



Sage CRM 7.3 SP3

Troubleshooting Guide

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Contents

About this guide	5
Chapter summary	5
User Interface	7
Internet Explorer Clear button	7
Classic Outlook Integration	9
Installing the Classic Outlook Plugin	9
Uninstalling the Classic Outlook Plugin	9
Viewing the Classic Outlook Plugin logs	10
Using Classic Outlook Integration with Auto Login	10
Formatting an email in Outlook	11
Sample Config.js file	12
Lite Outlook Integration	15
Installing the Lite Outlook Plugin	15
Uninstalling the Lite Outlook Plugin	15
Working with Lite Outlook Integration	16
Filing emails with Lite Outlook Integration	16
Relinking orphaned email records	17
Lite Outlook Integration load balancing	20
Formatting an email in Outlook	20
Sample Config.js file	21
Exchange Integration	24
Connecting to Exchange Server	24
Using a non-default IIS port	25
Contacts not synchronizing	25
Enabling logs to identify errors	26

About this guide

This guide is for Sage CRM system administrators who need to troubleshoot issues with Sage CRM.

This guide refers to **Sage CRM** but your system might have a different brand name, such as **Sage 200 Sales and Marketing**. The system works in the same way regardless of its name. The functionality that's available to you depends on the modules that you're licensed to use.

Chapter summary

Chapter	Description
Classic Outlook Integration	How to troubleshoot the Classic Outlook Plugin and Classic Outlook Integration.
Lite Outlook Integration	How to troubleshooting the Lite Outlook Plugin and Lite Outlook Integration.

User Interface

- [Internet Explorer Clear button](#)

Internet Explorer Clear button

When you view Sage CRM in Internet Explorer, the **Clear** ([X]) button on small input fields lets you clear the field contents. The button is controlled by an IE pseudo-element and is displayed based on a combination of the element width, font size, and padding. For more information about the `-ms-clear` pseudo-element, see <https://msdn.microsoft.com/en-us/library/windows/apps/hh465740.aspx>.

Depending on the version of Sage CRM and Internet Explorer that you're using, the button might not appear. You can use a Sage CRM CSS workaround to ensure the button always appears. This example displays the **Clear** button on date picker time fields in Sage CRM when using the Color theme. Add this to `\CRM\WWWRoot\Themes\color1.css`.

```
.EDIT.hasDatepicker {  
    font-family: Tahoma, Arial; font-size: 11px;  
}  
  
.EDIT[name$="_TIME"] {  
    font-family: Arial; font-size: 11px;  
}
```

Note: This work around is relevant to Sage CRM 7.3 SP3 and Internet Explorer 11.0.28.

Classic Outlook Integration

- [Installing the Classic Outlook Plugin](#)
- [Uninstalling the Classic Outlook Plugin](#)
- [Viewing the Classic Outlook Plugin logs](#)
- [Using Classic Outlook Integration with Auto Login](#)
- [Formatting an email in Outlook](#)

Installing the Classic Outlook Plugin

When installing the Classic Outlook Plugin, the installation process fails half way through with the following error message: "Could not obtain user's interface language. Try again?"

- In IE, go to **Tools | Internet Options | Security | Trusted Sites** and add the Sage CRM web site to the list of trusted sites.
- If possible, disable antivirus software and firewalls while you install the plugin.

Uninstalling the Classic Outlook Plugin

1. Back up the system registry before making any modifications to the registry keys.
2. Open the registry editor (regedit.exe).
3. Delete the following keys if they exist.
 - HKEY_CURRENT_USER\Software\ACCPAC\CRM
 - HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\SageCrmOutlookAddIn2010
 - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ACCPAC\CRM

- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Code Store Database\Distribution Units\{0AFD9937-10D5-436F-9F2B-08BF61754446}
- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\ModuleUsage\C:/Windows/Downloaded Program Files/OtlTools.ocx
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\SharedDlls\crmoutlookplugin*.*
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows Messaging Subsystem\MSMapiApps\crmoutlookplugin*.*

Viewing the Classic Outlook Plugin logs

- If there's a problem when installing the plugin, check `...Temp\crmclientinstallLog` for details.
- If any errors occur when you run the plugin, check `%UserProfile%\Users\\AppData\Roaming\Sage\CRM\OutlookPlugin\errorsdn.svcLog` for details. The best way to view the svcLog file is with the Service Trace Viewer Tool. You can download it here: [https://msdn.microsoft.com/en-us/library/ms732023\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/ms732023(v=vs.110).aspx)
- If there are issues with the Classic Outlook plugin, you should manually uninstall it. Also uninstall the Lite Outlook plugin if it's on the computer, and then install the Classic Outlook plugin.

