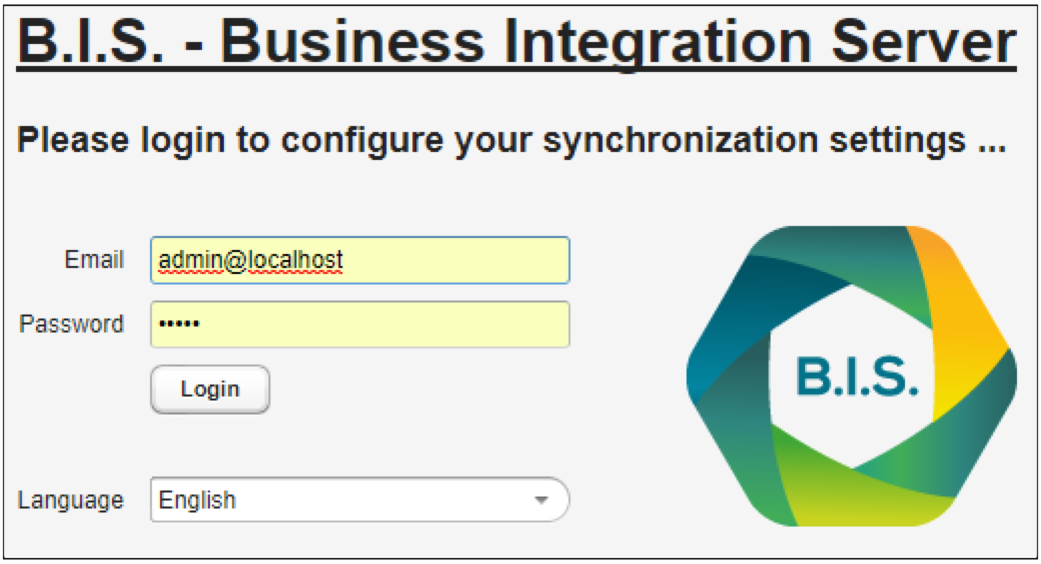
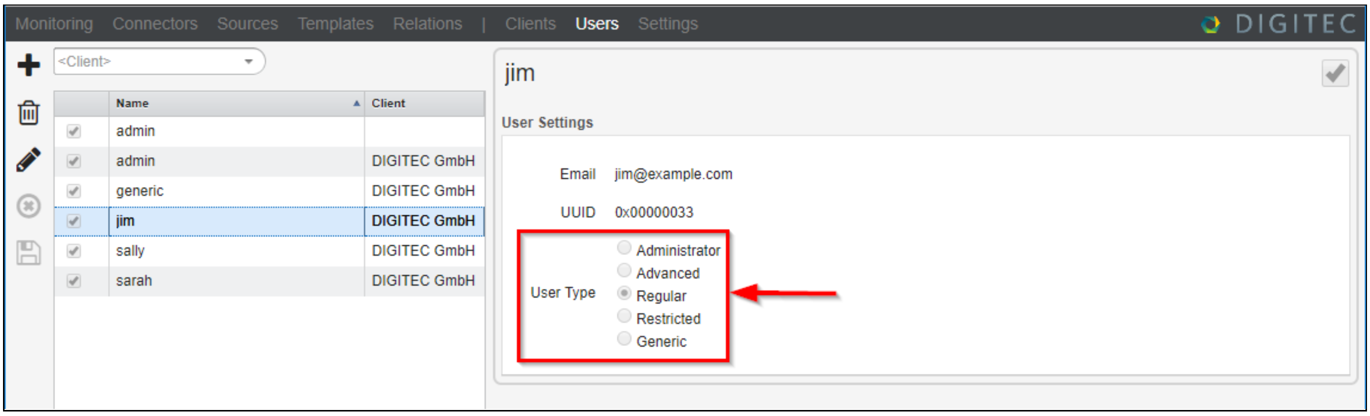
1. **Login as administrator to setup systemwide configurations**
   Default login: http://<server>:8080/gui **or** https://<server>:8443/gui
   Default credentials: Email: admin@localhost, Password: admin



