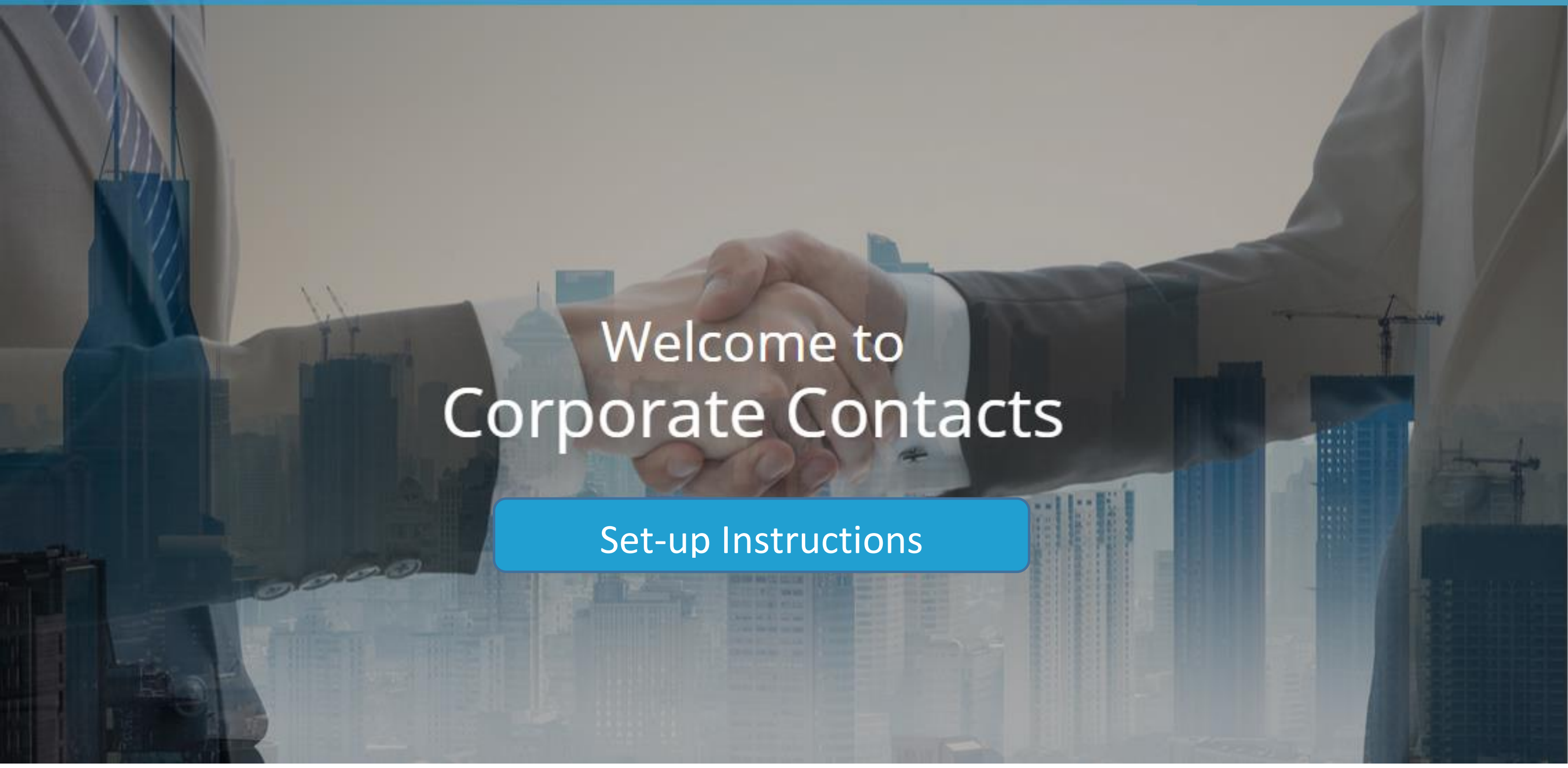
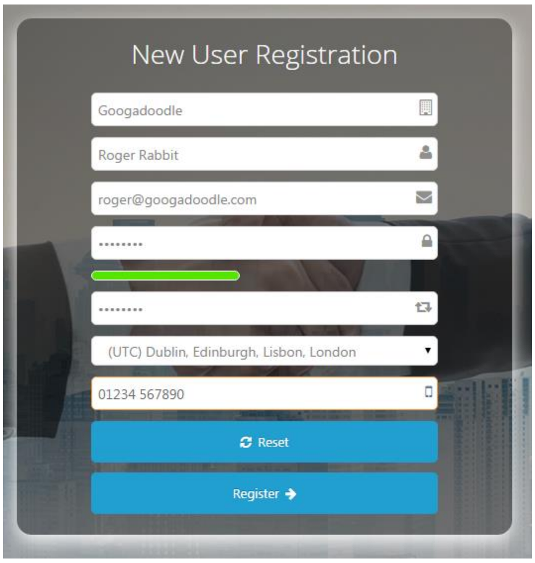


