend, indemnify and hold harmless ACCPAC and its directors, officers, employees, affiliates, sublicensees, and agents from and against all claims, defense costs (including reasonable expert and attorneys' fees), judgments and other expenses arising out of or on account of any negligent act, omission, or willful misconduct by You or on Your behalf in (i) the installation or use of the Software or (ii) your compliance or failure to comply with this EULA.

e. Data. YOU ACKNOWLEDGE THAT ANY DATA ENTRY, CONVERSION OR STORAGE IS SUBJECT TO THE LIKELIHOOD OF HUMAN AND MACHINE ERRORS, MALICIOUS MANIPULATION, OMISSIONS, DELAYS, AND LOSSES, INCLUDING, BUT NOT LIMITED TO, INADVERTENT LOSS OF DATA OR DAMAGE TO MEDIA THAT MAY RESULT IN LOSS OR DAMAGE TO YOU AND/OR YOUR PROPERTY, AND/OR YOUR DETRIMENTAL

RELIANCE ON MALICIOUSLY MANIPULATED DATA. ACCPAC SHALL NOT BE LIABLE FOR ANY SUCH ERRORS, OMISSIONS, DELAYS, OR LOSSES. YOU ARE RESPONSIBLE FOR ADOPTING REASONABLE MEASURES TO LIMIT THE IMPACT OF SUCH PROBLEMS, INCLUDING BACKING UP DATA, ADOPTING PROCEDURES TO ENSURE THE ACCURACY OF INPUT DATA, EXAMINING AND CONFIRMING RESULTS PRIOR TO USE, ADOPTING PROCEDURES TO IDENTIFY AND CORRECT ERRORS AND OMISSIONS, REPLACING LOST OR DAMAGED MEDIA, AND RECONSTRUCTING DATA. YOU ARE ALSO RESPONSIBLE FOR COMPLYING WITH ALL LOCAL, STATE, AND FEDERAL LAWS PERTAINING TO THE USE AND DISCLOSURE OF ANY DATA. IF YOU LICENSED AN EVALUATION PRODUCT, YOU ACKNOWLEDGE AND UNDERSTAND (I) THAT THE EVALUATION PRODUCT MAY BE USED FOR EVALUATION PURPOSES ONLY, (II) THAT THE EVALUATION PRODUCT SHALL BE OPERABLE ONLY FOR A LIMITED TIME AND (III) THAT, UPON EXPIRATION OF THE EVALUATION PERIOD, ANY DATA OR OTHER INFORMATION USED WITH, PROCESSED BY AND/OR STORED IN CONJUNCTION WITH THE EVALUATION PRODUCT MAY BE IRRETRIEVABLE, UNRECOVERABLE AND/OR OTHERWISE UNUSABLE.

f. Authorized ACCPAC Solution Providers and Certified Consultants. ANY AUTHORIZED ACCPAC SOLUTION PROVIDER, CERTIFIED CONSULTANT, RESELLER, INSTALLER OR CONSULTANT IS NOT AFFILIATED WITH ACCPAC IN ANY CAPACITY OTHER THAN AS A RESELLER, INSTALLER OR CONSULTANT OF ACCPAC'S PRODUCTS AND HAS NO AUTHORITY TO BIND ACCPAC OR MODIFY ANY LICENSE OR WARRANTY. ACCPAC MAKES NO REPRESENTATIONS, WARRANTY, ENDORSEMENT OR GUARANTEE WITH RESPECT TO THE SKILLS OR QUALIFICATIONS OF ANY AUTHORIZED ACCPAC SOLUTION PROVIDER, CERTIFIED CONSULTANT, RESELLER, INSTALLER OR CONSULTANT AND YOU ARE ENCOURAGED TO INDEPENDENTLY INVESTIGATE THE SKILLS AND QUALIFICATIONS OF ANY AUTHORIZED ACCPAC SOLUTION PROVIDER, CERTIFIED CONSULTANT, RESELLER, INSTALLER OR CONSULTANT WITH WHOM YOU ASSOCIATE.

7. Limitation of Liability. UNDER NO CIRCUMSTANCES AND UNDER NO LEGAL THEORY, WHETHER IN TORT, CONTRACT, OR OTHERWISE, SHALL ACCPAC BE LIABLE TO YOU OR TO ANY OTHER PERSON OR ENTITY FOR ANY INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES OF ANY CHARACTER WHATSOEVER (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, LOSS OF GOODWILL, LOSS OF CONFIDENTIAL OR OTHER INFORMATION, FOR BUSINESS INTERRUPTION, WORK STOPPAGE, COMPUTER FAILURE OR MALFUNCTION, FOR PERSONAL INJURY, LOSS OF PRIVACY, FOR FAILURE TO MEET ANY DUTY INCLUDING A DUTY OF GOOD FAITH OR OF REASONABLE CARE, FOR NEGLIGENCE (WHETHER ACTIVE OR PASSIVE), AND FOR ANY OTHER PECUNIARY OR OTHER LOSS WHATSOEVER) ARISING OUT OF OR IN ANY WAY RELATED TO THE USE OR INABILITY TO USE THE SOFTWARE, OR OTHERWISE UNDER OR IN CONNECTION WITH ANY PROVISION OF THIS EULA, EVEN IN THE EVENT OF FAULT, TORT (INCLUDING NEGLIGENCE, AND GROSS NEGLIGENCE), STRICT LIABILITY, BREACH OF CONTRACT, OR BREACH OF WARRANTY BY ACCPAC, AND EVEN IF ACCPAC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT WILL ACCPAC BE LIABLE FOR ANY DAMAGES IN EXCESS OF THE LIST PRICE ACCPAC CHARGES FOR A LICENSE TO THE SOFTWARE. THIS LIMITATION OF LIABILITY SHALL NOT APPLY TO LIABILITY FOR DEATH OR PERSONAL INJURY TO THE EXTENT THAT APPLICABLE LAW PROHIBITS SUCH LIMITATION. FURTHERMORE, SOME STATES AND JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF INCIDENTAL OR CONSEQUENTIAL DAMAGES, SO THIS LIMITATION AND EXCLUSION MAY NOT APPLY TO YOU. THE FOREGOING PROVISIONS SHALL BE ENFORCEABLE TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

8. Entire Agreement. This EULA expressly supersedes and completely replaces any and all prior end user license agreements. ACCPAC shall not be bound by or liable to You for any pre-existing or contemporaneous written or oral representations or warranties, made by anyone, with respect to the Software Product, including any authorized Solution Provider, Certified Consultant, distributor or reseller or their respective agents, employees, or representatives, nor shall You be deemed a third party beneficiary of any obligations of ACCPAC to any such Solution Provider, Certified Consultant, distributor or reseller.

9. Attorneys' Fees. If any party employs attorneys to enforce any rights arising out of or relating to this EULA, the prevailing party shall be entitled to recover its reasonable attorneys' fees, costs, and other expenses.

10. Severability. If any provision of this EULA is held to be unenforceable, the enforceability of the remaining provisions shall in no way be affected or impaired thereby.

11. United States Government. The Software and accompanying Documentation are deemed to be "commercial computer software" and "commercial computer software documentation," respectively, pursuant to DFAR Section 227.7202 and FAR Section 12.212, as applicable. Any use, modification, reproduction, release, performance, display or disclosure of the Software and accompanying Documentation by the United States Government shall be governed solely by the terms of this EULA and shall be prohibited except to the extent expressly permitted by the terms of this EULA.

12. Export Controls. You acknowledge that the Software may be subject to export controls imposed by U.S. laws and regulations. During the term of this EULA, You agree to comply with the U.S. Foreign Corrupt Practices Act and with all export laws and restrictions and regulations of the United States Department of Commerce or other United States or foreign agency or authority, and not to knowingly export, re-export, download, or allow the export, re-export or downloading of the Software or Documentation and any underlying information or technology in violation of any such restrictions, laws or regulations, to Afghanistan, Cuba, Iran, Iraq, Libya, North Korea or to any Group D:1 or E:2 country (or to any national of such countries), specified in the then current Supplement No. 1 to Part 740, or in violation of the embargo provisions in Part 746 of the U.S. Export Administration Regulations (or any successor regulations or supplement), except in compliance with all licenses and approvals required under applicable export laws and regulations, including, without limitation, those of the United States Department of Commerce. By accessing, installing, downloading or using the Software You are agreeing to the foregoing and You are certifying that You are not located in, under the control of, or a national or resident of any such country or on any such list.