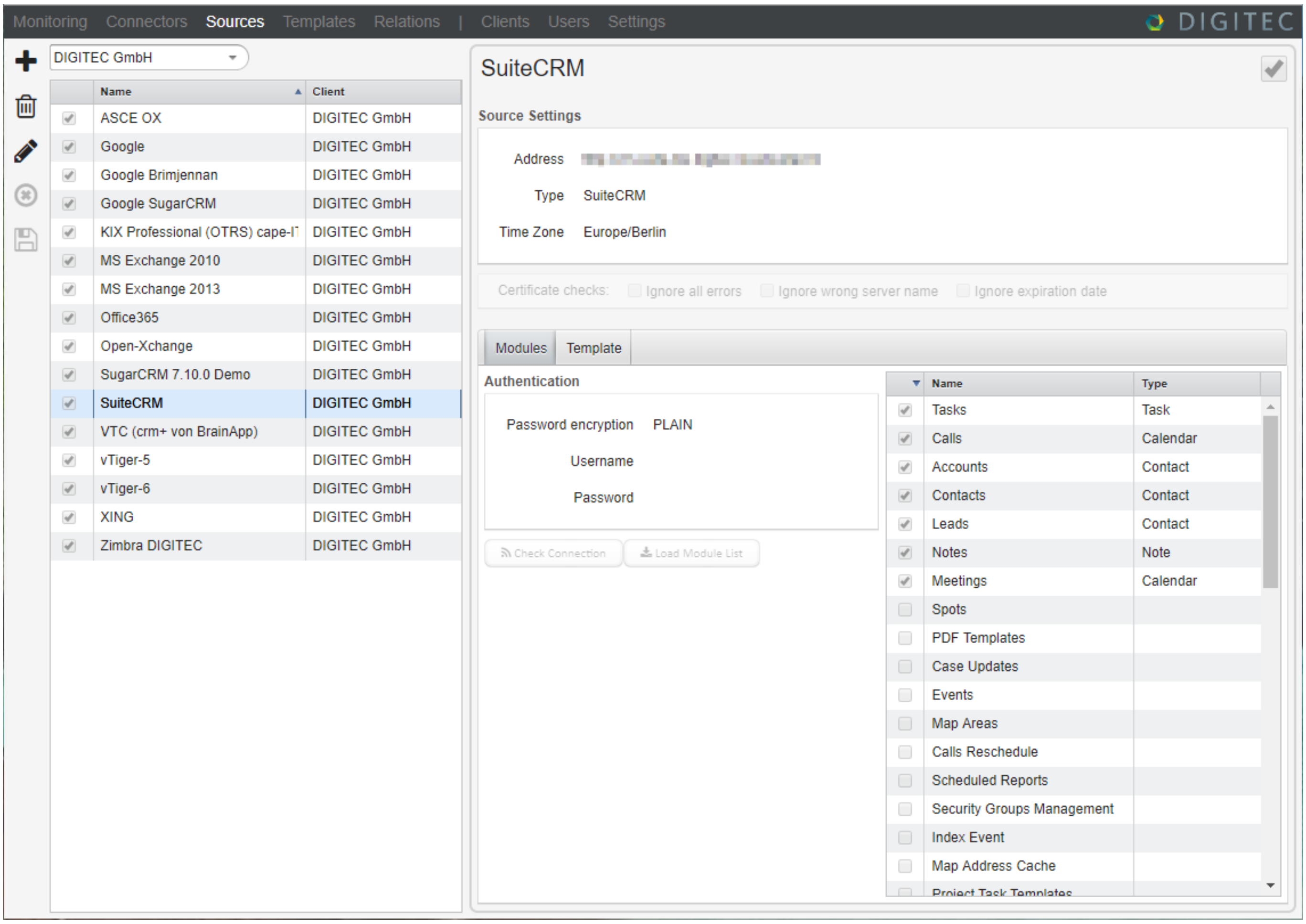
After login change password immediately via drop down menu of the B.I.S. icon.

