



Customer Relationship Management

CRM.Web 15.25.2

ACRM Graph Connector Setup Guide

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Overview

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.

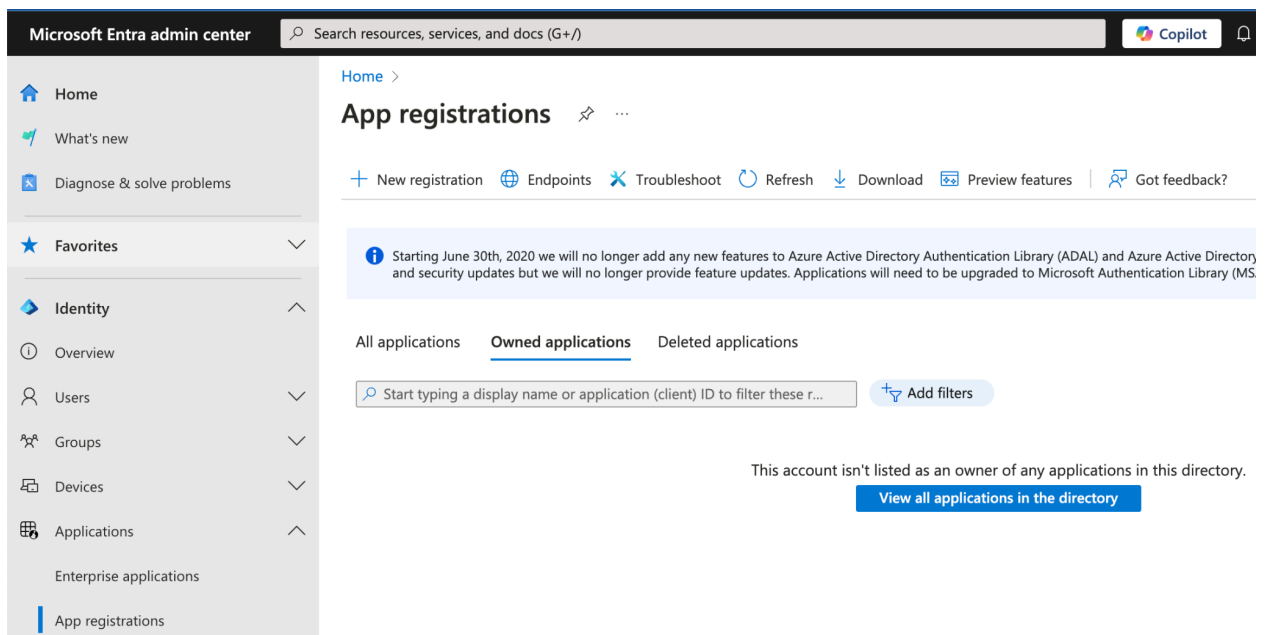
Before you begin

- 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**.



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

+ New registration | Endpoints | Troubleshoot | Refresh | Download | Preview features | Got feedback?

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure Active Directory Graph. We will continue to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

All applications | Owned applications | Deleted applications

Start typing a display name or application (client) ID to filter these r...

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

Search | Delete | Endpoints | Preview features

Overview

Quickstart | Integration assistant | Diagnose and solve problems

Manage

Branding & properties | Authentication | Certificates & secrets | Token configuration | API permissions

Essentials

Display name: [ACRM exchange](#)

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

Object ID: dae8cca1-9701-4c24-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](#)

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure Active Directory Graph. We will continue to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

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

Search | Refresh | Got feedback?

Overview | Quickstart | Integration assistant | Diagnose and solve problems

Manage

Branding & properties | Authentication | Certificates & secrets | Token configuration | API 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](#)

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 CoyoteIndigo

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

- o **Calendars.ReadWrite**
- o **Contacts.ReadWrite**
- o **Directory.Read.All**
- o **Mail.ReadWrite**
- o **Tasks.ReadWrite.All**
- o **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.ReadWrite	Application	Read and write calendars in all mailboxes	Yes	✓ Granted for Trilogy	...
Contacts.ReadWrite	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**  ... 

