

INTOGRATE NAV – CRM

Lotus Notes Integration Kit

For Dynamics NAV

Version 2.3.1



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1. Introduction

1.1 Integration of NAV CRM with Lotus Notes

With the CRM module for Dynamics NAV, 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 NAV CRM supports only Microsoft Outlook as e-mail and calendar client. With INTOGRATE NAV – 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 NAV 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 NAV, see the user documentation for Dynamics NAV.

This manual is based on Dynamics NAV 2013/2015/2016. 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 NAV users.

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

1.3 Terminology

In the following sections, elements of NAV, 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.
'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>NAVElement</i>	NAV 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 NAV.
- COM component which handles the overall communication between NAV 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 NAV.

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 NAV 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 Dynamics AX.

1.4.2 COM component

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

1.4.3 NAV Mail component

NAV 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 NAV CRM component

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

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

2. Program installation

The Integration Kit should normally be installed from a workstation where Lotus Notes and NAV 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, NT, 2000, XP, Vista, Windows 7, Windows 8.
- Lotus Notes client version 5.02c or newer
- Microsoft NAV Attain DK 3.60, Microsoft Business Solutions-NAV DK 3.70, Microsoft Business Solutions-NAV DK 4.0, Microsoft Dynamics NAV 5.0, Microsoft Dynamics NAV 2009, 2013, 2015 or Microsoft Dynamics NAV 2016 (32 bit client).

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 NAV 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 NAV 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 NAV. (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 NAV and make sure that you have a valid user name and password for NAV. Do not forget to close NAV before you continue with the installation.

2.3 Installation of the Integration Kit

Insert the CD called "INTOGRATE NAV - 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 NAV.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 NAV elements

The following instructions are based on the English language layer (United States). If NAV 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 NAV Development Environment 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 NAV and open the sub-directory "NAV" (INTOGRATE is usually installed in "C:\Program Files\INTOGRATE NAV").
4. Select the file "INTOGRATE NAV - CRM - X.XX.fob" and click [Open].

X.XX is determined by your version of NAV:

- 3.60 Microsoft NAV Attain 3.60
- 3.70 Microsoft Business Solutions-NAV 3.70
- 4.00 Microsoft Business Solutions-NAV 4.0
- 5.00 Microsoft Dynamics NAV 5.0
- 5.10 Microsoft Dynamics NAV 5.0 Servicepack 1
- 6.00 Microsoft Dynamics NAV 2009
- 7.00 Microsoft Dynamics NAV 2013
- 8.00 Microsoft Dynamics NAV 2015
- 9.00 Microsoft Dynamics NAV 2016 (32 bit client)

5. If existing NAV has modifications, these must be handled before the importing can continue.

3. Setting up NAV and Lotus Notes

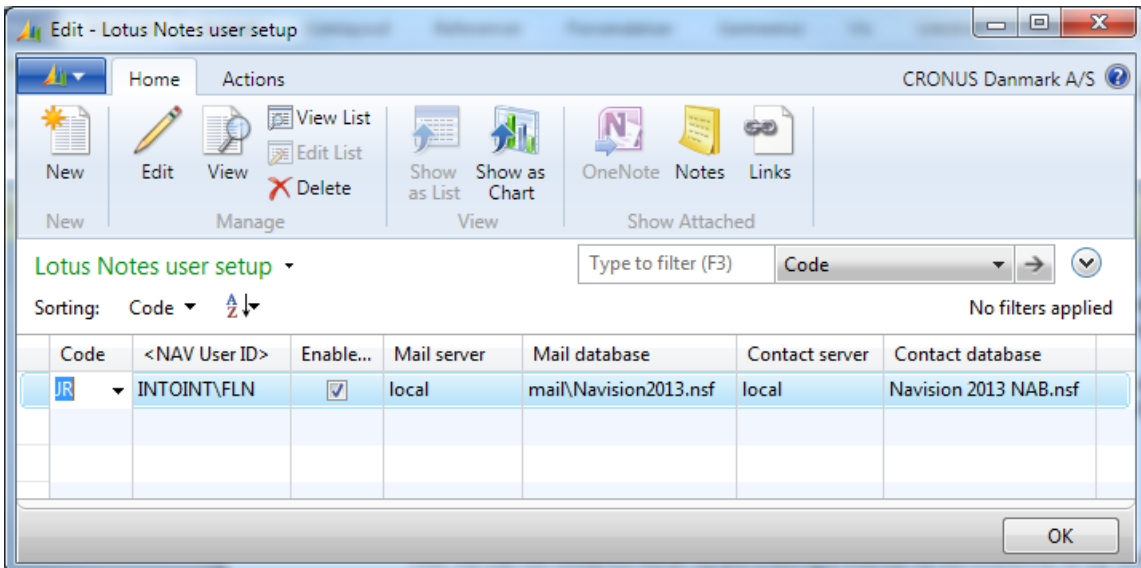
The following section describes how NAV must be set up so that the integration to Lotus Notes can be run.

