

INTOGRATE Navision – CRM

Lotus Notes Integration Kit

Version 1.7



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1. Introduction

1.1 Integration of Navision CRM with Lotus Notes

With the CRM module for Navision, close integration between a company's business management functions and the sales process can be achieved.

In connection with the management of activities in the CRM system it is essential that appointments and To-dos can be synchronized with the user's calendar. Likewise, it is important for the user to be able to use his e-mail system for sending e-mails from the CRM system.

The standard version of Navision CRM supports only Microsoft Outlook as e-mail and calendar client. With INTOGRATE Navision – CRM for Lotus Notes, it is possible to use the e-mail, calendar and contact person facilities of Lotus Notes.

To avoid unnecessary changes in the Navision application, the term Outlook is sometimes used in stead of Lotus Notes, e.g. in the error log which provides information about errors occurring in connection with the integration.

For further help with the CRM part in Navision, see the user instructions for 'Relationship Management-Navision 3.70' (the user instructions can normally be found on the Navision installation CD)

This manual is based on Microsoft Business Solutions-Navision v3.70 (EN). This means that screen dumps and the menu items, etc. were taken from this version.

1.2 Target group

This manual can be used by system administrators, developers as well as Navision users.

Navision developers can find additional information in the manual for INTOGRATION Navision - Developer, and in Appendix A where adjustments to the standard Navision CRM module are described.

1.3 Terminology

In the following sections, elements of Navision, references to menus, etc. are referred to as described in the below table:

<KEY>	Refers to a key on the keyboard. For example, <ENTER> means that you must press the Enter key.
Windows Start menu 	The Windows Start menu is typically located at the bottom left corner of the screen.
'Menu\sub-menu\menu item'	Refers to a menu selection. For example, 'File\Open' means that you must click 'Open' in the 'File' menu.
"c:\Lotus\Notes"	Refers to a path to either a file or a directory. Notice that the style resembles that of a menu selection.
<i>NavisionElement</i>	Navision elements are referred to in italics, e.g. the code unit <i>Mail</i> .
[button]	Refers to a button on the screen. For example, [OK] refers to a button with the text 'OK'.

1.4 Components

The Integration Kit is divided into four main components:

- The Integration Kit. This component handles the underlying communication between Lotus Notes and Navision.
- COM component which handles the overall communication between Navision and the Integration Kit.
- Mail component. This is used for sending e-mails.
- CRM component which handles the business logic in connection with the CRM part of Navision.

1.4.1 Integration Kit

The Integration Kit mainly consists of the files: erp2ln.dll, ERP2LN_addon.dll and ERP2LN_COM.dll. ERP2LN.dll handles all communication between Navision and Lotus Notes.

The Integration Kit can also be used for other types of integration. For example, it is also used for integration between Lotus Notes and CONCORDE XAL or Navision Axapta.

1.4.2 COM component

The COM component enables use of the Integration Kit from Navision by means of COM technology. This component is the link between the Integration Kit and the rest of Navision.

1.4.3 Navision Mail component

Navision uses this component to send e-mails. It replaces the part normally used for Microsoft Outlook. This means that no major adjustments are required in order to switch from Outlook to Lotus Notes.

The component comes as a single code unit called *Mail*. It can be used individually and does not require the CRM component to be installed.

1.4.4 Navision CRM component

The CRM part of Navision consists of several elements. It handles e.g. synchronization of to-dos, appointments and contact people between Lotus Notes and Navision. It also includes extended e-mail functionality which enables journaling of e-mails from Lotus Notes to both people and companies in Navision.

It includes both new elements and adjustments to existing ones. Appendix A includes a detailed description of the affected elements in Navision.

2. Program installation

The Integration Kit should normally be installed from a workstation where Lotus Notes and Navision clients are installed. All descriptions and tasks are based on the assumption that they are carried out from a local workstation.

2.1 Before you start

2.1.1 System requirements

The following software is necessary:

- Microsoft Windows Workstation/Server 98, NT, 2000 or XP.
- Lotus Notes client version 5.02c or newer¹.
- Microsoft Navision Attain DK 3.60, Microsoft Business Solutions-Navision DK 3.70, Microsoft Business Solutions-Navision DK 4.0, Microsoft Dynamics NAV 5.0 or Microsoft Dynamics NAV 2009.

2.2 Check list

Before you begin the installation of the Integration Kit, it is recommended that you carry out the following points. They may prevent potential problems not related to the Integration Kit itself.