EXPORT OF THE SOFTWARE MAY BE SUBJECT TO COMPLIANCE WITH THE RULES AND REGULATIONS PROMULGATED FROM TIME TO TIME BY THE BUREAU OF EXPORT ADMINISTRATION, UNITED STATES DEPARTMENT OF COMMERCE, WHICH RESTRICT THE EXPORT AND RE-EXPORT OF CERTAIN PRODUCTS AND TECHNICAL DATA. YOU ACKNOWLEDGE AND AGREE THAT IF THE EXPORT OF THE SOFTWARE IS CONTROLLED UNDER SUCH RULES AND REGULATIONS, THEN YOU SHALL NOT CAUSE THE SOFTWARE TO BE EXPORTED OR RE-EXPORTED, DIRECTLY OR INDIRECTLY, (A) WITHOUT ALL EXPORT OR RE-EXPORT LICENSES AND UNITED STATES OR OTHER GOVERNMENTAL APPROVALS REQUIRED BY ANY APPLICABLE LAWS, OR (B) IN VIOLATION OF ANY APPLICABLE PROHIBITION AGAINST THE EXPORT OR RE-EXPORT OF ANY PART OF THE SOFTWARE. SOME COUNTRIES HAVE RESTRICTIONS ON THE USE OF ENCRYPTION WITHIN THEIR BORDERS, OR THE IMPORT OR EXPORT OF ENCRYPTION EVEN IF FOR ONLY TEMPORARY PERSONAL OR BUSINESS USE. YOU ACKNOWLEDGE THAT THE IMPLEMENTATION AND ENFORCEMENT OF THESE LAWS IS NOT ALWAYS CONSISTENT AS TO SPECIFIC COUNTRIES. YOU ACKNOWLEDGE THAT IT IS YOUR ULTIMATE RESPONSIBILITY TO COMPLY WITH ANY AND ALL GOVERNMENT EXPORT AND OTHER APPLICABLE LAWS AND THAT ACCPAC HAS NO FURTHER RESPONSIBILITY AFTER THE INITIAL LICENSE TO YOU WITHIN THE ORIGINAL COUNTRY OF LICENSE.

13. High Risk Activities. The Software is not fault-tolerant and is not designed or intended for use in hazardous environments requiring fail-safe performance, including without limitation, in the operation of nuclear facilities, aircraft navigation or communication systems, air traffic control, weapons systems, direct life-support machines, or any other application in which the failure of the Software could lead directly to death, personal injury, or severe physical or property damage (collectively, "High Risk Activities"). ACCPAC expressly disclaims any express or implied warranty of fitness for High Risk Activities.

14. **Confidentiality.** You agree that the Software, including, but not limited to, all source and object code components, screen shots and displays, graphical user interfaces, algorithms, formulae, data structures, scripts, application programming interfaces and protocols, and the Documentation (collectively the "Confidential Information") are trade secrets of ACCPAC and are owned by ACCPAC or, where applicable, its third-party licensors. You agree to retain all Confidential Information in strict confidence at least with the same amount of diligence that You exercise in preserving the secrecy of Your most-valuable information, but in no event less than reasonable diligence. You agree to: (i) only disclose Confidential Information to Your employees and agents to the extent required to use the Software under the terms of this EULA and not to disclose or disseminate the Confidential Information to any third party without the prior written consent of ACCPAC, (ii) use the Confidential Information solely for Your benefit as provided for herein and not to allow any third party to benefit from the Confidential Information, and (iii) bind Your employees and agents, by terms no less restrictive than those set forth herein, to maintain the confidentiality of such Confidential Information, and not use or disclose such information except as permitted under this EULA. Notwithstanding the disclosure of any Confidential Information for any reason, such Confidential Information shall continue to be owned by ACCPAC or its licensors. Nothing contained herein shall be deemed to prevent You from disclosing or disseminating Your data, in any format or any report, to whomever You so choose. Notwithstanding anything else to the contrary in this Section 14, and only with respect to Demonstration Product, You are permitted to use the Demonstration Product to demonstrate and promote the functionality and benefits of the Product.

15. **Miscellaneous.** This EULA is exclusively governed by the laws of the United States and the State of California, without reference to conflicts of law principles. In the event of a dispute or legal action between the parties, they agree to waive any objections to personal jurisdiction, and agree to service of process and exclusive venue in the Federal District Court for Northern California or the California Superior Court of Alameda County. The application of the United Nations Convention of Contracts for the International Sale of Goods is expressly excluded. This EULA sets forth all of Your rights and is the entire agreement between the parties. This EULA supersedes any other communications with respect to the Software and/or Documentation. This EULA may not be modified except by a written addendum issued by a duly authorized representative of ACCPAC. No provision hereof shall be deemed waived unless such waiver shall be in writing and signed by a duly authorized representative of ACCPAC. You hereby acknowledge a breach of this EULA would cause irreparable harm and significant injury to ACCPAC that may be difficult to ascertain and that a remedy at law would be inadequate. You agree that ACCPAC shall have the right to seek and obtain immediate injunctive relief to enforce the obligations under this EULA in addition to any other rights and remedies it may have. If any provision of this EULA is held invalid, the remainder of this EULA shall continue in full force and effect. The controlling language of this EULA is English. If You have received a translation into another language, it has been provided for Your convenience only.

16. **Apache Software License, Version 1.1.**

Copyright (C) 1999-2001 The Apache Software Foundation. All rights reserved.

Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

- a. Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer.
- b. Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.
- c. The end-user documentation included with the redistribution, if any, must include the following acknowledgment: "This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>)." Alternately, this acknowledgment may appear in the software itself, if and wherever such third-party acknowledgments normally appear.
- d. The names "FOP" and "Apache Software Foundation" must not be used to endorse or promote products derived from this software without prior written permission. For written permission, please contact apache@apache.org.
- e. Products derived from this software may not be called "Apache", nor may "Apache" appear in their name, without prior written permission of the Apache Software Foundation.

THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

This software consists of voluntary contributions made by many individuals on behalf of the Apache Software Foundation and was originally created by James Tauber <jtauber@tauber.com>. For more information on the Apache Software Foundation, please see <http://www.apache.org/>.

17. **ACCPAC Customer Contact.** If You have any questions concerning these terms and conditions, or if You would like to contact ACCPAC for any other reason, please call (925) 461-2625, or write to us at: ACCPAC International, Inc., 6700 Koll Center Parkway, Third Floor, Pleasanton, California 94566, USA. You may also find us on the Web at <http://www.accpac.com> or <http://www.accpaconline.com>.

ACCPAC® SUPPORTPLUS™

TERMS AND CONDITIONS OF SALE

1. General. These terms and conditions (the "Terms and Conditions"), the invoice, statement, or notice ("Invoice"), and the end user license agreement (the "EULA") for the Software, as defined below, constitute the entire agreement (the "Agreement") between the ACCPAC entity identified in the Invoice ("ACCPAC," "we," "us," or "our") and the buyer identified in the "Bill To" section of the Invoice ("you" or "your") regarding your purchase of SupportPlus. The "Software" refers to ACCPAC software product(s) for which you have purchased SupportPlus. This Agreement supersedes all prior and contemporaneous agreements and may be amended only by a writing signed by ACCPAC.

2. SupportPlus Plans and À La Carte Options. Subject to your payment of all applicable fees set forth in the Invoice (the "Fees"), you will receive the SupportPlus Plan (Software Assurance, Standard or Premier) or à La Carte option (Tech-Support OnDemand or Payroll Update Plan) you purchased. The upgrades, service packs, payroll tax updates, technical telephone support, and/or other benefits included with the SupportPlus Plan or à La Carte option you purchased are set forth at www.accpac.com/supportplus (the "SupportPlus Website"). The SupportPlus Plans and à La Carte options may be amended or modified from time to time by ACCPAC, within its sole discretion, upon thirty (30) days notice via posting at the SupportPlus Website or other written notice given by ACCPAC. Certain SupportPlus Plans and à La Carte options may not be available in some countries.

3. Current Version; Media. To use or install any upgrades, service packs, payroll tax updates, or any other documentation data or materials available under SupportPlus ("Materials"), you must have a valid license for the then-current version of the Software; installing the Materials with older versions of the Software may cause the Materials and/or the Software to function improperly and/or the Software to cease functioning. The Materials, including but not limited to upgrades, service packs, and payroll tax updates, shall be released as determined appropriate by ACCPAC, in its sole discretion, and may be provided via CD, diskette, Internet, your Solution Provider and/or other delivery method at ACCPAC's sole discretion. If available on CD or diskette, ACCPAC will deliver the Materials to you (i) FOB origin; and (ii) after advance payment of an annual shipping and handling charge for all regular shipments to you under this Agreement during the applicable Initial or Renewal Term, as defined in section 6.

