

CONTROL OUTLOOK SYNCHRONIZATION SETTINGS FOR DYNAMICS CRM USERS

...with the help of XRM Toolbox's Sync Filter Manager

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THE PROBLEM WITH DYNAMICS CRM SYNCHRONIZATION SETTINGS

- Contact and activity record synchronization between Microsoft Dynamics CRM database and Outlook (& Exchange) is controlled via synchronization filters
- By default these settings need to be configured individually by each user via the Personal Options menu, as there is no central administration tool available for them in Dynamics CRM

Set Personal Options

Filter: Outlook or Exchange -- Webpage Dialog

Filter: Outlook or Exchange

Create and change filters that specify the appointments, contacts, and tasks that are synchronized to Outlook or Exchange. You can activate or deactivate filters.

Synchronization Filters

User Filters System Filters

New X Stop More Actions

✓	Name	Status ↑	Returned Type	Description
	My Recurring Appointments	Active	Recurring Appointment	Recurring Appointments Synced To Outlook
✓	My Outlook Contacts	Active	Contact	Contacts Syncing to Outlook
	My Appointments	Active	Appointment	Appointments Synced To Outlook
	My Letters	Active	Letter	Letters Synced To Outlook

WHAT IS SYNC FILTER MANAGER?

- Part of the XrmToolBox tools for Dynamics CRM, developed by Tanguy Touzard, available for free on CodePlex:
 - <http://xrmtoolbox.codeplex.com/>
 - Note: this is not a solution you import to your CRM, instead you run it from your local PC and connect to the specified CRM instance
- The tool author's post describing the features of Sync Filter Manager:
 - <http://mscrmttools.blogspot.fi/2013/12/introducing-new-tool-sync-filter-manager.html>
- In short: system administrators can use this tool to configure the appropriate synchronization settings for all the users

HOW DO THESE “FILTERS” WORK ANYWAY?

- Two types of settings:
 - **Filters** are shown to the user in their Personal Options menu in the system filters view. The user cannot choose to enable or disable the system filters.
 - **Filter templates** are applied by default to all new CRM users. The user can choose to enable or disable the filters from the user filters view in their Personal Options menu. There can be only one default template by record type.
- Two purposes:
 - **Outlook filters** define the records to be synchronized with standard Outlook and Exchange folders (contacts, appointments etc.) automatically
 - **Offline filters** define the records to be synchronized with CRM Outlook offline client to the local client machine CRM database (accounts, opportunities)
- More details in CRM SDK:
 - [http://msdn.microsoft.com/en-us/library/gg328205\(v=crm.6\).aspx](http://msdn.microsoft.com/en-us/library/gg328205(v=crm.6).aspx)

HOW TO GET STARTED?

- This presentation covers 3 common scenarios for managing the contact synchronization filters in Microsoft Dynamics CRM:
 1. Adding a new filter
 2. Disabling an existing filter
 3. Changing the default filter

SCENARIO 1: ADD A NEW FILTER

SCENARIO DESCRIPTION

- Situation: more than one user is working with the same contact, thus it should be synchronized to all their address books and not just the owner's
- Target: synchronize to Outlook all the contact records where a user has clicked on the "Follow" button (used by default for Activity Feeds functionality)
- Steps:
 - Use an existing system view to create a new Outlook synchronization filter template based on it: "Contacts I Follow"
 - Apply the filter to selected users

CREATING THE FILTER

2. Launch Sync Filter Manager and go to System Views, click "Load System Views"

3. Choose the contact view from the list, then click "Create", "System Synchronization Filter Template from selected view(s)"

4. Set the rule type as "Outlook template"

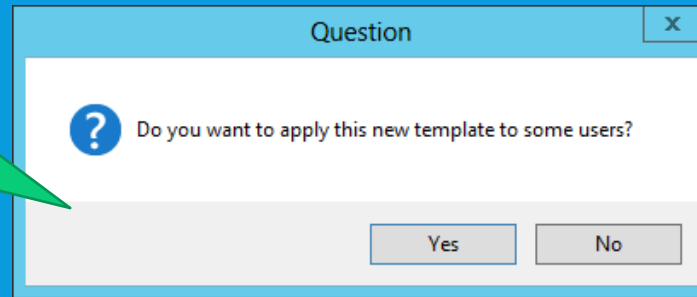
1. Run XrmToolBox and connect it to your CRM organization

The screenshot shows the XrmToolBox interface for Sync Filter Manager. The main window displays a list of system views under the 'System Views' tab. A context menu is open over the 'Contacts I Follow' view, with the option 'System Synchronization Filter Template from selected view(s)' selected. A dialog box titled 'Select Rule Template type' is open in the foreground, showing two options: 'Offline Template' and 'Outlook Template'. The 'Outlook Template' option is selected.