<<  Got feedback?


 Overview


 Quickstart


 Integration assistant


 Diagnose and solve problems

Manage



 Branding & properties

 Authentication

 **Certificates & secrets**

 Token configuration

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.


 Application registration certificates, secrets and federated credentials can be found in the tabs below. 

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

update Life Sciences & Consumer Goods - Super User - Rights 15.5.0.3115 OTCi (MSSQL) - [Rep]

File Edit View Data Info Extras Window Help

Update

CRM Process Configur... Rep

Login role

Language

Station

Rep

Rep hierarchy

Hierarchy Change

Rights

Triggers

Tenant

Tenant Rights

Station configuration

System Lock

User Tracking

Session Tracking

Process Tracking

User/Group 900100002 -x- 9001

Customer/Country Right ner/Country Right (name)

Organization Group rganization Group (name)

Station Access Rights Group Access Rights

User Right Inactive

Type Employee

Rep Super User

Right CORE_SR_Central

Desktop

*ID-TenNo Tenant Name

Account

Person

Gender Title

First name Last name

*E-mail JorgeArevalo@CovoteIndoo24.omicros Street

Country Code -x-

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
	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			

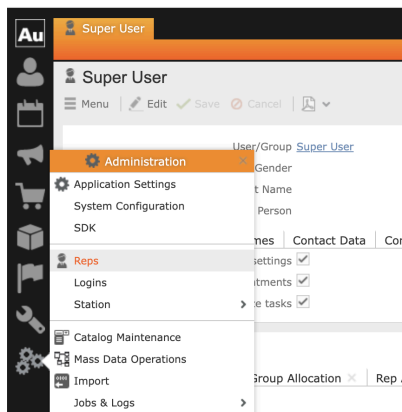
Catalog						
Ext. System (Rep) [53]			Records 3			
Tenant	External Key	Loc	0001 TE_CATALOG_BASE_LANG	External Key	Loc	0100 TE_German
	9001_53_1		GraphApi			
	9001_53_3		marketing.manager			
	9001_53_2		SyncML			

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.



Super User

Save Cancel

User/Group: [Super User](#) Rep: Super User

Gender Title

First Name Last Name

Person

Rights Settings Access Times Contact Data Configurations **connector Settings**

Enable connector settings ☒ Synchronize e-mails ☒

Synchronize appointments ☒ Synchronize address book ☒

Synchronize tasks ☒

Related Data

Skill Rep role User Group Allocation Rep Additional Info

New Display All Records

The query returned no results.

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**.

CRM.Interface configurator 15.5.0.3115 (C:\Program Files\update.CRM\CRM.Interface BTB\Web\system\settings.xml)

File Help

Config file

General

Inbound Transformations

Outbound Transformations

Output Encoding

Advanced I

Advanced II

Groupware

Catalogs

Attendee conflict resolution

By email: use company if unique	True
By email: use person if unique	True
Do not generate full status	False
Generate short status	False
Ignore locked records	False
Use FI/KP from rep	True
update CRM fields modified after last Sync always win	False

Autosync

Filter by favorites	False
Filter by rep	False
Filter by salesgroup	False
Synchronize companies	True
Synchronize contact persons	True
Synchronize persons	True

Options

Cache attendees	False
Cache reps	False
Create Journal	False
Deadlock priority	0
Disable database transactions	<unset>
Enable migration to update CRM	False
Enable rights when reading records	False
Generate SyncML trace information	<unset>

update CRM settings

Create new Companies	False
Create new Persons	False
Do not truncate field contents	False
Generate ToDo records	False
Store attachments in Documents (D1) instead of Customer Documents (D2)	True
Synchronize rep status	True

Filter by favorites

If this option is enabled, persons marked as favorites are synchronized from update CRM to the groupware system.