Corporate Contacts Set-up Instructions

1. Create a new Account

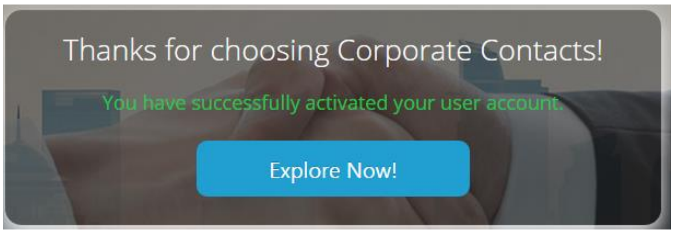
Enter the details for your new Corporate Contacts account.

We will send a confirmation email to the email address you provide, and this address will also be used to notify you of any issues. Likewise, the telephone number is so we can reach you if we need to let you know of any issues.



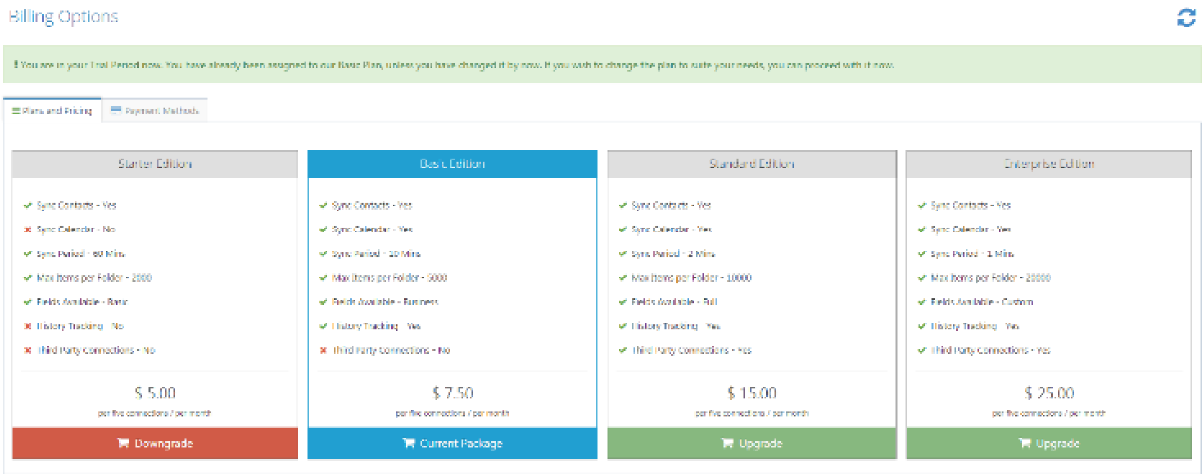
2. Check your email and click the link

You will be taken back to Corporate Contacts. Click the 'Explore Now' option and you will be taken to the Billing Options to select a plan.



3. Choose your plan

By default you will be allocated to the ***Basic*** plan. It is better to select a plan to test the system, which you think you will eventually require.