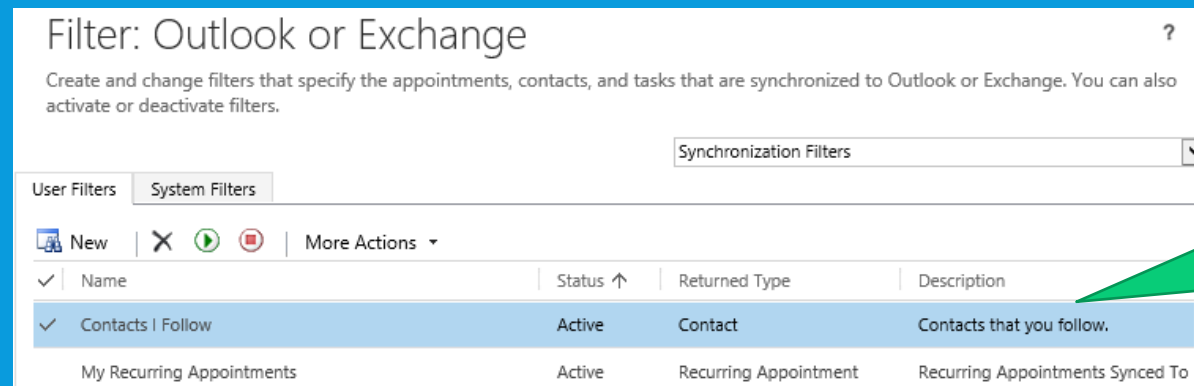
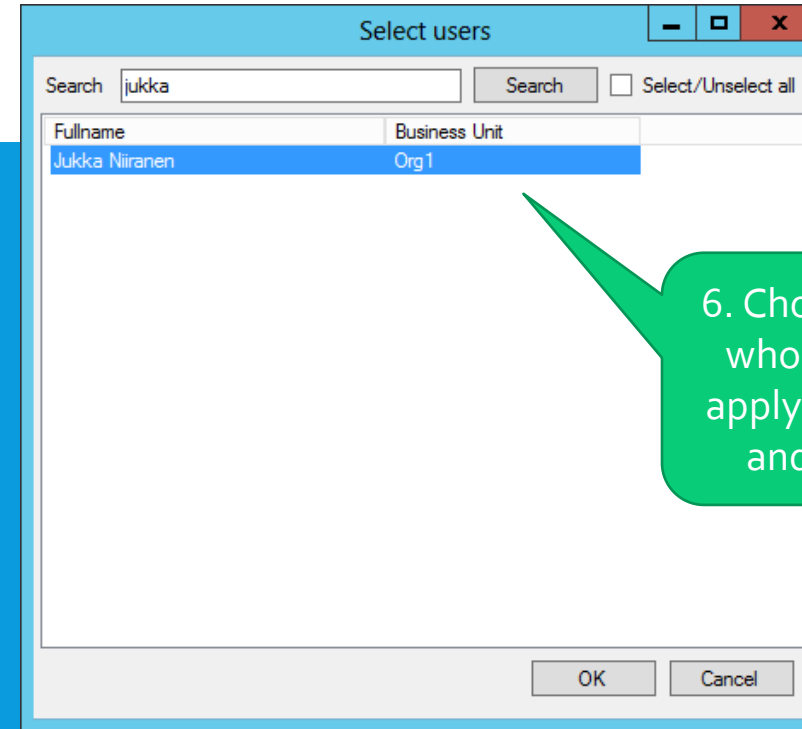
Name	Type	Description
contact	contact	
Active Contacts	contact	
Active Contacts Subgrid View	contact	Displays the Name and E...
Contacts Being Followed	contact	Contacts being followed.
Contacts I Follow	contact	Contacts that you follow.
Contacts: Influenced Deals That We...	contact	Key contacts who influen...
Contacts: No Campaign Activities in...	contact	
Contacts: Responded to Campaign...	contact	
Inactive Contacts	contact	
My Active Contacts	contact	
My Connections	contact	Shows all active instance...
Test Contacts	contact	
contract	contract	
All Contracts	contract	
Canceled Contracts	contract	
Contracts On Hold	contract	
Expired Contracts	contract	
My Connections	contract	Shows all instances of th...
My Contracts	contract	
contractdetail	contractdetail	
Active Contract Lines	contractdetail	
contracttemplate	contracttemplate	

