



www.mxsync.com

Outlook / Exchange Server to
SQL Server Synchronization Utility

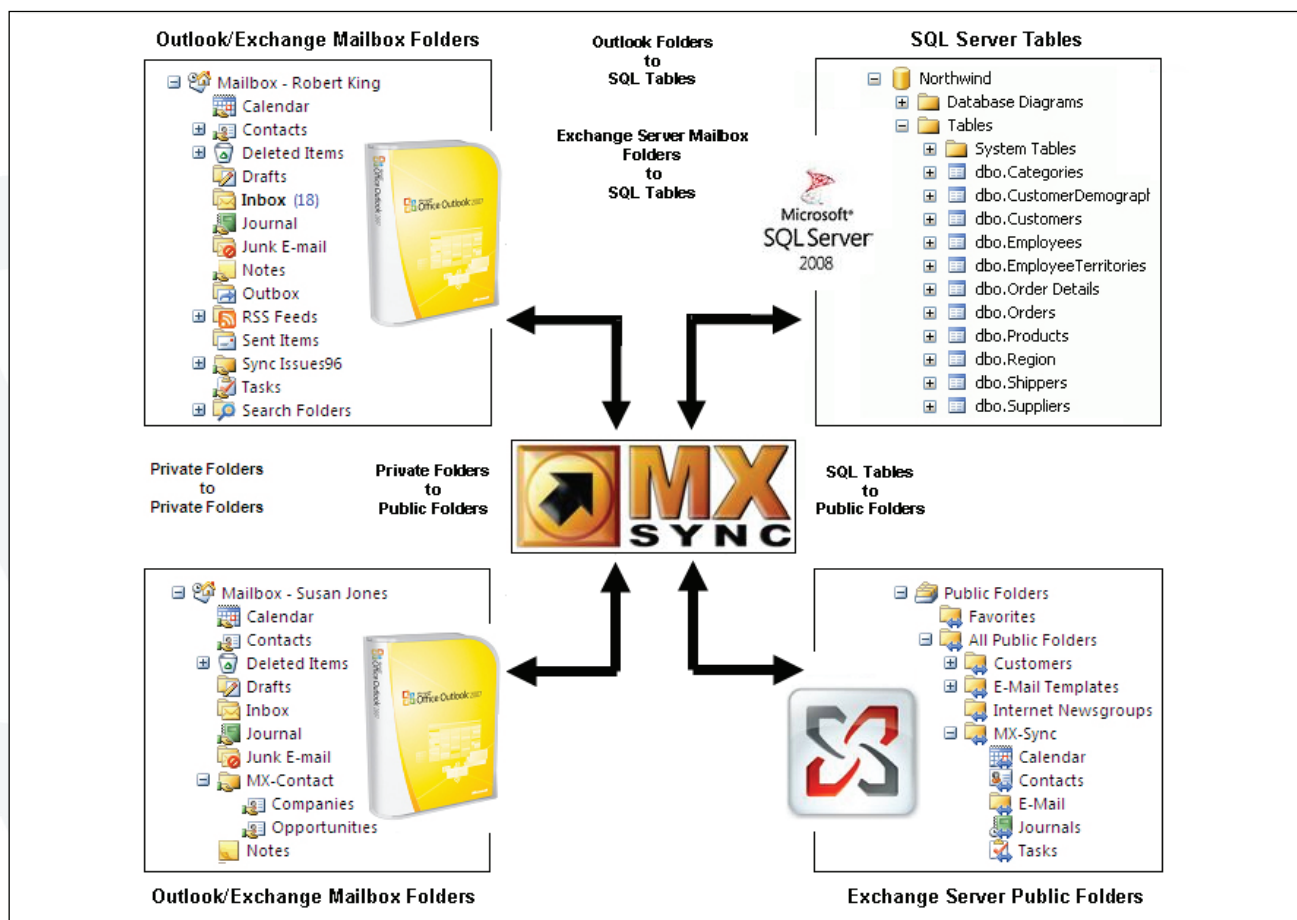
MX-Sync Overview

MX-Sync is an Outlook / Exchange Server to SQL Server synchronization utility that is designed to synchronize items bi-directionally between:

- a user's personal folders in Outlook or Exchange Server (Inbox, Sent Items, Contacts, Calendar, Tasks, etc.) and a set of SQL Server tables from any SQL off-the-shelf or custom-developed system.
- a set of Public Folders and an equivalent set of SQL Server tables.
- a user's personal folders in Exchange Server (Inbox, Sent Items, Contacts, Calendar, Tasks, etc.) and a set of Exchange Server Public Folders, that is typically used as a common shared contact management system or other application.
- multiple Outlook or Exchange Server mailbox folders, where for example sharing of personal contacts amongst users is required.