- Start your local Lotus Notes client. Use the shortcut key <CTRL>+<M> to create a new e-mail. If an error occurs at this point, this must be fixed before the installation of the Integration Kit can continue. It is a prerequisite that the Lotus Notes e-mail client is set up correctly and that it is possible to send e-mails from the client.
- Since Navision uses the local Lotus Notes client for e.g. sending e-mails, the user will be prompted for a password for Lotus Notes when starting Navision regardless of whether the Lotus Notes client has been started or not. This can be changed so that the entering of a password is not necessary if the Lotus Notes client has already been started. Start your Lotus Notes client and select the menu *'File\Tools\User ID'*. Mark *'Don't prompt for a password from other Notes-based programs..'*. Close the dialog box by clicking [OK]. After this, the user will not be prompted for a Lotus Notes password when starting Navision. (However, this requires Lotus Notes to be running in the background and the user to be logged in).
- It is recommended that you disable visible notification in Lotus Notes. This can be done from the menu *'File\Preferences\User preferences..'*. Select the 'Mail and News' icon on the left side of the dialog box. Deselect 'Visible Notification' in the 'Receiving' section. This change is advantageous because Lotus Notes is locked when a message indicating that new mail has arrived is being displayed. The Integration Kit can thus not access Lotus Notes as long as the message is shown.
- Start Navision and make sure that you have a valid user name and password for Navision. Do not forget to close Navision before you continue with the installation.

¹ Most features will work in older versions of Lotus Notes. However, the mail function of the CRM module will be limited.

2.3 Installation of the Integration Kit

Insert the CD called "INTOGRATE Navision - CRM". If the installation program does not start automatically, double-click "setup.exe" in the root of the CD (Click 'Run' in the Windows Start menu and type "D:\setup.exe" if the CD-ROM drive is the D-drive).

Follow the installation guidelines on the screen. For a detailed description of the installation, see the section "Manual installation" in the whitepaper "Technical Guidance - INTOGRATE Navision.pdf".

2.4 License file

To use INTOGRATE a license file must be installed.

This file can be obtained either by purchasing a license for INTOGRATE or by downloading a demo version from our website (<http://www.intograte.com>).

The license file must be copied to the directory where the product was installed (the directory where "erp2ln.dll" is located).

2.5 Installation of Navision elements

The following instructions are based on the English language layer (United States). If Navision is set to another language you can switch to English by selecting the menu item 'Language' in the 'Functions' menu and select English(United States).

1. Start Navision and select 'Object Designer' in the 'Tools' menu (short cut key: [SHIFT]+[F12])
2. Select 'Import' in the 'File' menu.
3. Find the directory where you installed INTOGRATE Navision and open the sub-directory "Navision" (INTOGRATE is usually installed in "C:\Program Files\INTOGRATE Navision").
4. Select the file "INTOGRATE Navision - CRM - X.XX.fob" and click [Open].

X.XX is determined by your version of Navision:

- | | |
|------|--|
| 3.60 | Microsoft Navision Attain 3.60 |
| 3.70 | Microsoft Business Solutions-Navision 3.70 |
| 4.00 | Microsoft Business Solutions-Navision 4.0 |
| 5.00 | Microsoft Dynamics NAV 5.0 |
| 5.10 | Microsoft Dynamics NAV 5.0 Servicepack 1 |
| 6.00 | Microsoft Dynamics NAV 2009 |
5. If Navision has adjustments, these must be handled before the importing can continue.
 6. Restart Navision in order for the changes to take effect.

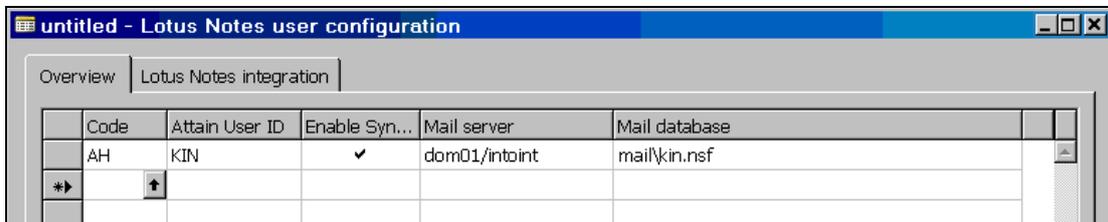
3. Setting up Navision and Lotus Notes

The following section describes how Navision must be set up so that the integration to Lotus Notes can be run.

3.1 Setting up users

To enable a user to use the Lotus Notes integration, some information about the user's Lotus Notes settings must be entered.

To carry out this setup, select the menu item *'Relationship Management'* in the *'Main Menu'*.