The Key difference between the plans are:

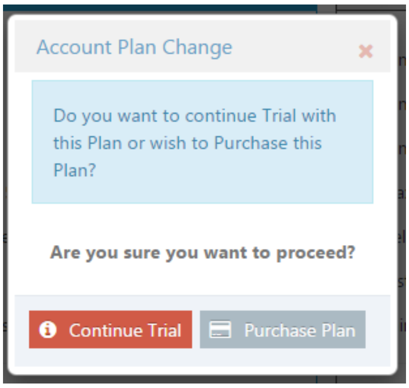
Sync period – approx. how long will the system wait between synchronising folders.

Max Items per folder – how many items will you have in a single folder.

Contact Fields – The ***Starter*** plan includes (syncs) the most commonly required fields (name, company, phone, email, notes). The ***Basic*** plan syncs all the starter fields plus business address fields. ***Standard*** and ***Enterprise*** plans sync nearly all Outlook contact fields (about 100). See Appendix 1 for a complete list of which fields are included in each plan.

History Tracking – Do you need to see the history of changed items and potentially undo changes? (This feature will be launched shortly).

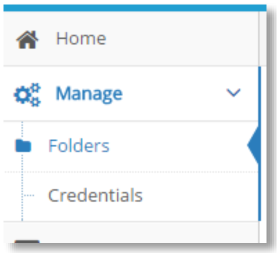
By default you will be enrolled in the ***Basic*** plan. If you choose to upgrade or downgrade your plan, you will be given the option of continuing the trial or setting up a subscription now. You will normally continue the trial unless you are ready to setup a subscription.



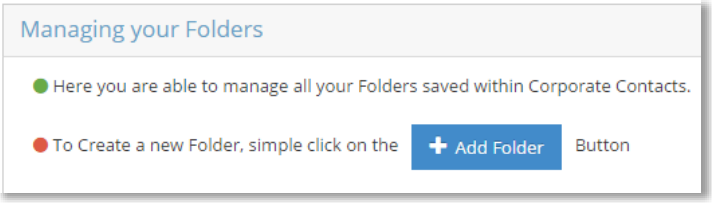
4. Set up a Corporate Contacts Folder

Now you have set up your plan, you can set up one or more folders. Your Corporate Contacts folder will be the main store for your contacts or appointments.

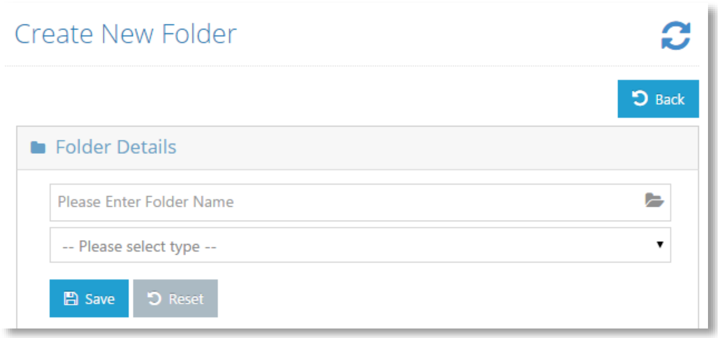
a. From the left hand menu select 'Manage / Folders'



b. In the new window select the '+ Add Folder' button.

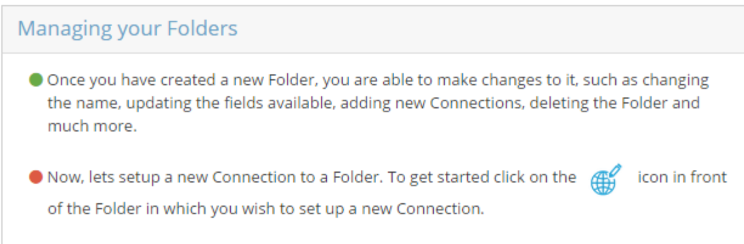


c. Give your new folder a name you will recognise, and select whether it will be a folder for contacts or appointments.



