



**Crm** Customer Relationship Management

**CRM.Web 15.25.2**

**ACRM Graph Connector Setup Guide**



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# Overview

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This guide explains how to configure update.connector.graph to synchronize Microsoft 365 (Exchange Online) data with Aurea CRM using Microsoft Graph. This is the recommended approach for Microsoft 365 environments because it avoids per-user passwords and supports tenant-wide access via an Entra (Azure AD) app registration.

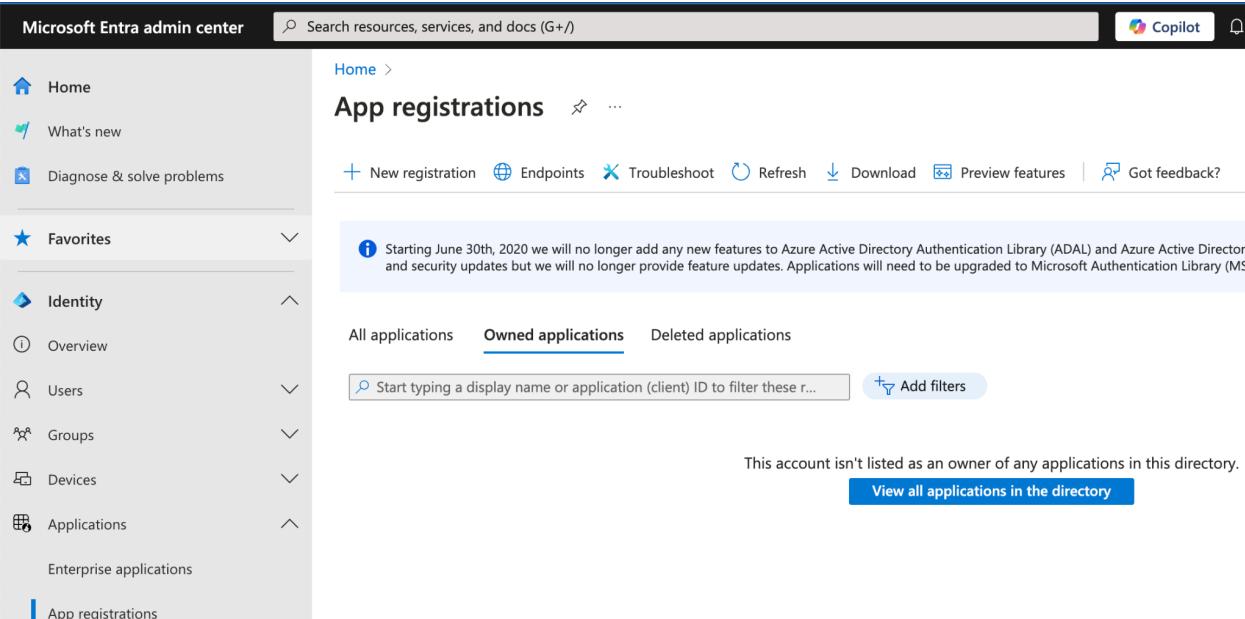
## Before you begin

- You will need:
  - Aurea CRM 15.x or newer
  - At least one licensed Exchange Online mailbox
  - An administrator who can access Microsoft Entra admin center (to create an app registration and grant consent)
  - Access to your ACRM server where the Graph connector is installed/configured

# Part A : Microsoft Entra (Azure AD) setup

## Step 1: Register an application

1. Open the **Microsoft Entra admin center**.
2. Go to **Identity** → **Applications** → **App registrations**.



The screenshot shows the Microsoft Entra admin center interface. The left sidebar has a 'Favorites' section with 'Identity' expanded, showing 'Overview', 'Users', 'Groups', 'Devices', and 'Applications'. 'Applications' is selected and expanded, showing 'Enterprise applications' and 'App registrations'. The main content area is titled 'App registrations' and shows a message: 'Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure Active Directory and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL)'. Below this are tabs for 'All applications', 'Owned applications' (which is selected and underlined), and 'Deleted applications'. A search bar says 'Start typing a display name or application (client) ID to filter these results...' and a 'Add filters' button. A message at the bottom says 'This account isn't listed as an owner of any applications in this directory.' and a 'View all applications in the directory' button.