Using Classic Outlook Integration with Auto Login

The recommended setting when using IIS Auto Login is to disable IIS Anonymous Authentication on the CRM web server. Classic Outlook Integration doesn't work when Anonymous Authentication is disabled and the user is prompted for a user name and password when trying to use the Integration. The following workaround lets you use Classic Outlook Integration with Auto Login. The client sends out one or two additional HTTP requests in the background, but no further user interaction is required.

1. Open IIS Manager (inetmgr.exe), expand the CRM virtual directory and double-click **URL Rewrite**.
2. Click **Add Rule(s)**.

3. In Inbound rules, double-click **Blank rule** and name the rule *Outlook plugin - force Windows authentication*.
4. In the Match URL section:
 - a. Set **Requested URL to Matches the Pattern**.
 - b. Set **Using to Regular Expressions**.
5. Set **Pattern** to **eware.dll/go* and select **Ignore case**.
6. In Conditions, set **Logical Grouping** to **Match All**.
7. Add a condition with an input of {QUERY_STRING}.
 - a. Set **Check if input string to Matches the Pattern**.
 - b. Set **Pattern** to *OutlookAction=logon*.
 - c. Select **Ignore case**.
8. Add a condition with an input of {HTTP_AUTHORIZATION}.
 - a. Set **Check if input string to Does Not Match the Pattern**.
 - b. Set **Pattern** to *Negotiate.**.
 - c. Select **Ignore case**.
9. Add a condition with an input of {HTTP_AUTHORIZATION}.
 - a. Set **Check if input string to Does Not Match the Pattern**.
 - b. Set **Pattern** to *NTLM.**.
 - c. Select **Ignore case**.
10. In Action, set **Action type** to **Custom Response**.
11. In Action Properties:
 - a. Set **Status code** to *401*.
 - b. Set **Substatus code** to *0*.
 - c. Set **Reason** to *Unauthorized - plugin auth*.
 - d. Set **Error description** to *Outlook plugin must use Windows authentication*.
12. Click **Apply**.

Formatting an email in Outlook

When a user files an email in Microsoft Outlook and then opens the email in Sage CRM, the email body may contain incorrect formatting such as extra paragraphs, lines, and spaces.

This issue is caused by the default settings in the CKEditor configuration file. As a result, CKEditor overrides the original Outlook formatting and extra paragraphs, lines, and spaces may appear in filed emails.

CKEditor is a third-party component used by Sage CRM to process emails. For more information about the CKEditor configuration file, go to http://docs.ckeditor.com/#!/guide/dev_configuration.

To fix this issue, edit the CKEditor configuration file on your Sage CRM server:

1. Locate the **Config.js** file.
Below are the default locations of the file:
 - On a 32-bit system: %ProgramFiles%\Sage\CRM\CRM\WWWRoot\ckeditor
 - On a 64-bit system: %ProgramFiles(x86)%\Sage\CRM\CRM\WWWRoot\ckeditor
2. Open **Config.js** in a text editor such as Notepad.
3. To prevent the insertion of extra paragraphs, add the following code immediately above the line `config.toolbar = "Full";`

```
config.autoParagraph = false;
```
4. To prevent the insertion of extra spaces and disable default CKEditor styling, append the following code to the file:


```
config.allowedContent =
{
    $1:
    {
        elements: CKEDITOR.dtd,
        attributes: true,
        styles: true,
        classes: true
    }
};
config.contentsCss=[];
```
5. Save your changes and close the file. As a result, the **Config.js** file should look as shown in [Sample Config.js file](#).
6. Open IIS Manager and restart the Sage CRM web site.