MX-Sync:

- is installed on a designated desktop computer running as a client application which is activated when Outlook is opened, or on a server as a service, and so is constantly running.
- connects to an Outlook profile or designated Exchange Server.
- monitors a number of Outlook or Exchange Server user mailboxes. Designated folders (Inbox, Sent Items, Tasks, Calendar, Personal Contacts etc.) are monitored for changes (new items, updates and deleted items).
- monitors a set of designated Exchange Server Public Folders for changes in the items within the folder(s).
- utilizes an MX-Sync SQL database created for the purpose of tracking all item changes and synchronization actions for both the Exchange Server folders and the source SQL database.
- connects to an external SQL Server database (if required). Triggers are installed on specified tables in the SQL database which log all changes to tables in the MX-Sync SQL database.
- polls the designated 'data changes' table in the MX-Sync database (where applicable) on a specified cycle, updating the corresponding SQL items for folder changes and the Public / Personal Folder items for changes in the source SQL database.



MX-Sync Features & Benefits

Outlook to SQL Synchronization

MX-Sync can utilize an existing Outlook Profile on a machine, which could in turn be connected to a POP account, Exchange Server mailbox, or any other Outlook-compliant mail server such as Kerio. Items in the Outlook folders can be synchronized to any local or remote SQL Server.

Public and Private Mailbox Synchronization

MX-Sync enables you to synchronize SQL to Private (Mailbox) folders, SQL to Public Folders, Private to Public Folders and/or Private to Private Folders.

Bi-Directional Synchronization

With MX-Sync you can synchronize bi-directionally between all tables / folders except e-mail, where by definition the synchronization is only mailbox folders (Inbox and Sent Items) to SQL.

Conditional Synchronization

Every user can synchronize a different set of data. 2 different filters can be specified for each user for each synchronization direction, namely SQL to Folder and Folder to SQL. The setting of these filters also provides complete flexibility for defining conditional synchronization between different user mailboxes and between Public Folders and Private Folders.

Custom Folder Synchronization

MX-Sync even synchronizes custom tables in an ERP or CRM system down to equivalent folders in the user's mailbox, or to equivalent Public Folders containing custom Outlook form(s) that can display the SQL data fields.

Support for all Folder Types

All standard Mailbox folders are supported namely Calendar, Contacts, Inbox, Journals, Sent Items and Tasks. Likewise all Outlook folder-types are supported for Public Folders namely Appointment, Contact, Journal, Task, Mail and Post, and Note folders.

Mobile Device Synchronization

Users can add or update contacts on their PDA, which sync back to their Personal Contacts folder in Outlook / Exchange, and these updated contacts are then automatically synced back to the SQL database via MX-Sync (and vice versa). Contacts and/or company records in SQL that match the filter conditions for different users will synchronize down to all the relevant user mailboxes.

Client e-mails sent via Windows Mobile or Blackberry devices are automatically copied to the SQL database and linked to the customer record.

Likewise users can add / update appointments and tasks on their PDA devices which then update the corporate SQL database. And tasks and appointments captured in SQL can be pushed down to the PDA automatically.

Shared Corporate Information / Data

MX-Sync enables you to share customer and other common data easily amongst users in their Personal Mailbox folders (which are then automatically synchronized to their PDA or smartphone devices. This shared corporate data can either be a Public Folder system on Exchange or a SQL Server-based ERP or CRM (or other) system.

Contact Synchronization

MX-Sync will synchronize selected contacts in the SQL or Public Folder database to each user's Personal Contacts folder, and vice versa. So MX-Sync will update changes made by anyone on the host database back to each user's respective Contacts folder, so that these changes can be replicated out to their smart-phone / PDA / Blackberry device. Likewise users can add contacts in Outlook or even via their PDA's and flag them in such a way that they will be added to the SQL or Public Folder database automatically by MX-Sync.

In summary:

1. Creating a contact in your Personal Contacts folder and setting a specified Category (e.g. 'MX-Contact) will create the contact in the SQL database (if it does not exist already).
2. Creating or editing a contact in SQL that matches a specified filter condition (per user) will sync that contact from SQL down to your Personal Contacts folder in Exchange / Outlook.

E-Mail Linking / Copying

MX-Sync performs server-side linking of e-mails from designated personal mailboxes to the SQL Server E-Mail Folder.

So all e-mails sent and received in Outlook can automatically be linked and copied to client records that are in your CRM or ERP database.

This 'server-side' linking of e-mails also means that e-mails sent from a user's Blackberry or PDA will automatically be copied to the E-Mail table even if that user does not have Outlook open on their machine at the office.

Below are examples of additional 'rules' that could be defined for MX-Sync:

1. E-Mail that is marked Private, Personal or Confidential can be excluded from being linked.
2. E-Mail for designated contact records can be excluded from being linked
3. Setting the Category 'Create Contact' on an e-mail will create the contact in SQL and then link the e-mail to the contact.
4. Setting the Category 'Create Contact and Company' will create the contact and company in SQL and then link the contact to the company and link the e-mail to the contact and company.
5. Setting the Category 'Link Opportunity' will link the e-mail to the most recently added open opportunity linked to the contact.
6. Setting a category 'mxStatus=Handled' will set the field [mxStatus] in the E-Mail table to the value 'Handled'.
7. Setting a Category (either for individual mails, or as a global setting) that indicates to MX-Sync that attachments should be saved to the Documents folder and possibly replace the attachment with a shortcut to this document.