5. Create Connections and Credentials

Next you need to set up the synchronisation '***Connections***' between your new Corporate-Contacts folder, and the Outlook folders you will be syncing with. Typically, you will have one connection from an existing public folder, and one or more connections to the personal folders you wish to copy the information to. Start by setting up the connection to the Public (or Shared) Folder where the master contacts or appointments are stored.



Each ***Connection*** will require ***Credentials*** to access the folder in the Office 365 account. The credentials are a username and password which the synchronisation account uses to access Office 365 (or MS Exchange).

Typically, you will set up one sync account which you give permissions to access all the required folders. This means only one set of credentials is required.

Delegation v Impersonation

A typical scenario would have one master list being synchronised to folders in several mailboxes. In order to avoid having to enter the username and password for each mailbox, a special sync account is set up in Office 365 / Exchange – which is given access to the required folders in each mailbox. This special sync account is given security privileges in order to do this. There are two types of privilege which can be given – **Delegation** and **Impersonation**.

Delegation is the same privilege used by a user when they allow another user to see and/or update their calendar. It can be set up by the user, or by an administrator, and is only suitable when small numbers of connections are being set up.

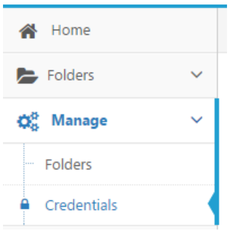
As the name suggests**, Impersonation** is a way for the account to impersonate the account it is accessing. It can only be set up by an administrator, but is easy to set up for large numbers of mailboxes.

There is a help file on how to set up an impersonation account here: How to create an impersonation account

6. Create a new Credential

We have established that a credential is essentially a username and password used by Corporate-Contacts to connect to Office 365 / MS Exchange.

a. From the left hand menu select 'Manage / Credentials'.



Adding credentials for an Office 365 or Hosted Exchange account

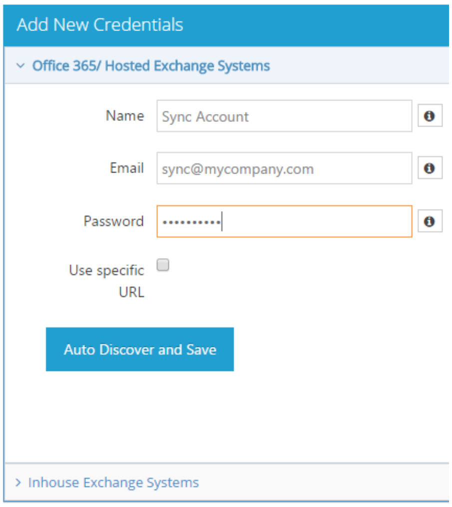
b. Enter details for the credentials:

Name: A name to recognise your credentials by later (not necessarily the name of the office 365 account). e.g. 'Sync Account'

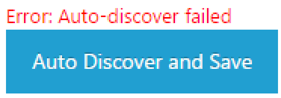
Email: The email address of the office 365 account. e.g. sync@mycompany.com

Password: The password for your sync account

Click 'Auto Discover and Save'. This process may take up to a minute.



c. If the system cannot find the correct URL, or the password is wrong, it will give you an error.

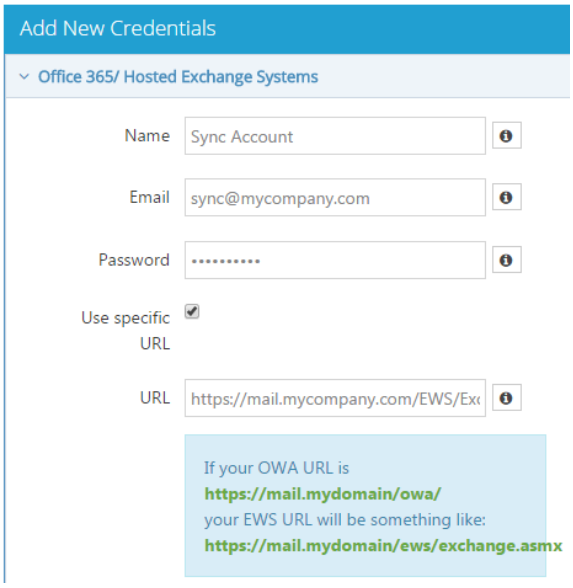


Check that you have the correct email address and password. If you are sure these are correct, Auto-Discover may not be set up. If ‘Auto-Discover’ is not set up, you will need to tell the system which URL to use to access the system.

d. Tick the checkbox ‘Use specific URL’ and enter the URL which your system uses for Exchange Web Services.