Sample Config.js file

After you've edited the **Config.js** file as described in [Formatting an email in Outlook](#), the file should look as follows:

```
CKEDITOR.editorConfig = function( config )
{
    config.autoParagraph = false;
    config.toolbar = "Full";
    config.disableNativeSpellChecker = false;
    config.resize_enabled = false;
    config.fillEmptyBlocks = false;
    config.pasteFromWordRemoveFontStyles = false;
    config.pasteFromWordRemoveFontStyles = false;
    config.extraAllowedContent = 'img(*){*}[*]';
    config.toolbar = [
    {
        name: 'document',
```

```

    groups: [ 'mode', 'document', 'doctools' ],
    items: [ 'Source', '-', 'Preview', 'Print', 'Templates' ]
  },
  {
    name: 'clipboard',
    groups: [ 'clipboard', 'undo' ],
    items: [ 'Cut', 'Copy', 'Paste', 'PasteText', 'PasteFromWord',
      '-', 'Undo', 'Redo' ]
  },
  {
    name: 'editing',
    groups: [ 'find', 'selection', 'spellchecker' ],
    items: [ 'Find', 'Replace', '-', 'SelectAll' ]
  },
  {
    name: 'basicstyles',
    groups: [ 'basicstyles', 'cleanup' ],
    items: [ 'Bold', 'Italic', 'Underline', 'Strike', 'Subscript',
      'Superscript', '-', 'RemoveFormat' ]
  },
  {
    name: 'links',
    items: [ 'Link', 'Unlink', 'Anchor' ]
  },
  {
    name: 'insert',
    items: [ 'Table', 'HorizontalRule', 'SpecialChar',
      'PageBreak', 'Maximize' ]
  },
  '/',
  {
    name: 'paragraph',
    groups: [ 'list', 'indent', 'blocks', 'align', 'bidi' ],
    items: [ 'NumberedList', 'BulletedList', '-', 'Outdent',
      'Indent', '-', 'Blockquote', 'CreateDiv', '-',
      'JustifyLeft', 'JustifyCenter', 'JustifyRight',
      'JustifyBlock', '-', 'BidiLtr', 'BidiRtl' ]
  },
  {
    name: 'styles',
    items: [ 'Styles', 'Format', 'Font', 'FontSize' ]
  },
  {
    name: 'colors',
    items: [ 'TextColor', 'BGColor' ]
  }
];
config.fontSize_sizes =
'8/8pt;9/9pt;10/10pt;11/11pt;12/12pt;14/14pt;16/16pt;
18/18pt;20/20pt;22/22pt;24/24pt;26/26pt;28/28pt;36/36pt;

```

```
48/48pt;72/72pt';  
config.allowedContent =  
{  
  $1:  
  {  
    elements: CKEDITOR.dtd,  
    attributes: true,  
    styles: true,  
    classes: true  
  }  
};  
config.contentsCss=[];
```

Lite Outlook Integration

- [Installing the Lite Outlook Plugin](#)
- [Uninstalling the Lite Outlook Plugin](#)
- [Working with Lite Outlook Integration](#)
- [Filing emails with Lite Outlook Integration](#)
- [Relinking orphaned email records](#)
- [Lite Outlook Integration load balancing](#)
- [Formatting an email in Outlook](#)

Installing the Lite Outlook Plugin

If a security certificate is missing on a user's machine, an error message is displayed when the user tries to install the Lite Outlook Plugin.

1. Uninstall the plugin.
2. Open a browser and go to Thawte Root Certificates (<http://www.thawte.com/roots/>).
3. Click **Download root package**.
4. When the certificates are installed, run the Lite Outlook Plugin Installer as normal.

Uninstalling the Lite Outlook Plugin

1. Back up the system registry before making any modifications to the registry keys.
2. Open the registry editor (regedit.exe).
3. Delete the following keys if they exist.
 - HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\SageCrmOutlookAddIn2010ForExchange
 - HKEY_CURRENT_USER\Software\Sage

- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Code Store Database\Distribution Units\{0AFD9937-10D5-436F-9F2B-08BF61754446}
- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\ModuleUsage\C:/Windows/Downloaded Program Files/OtlTools.ocx
- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\SharedDLLs (C:/Windows/Downloaded Program Files/OtlTools.ocx)
- HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Sage\Sage CRM\Outlook Plugin

Working with Lite Outlook Integration

When using Lite Outlook Integration, if an error occurs with the CRM Server, do the following:.