APPLYING THE FILTER

5. On the Question prompt, choose "Yes"



6. Choose the users who you want to apply the template and click "OK"



7. New filter is now applied and active for the selected users

SCENARIO 2: DISABLE A FILTER

SCENARIO DESCRIPTION

- Situation: contacts imported in the initial CRM data migration have been assigned to an system key user due to lack of actual contact business owner information in the source data
- Target: stop all these contacts from being synchronized to the admin user's Outlook address book when he or she connects to CRM for the first time
- Steps:
 - Retrieve the current synchronization filters for a specific user
 - Change the filter status to "Disabled"

DISABLING THE FILTER

2. Launch Sync Filter Manager, go to User Synchronization Filters, click "Load System Views"

1. Run XrmToolBox and connect it to your CRM organization

The screenshot shows the 'Sync Filter Manager' window for user Jukka Niiranen. The 'Users Synchronization Filters' tab is active, and the 'Load Users Synchronization Filters' button has been clicked. The table below lists various filters, with 'My Outlook Contacts' selected. The 'Disable' button is highlighted in the toolbar.

Name	Type	Returned Type	Description	User	Active
Jukka Niiranen					
My Appointments	Outlook filter	appointment	Appointments Synced To...	Jukka Niiranen	
Contacts I Follow	Outlook filter	contact	Contacts that you follow.	Jukka Niiranen	
My Outlook Contacts	Outlook filter	contact	Contacts Syncing to Outl...	Jukka Niiranen	
My Faxes	Outlook filter	fax	Faxes Synced To Outlook	Jukka Niiranen	
My Letters	Outlook filter	letter	Letters Synced To Outlook	Jukka Niiranen	
My Phone calls	Outlook filter	phonecall	Phone calls Synced To O...	Jukka Niiranen	Active
My Recurring Appointments	Outlook filter	recurringappointmentma...	Recurring Appointments ...	Jukka Niiranen	Active
My Service Activities	Outlook filter	serviceappointment	Service Activities Synced ...	Jukka Niiranen	Active
My Tasks	Outlook filter	task	Tasks Synced To Outlook	Jukka Niiranen	Active

3. Find the user and select the filter, then choose "Disable"

FILTER IS INACTIVE FOR THE USER

Filter: Outlook or Exchange

Create and change filters that specify the appointments, contacts, and tasks that are synchronized to activate or deactivate filters.

Synchronization Filters

User Filters System Filters

New X Play Stop More Actions ▾

✓	Name	Status ↑	Return type	Description
	My Phone calls	Active	Phone Call	Phone calls Synced To Outlook
✓	My Outlook Contacts	Inactive	Contact	Contacts Syncing to Outlook

