

White Paper – DoubleLook Enterprise

ACT! to Exchange 2007 sync (Beta)

www.companionlink.com/enterprise

ABSTRACT

DoubleLook Enterprise (DLE) is a server-side application that will synchronize CRM/PIM data with Microsoft Exchange 2007. For the purpose of this whitepaper, we will use ACT! as an example.

DLE manages synchronization for multiple ACT! user accounts from one server-side application that runs on any PC or server in the office. DLE runs as an application with administrator privileges.

When configured to synchronize with Exchange 2007, DLE will work in conjunction with any mobile sync solutions (like BlackBerry Enterprise Server or Exchange ActiveSync) that already are in place.

SYSTEM REQUIREMENTS

- ACT! versions 4.0 or higher
- Microsoft Exchange Server 2007 or higher
 - 1GB of free hard disk space recommended
 - 1GB of memory recommended

HOW IT WORKS



DoubleLook Enterprise (DLE) can be installed on any PC or server that is on the Exchange server domain and has LAN access to the ACT! database (which may reside on a separate server or PC). The ACT! application must also be installed on the computer with DLE. Outlook Web Access (OWA) must be configured for DLE to access your Exchange data.

DLE runs as an application (not as a service), synchronizing data between the ACT! and Exchange databases. This process runs sequentially, user-by-user, for all licensed users of DLE. Once data is synchronized with Exchange, your existing push-sync solution (e.g., BlackBerry Enterprise Server or Exchange ActiveSync) will sync the data with your phones.

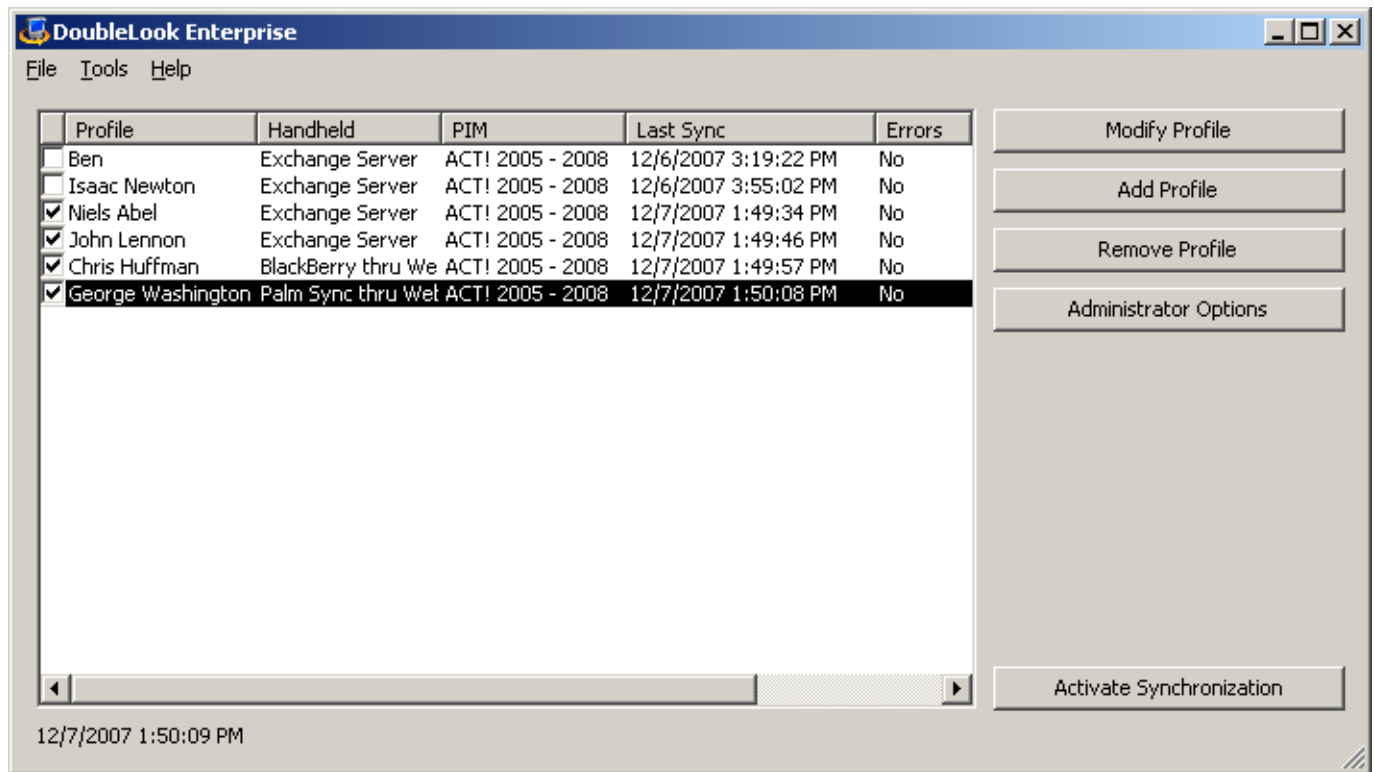
For example, if you have configured DLE to sync data for 20 users, the application will sync data for User 1, then User 2, and so forth. Once it completes sync for all 20 users, it will recycle back to User 1 and begin the process again.