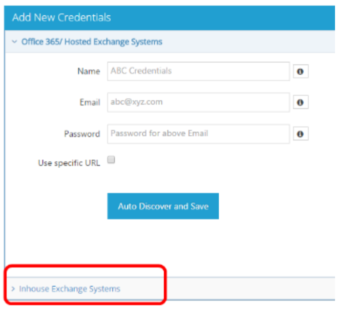
n.b. Your EWS URL will be very similar to your Outlook Web Access URL.
If your OWA URL is
https://mail.mydomain/owa/
your EWS URL will be something like:
https://mail.mydomain/ews/exchange.asmx

For further information on resolving issues with EWS URLs, see appendix 2.



Adding credentials for an In-house Exchange Account

If you have an in-house exchange account, and you want to use Auto-Discover, you will need to select the tab at the bottom of the screen.



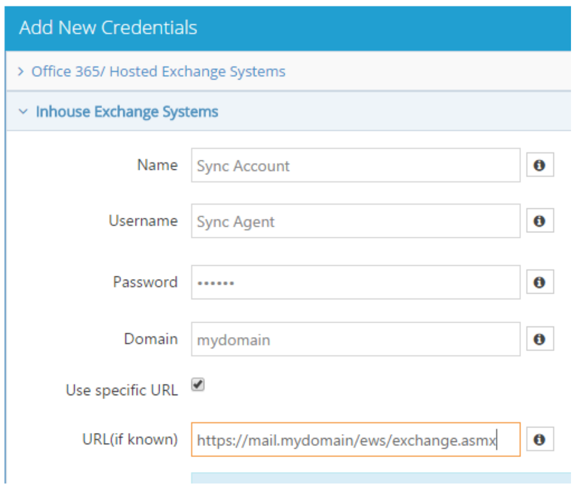
e. Enter details for the credentials:

Name: A name to recognise your credentials by later (not necessarily the name of the office 365 account).
e.g. ‘Sync Account’

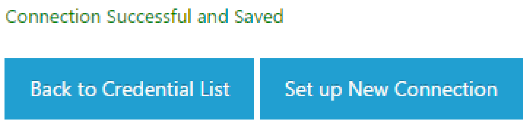
Username: The username of the office 365 account.
this may be something like:
‘sync’ or ‘mydomain\sync’

Password: The password for your sync account

f. Click ‘Auto Discover and Save’. This process may take up to a minute.

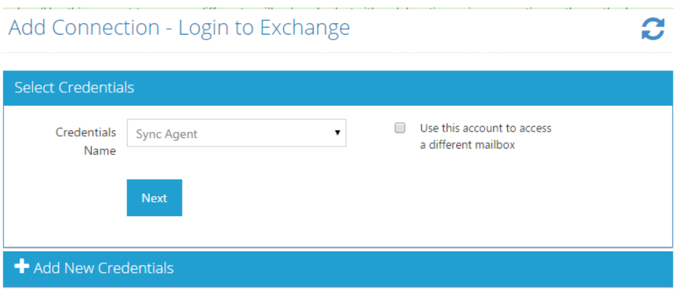


g. If the credentials work – you will see a notification that the Connection was successful and saved.



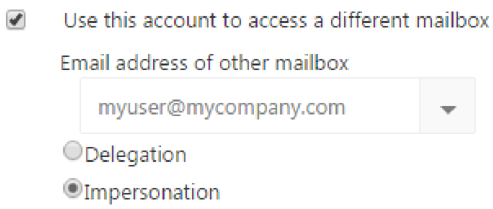
7. Create a new Connection

a. Select the credentials which you have just set up. (If you have several credentials, select the correct ones to use from the dropdown.)