As each Dynamics NAV 2013/2015/2016 installation can have its own role-center setup, the location of the individual components can differ from the examples below.

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 '*Departments/Sales and Marketing/Administration/Lotus Notes/Configuration/User configuration*'.



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

1. Enter the NAV user code in the 'Code' column. This can be done by typing in the code or selecting the user from the list of users.
2. Type in the 'NAV user ID' name or select it from the list.
3. Select 'Enable synchronization'. This activates the Lotus Notes integration for the user in question.
4. Enter the name of the server where the user's mail file is located in the 'Mail server' field.
5. 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.

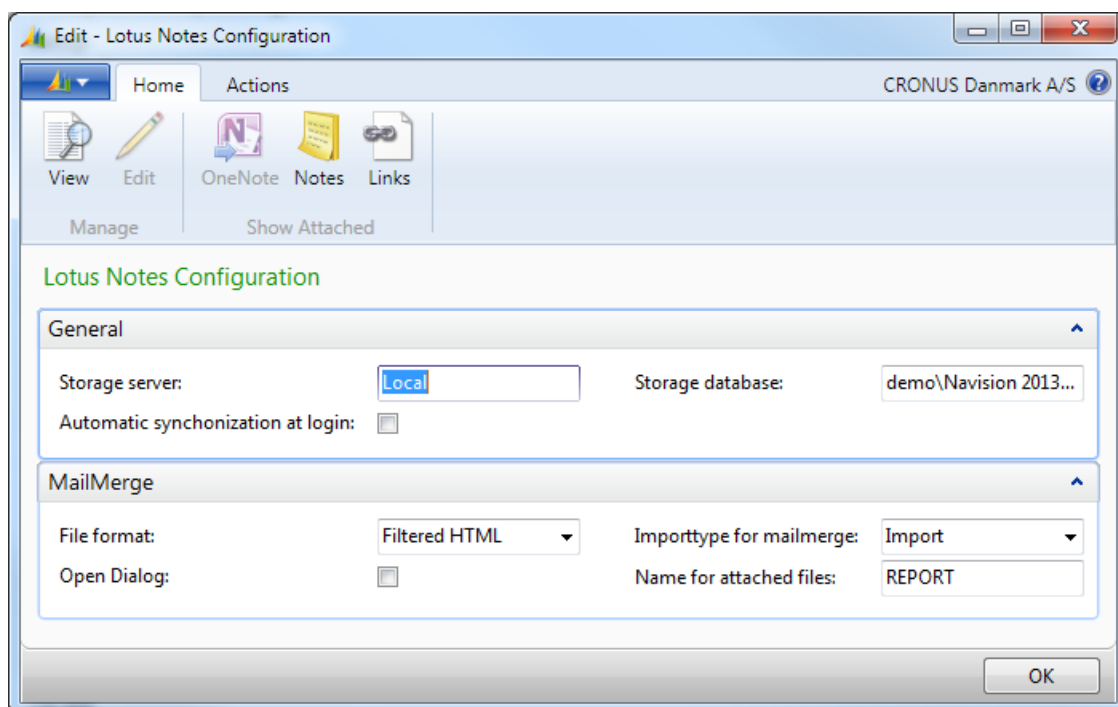
If contact synchronization is to be used, the following must be carried out:

6. 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).
7. 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

The general configuration defines the setup for all users integrating with Lotus Notes.