4. Pricing, Payment, and Acceptance. All fees are nontransferable and non-refundable (even in the event you cancel your SupportPlus coverage). You agree to pay all Fees set forth in the Invoice in the currency specified therein within 30 days of the date of the Invoice. ACCPAC may raise the Fees for any renewal term upon 30 days prior notice. A \$50.00 (U.S.) charge will be added to the amount of any dishonored check, charge, debit or transfer. You agree to pay all Fees, plus any applicable late fees or penalties, if any check, charge, debit or transfer is not honored by your financial institution for any reason. Unless you notify us in writing within 10 days of the date on your Invoice of any discrepancy between the Materials you ordered and those you received, you are deemed to have accepted delivery. By

installing, using or accepting delivery of the Materials, you agree to be bound by the EULAs and this Agreement. Unless otherwise indicated in the Invoice, all amounts set forth therein are exclusive of taxes, insurance, and shipping and handling charges and you are responsible for payment thereof.

5. Lapse. To resume your subscription to any SupportPlus Plan (Software Assurance, Standard or Premier) after a lapse, you must purchase a minimum of one (1) full year of service and pay a reinstatement fee of twenty percent (20%) of the then-current Fee for each month of lapsed coverage.

6. Term and Termination. Subject to your payment of all Fees, the term of the Agreement starts on the date indicated in the Invoice and shall continue in effect for a one-year period or such other period expressly set forth in the Invoice ("Initial Term"). Subject to your payment of the renewal and other Fees, this Agreement shall renew for successive one-year terms or such other period as expressly set forth in the Invoice (each a "Renewal Term"). The Agreement shall terminate upon (a) your failure to timely pay any renewal or other Fees, as specifically set forth in any Invoice; (b) your delivery of a written notice of termination to ACCPAC, provided that you are not in breach of any terms of the Agreement; or (c) your breach of the Agreement and failure to cure such breach within 30 days after written notice thereof by ACCPAC, provided that ACCPAC hereby reserves all rights and remedies available to it as a result of such breach. Upon expiration or termination of the Agreement for any reason, you acknowledge and agree that (i) you shall not be entitled to a refund or offset of any amounts owed or paid to ACCPAC; and (ii) you must cease using the Materials and any copies thereof, remove the Materials and any copies thereof from all computers and other devices in your control, and destroy all media in your control containing the Materials or copies thereof. Unless otherwise provided herein, remedies are cumulative and there is no obligation to exercise a particular remedy. Expiration or termination of the Agreement shall not prejudice, limit, or restrict any other rights or remedies either party may have arising prior to such expiration or termination. ACCPAC has no obligation to refund any amounts paid by you.

7. Additional Services. Technical support services, other than Tech-Support OnDemand, may be provided by ACCPAC, subject to a separate written agreement between the parties. Fees for such technical support services shall be at ACCPAC's then-current published rates, plus any costs and expenses, including reasonable transportation and lodging. Availability of and Fees for international technical support services shall be determined by ACCPAC, in its sole discretion.

8. Audits. ACCPAC or its agents may audit your books, records and information systems to ensure that your use of the Product complies with the end user license agreement between you and ACCPAC concerning the Product (the "EULA").

9. Client ID. You must maintain the security of your Client ID number, and you may not allow anyone other than your employees or employees of your authorized ACCPAC

Solution Provider of record to use your Client ID number. You may change your Solution Provider of record by completing the appropriate form provided by ACCPAC.

10. Limitations. ACCPAC has no obligation to support: (a) altered, damaged, or modified Software, (b) problems, issues, or errors caused by negligence, abuse, or misapplication of the Software; (c) use of the Software other than as specified in the ACCPAC documentation; or (d) hardware malfunctions, third-party software not licensed from ACCPAC, or Software which is not the then-current version. At ACCPAC's request and your own expense, you will provide ACCPAC with documentation of problems and test data, and cooperate with ACCPAC to resolve the issue(s) submitted by you. ACCPAC shall provide SupportPlus in the English language, except as otherwise agreed in writing.

11. DISCLAIMER OF WARRANTIES. THE PRODUCT, UPGRADES AND MATERIALS RELATED THERETO ARE SUBJECT EXCLUSIVELY TO THE WARRANTIES SET FORTH IN THE EULA. NO OTHER WARRANTIES ARE MADE BY ACCPAC WITH RESPECT TO THE MATERIALS. SERVICES PROVIDED PURSUANT TO THE AGREEMENT ARE NOT WARRANTED. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, ACCPAC PROVIDES THE MATERIALS AND SERVICES "AS IS" AND "AS AVAILABLE" AND THE ENTIRE RISK AS TO SATISFACTORY QUALITY, PERFORMANCE, ACCURACY AND EFFORT IS WITH YOU. EXCEPT AS PROVIDED IN THE LIMITED WARRANTY, IF ANY, ACCPAC HEREBY DISCLAIMS ALL WARRANTIES, CONDITIONS, OR DUTIES OF EVERY NATURE WHATSOEVER (EXCEPT ANY DUTIES OF GOOD FAITH). FURTHER, THERE IS NO WARRANTY OF TITLE, ENJOYMENT, OR LACK OF INFRINGEMENT, OR THAT THE PROVISION OR OPERATION OF ANY MATERIALS WILL BE TIMELY OR UNINTERRUPTED.

12. Limitation of Liability and Exclusion of Damages. NOTWITHSTANDING ANY DAMAGES YOU MAY INCUR FOR ANY REASON WHATSOEVER, ACCPAC'S ENTIRE LIABILITY FOR ANY BREACH OF THE AGREEMENT OR FOR ANY CAUSE OF ACTION OF ANY NATURE (INCLUDING WITHOUT LIMITATION, TORT OR PRODUCT LIABILITY), OR UNDER THE LIMITED WARRANTY, AND YOUR EXCLUSIVE REMEDY AGAINST ACCPAC SHALL BE LIMITED TO THE AMOUNT OF DAMAGES ACTUALLY INCURRED BY YOU, UP TO AN AMOUNT NOT TO EXCEED THE FEES PAID TO ACCPAC FOR THE PRECEDING 12-MONTH PERIOD. PROVISIONS SET FORTH IN SECTIONS 10, 11, AND 12 SHALL APPLY TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, EVEN IF ANY REMEDY FAILS OF ITS ESSENTIAL PURPOSE. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL ACCPAC BE LIABLE FOR ANY SPECIAL, INCIDENTAL, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INDIRECT DAMAGES OR LOSSES WHATSOEVER, ARISING OUT OF OR IN ANY WAY RELATED TO THE ACCPAC MATERIALS, EVEN IF ACCPAC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, AND EVEN IN THE EVENT OF FAULT, TORT (INCLUDING NEGLIGENCE) OR STRICT OR PRODUCT LIABILITY OR MISREPRESENTATION.

13. Miscellaneous. To the extent permitted by local law, this Agreement shall be governed by and construed exclusively in accordance with the laws of California without regard to the conflict of laws provisions thereof and without regard to the United Nations Convention on Contracts for the International Sale of Goods. In any action or proceeding to enforce rights under the Agreement, the prevailing party shall be entitled to recover costs and attorneys' fees.

Contents

Chapter 1: Introduction

What is CRM/Lotus Synchronization	1-1
CRM / Lotus Component Interaction	1-2
Sync Control Panel Interaction with Servers	1-2
Synchronizing Appointments	1-2
Chapter Summary	1-3

Chapter 2: Getting Started

Synchronization Prerequisites	2-1
Server Preparation	2-1
Now you can.....	2-2

Chapter 3: CRM Lotus Sync Control Panel

How the Sync Control Panel Works	3-1
Introduction	3-1
Upgrading an Existing CRM / Lotus Synchronization Installation	3-1
What the Sync Control Panel Does	3-2
When the Sync Control Panel is Configured and Run	3-3
Configuring the Sync Control Panel and Installing Scripts	3-5
Synchronizing Users	3-10
Lotus Domino Administration Tasks	3-11
Synchronization Files	3-11
Domino Default User	3-12
Strip Strings	3-13
Starting the Service	3-14
Testing the Service	3-14
Disabling Synchronized Users	3-14
Now you can.....	3-15

Chapter 4: Calendar Mappings

What Exactly gets Synchronized?	4-1
Calendar Item Actions and Categories	4-2
Other Field Mappings	4-3
Personal and Group To Dos	4-3
Start and End Times	4-4
Start Times and Dates	4-4
End Times and Dates	4-4
Other Points to Note	4-4
Now you can...	4-5

Chapter 5: Scheduling Appointments

Working with the CRM/Lotus Synchronization Feature	5-1
Creating Appointments and To Do Items	5-2
Example: Creating a Meeting Appointment in CRM	5-2
Example: Creating a Phone Out Appointment in CRM	5-4
Example: Creating a To Do Item in Lotus Notes	5-5
Now you can...	5-6

Chapter 1

Introduction

This guide is for Sage CRM MME Implementers. The final chapter, Scheduling Appointments, is for the user.