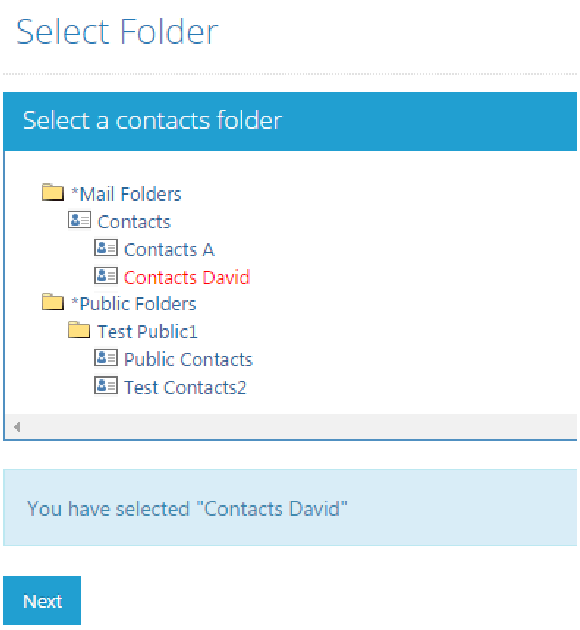


b. If you are using a sync account to access multiple mailboxes, tick the checkbox 'Use this account to access a different mailbox'.

Enter the email address of the account you wish to access, and set whether to use Delegation or Impersonation to access the account. (see section 5 above for an explanation of Delegation and Impersonation)

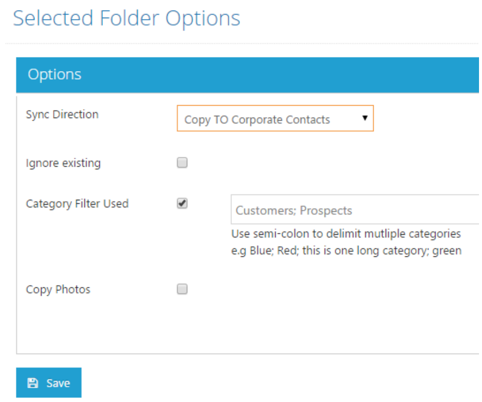


c. Select the folder you want to Synchronize with, and click 'next'.



d. Set the parameters for the synchronisation:

Contact Sync



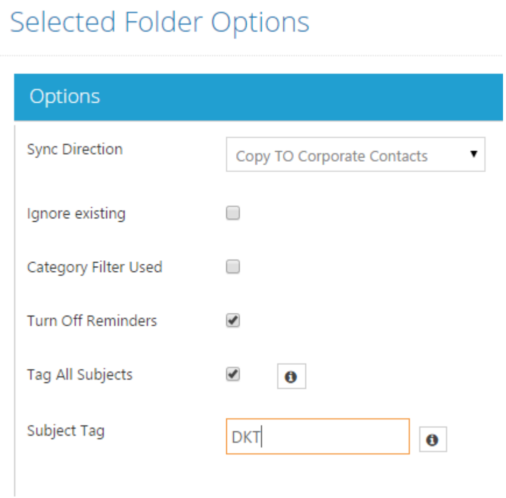
Sync Direction: Copy TO Corporate-Contacts (one way)
Copy FROM Corporate-Contacts (one way)
Two Way Sync

Ignore Existing: Existing items in the outlook folder will be ignored. (only useful for sync FROM Corporate-Contacts or Two Way sync)

Category Filter: Tick if you wish to filter the items to be synchronised based on the category field of the item. Enter one or more categories which will be included (separated by a semi-colon ; or a comma ,).
Filtering is NOT case sensitive.

Copy Photos Tick if you wish contact photos to be copied. (Only available with Enterprise plan).