The setup is found through: 'Departments' -> 'Sales and Marketing' -> 'Administration' -> 'Lotus Notes' -> 'Configuration' -> 'Configuration'.



3.2.1 Configuration of storage server for 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 NAV, and a copy of the e-mail is saved in a central database on a Domino server (storage server).


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

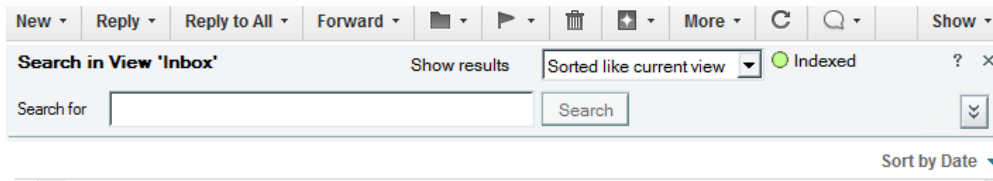
Enter the server name in the 'Storage server' field and the database name in the 'Storage database' field.





The database must be based on a standard mail template.

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, instead, it says  Not indexed, the full-text index must be activated. To do this click the icon . 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 NAV, the full-text index may not have been updated. In this case the e-mail will not appear in the journaling list in NAV 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

Synchronization of contacts and appointments/meetings between NAV and Lotus Notes can be performed both automatically when signing in to NAV or manually through the menu-system (see section 5.3.2).

If synchronization should be performed automatically for the users when starting NAV, click the checkbox *'Automatic synchronization at login'*.

When merging mails from NAV through Lotus Notes, the documents can be either imported to the body-segment of the mail or attached to the mail.

The field *'File format'* defines which format merge-documents are converted to before import or attachment, and the field *'Importtype for mailmerge'* defines if documents are to be imported or attached.

Remark: The maximum size of a file to be imported to Lotus Notes via INTOGRATE, is 40.000 bytes. It is strongly recommended to use the file format: "Filtered HTML" (HTML with images stripped of) when using the "import" method, as this format produces the smallest files.

When using the "Attach" option there is no size limitations.

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

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

The field *'Name for attached files'* sets the name of the merged document, when using the "attach" method.

4. Getting started

This section describes how to quickly start using the integration between Lotus Notes and NAV.

You are presupposed to have some knowledge of NAV 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.

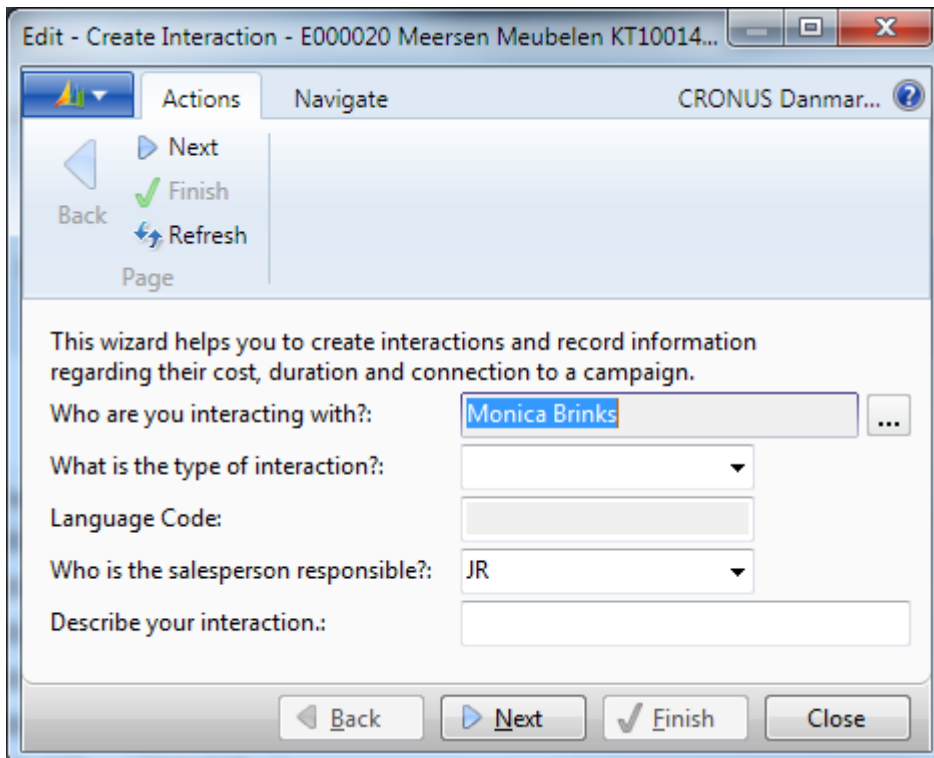
Start by opening the customer card for a customer (select the menu item 'Sales & Marketing/Order Processing/Customers' in the 'Departments' menu and select 'Edit').