3. Select **New registration**.
4. Enter:
  - **Name:** e.g., **AureaCRM Graph Connector**
  - **Supported account types:** typically **Single tenant** (most common)
5. Select **Register**.

Microsoft Entra admin center Search resources, services, and docs (G+ /) Copilot

Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application

**Name**  
The user-facing display name for this application (this can be changed later).  
ACRM exchange

**Supported account types**  
Who can use this application or access this API?  
 Accounts in this organizational directory only (CoyoteIndigo only - Single tenant)  
 Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)  
 Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)  
 Personal Microsoft accounts only  
[Help me choose...](#)

**Redirect URI (optional)**  
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.  
Public client/native (mobile ... urn:ietf:wg:oauth:2.0:oob)

By proceeding, you agree to the Microsoft Platform Policies

Register WorkSmart

6. Record these values (you will use them later):

- Application (client) ID**
- Directory (tenant) ID**

Note: For client-credentials (server-to-server) scenarios, a Redirect URI is typically not required.

Microsoft Entra admin center

Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application > App registrations

**App registrations**

**All applications**

1 applications found

Display name	Application (client) ID	Created on	Certificates & secrets
ACRM exchange	e849dd6a-0cb3-45ef-9d3b-0f135545a52e	11/18/2024	Current

Microsoft Entra admin center

Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application > App registrations > ACRM exchange

**ACRM exchange**

**Overview**

Display name: ACRM exchange

Application (client) ID: e849dd6a-0cb3-45ef-9d3b-0f135545a52e

Object ID: dae8cc1-9701-4c24-ad27-bf167c8d97cd

Directory (tenant) ID: d4c958e6-5a45-41ce-8a3a-6f58073ab82b

Supported account types: My organization only

Client credentials: 0\_certificate\_1\_secret

Redirect URIs: 0\_web\_0\_spa\_1\_public client

Application ID URI: Add an Application ID URI

Managed application in local directory: ACRM exchange

## Step 2: Add Graph API permissions

1. In the App Registration, go to **API permissions** → **Add a permission**.

Microsoft Entra admin center

Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application > App registrations > ACRM exchange

**ACRM exchange | API permissions**

**Overview**

**Configured permissions**

Granting tenant-wide consent may revoke permissions that have already been granted tenant-wide for that application. Permissions that users have already granted on their own behalf aren't affected. [Learn more](#)

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

+ Add a permission ✓ Grant admin consent for CoyoteIndigo

2. Choose **Microsoft Graph** and add **Application permissions** (tenant-wide):

- **Calendars.ReadWrite**
- **Contacts.ReadWrite**
- **Directory.Read.All**
- **Mail.ReadWrite**
- **Tasks.ReadWrite.All**
- **User.ReadWrite.All**

### 3. Select **Grant admin consent** and confirm.

#### Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

 Add a permission  Grant admin consent for Trilogy

API / Permissions name	Type	Description	Admin consent req...	Status	...
 Microsoft Graph (6)					
Calendars.ReadWr	Application	Read and write calendars in all mailboxes	Yes	 Granted for Trilogy	...
Contacts.ReadWr	Application	Read and write contacts in all mailboxes	Yes	 Granted for Trilogy	...
Directory.Read.All	Application	Read directory data	Yes	 Granted for Trilogy	...
Mail.ReadWrite	Application	Read and write mail in all mailboxes	Yes	 Granted for Trilogy	...
Tasks.ReadWrite.All	Application	Read and write all users' tasks and tasklists	Yes	 Granted for Trilogy	...
User.ReadWrite.All	Application	Read and write all users' full profiles	Yes	 Granted for Trilogy	...

**Security note (recommended for customers):** Review these permissions with your security/Entra admin team. Use a dedicated app registration for this connector and restrict who can manage it.

## Step 3: Create a client secret

1. Go to **Certificates & secrets** → **New client secret**.
2. Add a description and choose an expiration period aligned with your security policy.
3. **Copy and securely store** the secret value immediately.

Home > App registrations > Register an application > App registrations > ACRM exchange > App registrations > Register an application > App registrations > ACRM exchange

ACRM exchange | Certificates & secrets

Search Got feedback? ...