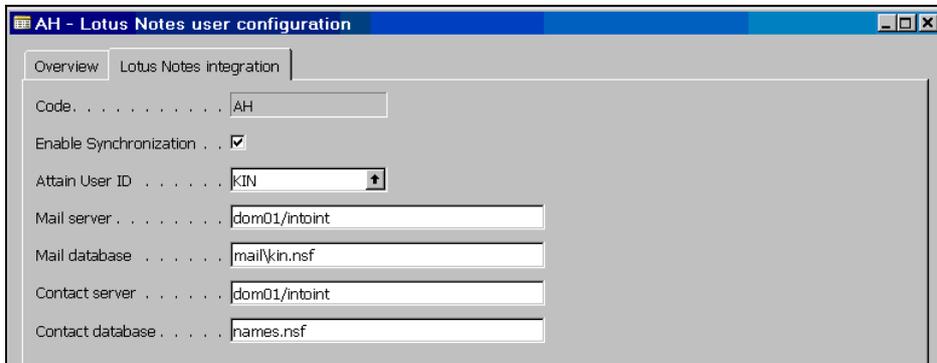
Code	Attain User ID	Enable Syn...	Mail server	Mail database
AH	KIN	<input checked="" type="checkbox"/>	dom01/intoint	mail\kin.nsf
*▶	↑			

For each user who is to use the Lotus Notes integration, the following procedure must be followed:

1. Open the menu *'Setup\Lotus Notes\User configuration'* and select the *'Overview'* tab.
2. Enter the Navision user code in the *'Code'* column. This can be done by typing in the code or selecting the user from the list of users.
3. Type in the *'Attain user ID'* name or select it from the list. The setting up of logins takes place from the menus *'Tools\Security\Database Logins'* and *'Tools\Security\Windows Logins'*.
4. Select *'Enable synchronization'*. This activates the Lotus Notes integration for the user in question.
5. Enter the name of the server where the user's mail file is located in the *'Mail server'* field.
6. The *'Mail database'* field must contain the relative path to the mail database, e.g. "mail\kin.nsf". The path must be relative to the "Lotus\Notes\Data" directory in the mail server specified.

If contact synchronization is to be used, the following must be carried out:

7. Select the tab 'Lotus Notes integration'
8. Enter the name of the server where the user's local address book is located in the 'Contact server' field (the address book can be the local address book in the Notes client or a common address book on a server).
9. The 'Contact database' field must contain the relative path to the address book. The path must be relative to the "Lotus\Notes\Data" directory in the server specified.



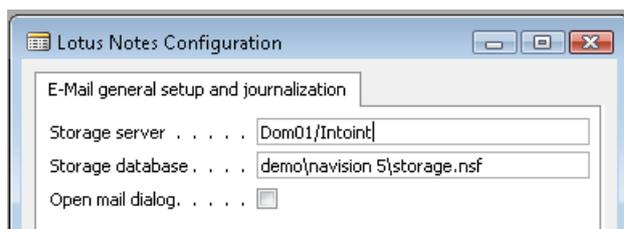
3.2 General configuration

3.2.1 Configuration of E-mail journaling

E-mail journaling enables the loading of e-mails sent and received from the user's mail database in Lotus Notes. The e-mails are then attached to a contact in Navision, and a copy of the e-mail is saved in a central database on a Domino server.

The users who are to journalize and be able to open journalized e-mails must have reading and writing rights to the central database.

To set up the central database go to the 'Main Menu' and select the menu item 'Relationship Management\Setup\Lotus Notes\Configuration'.



Enter the server name in the 'Storage server' field and the database name in the 'Storage database' field.

The database must be based on a standard mail template (either a Lotus Notes 5 or 6 template).

Journaling uses full-text searching in the users' mail databases and this must therefore be activated. Follow the below procedure to check if indexing has been activated in a mail database:

1. Start the Lotus Notes client and open the mail database.
2. If the search field is not already visible, select the menu item 'Search This View' in the 'View' menu.
3. If the word  Indexed appears in the top right corner of the search dialog, the full-text index is active and no further setting up is needed (you do not need to continue with this procedure).



4. If, in stead, it says Not indexed , the full-text index must be activated. To do this click the icon Not indexed . This will open the 'Create Full-Text Index' dialog box.
5. Click the [OK] button to create the full-text index (the standard settings are usually sufficient).
6. After a while, the index will be updated (the Not indexed icon will switch to Indexed).

If you have received an e-mail and want it journalized in Navision, the full-text index may not have been updated. In this case the e-mail will not appear in the journaling list in Navision until the index has been updated (this normally takes place automatically).

See Lotus Notes Help to find out how to manually update the index.

3.2.2 General mail setup

Normally, when sending mails through the interaction system, the mails are sent without further user-interaction in Lotus Notes.