We assume that implementers have:

- Experience in implementing and troubleshooting CRM installations.
- Experience in administering Lotus Domino servers.

We assume that users are:

- Familiar with the use of a Web browser.

What is CRM/Lotus Synchronization

Note: The latest CRM/Lotus Synchronization version is 4.0.

The synchronization functionality is available for CRM appointments only.

CRM / Lotus Domino synchronization results in the following functionality:

- When an Appointment is created, edited, or deleted by a CRM user who is enabled for Lotus synchronization, a corresponding Meeting or To Do is automatically created, updated, or deleted in Lotus Notes.
- When a Meeting, an Appointment, or a To Do item is created or edited by a synchronized user in Lotus Notes, a corresponding Appointment is automatically created or updated in CRM. If you delete a Meeting or To Do in Lotus Notes and the meeting has people invited to it, the corresponding Appointment is deleted from CRM. However, if you did not invite anyone to the meeting apart from yourself (or if you created a Notes Appointment or a Personal To Do item), it is not automatically deleted from CRM.

Lotus synchronization works as follows:

A service called the Custom Service Server, which resides on the Lotus Domino server, polls the Lotus Domino application and the CRM application. The service logs onto CRM and retrieves any Appointments that have been created or updated by those users who are enabled for Lotus synchronization. The calendar items are then created, updated, or deleted on the Lotus Domino server. Following this, the service retrieves any Meetings, Appointments, or To Do items that have been created, updated, or deleted on the Lotus Domino server and sends them to the CRM server. Once this happens, the Appointments are created or updated in CRM.

CRM / Lotus Component Interaction

The ability of a number of components to communicate with each other makes CRM / Lotus Domino synchronization possible. These include the eWare Message Object, the CRM Table Level Script, synchronization scripts, and the CRM Custom Service Server. The Sync Control Panel is responsible for installing the synchronization components on the servers.

Sync Control Panel Interaction with Servers

When the Sync Control Panel is configured and installed on the CRM server and then on the Lotus Domino server:

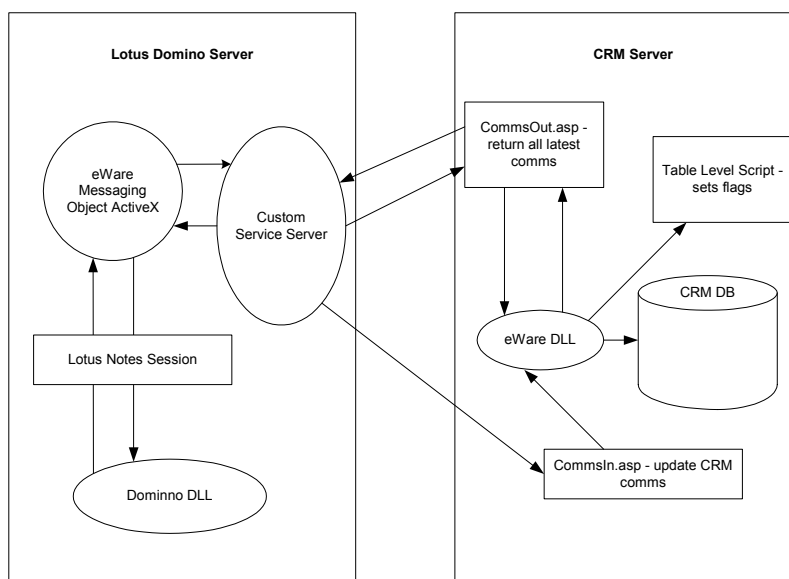
- A Table Level Script is installed on the CRM server.
- CRM ASP files are installed on the CRM server.
- The CRM Custom Service Server and its scripts are installed on the Lotus Domino server.
- The eWare Message Object is also installed on the Lotus Domino server.

Synchronizing Appointments

Once the Sync Control Panel is run and users have been synchronized, components interact as follows when calendar items are created, updated, or deleted on the servers.

- On the CRM server, when an Appointment is created, updated, or deleted, the CRM Table Level Script flags the CRM record that needs to be synchronized.
- On the Lotus Domino server, the CRM Custom Service Server constantly polls the Lotus database for new and updated Meetings, Appointments, and To Do items. When it finds them, it sends each record to the ASP files on the CRM server. The ASP files update the CRM server.
- The CRM Custom Service Server also polls the CRM server through another ASP page. This ASP page sends any new or updated Appointments to the Lotus Domino server.

The following diagram illustrates CRM / Lotus component interaction.



Component interaction when synchronizing appointments

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Getting Started	The steps that need to be taken prior to synchronizing CRM and Lotus Domino servers.
CRM Lotus Sync Control Panel	Using the Sync Control Panel to synchronize users and install synchronization scripts.
Calendar Mappings	Details on the way in which calendar item fields are mapped between CRM and Lotus.
Scheduling Appointments	How to create, update, and delete synchronized Appointments, Meetings, and To Dos.

Chapter 2

Getting Started

In this chapter you will learn about:

- The prerequisites for synchronizing CRM with Lotus Domino.

Synchronization Prerequisites

Server Preparation

Before you synchronize CRM with Lotus Domino, you need to:

On the CRM Server	On the Lotus Domino Server
Ensure you've got the Extensibility Module.	Ensure that Lotus Domino 5.0.9 is installed.
Ensure that IE 5.5 or above is installed, and ensure that Lotus Notes is the default E-mail application. You do this from Tools Internet Options Programs tab by checking that Lotus Notes is selected in the E-mail field.	Ensure that IE 5.5 or above is installed.
Ensure that XML Parser version 4 is installed. This is available on the CRM installation CD. Run the INSTMSIW.EXE file first followed by the MSXML.MSI file.	Ensure that XML Parser version 4 is installed.

You also need to:

- Ensure that the CRM server and Lotus Domino server are installed on separate machines. They cannot be installed on the same box.
- Ensure that both servers are installed on the same domain or that they have a trust relationship.

- Ensure that both servers are operating in the same time zone (clients can be in different time zones).
- Make sure that you have access to the Sync Control Panel file and the CRM Custom Service Server for use in the implementation. Both files are supplied with the CRM / Lotus Domino Synchronization installation files.
- Copy the Sync Control Panel and the files supplied with it to the C:\SYSTEMROOT\WINNT\SYSTEM32 directory on the Lotus Domino server and on the CRM server. Note that you should then create a new folder on the Lotus Domino server – called CRMLotus, for example – to store the synchronization files when the Sync Control Panel is run on the Lotus Domino server.

Now you can...

- Outline the prerequisites for synchronizing CRM with Lotus Domino.

Chapter 3

CRM Lotus Sync Control Panel

In this chapter you will learn about:

- How the Sync Control Panel works.
- Configuring the Sync Control Panel and installing scripts.
- Synchronizing users.
- Starting and testing the service.
- Disabling Synchronized users.

How the Sync Control Panel Works

Introduction

All the steps involved in working with the CRM Lotus Sync Control Panel are described in this chapter. It is recommended that you read the chapter fully before you run the Sync Control Panel. In addition, note that you should first:

1. Configure the Sync Control Panel on the CRM server.
2. Select the Install button to install scripts on the CRM server.
3. Reset IIS.

Then:

4. Configure Sync Control Panel on the Lotus Domino server.
5. Select the Install button to install scripts on the Lotus Domino server.
6. Perform a number of administration tasks on the Lotus Domino server.
7. Select the Sync Users button to synchronize users.

Upgrading an Existing CRM / Lotus Synchronization Installation

If you are upgrading an existing CRM / Lotus synchronization installation, it is important that you carry out the following steps before you run the control panel:

1. Move the following files out of the Custom Pages folder of the CRM install (...WWWROOT\CRM\CUSTOM PAGES) to a backup folder:

- COMMSIN.ASP
 - COMMSOUT.ASP
 - MAILGLOBALS.JS
 - MAILSERVER_LT.JS
2. From CRM | Administration | Customization | Communication, select the TableScripts tab.
 3. Click on the MailServerIntegration Table Level Script, and select the Delete button to delete it.

You can now go ahead and run the control panel.