Overview Quickstart Integration assistant Diagnose and solve problems

Manage

Branding & properties Authentication Certificates & secrets Token configuration

Certificates (0) Client secrets (1) Federated credentials (0)

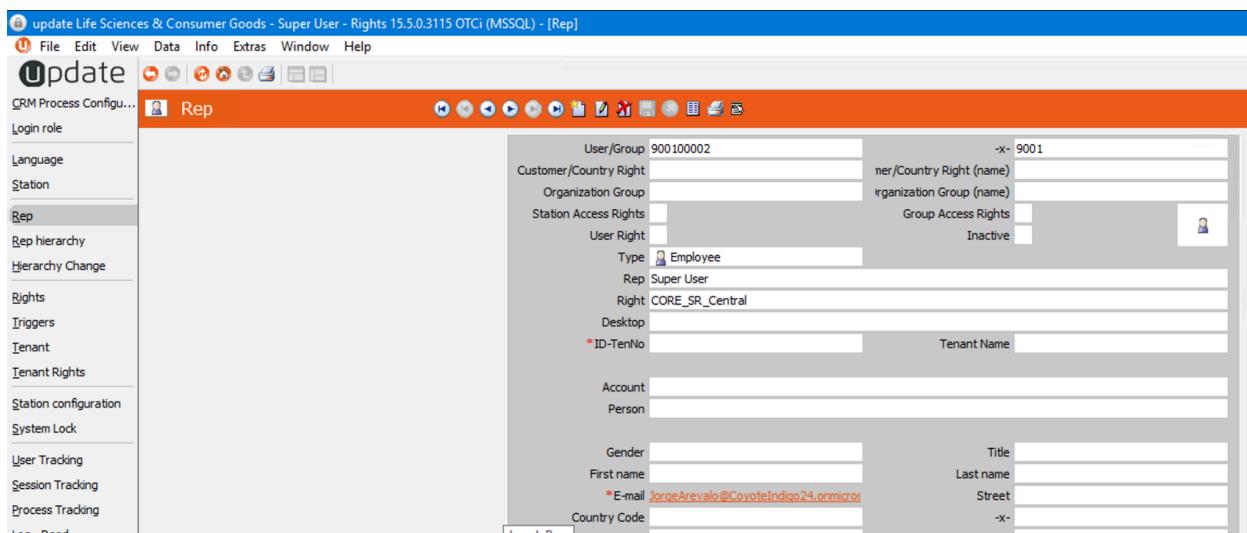
A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

New client secret

You cannot retrieve the secret value again later. If it's lost, you must create a new secret and update the connector configuration.

# Part B : Configure Aurea CRM

## Step 1: Confirm required catalog values exist



In the Data Model module, ensure the following catalog entries exist.

### Catalog: Content Type (groupware) (ExternalKey)

Add (if missing):

- application/x-mmRecord
- text/x-mmAbsences
- text/x-mmPerson
- text/x-mmTasks
- text/x-vevent

### Catalog: Ext. System (Rep)

Add (if missing):

- marketing.manager
- GraphApi
- SyncML

**Catalog**

Contents type (External Key) [479] Records 5

Tenant	External Key	Loc 0001 TE_CATALOG_BASE_LANG	External Key	Loc 0100 TE_German	External Key	Loc
	9001_479_1	application/x-mmRecord				
	9001_479_2	text/x-mmAbsences				
	9001_479_3	text/x-mmPerson				
	9001_479_4	text/x-mmTasks				
	9001_479_5	text/x-vevent				

**Catalog**

Ext. System (Rep) [53] Records 3

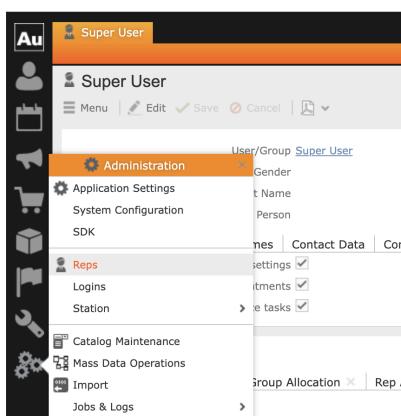
Tenant	External Key	Loc 0001 TE_CATALOG_BASE_LANG	External Key	Loc 0100 TE_German	External Key	Loc
	9001_53_1	GraphApi				
	9001_53_3	marketing.manager				
	9001_53_2	SyncML				

## Step 2: Enable synchronization for the required users (Reps)

The connector synchronizes only the mailboxes for users who are enabled for connector sync in Aurea CRM.