If it is preferred to see the mails in Lotus Notes before they are sent check the option "Open mail dialog" in the configuration form.

This option is global for all users.

3.3 Setting up Lotus Notes for reports by e-mail

If you plan to send reports from Navision a minor change must be made in Lotus Notes. Without this change, report attachments will have unreadable names.

Instructions on how to make these changes will be delivered with the licensed version of INTOGRATE. These instructions can be found in the document "Manual - INTOGRATE Navision - Reports by e-mail" found in the root directory of the installation CD.

In some cases it is not necessary to install the patch. To decide whether the patch should be applied try to generate a simple report from Navision. Install the patch if the result is similar to the following picture:



After the patch has been installed in Lotus Notes a report will look similar to this:



4. Getting started

This section describes how to quickly start using the integration between Lotus Notes and Navision. You are presupposed to have some knowledge of Navision and have a user set up to synchronize with Lotus Notes.

For the next few sections, you are recommended to keep your Lotus Notes running in the background.

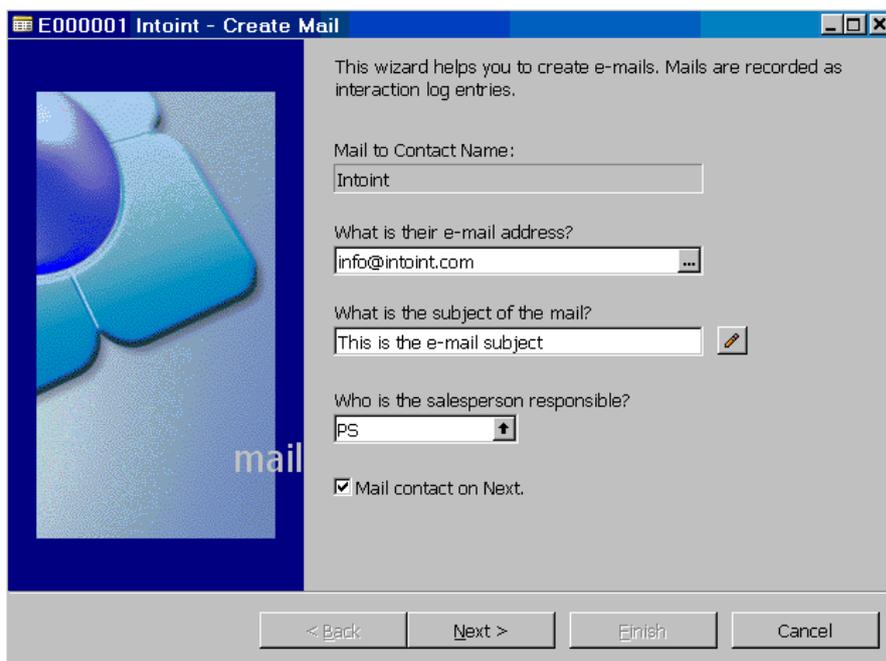
4.1 Sending e-mails

The following example describes how to send one e-mail to a customer in the customers table.

Start by opening the customer card for a customer (select the menu item 'Sales & Receivables\Customers' in the 'Main Menu').

Switch to the 'Communication' tab and enter an e-mail address in the 'E-Mail' field if it is not already filled in.

To send an email, click the  icon. This will open the following 'Create Mail' dialog:



E000001 Intoint - Create Mail

This wizard helps you to create e-mails. Mails are recorded as interaction log entries.

Mail to Contact Name:
Intoint

What is their e-mail address?
info@intoint.com

What is the subject of the mail?
This is the e-mail subject

Who is the salesperson responsible?
PS

Mail contact on Next.

< Back Next > Finish Cancel

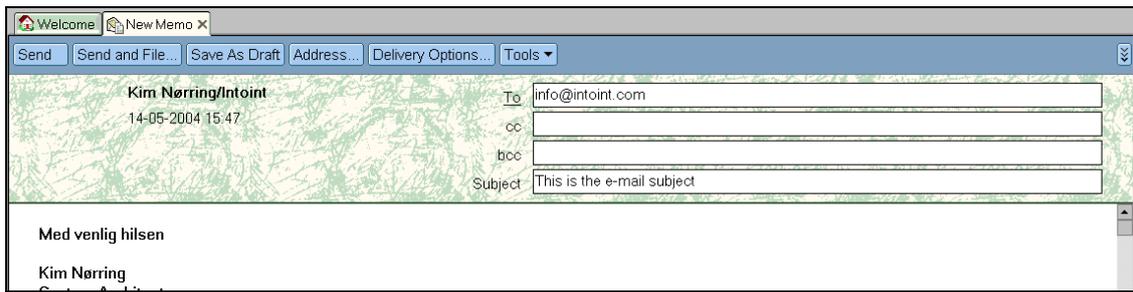
The field with the e-mail address is already filled in with information from the customer card. If the e-mail is to be sent to more people, separate the addresses by a comma (e.g. sales@intoint.com, info@intoint.com).