1. Log on to Sage CRM.
2. Check the Sage CRM URL and note if the protocol is HTTPS or HTTP.
3. Back up the system registry before making any modifications to the registry keys.
4. Open the registry editor (regedit.exe).
5. Open HKEY_CURRENT_USER\Software\ACCPAC\CRM\OutlookPlugin.
6. Update the **OutlookPort** value to **80** for HTTP and **443** for HTTPS.
7. Restart Outlook.

Filing emails with Lite Outlook Integration

When a user tries to file an email from a sender that does not have a corresponding record in Sage CRM, the following JavaScript error occurs: "Unable to get value of the property 'value': object is null or undefined."

This issue is caused by missing values for `cml_i_comm_companyid` and `_HIDDENcml_i_comm_companyidTEXT` in the `getSelection` function.

1. Click **<My Profile> | Administration | Customization | Translations.**
2. Delete `FileIT` in `filecrm` caption and add the following instead.

```
E-mail Target
<script>
```

```

window.attachEvent("onload", function ()
{
    if (document.location.href.indexOf("Act=6011")>-1)
        {
            if (!getElm("cmli_comm_companyid")&&!getElm("_HIDDENcmli_
comm_companyidTEXT"))
                {
                    var dummy1 = document.createElement("input");
                    with (dummy1)
                    {
                        type = "hidden"; id = "cmli_comm_companyid";
value = "";
                    }
                    var dummy2 = document.createElement("input");
                    with (dummy2)
                    {
                        type = "hidden"; id = "_HIDDENcmli_comm_
companyidTEXT"; value = "";
                    }
                    getElm("_Datacmli_comm_personid").appendChild
(dummy1);
                    getElm("_Datacmli_comm_personid").appendChild
(dummy2);
                }
        }
});
function getElm (a) { return document.getElementById(a);}
</script>

```

Relinking orphaned email records

If a user files an Outlook email in Sage CRM but does not link the email to a Person or Company, the resulting Communication record becomes an orphan record in Sage CRM and is difficult to find.

To solve this issue, you can create an Interactive dashboard gadget to display orphan Communication records, a flag to identify orphan records, and a table level script to link an orphan Communication record to an existing Person or Company record.

1. Click **<My Profile> | Administration | Customization | Primary Entities | Communication | Views** and click **New** to create a view that filters on orphaned Communication records.
 - a. Name the view *vCommOrphanedEmail*.
 - b. To make the view available when creating a new gadget, select **Reports View**.
 - c. Enter a short description and a translation.

- d. Enter the following in **View Script**.


```
create view vCommOrphanedEmail as
select * from vcommunication
where comm_type = N'Email'
and Comm_Action = N'EmailIn' and CmLi_Comm_PersonID is null
and CmLi_Comm_CompanyID is null and Comm_Deleted is null
and CmLi_Comm_UserID is not null
```
- e. Click **Save**.
2. Click **Reports | General** and click **New** to create a report that displays orphaned Communication records.
 - a. Name the report *Orphaned Emails*.
 - b. Choose **vCommOrphanedEmail** as the source view.
 - c. Select **Filter by Current User** and **Filter by User's Primary Team**.
 - d. Add **Subject**, **From**, and **To** columns to the report. Add any other columns you want to display on the dashboard.
 - e. Click **Continue** and then click **Save**.
3. Click **My CRM | Dashboards** and open the interactive dashboard to which you want to add the new gadget.
 - a. Click **New Gadget | Create Gadget** and select **List**.
 - b. Choose the **Communication** entity. Click **Next** to proceed through the wizard.
 - c. Choose the **Orphaned Emails report** as the data source.
 - d. Select **Go To Summary Screen** from **Drill Down**.
 - e. Name the gadget and click **Finish**.
4. Click **<My Profile> | Administration | Customization | Primary Entities | Communication | Fields** and click **New** to create a field that acts as a flag on a filed email.
 - a. Select **Adv Search Select** from **Entry Type**.
 - b. Enter *comm_linkorphan* in **Column Name**.
 - c. Enter *Link Orphan* in **Caption**.
 - d. Select **Person** from **Search Entity**.
To link an orphan Communication record to a Company record, select **Company** instead.
 - e. Click **Save**.
5. Click **<My Profile> | Administration | Customization | Primary Entities | Communication | Screens** to add the new field to the Email Filing screen.
 - a. Click the pencil icon beside **EmailFilingBox**.
 - b. Select **comm_linkorphan** from **Field**.
 - c. Enter the following in **Create Script** to hide the field for emails that are not orphans:


```
if ((CRM.GetContextInfo("Communication","comm_type")== 'Email')
&& (CRM.GetContextInfo("Communication","Comm_Action")
== 'EmailIn')
&& (CRM.GetContextInfo("Communication","CmLi_Comm_PersonID")
```

```

=="")
&& (CRM.GetContextInfo("Communication", "CmLi_Comm_CompanyID")
==""))
{
    Hidden = false;
}
else Hidden = true;