Open 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 mail in Lotus Notes with the customers e-mail in the send-to field.

4.2 Creating interaction e-mail

Start by opening the contacts view (select the menu item 'Sales & Marketing/Order Processing/Contacts' in the 'Departments' menu) and click the [Create interaction] button  for a con



CRONUS Danmar...

Back Next
Finish
Refresh
Page

This wizard helps you to create interactions and record information regarding their cost, duration and connection to a campaign.

Who are you interacting with?: ...

What is the type of interaction?:

Language Code:

Who is the salesperson responsible?:

Describe your interaction.:

Back Next Finish Close

This will open the Interaction wizard which can eventually result in merging a document that will be sent through Lotus Notes.

The behaviour of this process, e.g. if the merged document are imported to the mail body or attached, can be setup in the Lotus Notes configuration in NAV (see section 3.2.2).

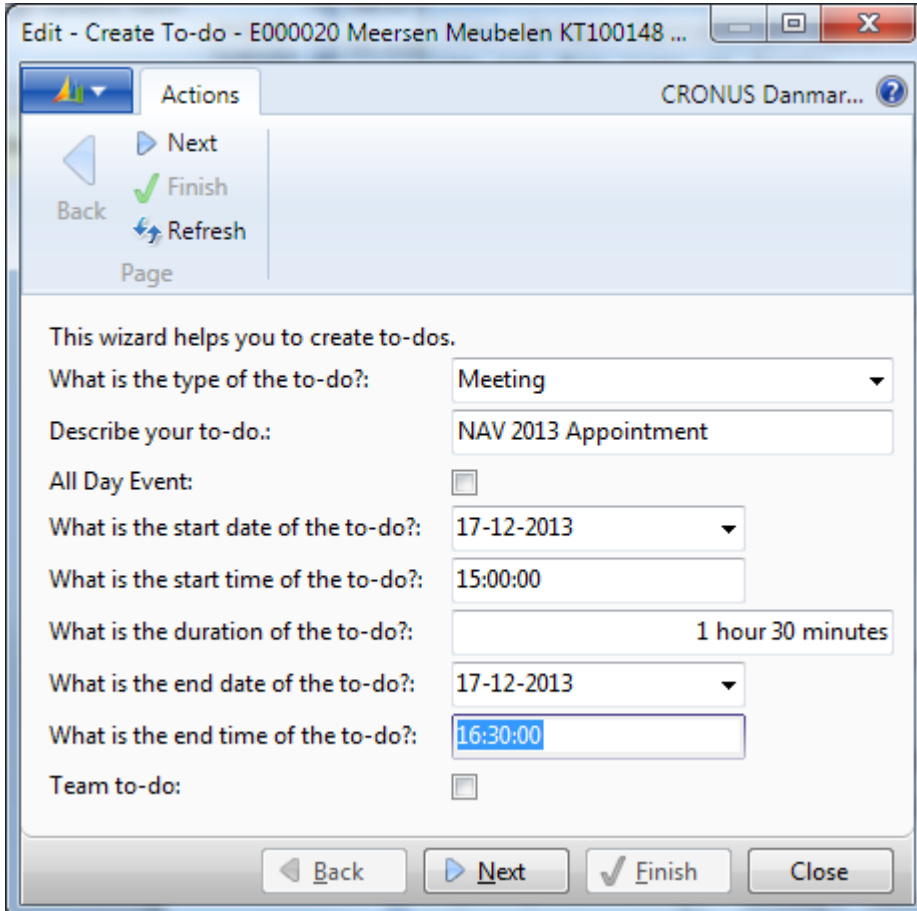
4.3 Synchronisation of to-dos and appointments