Enter the e-mail subject in the field called 'What is the subject for the mail?'. This will automatically be transferred to the 'Subject' line of the Lotus Notes e-mail.

If you deselect 'Mail contact on Next', the e-mail will not be created and shown in Lotus Notes. This feature can be used if the e-mail has already been sent from Lotus Notes and all that is needed is the creation of an Interaction Log Entry. Alternatively, e-mail journaling can be used to load an already sent or received e-mail (see section 5.2).

Click [Next] to create the e-mail in Lotus Notes.

An example of how the e-mail will look in Lotus Notes:



4.2 Synchronisation of to-dos and appointments

The Integration Kit enables you to automatically synchronize your appointments and to-dos between Lotus Notes and Navision. When you create new activities you must be aware that in Navision CRM, only meetings and phone calls will be transferred to Lotus Notes.

Start your Navision client and select 'Relations Management' in the main menu. Select the menu item 'To-dos' to see a list of activities. See the Navision manual for a description of this list. By default, the date is the work date chosen.

No.	Name	16-05-04	17-05-04	18-05-04	19-05-04	20-05-04
AH	Anne Grethe Hansen			1	1	
HJ	Henrik Jensen			2	1	1

In this example, an appointment is created for the sales person 'AH - Anne Grethe Hansen'.

Create a new appointment by clicking the  icon by the date of the appointment (the date field must be selected for the icon to appear). A list of activities for the day in question will appear:

Closed	Starting D...	T...	Description	P...	S...	No.	Date Closed	Canceled	Comment	Cot
	18-05-04		Bekræft værdien af lead	H...	I...	OP100027				KT?

Click the [Create To-Do] button to create a new activity. The following dialog box will appear:

AH Anne Grethe Hansen - Create To-do

This wizard helps you to create to-dos.

What is the type of the to-do?
Meeting

Describe your to-do.
This is a meeting

All Day Event

What is the start date and time of the to-do?
17-05-04 14:00:00

What is the duration of the to-do?
45 minutes

What is the end date and time of the to-do?
17-05-04 14:45:00

Team to-do

< Back Next > Finish Cancel

Select 'Meeting' in the 'What is the type of the to-do' selection box. Enter the subject of the appointment in the 'Describe your to-do' field. The subject will appear in 'Subject' in Lotus Notes. Enter a start time and an end time. If the appointment will last a whole day, select 'All day event'. Click [Next >] to invite participants to the appointment (these will not be transferred to Lotus Notes). Click [Next >] and, if relevant, select the campaign to which the appointment relates and attach a subject. If you enter something in the 'Location' field, this will be transferred to the field with the same name in Lotus Notes. Click [Next >] and then [Finish] to create the appointment in Navision and Lotus Notes.

In Lotus Notes, the appointment will appear as any other appointments:

Schedule a Meeting New Tools

Day Week Month Meetings

17 mandag maj 2004 20 tors maj

14:00 - 14:45 Identifier noglepersoner
This is a meeting
Location: Location of meeting

If you further amend it in Navision, the changes will be updated to Lotus Notes. If you amend it from Lotus Notes these changes can be updated too.

4.3 Synchronising contacts

For exchange of contacts to be possible, an address book must be specified in the settings for the user in question. See section 3.1 for help with setting this up.

At the first synchronization, all contacts attached to the user will be transferred to the address book. To attach a contact, enter the initials of the user in the 'Salesperson Code' field in the contact card.

Start your Navision client and select 'Relations Management' in the main menu. Select the menu item 'Contacts' to open the contact table.

Select a contact for which the 'Salesperson Code' is set to the logged in user, in this case 'AH':

Question	Answer	Quest...	Last Date ...
Fritidsinteressert	Tennis		31-01-01
Fritidsinteressert	Golf		31-01-01
Køn	Mand		31-01-01

Change e.g. the address and jump to the next contact by pressing <Page Down>. Switch to Lotus Notes and open the address book (the one that was set up for integration in section 3.1).