2. **Add synchronization users (These users later will be able to synchronize data)**
   - Click on the Users tab
     If a client is selected new user can be added.
     - Use 'Regular' as User Type.
       The description of other User Types can be viewed here: [User Types]
     - The password can be changed by the user itself after first login.



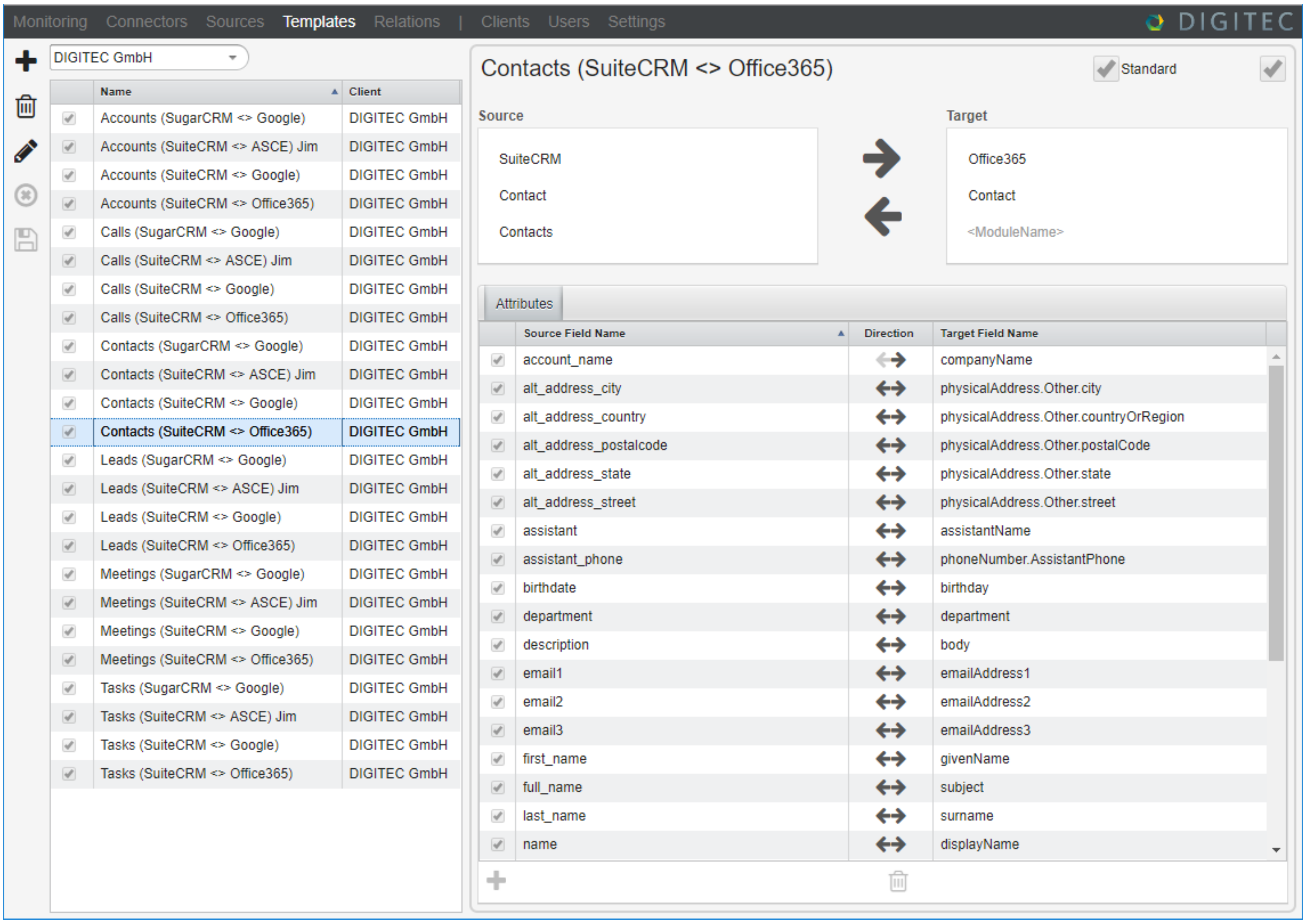
3. Add a Source

- Click on the Sources tab
- Choose your client from the drop down menu
- Press the ‘+’ icon
- Enter a name for the new source (e.g. SuiteCRM)
- Enter the URL of the source (e.g. https://suitecrm.example.com)
- Select the type of the connector from the dropdown-menu (e.g. SuiteCRM)
- Select the time zone of the server from the drop down box (if you know it)
- Select the password encryption from the dropdown box (use PLAIN with SuiteCRM)
- Enter username and password, this may be an administrative account
- Press ‘Check Connection’ button. This is necessary to check if the URL and the connection settings are correct.
- If there occur errors due to certificate problems it is possible to disable certificate checks
- Press ‘Load Module List’ button (In Groupware systems there might be no module list)
- select modules for synchronization (e.g. Modulename Contacts with Moduletype Contacts from the dropdown menu) then activate the enabled check-box
- Activate the ‘enabled’ check box in the upper right corner to access the source
- Save the configuration by pressing the disk icon in the left side actionbar



4. Add a template

- Click on the Templates tab
- Select a client from the client dropdown-menu
- Press the '+' icon
- Add a Template Name (e.g. Contacts between SuiteCRM and Office365)
- Select a source from the dropdown menu on the left (SuiteCRM)
  <u>REMARK:</u> The CRM system shall be the leading system!
- Select a moduleType from the dropdown menu on the left (e.g. CONTACT)
- Select a ModuleName from the dropdown menu on the left (e.g. Contacts)
- Select the direction for synchronization (left to right, right to left or both directions)
- Select a source from the dropdown menu on the right (Office365)
- Select a moduleType from the dropdown menu on the right (CONTACT)
- Optional: Enter a ModuleName on the right (Contacts [SuiteCRM])
- This will be the folder name shown in the groupware with the synchronized SuiteCRM contacts
- Activate the 'enabled' check box in the upper right corner to access the source
- Save the configuration by pressing the disk icon in the left side actionbar