4. Filter status has now been changed to "Inactive" for the selected user only

SCENARIO 3: CHANGE THE DEFAULT FILTER

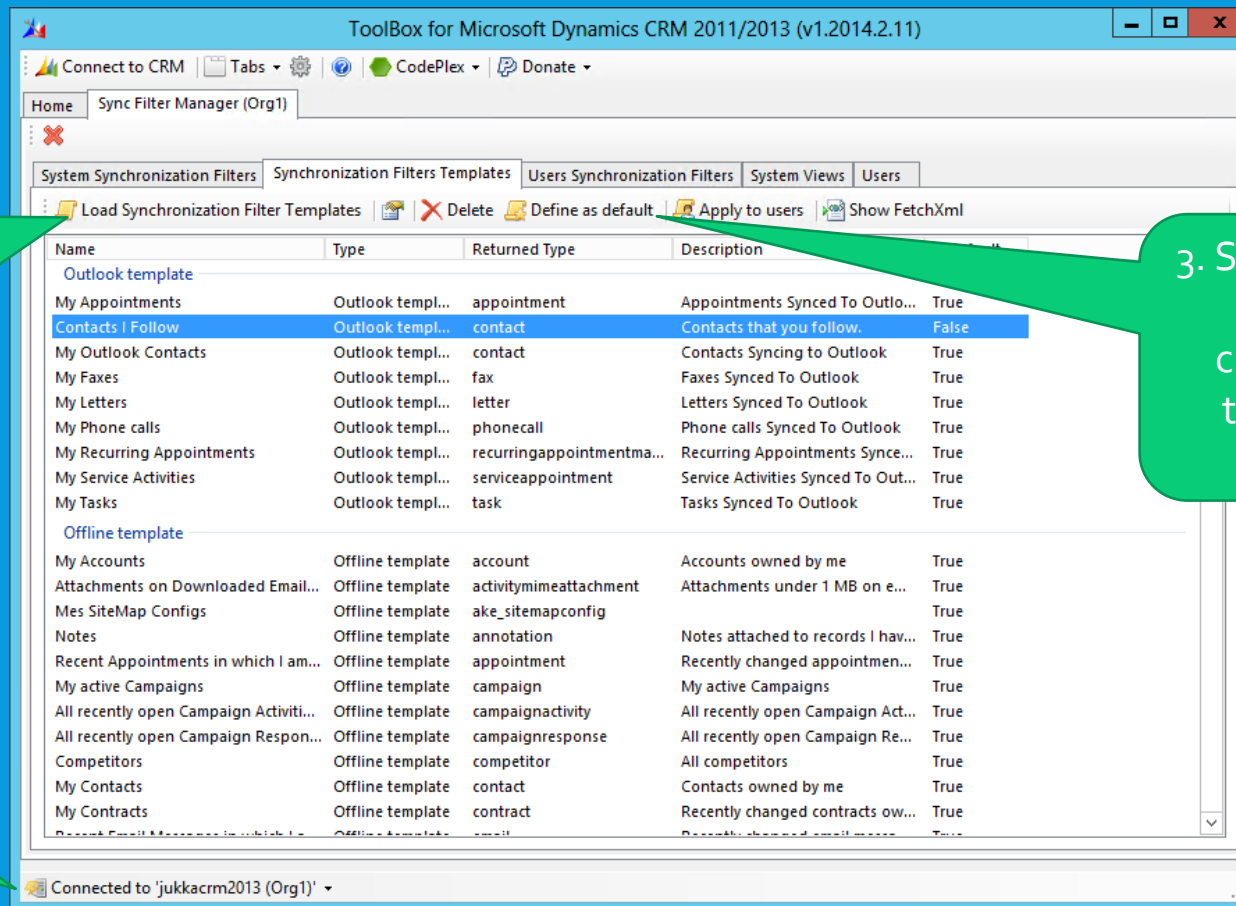
SCENARIO DESCRIPTION

- Situation: defining business owner on contact level is not considered practical when several units sell to the same accounts, users wish to be able to selectively define contacts to be synchronized to Outlook
- Target: change the default synchronization filter to “contacts I follow”, but allow users to manually enable the “my contacts” filter when needed
- Steps:
 - Change the contact synchronization default template
 - Reset the user’s filters to default
 - Note: this will wipe also the Offline filters
 - Create a new filter template for “my contacts”
 - Apply the template to users but set it as disabled