The following will appear in Lotus Notes:

Andrew Dixon • sales@intoint.com • http://www.intoint.com

First: Andrew
Middle:
Last: Dixon
Title: None
Suffix: None
Email: sales@intoint.com

Business | Personal | Briefcase | Advanced

Business
Company: Eco Office Inc.
Job Title:
Business address
Street: New address
City: Chicago | State/Province:
Zip/Postal: US-IL 61236 | Country/Region: USA

Contact information
Office phone: +45 70 20 51 10
Office fax: +45 70 20 51 11
Cell phone: +45 60 20 60 20
Pager:
Other email 1:
Other email 2:
Other email 3:

5. Using the integration

In this section the various fields of application will be described in detail.

5.1 E-mail

In Navision there are several ways to use the e-mail facilities. The following examples can be mentioned:

- You can use the e-mail icon (✉) in Navision. This will start Lotus Notes, open a new e-mail and fill in the 'To' field.
- Automatic sending of notification when a service order has been marked complete. This can be set up through job scheduling.

5.1.1 Sending e-mails from contact card and customer card

The Lotus Notes e-mail client can be activated from any location in Navision where the e-mail icon (✉) appears. The 'To' field is automatically filled in with the contents of the e-mail field in Navision. The other fields must be filled in manually.

Examples of places from where e-mails can be sent through the e-mail icon are through the contact card under the communication tab and on the sales person/purchaser card in the 'General' tab:

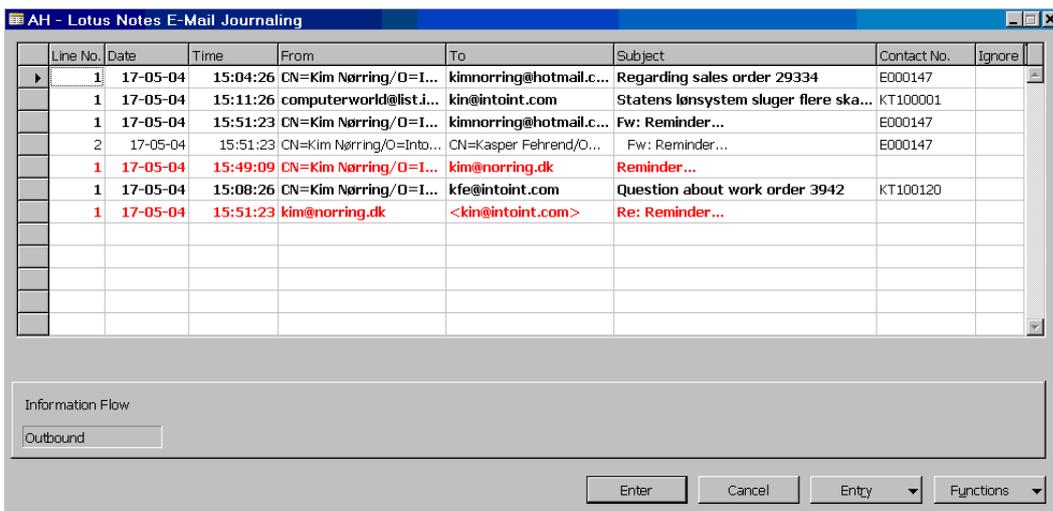
5.2 E-mail journaling

Journaling is used for loading e-mails sent and received from Lotus Notes and then attaching them to contacts in Navision.

To set up journaling, follow the instruction in section 3.2. The user who is to perform the journaling must be activated in the synchronization settings.

To start the journaling, go to 'Relationship Management' in the 'Main Menu'. Then select the menu item 'Periodic Activities\Lotus Notes Integration\E-Mail Logging'. This will start the journaling.

As a main rule, all e-mails not previously loaded or set to be ignored in Navision will be loaded.



Line No.	Date	Time	From	To	Subject	Contact No.	Ignore
1	17-05-04	15:04:26	CN=Kim Nørring/O=I...	kimnorring@hotmail.c...	Regarding sales order 29334	E000147	
1	17-05-04	15:11:26	computerworld@list.i...	kin@intoint.com	Statens lønssystem sluger flere ska...	KT100001	
1	17-05-04	15:51:23	CN=Kim Nørring/O=I...	kimnorring@hotmail.c...	Fw: Reminder...	E000147	
2	17-05-04	15:51:23	CN=Kim Nørring/O=Int...	CN=Kasper Fehrend/O...	Fw: Reminder...	E000147	
1	17-05-04	15:49:09	CN=Kim Nørring/O=I...	kin@norring.dk	Reminder...		
1	17-05-04	15:08:26	CN=Kim Nørring/O=I...	kfe@intoint.com	Question about work order 3942	KT100120	
1	17-05-04	15:51:23	kin@norring.dk	<kin@intoint.com>	Re: Reminder...		