```

d. Click **Add** and then click **Save**.

6. Click **<My Profile> | Administration | Customization | Primary Entities | Communication | TableScripts** to create a table level script on Communication that checks whether there's a value in comm_linkorphan.

a. Click **New**.

b. Add the following to **Table level script**. If there's a value in the comm_linkorphan field, the script links the Communication record to the Person entity and clears the existing comm_linkorphan value.

To link an orphan Communication record to a Company record, replace CmLi_Comm_PersonId with CmLi_Comm_CompanyId in the script below.

```

function UpdateRecord ()
{
    if (IsValid(Values("comm_linkorphan")))
    {
        var PrimaryCommLink = CRM.FindRecord("Comm_Link",
        "CmLi_Comm_Communicationid=" +
        WhereClause.replace(/comm_communicationid\=
        (\d*)\.*/i, "$1")
        + " and CmLi_Comm_UserId is not null");
        PrimaryCommLink.item("CmLi_Comm_PersonId") =
        Values("comm_linkorphan");
        PrimaryCommLink.SaveChanges();
        Values("comm_linkorphan") = "";
    }
}
function IsValid(str)
{
    str = str + "";
    if ((str!="undefined") && (str != "null") && (str != ""))
    {
        return true;
    }
    else return false;
}

```

c. Click **Save**.

Lite Outlook Integration load balancing

In a multi-server environment, the Lite Outlook Plugin should connect to Load Balancing and identify which server is available. Instead, it reads the name of the server from the time of installation and adds it to the Windows registry. The plugin reads this key each time it tries to connect to the Sage CRM database.

To work around this issue:

1. Update the Windows Registry key `HKEY_CURRENT_USER\Software\Sage\Lite Outlook Plugin\` to the correct server name.
2. During installation, change the server name to the main server name rather than the backup server name to ensure service integrity.

Formatting an email in Outlook

When a user files an email in Microsoft Outlook and then opens the email in Sage CRM, the email body may contain incorrect formatting such as extra paragraphs, lines, and spaces.

This issue is caused by the default settings in the CKEditor configuration file. As a result, CKEditor overrides the original Outlook formatting and extra paragraphs, lines, and spaces may appear in filed emails.

CKEditor is a third-party component used by Sage CRM to process emails. For more information about the CKEditor configuration file, go to http://docs.ckeditor.com/#!/guide/dev_configuration.

To fix this issue, edit the CKEditor configuration file on your Sage CRM server:

1. Locate the **Config.js** file.
Below are the default locations of the file:
 - On a 32-bit system: `%ProgramFiles%\Sage\CRM\CRM\WWWRoot\ckeditor`
 - On a 64-bit system: `%ProgramFiles(x86)%\Sage\CRM\CRM\WWWRoot\ckeditor`
2. Open **Config.js** in a text editor such as Notepad.
3. To prevent the insertion of extra paragraphs, add the following code immediately above the line `config.toolbar = "Full";`

```
config.autoParagraph = false;
```
4. To prevent the insertion of extra spaces and disable default CKEditor styling, append the following

code to the file:

```
config.allowedContent =
{
    $1:
    {
        elements: CKEDITOR.dtd,
        attributes: true,
        styles: true,
        classes: true
    }
};

config.contentsCss=[];
```

5. Save your changes and close the file. As a result, the **Config.js** file should look as shown in [Sample Config.js file](#).
6. Open IIS Manager and restart the Sage CRM web site.