1. In **CRM.Web**, open the Rep/User administration area.
2. Set the user's **Enable Connector settings** flag (or equivalent connector enablement option).
3. Repeat for each mailbox user that should be synchronized.

The connector refreshes the user/mailbox list periodically (commonly once per day), depending on your connector configuration.



## Step 3: Update CRM.Interface authentication configuration

To allow Graph connector authentication through CRM.Interface, add the **GraphApi** master user entry in your `forms.xml`.

1. Locate your **CRM.Interface** configuration file:

- `.../Web/system/xml/forms.xml` (exact path depends on your installation)

2. In the `<authentication>` section, add a master user entry for **GraphApi** (example):

```

<authentication>
    <masterUser client="outlook"
    login="Principal,ClientID">OCSU</masterUser>
    <masterUser client="notes"
    login="Principal,ClientID">OCSU</masterUser>
    <masterUser client="GraphApi"
    login="Principal,ClientID">OCSU</masterUser>
</authentication>

```

Also, notice that the if the \*Connector\* fields are intended to be used, these need to be added to the forms.xml (if they haven't already been added for the previous connector) and notice that the field names may differ between the templates used. Below are the changes for the ISI template.

Event filters:

```

<SyncHandler type="ExchangeConnector_VeventFilter">
    <condition>
        <lop value="and">
            <cond tablename="Contact" fieldname="ConnectorDeleted" op="!="
value="true"/>
        </lop>
        <lop value="and">
            <cond tablename="Contact" fieldname="ConnectorPublished" op="!="
value="true"/>
        </lop>
    </condition>
</SyncHandler>

```

Event deletion:

```

<options>
    <vevent>
        <!-- missing attendees will be append to the textfield or written in a seperate field -->
        <!-- possible values for mode are replace and append -->
        <!-- Without email_seperator the adresses will be written linewise, if the tag exist they will
be written in one line -->
        <missing_attendees>
            <Contact>

```

```

<ConnectorMissingparticipants>true</ConnectorMissingparticipants>
</Contact>
<summary>
  <field fieldname='MissingParticipants' mode='replace'>
    <!--field fieldname='Text' mode='append'//-->          <!-- SN some
customers prefer the use of the default text field, so just put it disabled ready for user -->
    <!--<separator></separator>-->
    <header lang='en'>Unassigned participants:</header>
    <required lang='en'>To: </required>
    <optional lang='en'>CC: </optional>
    <informational lang='en'>BCC: </informational>
    <unknown lang='en'>Unknown: </unknown>
    <header lang='de'>Fehlende Teilnehmer:</header>
    <required lang='de'>To: </required>
    <optional lang='de'>CC: </optional>
    <informational lang='de'>BCC: </informational>
    <unknown lang='de'>Unbekannt: </unknown>
    <email_separator>, </email_separator>
  </summary>
</missing_attendees>

<!-- Customised - Deletion from Outlook to update -->
<!-- Customised: Deactivated, as not used for connector-->
<!--This line enables the deletion event to work with the sync process -->
<key name='delete_sync_process_410' value='true'>

</event>
</options>

```

Contact events:

```

<form type='vevent'>
  <table tablename='Contact'>
    <field fieldname='StatNo' />
    <field fieldname='SeqNo' />
    <field fieldname='CoGrp' />