What the Sync Control Panel Does

The Sync Control Panel is responsible for the following:

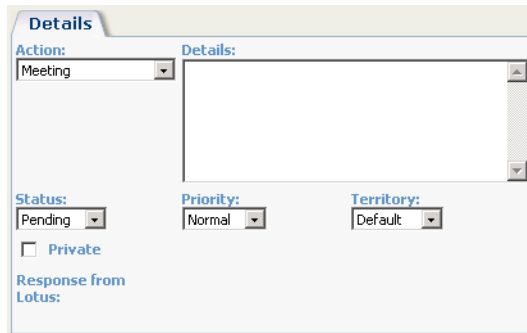
- Installing synchronization scripts on the Lotus Domino and CRM servers.
- Synchronizing Lotus Notes users with CRM—the user synchronization creates logons for all Lotus users in CRM. The new users are marked as Resources in CRM.

When the Sync Control Panel is Configured and Run

The following operations occur in CRM once the Sync Control Panel has been configured and run on the CRM server and the Lotus Domino server:

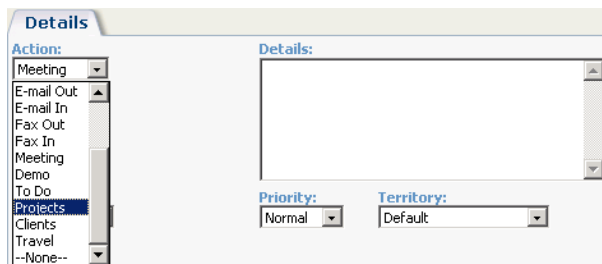
- A Table Level Script is installed on the Communication table on the CRM server.
- Three new columns are created in the USERS table for each synchronized user in CRM—one for their Lotus Notes user ID, one for their Lotus Notes mail file name, and one for their Lotus Domino server name.
- Three new fields are displayed on the Other Details panel on the User Details page of each user—Lotus User Name, Lotus Notes Database Name, and Lotus Server.

- A new field, Response From Lotus, becomes available on the Enter New Communication page if additional users are added to the Appointment when it is being created. This field displays Lotus Notes users' responses to e-mail alerts. For more information on the Response From Lotus field, please refer to the Scheduling Appointments chapter in this document.



Enter New Communication page – Detail panel

- Three new appointment action types are added to CRM – Projects, Clients and Travel.



Detail Panel with new Actions

Configuring the Sync Control Panel and Installing Scripts

The Sync Control Panel needs to be run first on the CRM server and then on the Lotus Domino server.

The Sync Control Panel needs to be configured on the CRM server and on the Lotus Domino server so that you can install synchronization scripts on them.

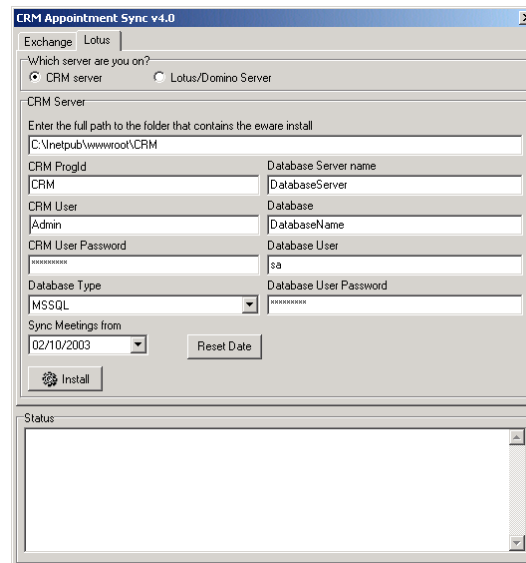
To configure the Sync Control Panel and install scripts on either server:

1. Select Start | Settings | Control Panel | Sync Control Panel.
2. When the Sync Control Panel is displayed, select the Lotus tab.
3. From the Which Server Are You On panel, select the CRM Server button to configure the Sync Control Panel on the CRM server, or select the Lotus/Domino Server button to configure the Sync Control Panel on the Lotus Domino server.
4. Enter the Sync Control Panel settings. Please refer the to the tables below for more information on completing the fields.
5. Select the Install button to install synchronization scripts.
6. If you are installing scripts on the CRM server, reset IIS at this point.
7. If you are installing scripts on the Lotus Domino Server you need to carry out a number of administration tasks and then synchronize users. Please refer to the Synchronizing Users section for more information.



Install Button

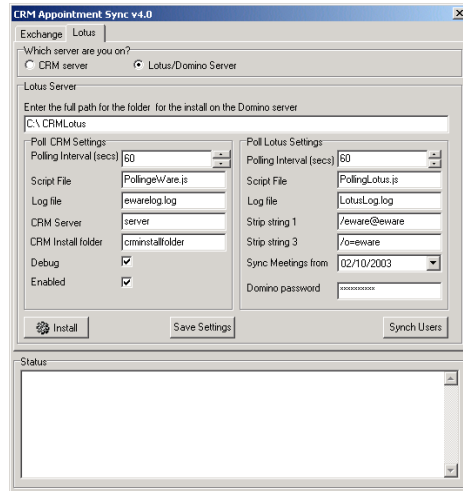
The following table describes the fields on the Sync Control Panel when you are configuring it on the CRM server. Note that all of the fields are required fields.



CRM Server Sync Control Panel settings

Field	Description
Enter The Full Path To The Folder That Contains The CRM Install	Specify the path to the CRM install folder, for example, C:\INETPUB\WWWROOT\CRM
CRM Prog Id	The name of the folder that CRM is installed in.
Database Server Name	Type the name of the CRM database server.
CRM User	Enter and Admin user's logon ID. The user needs to have rights to log onto CRM externally.
Database	Type the name of the CRM database.
CRM User Password	Enter the password for the above Admin user.
Database User	Enter the name of the CRM database administrator.
Database Type	Select the CRM database type from a list of databases.
Database User Password	Type the CRM database administrator's password.
Sync Meetings From	<p>This field is set to today's date by default. Using the default setting means that when you start the synchronization, only meetings in CRM from "today" onward are synchronized.</p> <p>If you want to set this to sync meetings from an earlier date, change the date here.</p>
Reset Date	The default date applied is the initial install date. However, if you want to reset it afterwards, then you can run the Sync Control Panel again and select the Reset Date button. The date specified in the Sync Meetings From field will be set as the new default date. As a result, all meetings from that date onward will be flagged and resynchronized in Lotus.
Install	Installs synchronization scripts on the CRM server.

The following tables describe the fields on the Sync Control Panel when you are configuring it on the Lotus Domino server.



Lotus Domino Server Sync Control Panel settings

This table describes the Poll CRM Settings on the Sync Control Panel.

Poll CRM Settings

Field	Description
Enter the full path to the folder for the install	Specify the path to the folder where the Sync Control Panel and other files are to be installed, for example C:\CRMLotus
Polling Interval (secs)	The interval between script runs (how often the server is polled, in seconds).
Script File	The name of and path to the script file you want to run in the CRM server, for example, C:\TEMP\POLLINGEWARE.JS
Log File	The name of the log file.
CRM Server	The name of the CRM server.
CRM Install Folder	The folder where CRM is installed.
Debug	If selected, extra logging information is sent to the log files. Select this option when performing the initial installation and then unselect it when the synchronization is running smoothly. If unselected, error messages only are recorded in the log files.
Enabled	Select to enable the service.

This table describes the Poll Lotus Settings on the Sync Control Panel.

Poll Lotus Settings

Field	Description
Polling Interval (secs)	Specify the interval between the script runs, that is, how often the server is to be polled, in seconds.
Script file	The name of the script file you want to run on the Lotus Domino server, for example, POLLINGLOTUS.JS.
Log file	The name of the Lotus log file.
Strip String 1	Lotus Domino Strip string 1. Must be all lowercase letters. Please Refer to the "Strip Strings" section in this chapter for more information.
Strip String 3	Lotus Domino Strip string 3. Must be all lowercase letters. Please Refer to the "Strip Strings" section in this chapter for more information.
Synch Meetings From	This field is set to today's date by default. Using the default setting means that when you start the synchronization, only meetings in Lotus from "today" onward will be synchronized. If you want to set this to synch meetings from an earlier date, change the date here.
Domino Password	The password of the Domino admin user that is being used by the integration scripts to log onto the Domino server. For details on setting up this user, please refer to Domino Default User in the next section.

This table describes other options on the Sync Control Panel.

Other Options

Field	Description
Install	Installs synchronization scripts on the Lotus Domino server.
Save Settings	The Sync Control Panel loads your existing settings by default. However, you can use it to edit settings in the POLLLOTUS INI file, such as the Polling Interval or Debug Mode. To do this, run the Sync Control Panel, edit the settings, and click the Save Settings button. The new settings are written back to the INI file.
Synch Users	Selecting the Synch Users button, displays the Synchronize Domino Users dialog box, from which you can create new users in CRM for existing Lotus Domino users.