Information Flow
Outbound

Enter Cancel Entry Functions

The Integration Kit will automatically attempt to attach an e-mail to a contact in Navision. This attachment takes place through a comparison of the to and from addresses with the contact addresses in Navision. If no matching contact is found, the line will be marked in red. The contact to be attached to the e-mail must then be selected manually in the 'Contact No.' column.

If an e-mail is outgoing and has several recipients, it will be shown in several lines. This enables the user to attach multiple contacts to one e-mail. The lines of a split-up e-mail will always follow each other and the subject will be indented from line 2. All recipients of an e-mail must be attached to a contact before the e-mail can be journalized.

Whether an e-mail is incoming or outgoing will appear from 'Information Flow' field in the details section.

By clicking the [Entry] button and 'Open mail in Lotus Notes' you can view the selected e-mail in the Lotus Notes client.

When all lines have been taken care of and there are no more red lines, you can click Enter]. This will start the journaling and the e-mails will be copied to the central database so that other users can open them through Navision. If there are no emails to be journalized, a dialog box with the text 'There are no e-mails to journalize' will appear.

5.2.1 Interaction Log Entries

When the journaling is complete each of the selected e-mails will be attached to a contact through an 'Interaction Log Entry'. To view these entries, go to 'Relationship Management' in the 'Main Menu', click 'Contacts' and select the contact to which an e-mail is attached. Click [Contact] and select 'Interaction Log Entries' (short cut key: <CTRL>+<F5>). The following dialog box will appear:

C...	A...	Date	Interactio...	Description	Attachment	Contact No.	E...	Cost (LCY)	Duration (Min.)
		17-05-04	E-MAIL	Regarding sales order 29334	Yes	E000147		8,00	
		17-05-04	E-MAIL	Fw: Reminder...	Yes	E000147		8,00	

Contact Name: Morten Rasmussen

Contact Company Name:

Buttons: Entry, Functions, Show, Create Interact, Help

If you click the [Show] button, the selected e-mail will open in Lotus Notes. This requires the user to have access to the central database where the e-mails were saved in connection with the journaling.

5.2.2 Ignore e-mails

There are two ways to ignore an e-mail: temporarily and permanently. Ignoring an e-mail temporarily means to only ignore it until the next journaling. Ignoring it permanently will prevent the selected e-mail from appearing in the journaling list ever again.

To ignore an e-mail temporarily, tick the last column called 'Ignore'. If the e-mail is outgoing and there are multiple recipients, all the lines relating to the e-mail will automatically be ignored. A quick way to temporarily ignore multiple e-mails that do not have a contact attached is to click the [Functions] button and select 'ignore all without contact person'.

To ignore an e-mail permanently, click the [Entry] button and select the menu item 'Ignore in future'. A confirmation box showing information about the e-mail to be ignored in the future will appear. Be

aware that all recipients belonging to the e-mail will be ignored. The permanent Ignoring of an e-mail will only take effect once the journaling is run (i.e. when you press [Enter] in the journaling form).

5.3 Appointments and to-dos

In Navision all activities (to-dos) have a field called *Type*. If this is set to *Meeting* or *Phone Call* it will be synchronized with Lotus Notes². A *Meeting* corresponds to an *Appointment* in Lotus Notes and a *Phone Call* corresponds to a *To-do*.

Synchronisation takes place in two ways: Online synchronization and batch synchronization.

5.3.1 Online synchronization

Online synchronization takes place automatically when you create, modify and delete activities in Navision of the types *Meeting* or *Phone Call*. When you update an activity, this creation, modification or deletion is immediately transferred to Lotus Notes. Online synchronization only applies when you update activities in Navision and not in Lotus Notes. Changes made in Lotus Notes will not be updated in Navision until you run a batch synchronization run.

5.3.2 Batch synchronization

Batch synchronization transfers several changes at a time. It brings all to-dos and appointments in Lotus Notes and Navision up to date. This includes activities that have previously been synchronized. It may take a while since the system will go through all appointments and to-dos.

A batch synchronization run can be started in the following ways:

- Go to *Relationship management\Periodic Activities\Lotus Notes Integration* and activate synchronization by clicking the menu item *Synchronize with Lotus Notes*.
- You can also synchronize from *Salesperson/Purchaser Card* by selecting *Functions\Synchronize with Lotus Notes*.
- When Navision is started a dialog box enabling the user to start a synchronization run will appear.