```

```
<fieldfieldname='CoNo'>
<fieldfieldname='PeGrp'>
<fieldfieldname='PeNo'>
<fieldfieldname='Company'>
<fieldfieldname='Person'>
<fieldfieldname='Contact'>
<fieldfieldname='Status'>
<fieldfieldname='Date'>
<fieldfieldname='Time'>
<fieldfieldname='Duration'>
<fieldfieldname='Unit'>
<fieldfieldname='EndDate'>
<fieldfieldname='EndTime'>
<fieldfieldname='Subject'>
<fieldfieldname='Text'>
<fieldfieldname='Priority'>
<fieldfieldname='RepID'>
<fieldfieldname='Rep'>
<fieldfieldname='ContactByID'>
<fieldfieldname='ContactBy'>
<fieldfieldname='Private'>
<fieldfieldname='ParticipantID'>
<fieldfieldname='Participants'>
<fieldfieldname='Document1'>
<fieldfieldname='Document2'>
<fieldfieldname='FreeC4'>
<fieldfieldname='FreeC5'>
<fieldfieldname='FreeC6'>
<fieldfieldname='IsMasterContact'>
<fieldfieldname='IsSerialContact'>
<fieldfieldname='ContactStatNo'>
<fieldfieldname='ContactSeqNo'>
<!-- vertical specific -->
<fieldfieldname='ProjectsStatNo'>
```

```

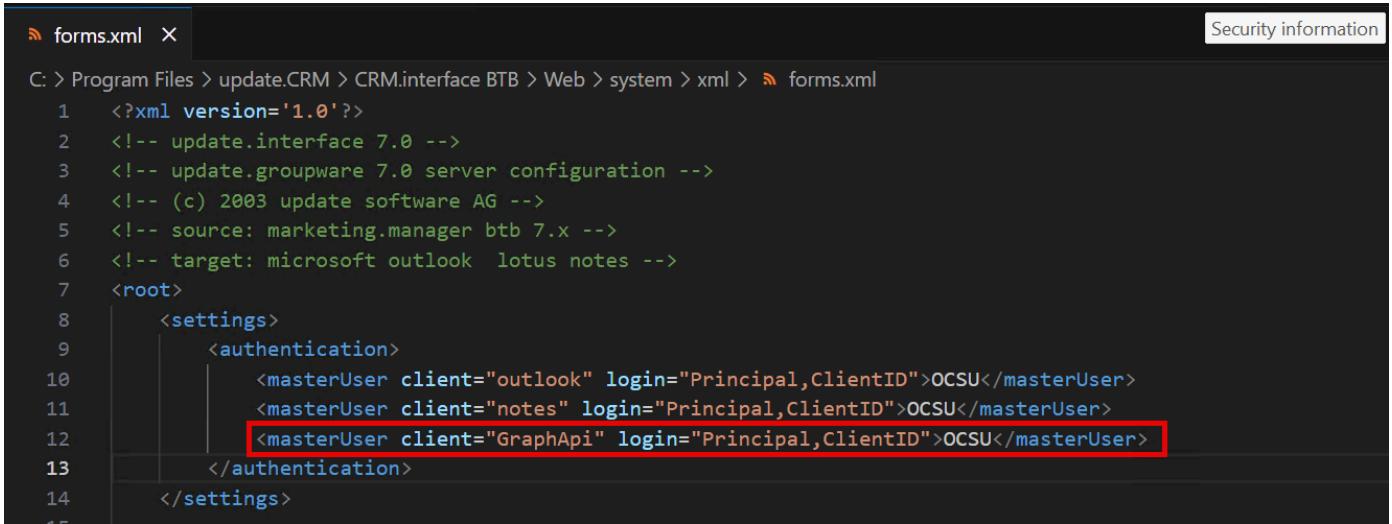
<field fieldname='ProjectsSeqNo'>
<!-- Reminder fields -->
<field fieldname='ReminderDur'>
<field fieldname='ReminderUnit'>
<!-- new Catalogue ShowAs -->
<field fieldname='ShowAs'>
<!-- Customised -->
<field fieldname='OpportunityStatNo'><!-- Y1 -->
<field fieldname='OpportunitySeqNo'>
<field fieldname='ConnectorMissingparticipants'>
<field fieldname='ConnectorPublished'>
<field fieldname='ConnectorDeleted'>
<field fieldname='A031Location' />

<!--SN make sure all needed fields are initialized-->
<field fieldname='MissingParticipants'>
<field fieldname='F5021'> <!-- New From Connector -->
<field fieldname='Todo'>
<!-- This field is used for the rich text -->
<field fieldname='F5044' />
<!-- End customisation -->
</table>