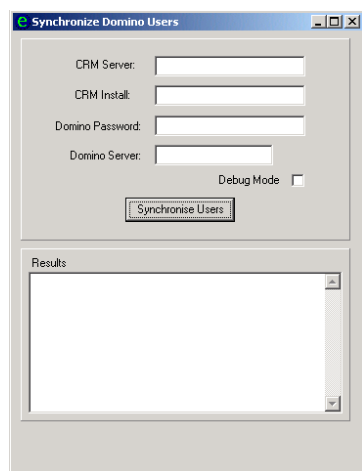
Synchronizing Users

You synchronize users using the Sync Control Panel on the Lotus Domino server.

To synchronize users:

1. Carry out the administration tasks described in the Lotus Domino Administration Tasks section, below.
2. Once you have carried out the administration tasks, select the Synchronize Users button on the Sync Control Panel.
3. When you do this the Synchronize Domino Users dialog box is displayed.
4. Complete the fields on the dialog box and select the Synchronize Users button.

The following table describes the fields on the Synchronize Domino Users dialog box. It is displayed if you select the Synch Users button when you run the Sync Control Panel on the Domino server.



Synchronize Domino Users dialog box

Field	Description
CRM Server	The name of the server where CRM is installed.
CRM Install	The name of the IIS alias for the CRM install, for example CRM.

Field	Description
Domino Password	The password of the Domino admin user that is being used by the integration scripts to log onto the Domino server as. For details on setting up this user, please refer to Domino Default User in the next section.
Domino Server	The name of the Domino server.
Debug Mode	Ensure that this is unchecked initially. If you encounter problems, run the Synchronization again. Then, with the Debug Mode checkbox selected, review the messages that are displayed.
Synchronize Users	<p>When you select the Synchronize Users button, new users are created in CRM for each Lotus Notes user who is not already a CRM user. The new users are created as resources in CRM.</p> <p>If a user already exists with the same Lotus Logon or the same first and last names, they are updated.</p> <p>Note that you need to review the Lotus Domino Administration Tasks section in this chapter before you synchronize users.</p>

Lotus Domino Administration Tasks

A number of steps need to be carried out on the Lotus Domino server before you select the Synchronize button on the Sync Control Panel to synchronize users.

Synchronization Files

1. Install the Custom Service Server manually. To do this, open the DOS prompt and enter `c:\<syncfilefolder>\ewarecss.exe /install`
2. Register the eWare Message Object. To do this, type the following in the DOS prompt: `c:\<syncfilefolder>\regsvr32 ewaremessageobject.dll`
3. Register the nlsxbe.dll. To do this, type the following in the DOS prompt: `c:\lotus\domino\regsvr32 nlsxbe.dll`
Note: If you have a Notes client installed on the Domino server, make sure that you install the correct nlsxbe.dll, that is, the one in the `c:\lotus\domino` folder not the one in the `c:\lotus\notes` folder.

If the message "You Must Be Running On A Server" is displayed, unregister the nlsxbe.dll and register the correct one.

Domino Default User

The integration scripts running on the Domino server need to log onto Domino using the default user that is configured on the Domino server. Consequently, the server must be configured so that this default user is an administrator or has admin rights to view and update all other users' mail databases. **Note:** This user's password is the Domino Password you enter when you run the control panel on the Domino server and when you synchronize users.

You can do this using one of the following methods:

Method 1

- If there is no Notes client installed on the server, use the default server ID that exists from when the server was installed. This ID has a blank password. There is no extra configuration required – the Domino Password is blank.
- If a Notes client that uses the server ID is already installed, additional configuration steps are not required. The Domino Password is blank.

Method 2

You can install a client on the Domino server that uses a specially created Admin user ID as follows:

1. Use the Domino Administrator to create a new admin user and give the new user full admin rights. The password you set for this user becomes the Domino Password.
2. Copy the new user's ID to the Domino server. Note that this step assumes that the Domino Administrator is on a different machine.
3. Install Notes Client on the Domino server.
4. Run the Client and connect it to the new admin user ID file.
5. Unregister the NLSXBE.DLL from the Notes install folder (regsvr32 /u nlsxbe.dll) and register the NLSXBE.DLL on the Domino install folder (regsvr32 nlsxbe.dll).
6. Edit the NOTES.INI file in the Domino install folder so that the KeyFileName is pointing to the same ID file as the KeyFileName setting in the NOTES.INI in the Notes install folder. However, you need to specify the full path to the ID file here.
7. You can use the TESTLOGONTOLOTUS.JS file to test that the configuration is correct.

Strip Strings

Once scripts have been installed on the Lotus Domino server (and before you synchronize users), you need to edit settings in the PollLotus INI file. You can edit the INI file directly through a Text Editor, or you can edit the Strip String fields on the Sync Control Panel when you are running it on the Lotus Domino server. When you change setting in this way, remember to select the Save Settings button to save the new values.

- Edit the following settings in the PollLotus INI file if a hierarchal naming system is not being used:

- stripuser1=/server@server
- stripuser2=cn=
- stripuser3=/o=server

Users in Lotus have canonical names, which are in the format cn=firstname lastname/o=server. When invited to meetings, their names are in the format firstname lastname/server@server. Consequently

- stripuser1 needs to be set to <server@server> that is, the last part of the string that is displayed when you view users who have been invited to a meeting.
- stripuser2 can remain as is.
- stripuser3 should be set to /o=<your server name> that is, as it appears when you view a users canonical name in Lotus.

- Edit the following settings in the PollLotus INI file if a hierarchal naming system is being used.

If your Notes user names are of the format Joe Bloggs/Dublin/Ireland and the canonical names are in the format CN=Joe Bloggs/OU=Dublin/O=Ireland, you need to set the Lotus User Name in CRM to Joe Bloggs/Dublin/Ireland. In addition, the strip strings need to be set as follows:

- stripuser1=@ireland
- stripuser2=cn=
- stripuser3=o=
- stripuser4=ou=

The string stripuser1 is used to match the recipient name as it appears in a meeting with the CRM user name. The strings stripuser2, stripuser3, and stripuser4 are used to match the Canonical name as it appears in Lotus Notes

to the CRM user name. When these strings are removed from the canonical name, it should match the user name as entered in CRM.

Note: Make sure the strip strings are entered in lowercase letters.

Starting the Service

Once the Sync Control Panel has been run on the Lotus Domino server, the Custom Service Server (eWareCSS) needs be started

- You can start the service from the Lotus Domain server in Start | Settings | Control Panel | Administrative Tools | Services | eWareCSS.

Or

- Or you can start it by selecting Start | Run and typing **net start awarecssserver** in the Command Prompt.

Testing the Service

The following two files are included with the synchronization files. You can use them for trouble shooting on the Lotus Domino server if errors are displayed in the log files.

- **TESTLOGONTOLOTUS.JS.** Open this file and enter the Domino Password – that is, the password of the Domino admin user that is being used by the integration scripts to log onto the Domino server. For details on setting up this user, please refer to Domino Default User in the previous section – and then run it. This tests to ensure that correct DLLs are registered and users are correctly enabled to log onto Domino through a script.
- **TESTXML.JS.** Run this file to test if the XML Parser is installed properly and registered.

Disabling Synchronized Users

To disable a synchronized user:

1. Select Administration | Users | Users.
2. Find the user you wish to disable and open the User Details page.
3. Select the Change button.
4. Delete the Lotus User ID that is currently specified in the Lotus User ID field, and select the Save button.

The user can no longer work with synchronized appointments.

Note. If, after a synchronized user has been disabled, the Sync Users option and the Install Scripts option are run on the Sync Control Panel, the user is re-enabled.

Now you can...

- Explain how the Sync Control Panel works.
- Configure the Sync Control Panel and install scripts.
- Synchronize users.
- Start and test the service.
- Disable Synchronized users.

Chapter 4

Calendar Mappings

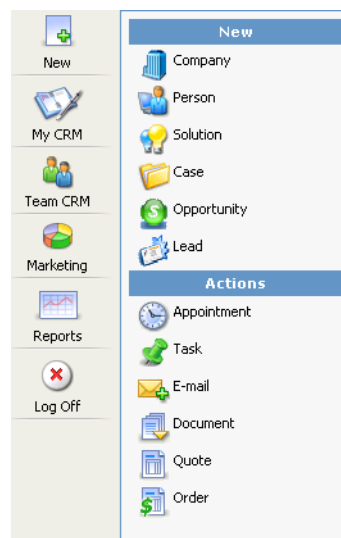
In this chapter you will learn about:

- How calendar items get synchronized between CRM and Notes.