DLE also runs a secondary Executable process called *ProcessLauncher.exe*. This process monitors DLE and reboots the application if it detects that the DLE application has hung or not responding.

USER MANAGEMENT CONSOLE

DLE has a user management console (UMC) that allows IT administrators to quickly set up and configure user accounts. The UMC gives administrators a single screen from which the sync relationships between user accounts in ACT! and user accounts in Exchange can be set up. Administrators can choose to apply the default settings for all users, or individually customize the sync parameters for individual users. Users can be added, removed or disabled directly from this console.

The UMC also allows administrators to monitor synchronization status for all users. Statistics on the number of successful and unsuccessful synchronizations and service outages can be directly emailed to the administrator. This provides real-time notification of any service interruptions.



The user management console allows administration of all users from one screen.

FREQUENTLY ASKED QUESTIONS

Does the DLE login have to always be logged in for DLE to work?

Yes, the Windows account that runs DLE must be logged in for DLE to synchronize your data.

Can we run DLE without giving the admin account full mailbox rights when synchronizing with MS Exchange 2007?

No. DLE requires that the admin account has full mailbox rights. This is a result of the Exchange security protocol, and cannot be modified by DLE.

How can I keep private records private when synchronizing with MS Exchange?

Records marked as private in your ACT! database will only synchronize with Exchange if the ACT! login info entered in the DLE configuration matches the login info for the record owner in ACT!.

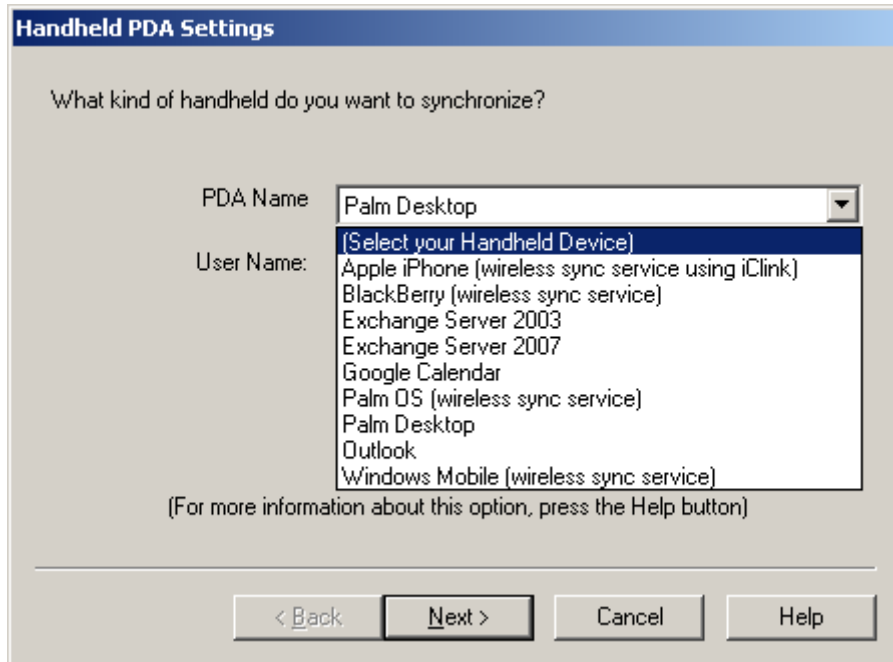
(NOTE: The ACT! login info in the DLE configuration is entered under the ACT! data tab.)

Public records will synchronize regardless of the record owner.

Also, DLE includes an option to exclude any data from the synchronization that is categorized as "Personal". This option can be found in the DLE configuration wizard, under the Personal Category tab.

(NOTE: To categorize an item as "Personal" in ACT!, set the ID/Status of the record to "Personal".)

DOUBLELOOK ENTERPRISE SCREENSHOTS



Handheld PDA Settings

What kind of handheld do you want to synchronize?