```

3. Restart the CRM web application (for IIS deployments: recycle the application pool) so the change takes effect.

Use the appropriate ACRM “master”/service user for your environment (often **OCSU** by default).



```
C: > Program Files > update.CRM > CRM.interface BTB > Web > system > xml > forms.xml
1  <?xml version='1.0'?>
2  <!-- update.interface 7.0 -->
3  <!-- update.groupware 7.0 server configuration -->
4  <!-- (c) 2003 update software AG -->
5  <!-- source: marketing.manager btb 7.x -->
6  <!-- target: microsoft outlook lotus notes -->
7  <root>
8      <settings>
9          <authentication>
10             <masterUser client="outlook" login="Principal,ClientID">OCSU</masterUser>
11             <masterUser client="notes" login="Principal,ClientID">OCSU</masterUser>
12             <masterUser client="GraphApi" login="Principal,ClientID">OCSU</masterUser>
13         </authentication>
14     </settings>
15 
```

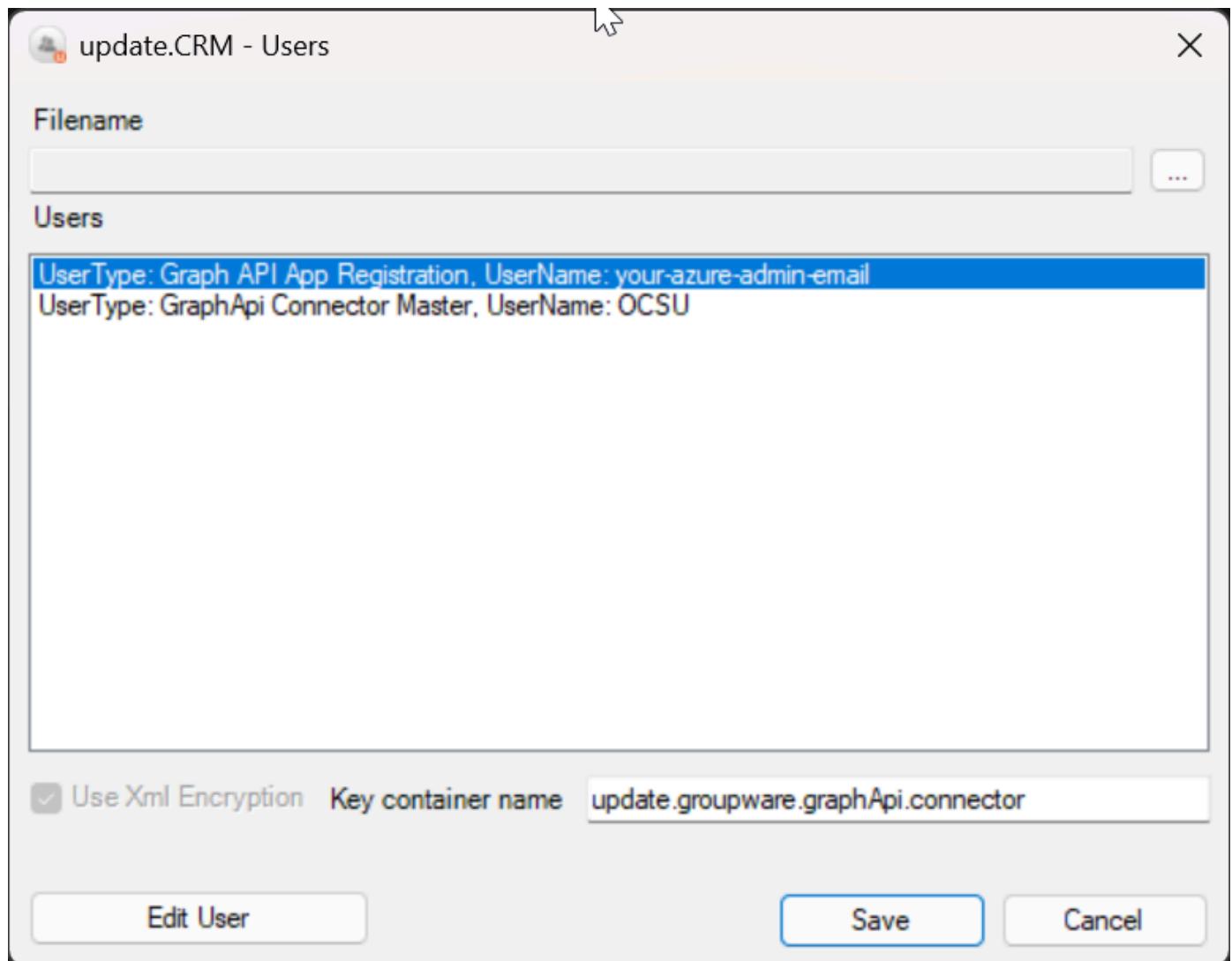
## Step 4: Install the Graph connector

On the connector host/server:

1. Run `setup.exe` for `update.connector.graph`
2. Complete the installation wizard

## Step 5: Configure ACRM + Entra credentials (users.xml)

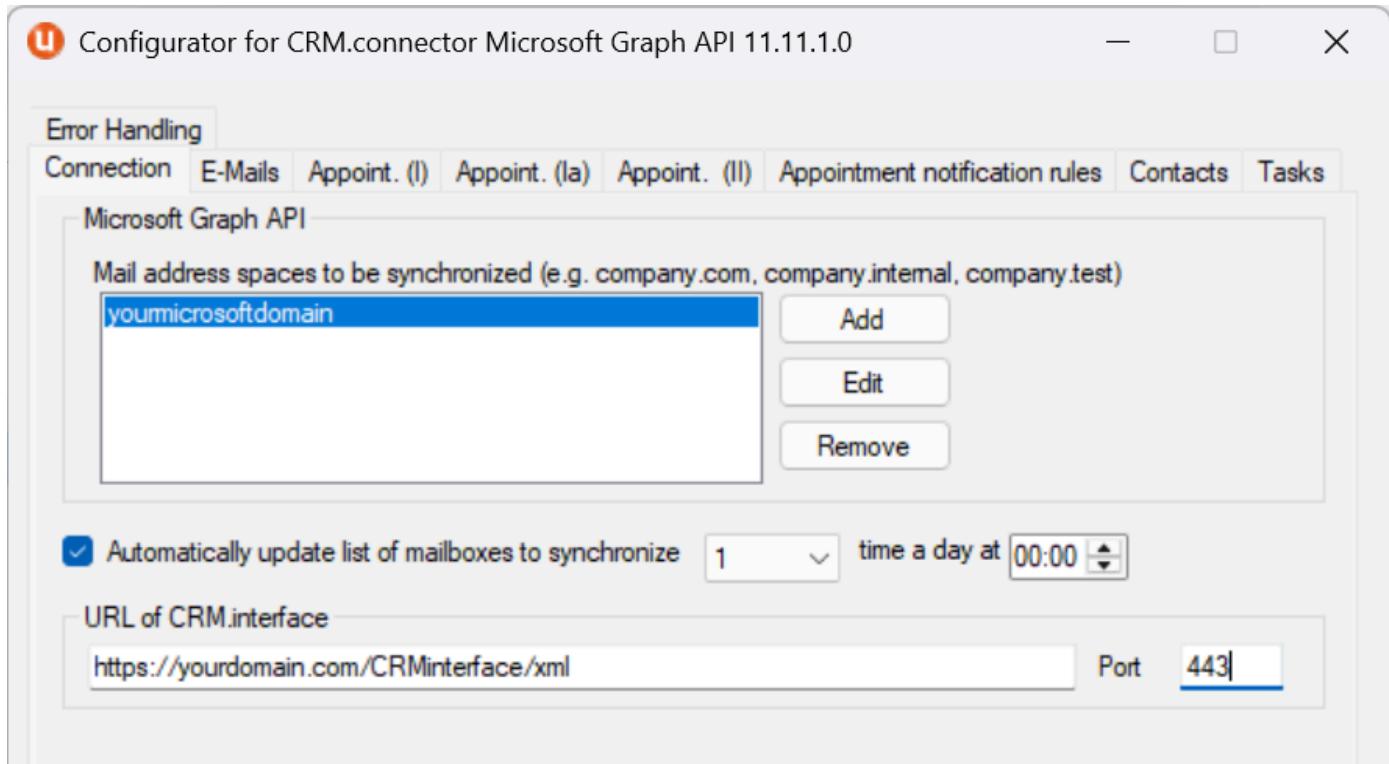
1. Open `update.users.exe`
2. Open the `users.xml` in the same directory.
3. Update the following entries:
  - o **GraphApi Connector Master:** set to your ACRM master/service user (e.g., `OCSU`)
  - o **Graph API App Registration:**
    - Tenant ID
    - Client ID
    - Client Secret
    - Admin email address (password is not required for Graph client-credentials flow)