Calendar Sync



Sync Direction: Copy TO Corporate-Contacts (one way)
Copy FROM Corporate-Contacts (one way)
Two Way Sync

Ignore Existing: Existing items in the outlook folder will be ignored. (only useful for sync FROM Corporate-Contacts or Two Way sync)

Category Filter: Tick if you wish to filter the items to be synchronised based on the category field of the item. Enter one or more categories which will be included (separated by a semi-colon ; or a comma ,).
Filtering is NOT case sensitive.

Turn Off Reminders: Un-tick this if you want all new appointments added to this folder to display an appointment reminder. (It is recommended to leave this ticked as you can get thousands of reminders).

Tag All Subjects: This is only valid for One way sync TO Corporate-Contacts. If ticked each appointment has its subject tagged with the initials of the user whose calendar the appointment came from. This means if you sync appointments from many calendars into one main calendar, you can tell where each appointment came from.

Subject Tag: The initials to use when ‘Tag All Subjects’ is ticked.

e. Once you have clicked ‘Save’ to the Folder Options, the details are saved, and the Folder will be synchronised on the next sync run.

8. Add more Folders and Connections as required.

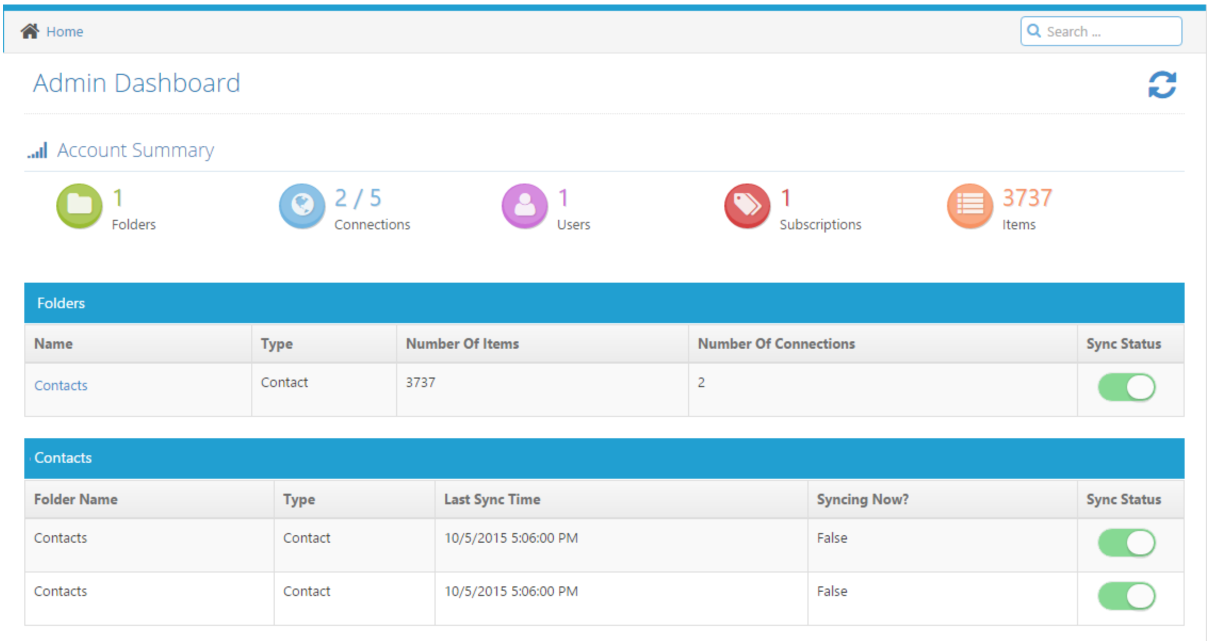
Each Corporate-Contacts folder can have multiple connections – each of which can be one-way or two way connections.

Add further folders and connections as required. Each subscription allows for 5 connections and any number of folders. Purchase more subscriptions if you need more connections.

9. Dashboard

The dashboard (‘Home’ on the menu) will give you an overview of the synchronisation process for your folders.

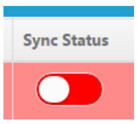
The picture below shows the dashboard for one Corporate-Contacts folder with two connections.



Number of Items: Number of items in the Corporate-Contacts folder.