CHANGING THE DEFAULT TEMPLATE

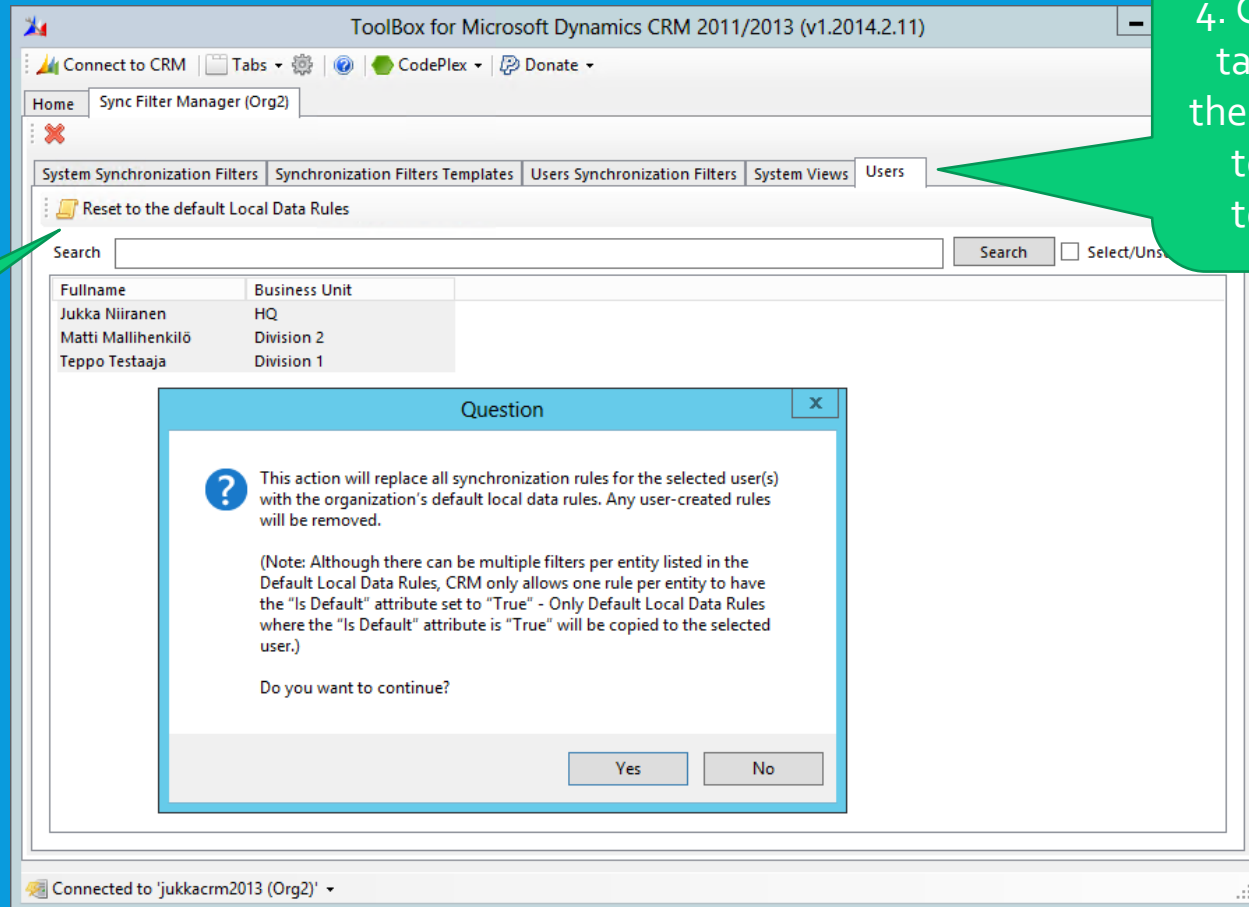
2. Launch the good ol' Sync Filter Manager you've come to know by now, go to Synchronization Filter Templates, click "Load Synchronization Filter Templates"

1. Once again, run XrmToolBox and connect it to your CRM organization



3. Select the new Outlook filter template you created in scenario 1, then click "Define as default"

RESETTING THE FILTERS



4. Go to the Users tab and choose the users you wish to update the templates for

5. Select "Reset to the default Local Data Rules", click "Yes" in the question dialog.

ADDING A NEW TEMPLATE

ToolBox for Microsoft Dynamics CRM 2011/2013 (v1.2014.2.11)

Home Sync Filter Manager (Org2)

System Synchronization Filters Synchronization Filters Templates Users Synchronization Filters System Views Users

Load System Views Show FetchXml Create Update

Name	Type	
contact		
Active Contacts	contact	
Active Contacts Subgrid View	contact	Displays the Name and E...
Contacts Being Followed	contact	Contacts being followed.
Contacts I Follow	contact	Contacts that you follow.
Contacts: Influenced Deals That We...	contact	Key contacts who influen...
Contacts: No Campaign Activities in...	contact	
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My Connections	contact	Shows all active instance...
Test Contacts	contact	
contract		
All Contracts	contract	
Canceled Contracts	contract	
Contracts On Hold	contract	
Expired Contracts	contract	
My Connections	contract	Shows all instances of th...
My Contracts	contract	
contractdetail		
Active Contract Lines	contractdetail	
contracttemplate		

System Synchronization Filter from selected view(s)
Synchronization Filter Template from selected views(s)

7. Click on "Create Synchronization Filter Template from selected views"

6. Go to System Views and select the "My Active Contacts" view

8. Set the rule type as "Outlook template"

Select Rule Template type

Select Rule Template type

What kind of template do you want to create?