5.3.3 Synchronised changes

If the system has been configured to run synchronization, the following changes will be synchronized (provided that the sales person is set to the active user):

- When you create a new activity and set the *Type* field to *Meeting* or *Phone Call*, the new activity will be copied to Lotus Notes as soon as it is saved.
- When you modify an existing activity that has the *Type* field set to *Meeting* or *Phone Call*, the modification will be copied to Lotus Notes as soon as it is saved unless the corresponding to-do or appointment in Lotus Notes has been marked private.
- When you cancel an existing activity which has already been synchronized with Lotus Notes from Navision it will immediately be deleted from Lotus Notes unless the corresponding to-do or appointment in Lotus Notes has been marked private.
- When you modify a to-do or appointment in Lotus Notes which is not marked private and which has already been synchronized with Navision the changes will be copied to Navision the next time you run the synchronization from Navision.
- When you delete a to-do or appointment which has already been synchronized from Lotus Notes and then do a synchronization run from Navision the corresponding activity in Navision will be cancelled.
- If you change the *Salesperson code* to someone other than the active user, the activity will be deleted from Lotus Notes.

5.3.4 Deleting appointments and to-dos

If a to-do in Lotus Notes which has a corresponding activity in Navision is deleted from Lotus Notes, the activity will be updated in Navision so that the next time the synchronization is run, it will be set to cancelled.

² Provided that the user has activated synchronization in the CRM settings.

If an activity is deleted in Navision, the corresponding activity will be deleted in Lotus Notes provided that the activity has not been marked private.

5.4 Contact synchronization

In addition to mail and calendar integration, the Integration Kit enables synchronization of contacts between Lotus Notes and Navision. The address book synchronized will be the one specified in the user's CRM settings (see section 3.1 Setting up users).

Synchronisation takes place automatically when Navision is started and when a user modifies a contact attached to him or her. The user can also start the synchronization manually.

If the system is configured to run contact synchronization, the following changes will be synchronized:

- When you create a new contact and the '*Salesperson Code*' is set to the active user, the new contact will be copied to Lotus Notes as soon as it is saved.
- If the '*Salesperson Code*' is changed to a different sales person in an already synchronized contact, the contact will be deleted from Lotus Notes. If the contact is of the type Contact Company, attached contact persons will also be deleted in Lotus Notes since a change of the '*Salesperson Code*' will automatically be copied to all attached contact persons in Navision.

Appendix A Adjustments to Navision

The below table describes all the elements in Navision which are adjusted or added by the Integration Kit (adjustments are described in relation to the standard CRM module).

All code units added to existing code units are surrounded by the following:

```
// INTOGRATE Navision: START
```

```
.... code modifications
```

```
// INTOGRATE Navision: END
```

Modifications to local and global variables are not described in the code, but can be seen in the text versions of the import files. These can be found on the INTOGRATE CD or in the installation directory.

New elements

Object type	Object	Id
Table	<i>I2I Synchronization Entry</i>	79540
Table	<i>I2I PIM User Setup</i>	79541
Table	<i>I2I E-Mail Journaling Header</i>	79542
Table	<i>I2I E-Mail Journaling Line</i>	79543
Table	<i>I2I PIM Setup</i>	79544
Form	<i>I2I PIM User Setup</i>	79540
Form	<i>I2I E-Mail Journaling</i>	79542
Form	<i>I2I PIM Setup</i>	79543
Form	<i>I2I E-Mail Logging Filter</i>	79544
Report	<i>Synchronize with Lotus Notes</i>	79540
Code unit	<i>Lotus Notes Mail</i>	79540
Code unit	<i>Lotus Notes Management</i>	79541
Code unit	<i>Lotus Notes E-Mail Journaling</i>	79542
Code unit	<i>Lotus Notes Handler</i>	79543
Code unit	<i>Lotus Notes Version Specific</i>	79544
MenuSuites	<i>INTOGRATE (only Navision 4.0)</i>	80

Adjustments to existing elements

Object type	Object	Id	Comments
Table	<i>Contact</i>	5050	Adjustments: OnInsert() OnDelete() OnRename() OnModify(xRec)
Table	<i>Attachment</i>	5062	New type added to 'Storage Type'. Adjustments: OpenAttachment(Caption, IsTemporary)

			ShowAttachment(SegLine, WordCaption, IsTemporary)
Table	<i>To-Do</i>	5080	Adjustments: OnInsert() OnModify() OnRename()
Form	<i>Relationship Management Menu</i>	5000	'Lotus Notes' menu item added in the menus 'Periodic Activities' and 'Setup'.
Form	<i>Salesperson/Purchaser Card</i>	5116	New menu item in the 'Functions' button.
Code unit	<i>ApplicationManagement</i>	1	Adjustments: LogInStart() LogInEnd()
Code unit	<i>Mail</i>	397	Most methods are modified by the Integration Kit. Adjustments: NewMessage(...) AddBodyline(...) Send() GetErrorDesc() GetErrorCode()