Number of Connections: Number of connections to the Corporate-Contacts folder.

Sync-Status: Sync Status shows Green when syncing normally, and Red when ‘paused’. A sync can be paused and re-started from this dashboard by clicking the button. When ‘paused’ a connection will never start a new sync (but it won’t stop an existing sync once it is running).



Last Sync Time: The time when the last sync started (only set when it has actually completed.)

Syncing Now? : Shows if a sync is currently running on this connection.

Appendix 1 – Contact Fields Synchronised by plan

Plan: Starter	Plan: Basic	Plan: Standard/ Enterprise
▪ First Name ▪ Last Name ▪ Job Title ▪ Company ▪ Mobile Phone ▪ Business Phone ▪ Email Address ▪ Categories ▪ Notes	▪ First Name ▪ Last Name ▪ Job Title ▪ Company ▪ Mobile Phone ▪ Business Phone ▪ Business Fax ▪ Business Address Street ▪ Business Address City ▪ Business Address State ▪ Business Address Postal Code ▪ Business Address Country ▪ Business Phone 2 ▪ Company Main Phone ▪ Email Address ▪ Email2 Address ▪ Categories ▪ Notes	▪ Title ▪ First Name ▪ Middle Name ▪ Last Name ▪ Suffix ▪ Gender ▪ Birthday ▪ Anniversary ▪ Job Title ▪ Company ▪ Department ▪ Profession ▪ Mobile Phone ▪ Business Phone ▪ Business Fax ▪ Web Page ▪ Home Address Street ▪ Home Address City ▪ Home Address State ▪ Home Address Postal Code ▪ Home Address Country ▪ Home Phone ▪ Home Fax ▪ Business Address Street ▪ Business Address City ▪ Business Address State ▪ Business Address Postal Code ▪ Business Address Country ▪ Assistant's Name ▪ Assistant's Phone ▪ Billing Information ▪ Business Phone 2 ▪ Business Address PO Box ▪ Business Home Page ▪ Callback ▪ Car Phone ▪ Categories ▪ Children ▪ Company Main Phone ▪ Computer Network Name ▪ Customer ID ▪ Email Address ▪ Email2 Address ▪ Email3 Address ▪ Full Name ▪ Government ID Number ▪ Hobbies ▪ Home Phone 2 ▪ Home Address PO Box

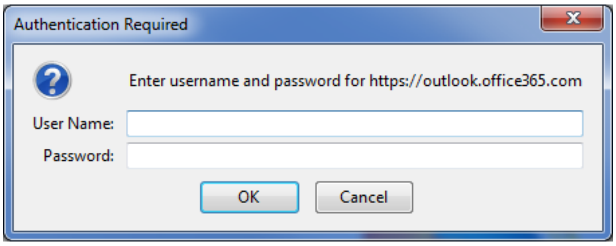
		▪ IM Address ▪ Internet Free/Busy Address ▪ ISDN ▪ Language ▪ Manager's Name ▪ Mileage ▪ Nick Name ▪ Office Location ▪ Organizational ID Number ▪ Other Address City ▪ Other Address Country ▪ Other Address Postal Code ▪ Other Address PO Box ▪ Other Address State ▪ Other Address Street ▪ Other Fax ▪ Other Phone ▪ Pager ▪ Personal Home Page ▪ Primary Phone ▪ Radio Phone ▪ Referred By ▪ Spouse ▪ Subject ▪ Telex ▪ TTY/TDD Phone ▪ User1 ▪ User2 ▪ User3 ▪ User4 ▪ Notes

Appendix 2. Checking the EWS URL

To check if you have the correct URL, email address and password, you can enter the URL directly into a browser. For example the URL for Microsoft Office 365 systems is:

https://outlook.office365.com/EWS/Exchange.asmx

Enter the URL for your system into a browser, and you should get a request for a username and password. If you do not then you do not have the correct URL.



Enter the username and password, and if they are correct, your will see some kind of static text. (i.e. not an error text.) If you don't see the static text, then you have the wrong user name and password, or the account is not able to access EWS.