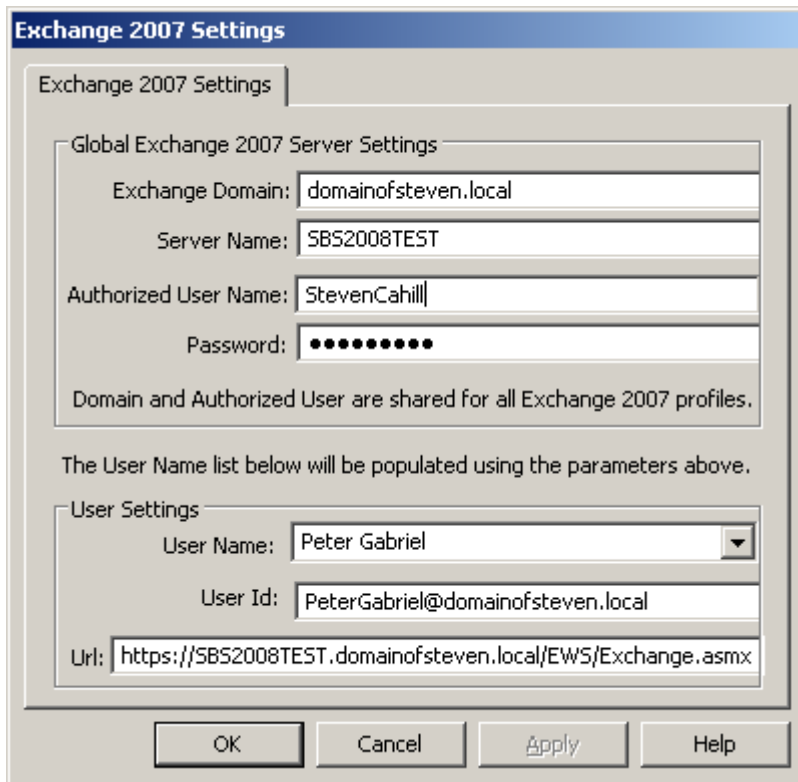
PDA Name: Palm Desktop

User Name: (Select your Handheld Device)
Apple iPhone (wireless sync service using iClink)
BlackBerry (wireless sync service)
Exchange Server 2003
Exchange Server 2007
Google Calendar
Palm OS (wireless sync service)
Palm Desktop
Outlook
Windows Mobile (wireless sync service)

(For more information about this option, press the Help button)

< Back Next > Cancel Help

Select your sync destination. This can be done a per-user basis.



Exchange 2007 Settings

Exchange 2007 Settings

Global Exchange 2007 Server Settings

Exchange Domain: domainofsteven.local

Server Name: SBS2008TEST

Authorized User Name: StevenCahill

Password: ●●●●●●●●

Domain and Authorized User are shared for all Exchange 2007 profiles.

The User Name list below will be populated using the parameters above.

User Settings

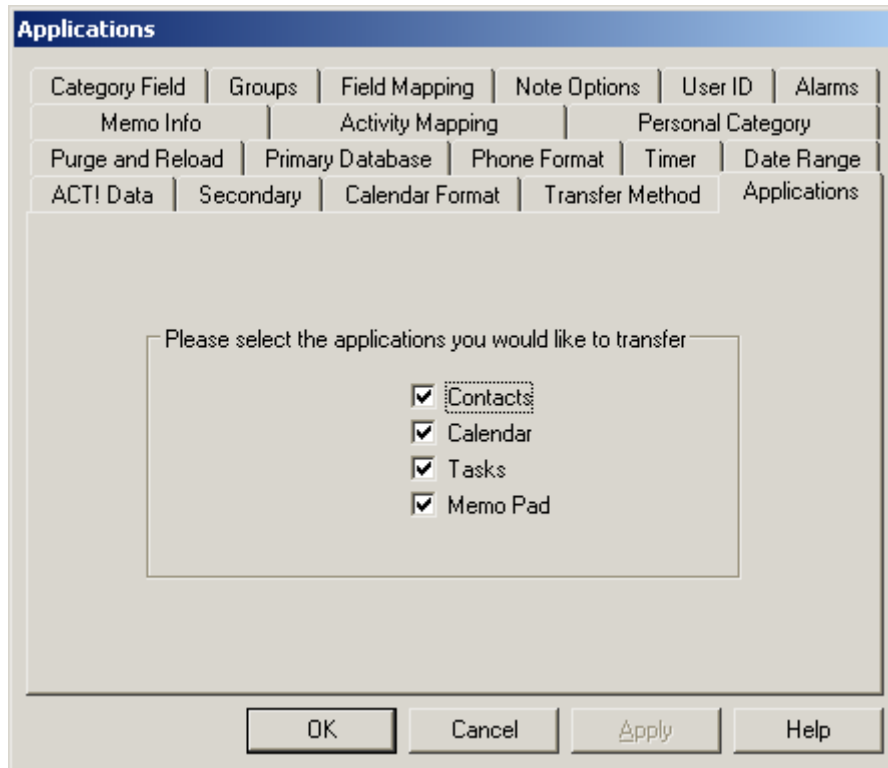
User Name: Peter Gabriel

User Id: PeterGabriel@domainofsteven.local

Url: https://SBS2008TEST.domainofsteven.local/EWS/Exchange.asmx

OK Cancel Apply Help

User login credentials for Exchange 2007.



Customize sync data types for each user