Offline Template
Defines the subset of an entity to be synchronized with Microsoft Office Outlook with Offline Accounts. The subset of data defined by these filters will synchronize to the offline database.

Outlook Template
Defines the subset of an entity to be synchronized with Microsoft Dynamics CRM for Outlook. The subset of data defined by these filters will synchronize to Microsoft Outlook folders such as Contacts, Calendar, and so on.

OK Cancel

APPLYING THE TEMPLATE AND DISABLING

9. Apply the new template to all users

10. Go to Users Synchronization Filters and disable the view from the selected users

Select users

Search: jukka Search Select/Unselect all

Fullname	Business Unit
Jukka Niiranen	Org1

Question

Do you want to apply this new template to some users?

Yes No

OK Cancel

ToolBox for Microsoft Dynamics CRM 2011/2013 (v1.2014.2.11)

Connect to CRM Tabs CodePlex Donate

Home Sync Filter Manager (Org2)

Filters Synchronization Filters Templates Users Synchronization Filters System Views Users

Load Users Synchronization Filters Disable Delete Show FetchXml Group by

Display Outlook Filters Display Offline Filters

Name	Type	Returned Type	Description	User	State
Contacts I Follow					
Contacts I Follow	Outlook filter	contact	Contacts that you follow.	Jukka Niiranen	Active
Contacts I Follow	Outlook filter	contact	Contacts that you follow.	Matti Mallihenkilö	Active
Contacts I Follow	Outlook filter	contact	Contacts that you follow.	Teppo Testaaja	Active
My Active Contacts					
My Active Contacts	Outlook filter	contact		Jukka Niiranen	Active
My Active Contacts	Outlook filter	contact		Matti Mallihenkilö	Inactive
My Active Contacts	Outlook filter	contact		Teppo Testaaja	Inactive
My Appointments					
My Appointments	Outlook filter	appointment	Appointments Synced To...	Jukka Niiranen	Active
My Appointments	Outlook filter	appointment	Appointments Synced To...	Matti Mallihenkilö	Active
My Appointments	Outlook filter	appointment	Appointments Synced To...	Teppo Testaaja	Active
My Faxes					
My Faxes	Outlook filter	fax	Faxes Synced To Outlook	Jukka Niiranen	Active
My Faxes	Outlook filter	fax	Faxes Synced To Outlook	Matti Mallihenkilö	Active
My Faxes	Outlook filter	fax	Faxes Synced To Outlook	Teppo Testaaja	Active
My Letters					
My Letters	Outlook filter	letter	Letters Synced To Outlook	Jukka Niiranen	Active
My Letters	Outlook filter	letter	Letters Synced To Outlook	Matti Mallihenkilö	Active
My Letters	Outlook filter	letter	Letters Synced To Outlook	Teppo Testaaja	Active

Connected to 'jukkacrm2013 (Org2)'

NEW FILTERS IN PERSONAL OPTIONS

11. The “contacts I follow” filter is now enabled for all current and future users by default

12. The “my contacts” filter is now available for users to enable from their Personal Options menu

Filter: Outlook or Exchange ?

Create and change filters that specify the appointments, contacts, and tasks that are synchronized to Outlook or Exchange. You can also activate or deactivate filters.

Synchronization Filters

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	My Letters	Active	Letter	Letters Synced To Outlook
	My Faxes	Active	Fax	Faxes Synced To Outlook
	My Recurring Appointments	Active	Recurring Appointment	Recurring Appointments Synced To
	My Tasks	Active	Task	Tasks Synced To Outlook
	My Appointments	Active	Appointment	Appointments Synced To Outlook
	My Service Activities	Active	Service Activity	Service Activities Synced To Outlook
✓	My Active Contacts	Inactive	Contact	

1 - 9 of 9 (1 selected) Page 1

- If you found the Sync Filter Manager tool useful, please consider supporting its development via the XrmToolBox donations page:
 - <http://mscrmtools.blogspot.fr/p/xrmtoolbox-sponsoring.html>
- If you found this tutorial useful, please follow my blog:
 - <https://jukkaniiranen.com/>
- Happy synchronizing!