Sample Config.js file

After you've edited the **Config.js** file as described in [Formatting an email in Outlook](#), the file should look as follows:

```
CKEDITOR.editorConfig = function( config )
{
    config.autoParagraph = false;
    config.toolbar = "Full";
    config.disableNativeSpellChecker = false;
    config.resize_enabled = false;
    config.fillEmptyBlocks = false;
    config.pasteFromWordRemoveFontStyles = false;
    config.pasteFromWordRemoveFontStyles = false;
    config.extraAllowedContent = 'img(*){*}[*]';
    config.toolbar = [
    {
        name: 'document',
        groups: [ 'mode', 'document', 'doctools' ],
        items: [ 'Source', '-', 'Preview', 'Print', 'Templates' ]
    },
    {
        name: 'clipboard',
        groups: [ 'clipboard', 'undo' ],
        items: [ 'Cut', 'Copy', 'Paste', 'PasteText', 'PasteFromWord',
        '-', 'Undo', 'Redo' ]
    },
    {
        name: 'editing',
        groups: [ 'find', 'selection', 'spellchecker' ],
```

```

        items: [ 'Find', 'Replace', '-', 'SelectAll' ]
    },
    {
        name: 'basicstyles',
        groups: [ 'basicstyles', 'cleanup' ],
        items: [ 'Bold', 'Italic', 'Underline', 'Strike', 'Subscript',
            'Superscript', '-', 'RemoveFormat' ]
    },
    {
        name: 'links',
        items: [ 'Link', 'Unlink', 'Anchor' ]
    },
    {
        name: 'insert',
        items: [ 'Table', 'HorizontalRule', 'SpecialChar',
            'PageBreak', 'Maximize' ]
    },
    '/',
    {
        name: 'paragraph',
        groups: [ 'list', 'indent', 'blocks', 'align', 'bidi' ],
        items: [ 'NumberedList', 'BulletedList', '-', 'Outdent',
            'Indent', '-', 'Blockquote', 'CreateDiv', '-',
            'JustifyLeft', 'JustifyCenter', 'JustifyRight',
            'JustifyBlock', '-', 'BidiLtr', 'BidiRtl' ]
    },
    {
        name: 'styles',
        items: [ 'Styles', 'Format', 'Font', 'FontSize' ]
    },
    {
        name: 'colors',
        items: [ 'TextColor', 'BGColor' ]
    }
];
config.fontSize_sizes =
'8/8pt;9/9pt;10/10pt;11/11pt;12/12pt;14/14pt;16/16pt;
18/18pt;20/20pt;22/22pt;24/24pt;26/26pt;28/28pt;36/36pt;
48/48pt;72/72pt';
config.allowedContent =
{
    $1:
    {
        elements: CKEDITOR.dtd,
        attributes: true,
        styles: true,
        classes: true
    }
};

```

```
config.contentsCss=[];
```

Exchange Integration

- [Connecting to Exchange Server](#)
- [Using a non-default IIS port](#)
- [Contacts not synchronizing](#)
- [Enabling logs to identify errors](#)