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

Select a contact through 'Departments/Sales & Marketing/Order Processing/Contacts'

Select the tab 'Navigate' and click the [To-dos] button  see to-do list.

Press the [Create To-do] button  to create a new to-do item.



Select 'Meeting' in the 'What is the type of the to-do' selection box (or 'Phone call' if you want to make a Lotus Notes 'To-do' document). Enter the subject of the appointment in the 'Describe your to-do' field. The subject will appear in 'Subject' in the Lotus Notes appointment.

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 NAV and Lotus Notes.

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

New ▾	More ▾		
Mandag den 16. december 2013			
<hr/>			
Tirsdag den 17. december 2013			
<hr/>			
	15:00	- 16:30	<input checked="" type="checkbox"/> NAV 2013 Appointment Flemming Nielsen

If you further amend it in NAV, the changes will be updated to Lotus Notes. If you change the appointment in Lotus Notes these changes will be updated too in NAV.

4.4 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.

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

KT100148 · Monica Brinks

Home Actions Navigate Report

Edit View New Delete Apply Template... Create Interact Sales Quotes Statistics Process Contact Cover Sheet Report

General

No.:	KT100148	Country/Region Code:	NL
Type:	Person	Search Name:	MONICA
Company No.:	E000020	Phone No.:	123456
Company Name:	Meersen Meubelen	Salesperson Code:	JR
Name:	Monica Brinks	Salutation Code:	K
Address:	Vijfpoortenweg 71	Last Date Modified:	10-01-20
Address 2:		Date of Last Interaction:	23-01-20
Post Code:	NL-6827 BP	Last Date Attempted:	23-01-20
City:	Arnhem	Next To-do Date:	02-01-20

Change e.g. the address and jump to the next contact by pressing <Ctrl>-<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:

[Edit](#) [New](#) [Delete](#) [Reply](#) [Trash](#)

Monica Brinks
 Meersen Meubelen
 monica.brink@cronuscorp.net
 123456

E-mail		Addresses	
Business:	monica.brink@cronuscorp.net	Business:	Vijfpoortenweg 71
Phone Numbers		Arnhem NL-6827 BP Nederlandene	
Business:	123456		
Mobile:	654321		
Other Information			
Messaging ID:	monica.brink@cronuscorp.net		


[Comments](#) [Name Information](#) [Certificates](#)

5. Using the integration


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

5.1 E-mail

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

- You can use the e-mail icon () in NAV. 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.
- In NAV 2013/2015/2016 it is not possible to use the "Print & Send" functionality with Lotus Notes.

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 NAV where the e-mail icon () appears. The 'To' field is automatically filled in with the contents of the e-mail field in NAV. The other fields must be filled in manually.