Interface (mmint.dll) version: 15.5.0.3115

1. Locate your **CRM.Interface** configuration file:
 - o **.../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' />

</vevent>
</options>

```

Contact events:

```

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

```

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


```

<field fieldname='ProjectsSeqNo'/>
<!-- Reminder fields -->
<field fieldname='ReminderDur'/>
<field fieldname='ReminderUnit'/>
<!-- new Cataloge 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-->

```

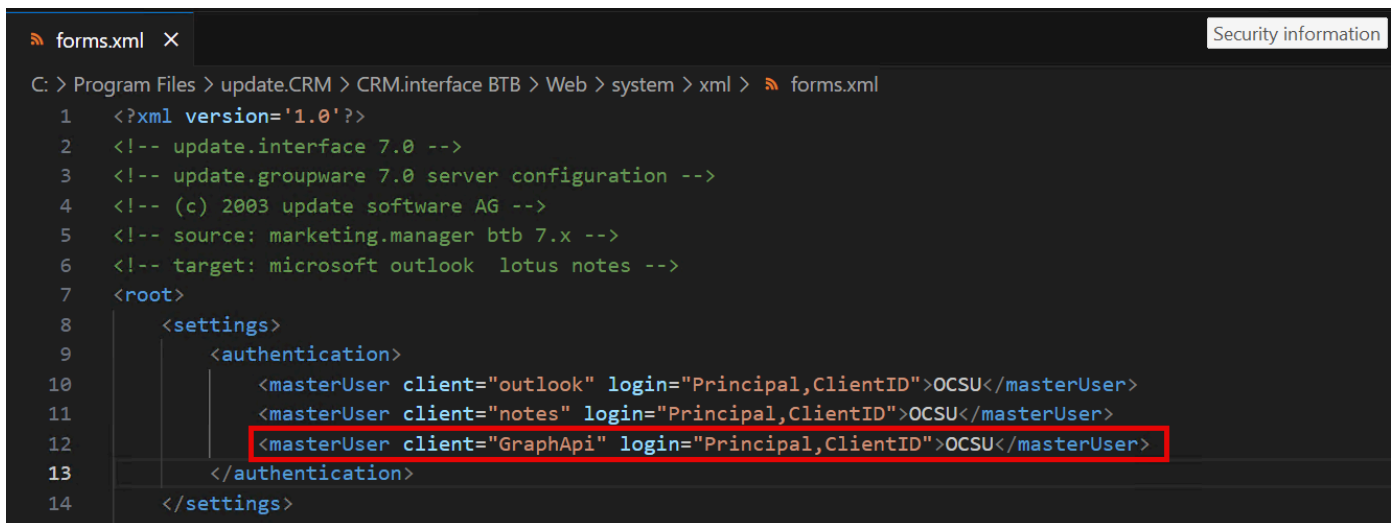
<field fieldname='MissingParticipants'/>
<field fieldname='F5021'/> <!-- New From Connector -->
<field fieldname='Todo'/>
<!-- This field is used for the rich text -->
<field fieldname='F5044' />
<!-- End customisation -->

```

</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).



```
forms.xml X Security information
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>
```

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:
 - **GraphApi Connector Master**: set to your ACRM master/service user (e.g., **OCSU**)
 - **Graph API App Registration**:
 - Tenant ID
 - Client ID
 - Client Secret
 - Admin email address (password is not required for Graph client-credentials flow)

update.CRM - Users

Filename

Users

UserType: Graph API App Registration, UserName: your-azure-admin-email
UserType: GraphApi Connector Master, UserName: OCSU

☒ Use Xml Encryption Key container name update.groupware.graphApi.connector

Edit User Save Cancel

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**:
 - Add your Microsoft 365 managed domain(s) (e.g., `company.com`) **without** the @
 - Set the **CRM.Interface URL**
 - (Optional) Enable automatic mailbox list refresh (commonly once per day)

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

Microsoft Graph API

Mail address spaces to be synchronized (e.g. company.com, company.internal, company.test)

youmicrosoftdomain Add Edit Remove

☒ Automatically update list of mailboxes to synchronize 1 time a day at 00:00

URL of CRM.interface

https://yourdomain.com/CRMinterface/xml Port 443

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.

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/cm)

☒ 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

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.