Connecting to Exchange Server

Issue	Solution
No Impersonation rights	The Exchange Server User Name specified in Exchange Server Connection Setting requires impersonation rights in Exchange. Check the user rights in Exchange.
Cannot access EWS URL	If the EWS URL cannot be accessed, the connection cannot be set up. Paste the EWS URL into a browser and check it can be accessed using the impersonation user's username and password.
Wrong authentication settings on EWS folder	If the EWS folder in IIS on Exchange Server has the wrong authentication settings, the connection cannot be set up. For more information, see <i>Configuring Exchange Server</i> in the System Administrator Help .
Tomcat is not running	The Tomcat service is required to establish the Exchange connection and to run the Sync Engine. If the Tomcat service is not running, errors usually occur in other areas of Sage CRM that rely on this service. For example, the Interactive Dashboard. Restart the Tomcat service if it has stopped. Alternatively, you can schedule a Tomcat service restart.
jdbc.properties or syncengine.properties contain incorrect server or port information	The jdbc.properties file contains the wrong server name or port number, or the syncengine.properties file contains the wrong server name. These files are typically located in <code>..\Program Files\Sage\CRM\[installname]\tomcat\webapps\[installname]ExchangeSyncEngine\WEB-INF</code> .

Using a non-default IIS port

If you change the default port for Sage CRM on IIS to any port other than port 80 and then set up Exchange Integration, the following error is displayed.

CRM is attempting to establish a connection with the Sync Engine. Please wait..

The Exchange Server connection could not be saved as CRM was unable to connect to the Sync Engine.

To resolve this issue:

1. Click **<My Profile> | Administration | Email and Documents | Exchange Server Integration | Connection Management**.
2. Set **Use Default Sync Engine Location** to **No**.
3. Enter the server name and port number separated by a colon(:) in **Sync Engine Location**. For example, *http://SERVER:8080/sdata/crmExchangeSyncEngine/crmExchange/-/*.

Contacts not synchronizing

When you enable contact synchronization in Exchange Integration, the contacts are added to the EcngSyncResource table. They are then moved to the EWSSyncResource table and the number of contacts decreases as they're processed.

However, running the following SQL statement shows that x number of records have been added to the EcngSyncResource table but they have not been successfully moved to the EWSSyncResource table.

```
select * from EcngSyncResource with (NOLOCK)
where exsr_UUID not in (select EWRS_UUID from EWSSyncResource WITH
(NOLOCK)) and exsr_Deleted is null and exsr_processed = 0 and exsr_
EndpointID in (6009,6014)
```

To troubleshoot this issue, update one of the contacts before performing a synchronization to check if it processed. Also check the log files for any errors or conflicts when processing the records.

Note: The exsr_NoUpdateToRecord column is set to 1 during Exchange synchronization if the record has not been updated since the last synchronization session.

Enabling logs to identify errors

Enable the following logs to help identify the cause of Exchange Integration failures.

- Use the **IIS log** to check if a request reached IIS Web Server. Enable this log in IIS Manager.
- Use the **CRMRewriter log** to analyze what happened to a request that was sent to the Tomcat web application. To enable this log:
 - a. Open <Program Files>\Sage\Services\IISUtils\CRMRewriter\CRM.Rewriter.rules.
 - b. Change

```
#RewriteLog C:\Program
Files\Sage\CRM\Services\IISUtils\CRMRewriter\rewriter.log
#RewriteLogLevel 2
to
RewriteLog C:\Program
Files\Sage\CRM\Services\IISUtils\CRMRewriter\rewriter.log
RewriteLogLevel 5
```
- Use the **Tomcat access log** to establish if the request reached Tomcat server. To enable this:
 - a. Open <installed instance dir>\tomcat\conf\server.xml.
 - b. Change

```
<!--
<Valve className="org.apache.catalina.valves.AccessLogValve"
directory="logs"
prefix="localhost_access_log." suffix=".txt" pattern="common"
resolveHosts="false"/>
-->
To
<Valve className="org.apache.catalina.valves.AccessLogValve"
directory="logs"
  prefix="localhost_access_log." suffix=".txt" pattern="common"
  resolveHosts="false"/>
```
- Use the detailed **Sync Engine log** to view detailed information about what happened in the Sync Engine, including detailed information about requests made from Sync Engine. To enable this:
 - a. Open (<installed instance dir>\tomcat\webapps\<Sync Engine folder>\WEB-INF\log4j.properties).
 - b. Change

```
# defaultLog - default catch-all
log4j.rootLogger=ERROR, defaultLog
To
log4j.logger.httpclient.wire.header=DEBUG
log4j.logger.org.apache.commons.httpclient=DEBUG
# defaultLog - default catch-all
log4j.rootLogger=ALL, defaultLog
```