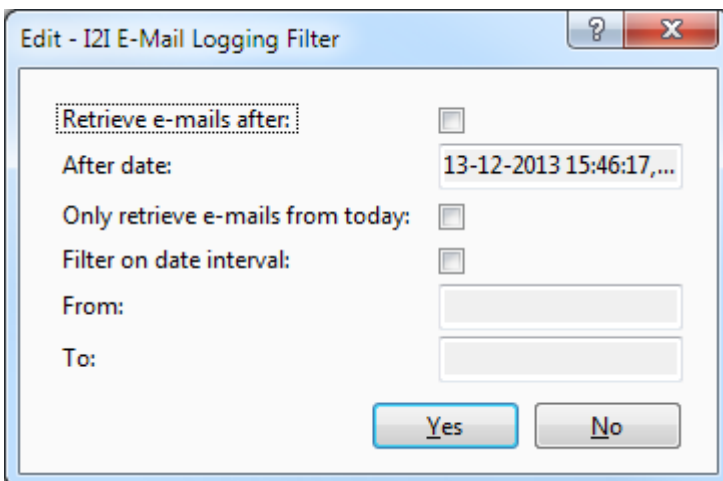
Examples of places from where e-mails can be sent through the e-mail icon are through the contact card under the communication tab and on the sales person/purchaser card in the 'General' tab:

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 NAV.

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 'Departments/Sales and Marketing/Lotus Notes Integration/ E-Mail logging'. This will start the journaling.



Dialog box titled "Edit - I2I E-Mail Logging Filter".

Options:

- Retrieve e-mails after: (Date/Time: 13-12-2013 15:46:17,...)
- Only retrieve e-mails from today:
- Filter on date interval:
- From:
- To:

Buttons: Yes, No

If the checkbox *'Retrieve e-mails after'* is checked, only mails received or sent at the date on or after the date specified in *'After date'* is fetched (suggests a date 30 days before today). Further date-refinement can be entered through the *'Filter on date interval'* selections.

Mails from today can also be selected.

Only mails that has not been processed before is loaded to NAV, so if no date selections is entered, all mails that hasn't been processed before will be shown.

Line No.	Date	Time	From	To	Subject	Contact No.	Ignore
1	12-01-2014	17:55:29	CN=Flemming Nielsen/O=Intoint	fln3400@gmail.com	Test multiple receivers	E000001	<input type="checkbox"/>
2	12-01-2014	17:55:29	CN=Flemming Nielsen/O=Intoint	IntointMailUser@Intoint.com	Test multiple receivers		<input type="checkbox"/>
1	09-01-2013	19:27:41	Jean-Francois.Lortie@acceo.com	"info@intoint.com" <...>	Need some info and price		<input type="checkbox"/>
1	16-11-2005	15:37:26	CN=Flemming Nielsen/O=Intoint	christesen@multiban.com	INTOGRATE Information		<input type="checkbox"/>
1	11-01-2014	11:18:35	hello@triggertrap.com	fln@intoint.com	Customer Account confirmation		<input type="checkbox"/>
1	08-04-2013	21:21:24	Alvaro.Toro@ametek.com	info@intoint.com	Nav RTC 2009 r2 and Lotus Int...		<input type="checkbox"/>
1	30-01-2013	09:43:02	guclu.sanli@tr.sika.com	sales@intoint.com	Ynt: Intograte Download Infor...		<input type="checkbox"/>
1	24-09-2013	17:52:12	Thomas.Sievert@gob.de	"info@intoint.com" <...>	Intograte: NAV & Lotus Notes 9		<input type="checkbox"/>
1	05-05-2012	13:13:35	Nadezhda.Davydova@avon.com	info@intoint.com	INTOGRATE		<input type="checkbox"/>
1	04-09-2007	13:48:54	CN=Flemming Nielsen/O=Intoint	JFL@cornator.com	Re: Intration mellem Lotus No...		<input type="checkbox"/>
1	14-02-2013	12:53:17	Haraldur@astra.is	"support@intoint.co..."	intograte		<input type="checkbox"/>
1	20-12-2013	12:00:52	Johan.Carlstedt@navipro.se	"info@intoint.com" <...>	Lotus Notes integration, Dyna...		<input type="checkbox"/>
1	14-12-2012	14:23:44	krzysztof.lapacz@floppy.pl	"info@intoint.com" <...>	Intograte pricing and licensing		<input type="checkbox"/>

Information Flow: Outbound

The Integration Kit will automatically attempt to attach an e-mail to a contact in NAV. This attachment takes place through a comparison of the "to" and "from" addresses with the contact addresses in NAV. 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.