What Exactly gets Synchronized?

This section describes how the different types of calendar items and their details get synchronized between CRM and Notes. It is important to review this section before you begin synchronizing calendar items between Notes and CRM.

Make sure that you use the New Appointment button to create new calendar entries in CRM. If you select New Task, you create a task, which is not synchronized with Lotus.



New pop-out menu



New list in context area

Calendar Item Actions and Categories

The following table outlines the way in which different types of Notes calendar items and their Categories get mapped to CRM.

Notes Item: Category	CRM Item: Action
To Do: Vacation / Holiday	Appointment: Vacation
To Do: Phone Calls	Appointment: Phone Out
To Do: Projects	Appointment: Projects
To Do: Clients	Appointment: Clients
To Do: Travel	Appointment: Travel
To Do: <No Category Set>	Appointment: Notes - ToDo Set
Meeting: N/A	Appointment: Meeting
Appointment: N/A	Appointment: Meeting
Anniversaries, All Day Events, and Reminders	Not synchronized

Note: Although Notes To Do items map to Appointments in CRM, they are displayed in the Task section of the CRM calendar (when you are in Daily or Weekly mode). This makes it easy to distinguish between Notes Meetings and To Do's when viewing the calendar in CRM.

The following table outlines the way in which CRM Appointments and their Actions get mapped to Notes calendar items.

CRM Item: Action	Notes Item: Category
Appointment: Meeting	Meeting: N/A
Appointment: Vacation	To Do: Vacation
Appointment: Phone Out	To Do: Phone Out
Appointment: Projects	To Do: Projects
Appointment: Clients	To Do: Clients

CRM	Notes
Item: Action	Item: Category
Appointment: Travel	To Do: Travel
Appointment: Phone In / Letter Out / Letter In / E-mail Out / E-mail In / Fax Out / Fax In / Demo / To Do / None	Not Synchronized
Tasks	Not Synchronized

Other Field Mappings

The following table describes other elements of the Calendar items that get synchronized between CRM and Notes:

CRM Field	Notes Field
Description	Subject
Start Date	Calendar Date (note that this field is not visible in Notes)
End Time	Due Date
Priority (High, Low, Normal, or None)	Priority (High, Low, Normal, or None)
Action (action types that get synchronized are described in the two tables above).	Categorize (category types that get synchronized are described in the two tables above).

Personal and Group To Dos

Notes Group and Person To Dos are treated in the same way when they are synchronized to CRM—that is, they map to standard CRM Appointments.

However, if you create an Appointment in CRM with only one user, it is synchronized to Notes as a Personal To Do. If you create an Appointment in CRM with more than one user, it is synchronized to Notes as a Group To Do.

If you add additional users to an existing Appointment in CRM that has just one user, it will be changed from a Personal To Do to a Group To Do in Notes.

However, if you edit an existing appointment in CRM and remove users so there is only one user left, then it remains a Group To Do with no participants. Note

that this is the same outcome as removing the users from a Group To Do in Notes.

Note: Make sure you Cancel Group To Dos in Notes, as opposed to deleting them, to ensure that they are deleted for all CRM and Notes users. See "Other Points to Note" below for more details.

Start and End Times

Start Times and Dates

Notes To Do items do not have a *visible* start time, although it is actually set to 00:01 AM so that the To Do is displayed at the start of each day when viewed in Calendar mode. CRM Appointments display a start date and a start time. The difference between the two is handled as follows:

- When To Do items created in Notes are synched to CRM, the start time is set to 00:00 so they will show at the start of the day as they do in Notes.
- For Appointments created CRM, the start time can be set manually. However, the time specified does not synch to Notes, but it will always be displayed on the CRM Appointment.

End Times and Dates

Notes To Do items have a Due Date. This is mapped to the end date (visible on the End Time field) in CRM. There is no visible end time in Notes, but there is in CRM.

- When To Do items created in Notes are synched to CRM, the End Time is set to 00:00 so they will show at the start of the day as they do in Notes.
- For Appointments created CRM, the start time can be set manually. However, the time specified does not synch to Notes, but it will always be displayed on the CRM Appointment.

Other Points to Note

Additional Users. When an Appointment is created in Notes it is synched to be a CRM Appointment. It is possible to add users to the Appointment in CRM, however these users will not be added in Notes, as you cannot add users to Notes appointments.

Resource Users. Users who work with Lotus Notes but not with CRM are set up in CRM as Resource users. This allows CRM users to invite them to meetings—they appear on the user list in CRM.

When synching from Notes, meetings created by CRM users only are synched. This means that if CRM users are invited to a meeting by a non-CRM user in

Notes, the meeting will not show on their CRM calendar. However, if the Resource setting is set to On, meetings in Notes that are created by CRM resource users, where there is one or more invitee who is a CRM user, are also be synched to CRM.

To turn the Resource option on or off, select Administration | Customization | Translations and search for the code "Resource". Then, change all the translations to "Y" to turn the option on or "N" to turn the option off. The default setting is "N".

Recurring Communications. CRM/Lotus Integration does not support recurring communications. For example, if a meeting is scheduled in CRM to occur on a weekly basis, the meetings will not be recorded in the Lotus Notes calendar. Similarly, meetings or appointments marked as "Repeating" in Lotus Notes, are not synched to CRM.

Attachments. E-mail attachments are not saved in the Lotus Notes calendar.

Private Meetings. Meetings marked as Private in Lotus Note or in CRM are not synched.

Associating People and Companies. If you associate People or Companies with an appointment in CRM, the association is not reflected in Lotus Notes.

Canceling / Deleting Group To Dos. Make sure that you Cancel Group To Dos in Lotus rather than delete them.

If you delete a Group To Do, Notes does not send a notification to the other users, so it does not get deleted from their notes calendars and it does not get deleted in CRM. However if you cancel the Group To Do—that is, open it up and Choose Cancel from the Actions menu—Notes sends the cancel notice to the other users, and it gets deleted from their Notes calendars and from CRM.

Now you can...

- Describe how calendar items get synchronized between CRM and Notes.

Chapter 5

Scheduling Appointments

In this chapter you will learn about:

- Working with the CRM/Lotus Synchronization feature.
- Creating synchronized appointments.

Working with the CRM/Lotus Synchronization Feature

The CRM/Lotus Synchronization feature allows CRM users to schedule appointments with Lotus Notes users who use Lotus Notes to access their diary listings. Similarly, it allows Lotus Notes users to schedule meetings with colleagues who exclusively use CRM to manage their diaries.

Note: Before you start working with appointments in CRM and Notes, please refer to Chapter 4: "Calendar Mappings" for detailed information on the way in which calendar item details get synchronized.

The following is an overview of what happens when you create, update or delete an item in CRM or in Notes:

Creating
Appointments

- When you create an Appointment in CRM, a corresponding Meeting or To Do item is created in Lotus Notes, depending on the Action type selected. Similarly, if you create a new Meeting, Appointment, or To Do item in Lotus Notes, a corresponding Appointment is created in CRM.

Updating
Appointments

- When you update certain Appointment details in CRM (for example, if you change text in the Details field, amend the Start Date, or change the Priority), the meeting details are updated in the Lotus Notes user's calendar. Similarly, when you update certain Appointment, Meeting, or To Do item details in Lotus Notes the changes are reflected in the My CRM work area.

Deleting
Appointments

- When you delete an Appointment in CRM, the calendar item is deleted from the Lotus Notes user's calendar. When you delete a Meeting, and Appointment, or a To Do item in Notes it is also deleted from CRM. However, if you did not invite anyone to the meeting apart from yourself (or if you created a Notes Appointment or a Personal To Do), it is not automatically deleted from CRM.

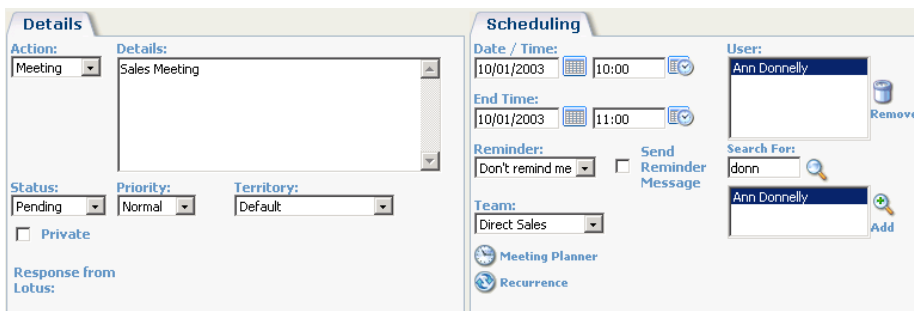
Creating Appointments and To Do Items

Example: Creating a Meeting Appointment in CRM

You are a CRM user, and you need to organize a sales meeting for yourself and two colleagues who use Lotus Notes to access their appointments.