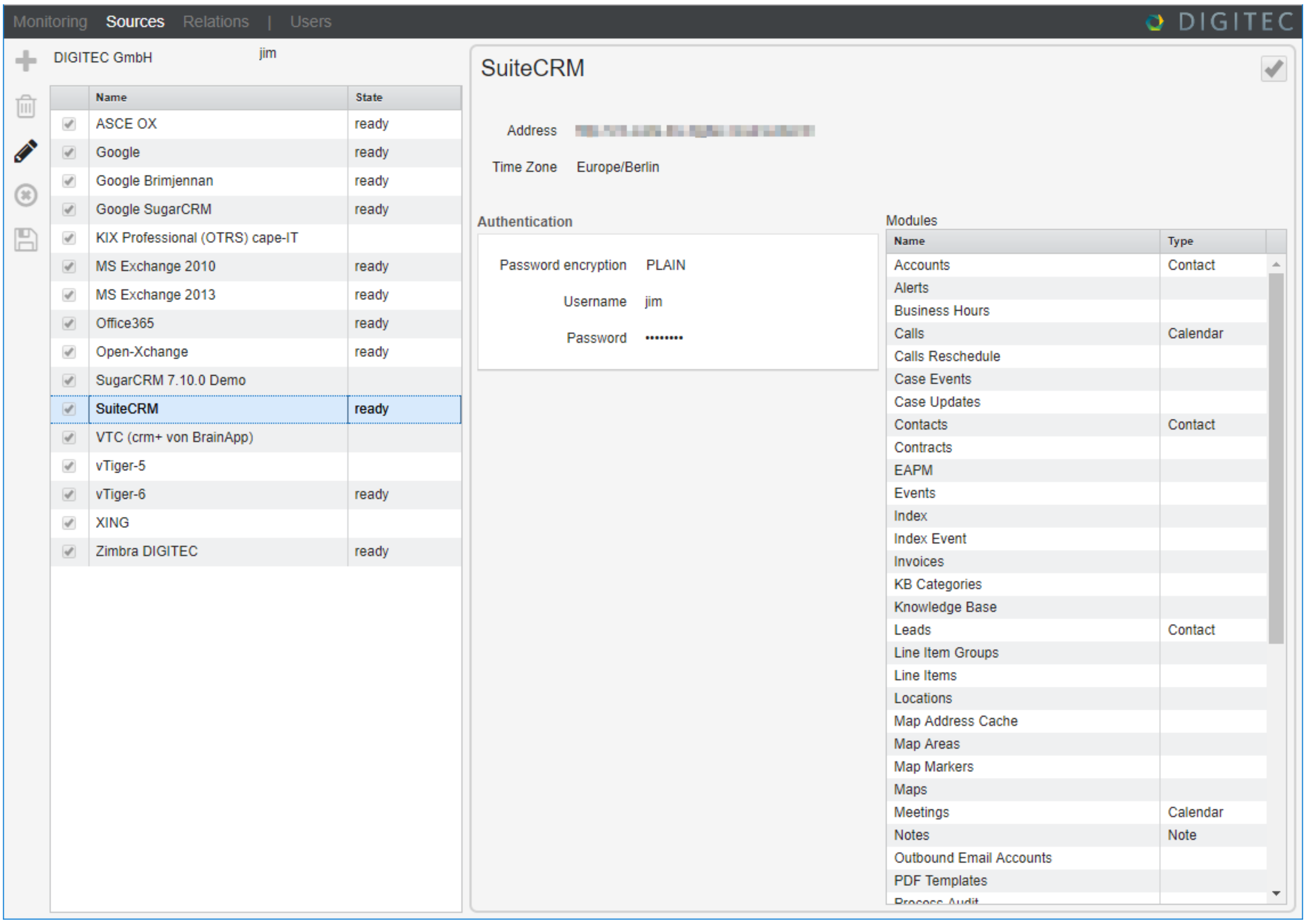


5. Logout from admin account via drop down menu of the B.I.S. icon and re-login as a regular user

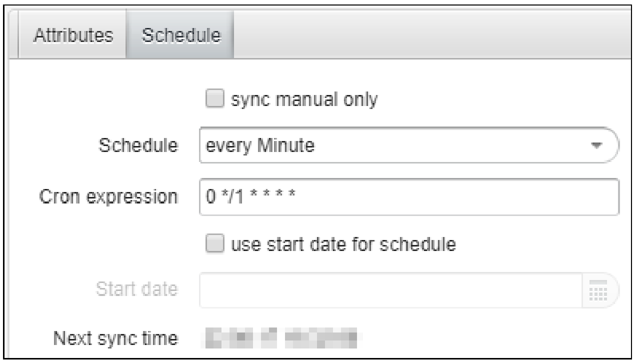
6. **Enter user credentials for systems to be synchronized**

The sources tab shows all available sources. The user has to enter his personal login data for every used source.