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 selecting the *'Actions'* tab and the [Open mail in Lotus Notes] button you can view the selected e-mail in the Lotus Notes client.

When all lines have been assigned to a contact and there are no more red lines, you can click [Post]. This will start the journaling and the e-mails will be copied to the central database so that other users can open them through NAV. 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 *'Sales & Marketing/Order Processing/Contacts'* in the *'Departments'* menu, find the contact and select the *'Navigate'* tab. Click [Interaction Log Entries]. Here the journalized mails can be found and they can be opened in Lotus Notes through the [Show] button on the *'Actions'* tab.

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'*. 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 [Ignore in future] button on the *'Actions'* pane.

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 NAV all activities (to-dos) have a field called *'Type'*. If this is set to *'Meeting'* or *'Phone Call'* it will be synchronized with Lotus Notes¹. 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 NAV 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 NAV and not in Lotus Notes. Changes made in Lotus Notes will not be updated in NAV 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 NAV 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 *Departments/Sales & Marketing/Sales/Lotus Notes Integration* and activate synchronization by clicking the menu item *'Synchronize with Lotus Notes'*.
- When NAV is started a dialog box enabling the user to start a synchronization run will appear, if this options has been enabled.

5.3.3 Synchronise 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 NAV 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 NAV the changes will be copied to NAV the next time you run the synchronization from NAV.
- When you delete a to-do or appointment which has already been synchronized from Lotus Notes and then do a synchronization run from NAV the corresponding activity in NAV will be cancelled.

¹ Provided that the user has activated synchronization in the CRM settings.

- 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 NAV is deleted from Lotus Notes, the activity will be updated in NAV so that the next time the synchronization is run, it will be set to cancelled.

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

5.3.5 *Limitations on appointments and to-dos*

- Recurring meetings are not fully supported
- Team meetings are not fully supported.
- If changes are made in NAV and Lotus Notes, within the same minute, changes will not be synchronized.

5.4 *Contact synchronization*

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

Synchronisation can, if enabled, take place automatically when NAV 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 NAV.
- If the contact person information is changed in Lotus Notes, these changes will be updated in NAV on the next synchronization.
- If changes are made in NAV and Lotus Notes, within the same minute, changes will not be synchronized.

Appendix A Adjustments to NAV

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

All modifications in code added to existing design-elements are surrounded by the following:

```
// INTOGRATE START
.... code modifications
// INTOGRATE 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
Page	<i>I2I PIM User Setup</i>	79540
Page	<i>I2I PIM User Setup Card</i>	79541
Page	<i>I2I E-Mail Journaling</i>	79542
Page	<i>I2I PIM Setup</i>	79543
Page	<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
Code unit	<i>Lotus Notes Mass Mailer</i>	79545
MenuSuites	<i>INTOGRATE_RAW</i>	80

Adjustments to existing elements

Object type	Object	Id	Modifications/comments
Table	<i>Contact</i>	5050	New field: "Version No." (79540) OnInsert() OnDelete() OnRename() OnModify(xRec)
Table	<i>Attachment</i>	5062	New type added to 'Storage Type'. OpenAttachment(Caption, IsTemporary)

			ShowAttachment(SegLine, WordCaption, IsTemporary)
Table	<i>To-Do</i>	5080	New field: "Version No." (79540) OnInsert() OnModify() OnRename() CreateRecurringTodo()
Page	<i>Create To-do</i>	5097	ShowStep(Visible: Boolean)
Codeunit	<i>LoginManagement</i>	40	LoginStart()
Codeunit	<i>ApplicationManagement</i>	1	LoginStart() LoginEnd()
Codeunit	<i>Mail</i>	397	Most methods are modified by the Integration Kit.