**Recommendation:** Use a dedicated service account and follow your organization's secret storage/rotation policy.

## Step 6: Configure the connector (Configurator)

1. Open `SynchroConnectorConfigurator.exe` in the `update.connector.graph` installation folder.
2. In **Connection**:
  - o Add your Microsoft 365 managed domain(s) (e.g., `company.com`) **without** the `@`
  - o Set the **CRM.Interface URL**
  - o (Optional) Enable automatic mailbox list refresh (commonly once per day)



3. Recommended baseline sync settings (adjust to your business needs):
  - **E-Mails**: every **10** minutes
  - **Appointments**: every **10** minutes; timeframe **7 days past / 7 days future**
  - **Tasks**: every **10** minutes; timeframe **7 days past / 7 days future**
  - **Contacts**: every **1440** minutes (24 hours)
4. Save changes and start the connector service.

Configurator for CRM.connector Microsoft Graph API 11.11.1.0

### Error Handling

Connection E-Mails Appoint. (I) Appoint. (Ia) Appoint. (II) Appointment notification rules Contacts Tasks

Synchronize E-Mails every  minutes. (Note: 0 = as often as possible).

Name of the synchronization folder (e.g., /Inbox/crm)

Automatically create folder

Enable coloring of synchronized messages in subfolders (note: can cause performance issues)

Synchronize E-Mails even if the mailbox owner cannot be found in the recipient list (e.g. was added as BCC)

Validate license for every mailbox

Enable synchronization of HTML content Maximum content size  characters

Remove HTML comments to reduce email body size

Attachments

Do not synchronize attachments

Synchronize attachments

Do not synchronize attachments larger than  kilobytes

Save whole message as MSG file (attachments are included)

Do not synchronize MSG files larger than  kilobytes

Synchronization Success

Move successfully synchronized messages to the following subfolder (e.g. Sync\_Success)  
 or its subfolders

Synchronization Failure

Send error messages to the users by E-Mail

Move unsuccessfully synchronized messages to the following subfolder (e.g. Sync\_Failure)

Sending Warning Message

Message body was truncated

At least one attachment was not synchronized

Configurator for CRM.connector Microsoft Graph API 11.11.1.0

### Error Handling

Connection E-Mails Appoint. (I) Appoint. (Ia) Appoint. (II) Appointment notification rules Contacts Tasks

Synchronize tasks every  minutes. (Note: 0 = as often as possible).

Time Frame

Synchronize tasks up to  days in the past and  days in the future

# Validation checklist

---

After configuration, verify:

- The connector service starts successfully
- Enabled users in CRM are recognized for mailbox sync
- Email / appointment / task / contact changes in Microsoft 365 appear in Aurea CRM (and vice versa if configured)
- No “permission/consent” errors appear in connector logs

## Common issues

- **No users are synchronized:** confirm the user is enabled for connector sync in CRM and the mailbox exists in Microsoft 365.
- **Authentication/consent errors:** confirm admin consent was granted and the Tenant/Client IDs + Secret match the app registration.
- **Secret expired:** create a new secret and update the connector configuration.
- **Duplicated records:** due to incompatibilities between the Microsoft EWS and Microsoft Graph APIs, records processed by the previous connector may get duplicated. It is recommended to follow one of these practices:
  - Process only new records for a few days so that no old records are processed.
  - Remove duplicate records manually.