Calendar Integration

Appointments will be synchronized between Exchange and SQL in the following scenarios:

1. Creating an appointment / task linked to a personal contact in the Personal Contacts folder that has been synchronized to SQL will create the appointment in SQL and then link the appointment to the user, the contact and the contact's primary company.
2. Creating a task / appointment (not linked to contact) but setting a specified category (e.g. 'MX-Contact') will create the task / appointment in SQL, linked to the user.
3. Creating an appointment in Outlook where a contact in the SQL database is invited as an 'attendee' will create the appointment in SQL and then link the appointment to the user, the contact and the contact's primary company.
4. Creating a task / appointment with the e-mail address or a specified 'descriptor' in the Subject line that identifies the contact / company to which the appointment should be linked will create the appointment in SQL and then link the appointment to the user, the contact and any other entities identified by the 'descriptor'.

Task Assignments

Most SQL-based CRM systems have a 'To-Do List' component but these follow up actions are usually more comfortably handled by the user with Outlook tasks. So it's logical that there should be two-way synchronization between Outlook Tasks and the equivalent table in the SQL system. So tasks created in Outlook and marked in a certain manner (for example by setting a specific category) will be copied to the SQL database by MX-Contact, and linked to the appropriate contact.

Call Recording / Logging

Sales or Service personnel can use standard Outlook appointment or Journal forms to log calls made and report findings from site back to the head office. MX-Sync will automatically convert these appointment or journal records into the equivalent item in the SQL database. These calls can even be logged via a Windows mobile or Blackberry device.

Below are examples of additional 'rules' that could be defined for Journals:

1. Creating a journal linked to a personal contact in the Personal Contacts folder that has been synchronized to SQL will create the journal in SQL and then link the journal to the user, the contact and the contact's primary company.
2. Editing an appointment in Outlook and setting a category like "Create Journal" will create a record in the Journals table rather than the Appointments table.

Automated CRM

One of the challenges of any CRM system is getting users to keep the system updated, i.e. enter their contacts and activities indicating who they are dealing with.

Given that MX-Sync can synchronize and 'process' e-mails and appointments on the server side according to a set of 'rules' and flags, MX-Sync can 'populate' a CRM system automatically by:

1. Creating contacts from e-mails, using the senders' / recipients' e-mail address(es), and scanning signatures for phone, mobile numbers, etc.
2. Creating companies automatically using the senders' / recipients' mail server domain(s), and linking the contacts to these companies.
3. Creating journals / call reports automatically from Outlook appointments which users should be utilizing already.

4. Saving e-mail attachments to a Documents table in the SQL database or a designated series of file system folders, and linking these documents to the relevant contacts, companies and users.
5. Linking the e-mails to the contacts, companies and users.

This process creates a self-populating and self-sustaining, well-structured CRM system, comprising contacts, companies, e-mails, documents and journals, which just needs to be updated as resources allow. But because of the value to the organization of such a centralized information system, users would be quick to see the value and therefore allocate the necessary time to update the system and therefore derive additional benefit from it.

Optional Outlook Add-In

All the functionality described thus far can be achieved without any client installation. Only a

server-side component is installed. This greatly eases the administration and support burden normally associated with Outlook CRM client software systems.

However ExchangeWise does offer the option of 2 Outlook Add-in clients to greatly enhance the functionality normally available in Outlook, namely:

1. **MX-Contact Enterprise Edition Client:** This is the full MX-Contact client which connects to the same SQL database that MX-Sync utilizes and offers full CRM functionality in Outlook. For more details visit www.mxcontact.com.
2. **MX-Contact Express Edition Client:** This is a 'lightweight' Outlook add-in that basically enhances the capabilities in Outlook to link activity items to Contacts and other 'custom' entities synchronized to the user's mailbox like Companies, Opportunities, Groups, Issues, etc.

Custom Projects

Because of the wide variety of both off-the-shelf and "home-grown" CRM and ERP systems available, and the differing complexities of the various SQL Server databases, we will gladly customize MX-Sync to meet any requirement whatsoever.

System Requirements / Supported Environments

Microsoft Outlook	Exchange Server	SQL Server
• Outlook 2002		• SQL Server 2005 Express
• Outlook 2003	• Exchange 2003	• SQL Server 2005
• Outlook 2007	• Exchange 2007	• SQL Server 2008 Express
• Outlook 2007	• Exchange 2010	• SQL Server 2008

Pricing

Please contact us for pricing at sales@exchangewise.com. Pricing is dependent on a number of factors, including the number of Exchange Server user mailboxes and folders being synced.

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