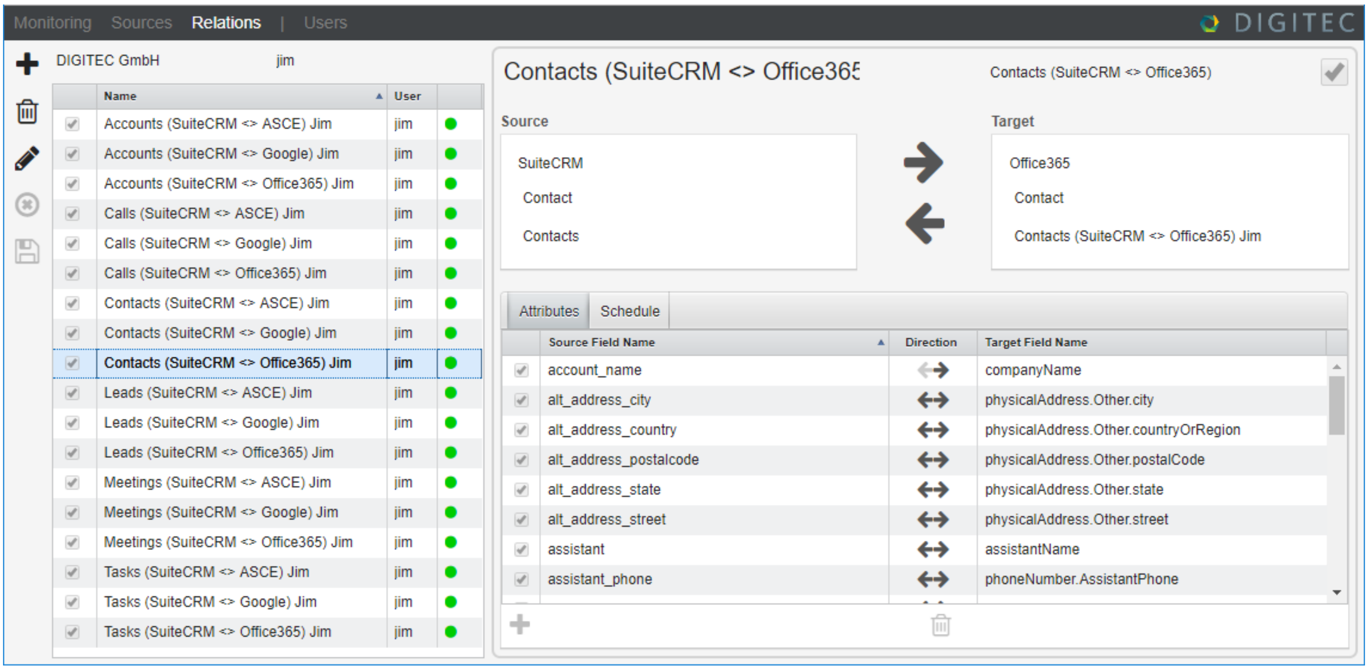
- Click on the Sources tab
- Select a source from the left side table
- Select the time zone where the user is located
- Enter user name and password
- Press 'Check Connection' button. This is necessary to check if the URL and the connection settings are correct.
- Activate the 'enabled' check box in the upper right corner to access the source
- Save the configuration by pressing the disk icon in the left side actionbar



7. **Add a relation (a relation describes the user based synchronization between two systems)**
The Relations Tab allows to assign a predefined template to a user. Usually this is done on personal by each user.
<u>REMARK:</u> Adding a relation is only possible if the user has entered his login data (via the sources tab) for each of the systems to be synchronized. In this case, the administrator can also add relations for this user.
   - Click on The Relations tab
   - Press the '+' button
   - Add a name for the new relation
   - Select a template from the Dropdown menu (e.g. Contacts (SuiteCRM <> Office365))
   - Choose an existing target folder from the target module name dropdown menu or enter a new folder name
   - Check if the enabled Checkbox is activated
   - Check if all attributes for synchronization are enabled
   - Optional: deselect not needed attributes
   - Optional: add user specified attributes
   - Optional: Change scheduling by editing the default of 5 minutes



   - Save the configuration by pressing the disk icon in the left side actionbar



8. **Wait for the end of the first synchronization (depending of the amount of data, this can take a while)**
The status of each synchronization can be checked via the relations tab or the monitoring tab for more details.

A DETAILED DESCRIPTION OF THE B.I.S. CAN BE FOUND HERE:

https://digitec.de/en/bi/business-integration-server

A DETAILED CONFIGURATION GUIDE / MANUAL WITH ALL AVAILABLE FUNCTIONS CAN BE FOUND HERE:

For administrators:
Administrator Manual

For users:
User Manual