To schedule a meeting for a mixed group of CRM and Lotus Notes users:

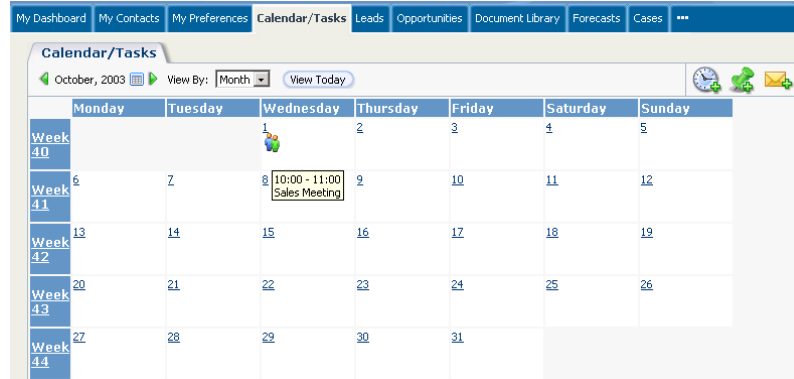
1. Right-click or hover over the New menu button.
The pop-out menu is displayed.
2. Select Appointment.
The Enter New Appointment page is displayed.
3. Select the date as well as the start and end times of the meeting from the Scheduling panel, and add the users you want to invite.
4. Select the Meeting Planner button.
The meeting planner is displayed in a new window with your name already selected as an attendee.
5. Select the users you wish to invite by selecting their names from the list of users and clicking the Invite User button.
6. Check if there are any conflicts with the current meeting, and make adjustments to the meeting times if you need to.
7. Select the Continue button, and fill in the rest of the details on the Appointment details page.



Appointment Details page

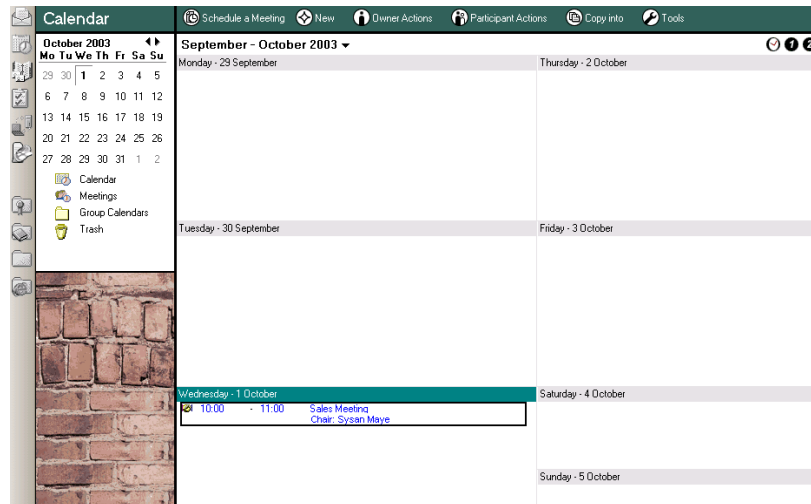
8. Select the Save button.

The appointment is displayed in your CRM calendar.



CRM Calendar

A Meeting is displayed in the other users' Notes Calendars.



Lotus Notes User's Calendar

Example: Creating a Phone Out Appointment in CRM

You are a CRM user, and you want to create a Phone Out Appointment for two telesales colleagues who use Lotus Notes to track their To Dos.

To create the Phone Out Appointment in CRM:

1. Right-click or hover over the New menu button.

The pop-out menu is displayed.

2. Select Appointment.

The Enter New Appointment page is displayed.

3. Enter the Appointment details, and add the colleagues you want to invite.

Appointment details page

4. Select the Save button.

The appointment is displayed in your CRM calendar.

A group To Do item is displayed in each of the other users' Notes To Do lists

To do	Due	Status	Category
Call Tradeshow Attendees		Future	Projects

Notes To do List

If they click on the To Do item, they can select the Participants to see what other users are invited.

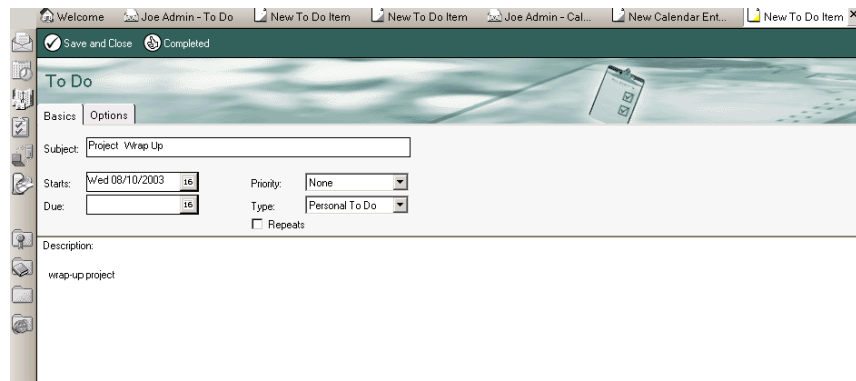
Note: If you had created the Phone Out Appointment for a single Notes User, a personal To Do would have been created in the user's Notes To Do list.

Example: Creating a To Do Item in Lotus Notes

You use Lotus Notes to manage your daily tasks, but your manager uses CRM. You want to create a Task to indicate you are working on wrapping a project next week.

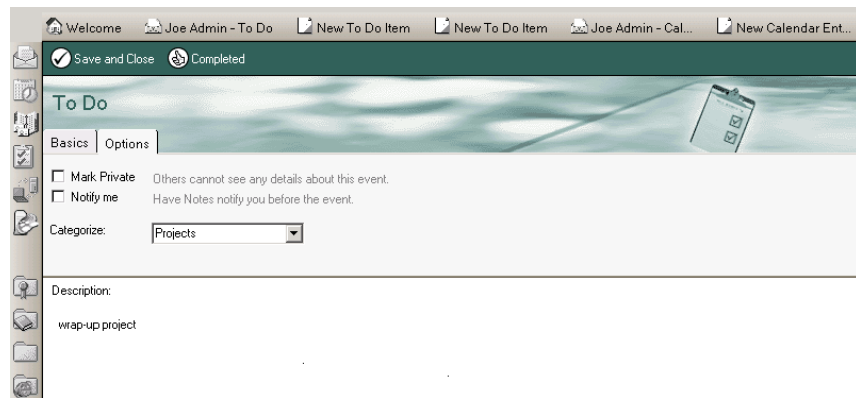
To do this:

1. Open your Lotus Notes Calendar and create a new To Do item.
2. Fill in the Subject and Start Date fields.



To Do page Basic tab

3. Select the Options tab and select Project from the Categorize field.

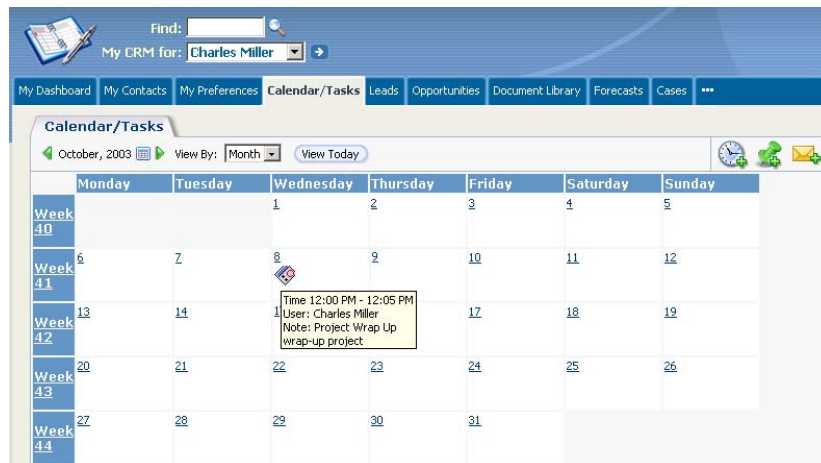


4. Select the Save And Close button.

Now you can...

The To Do item is displayed in your Notes To Do list.

If your manager wants to check what you are up to next week he can check you CRM calendar.



CRM Calendar

Now you can...

- Work with the CRM/Lotus Synchronization feature.
- Create synchronized appointments.

