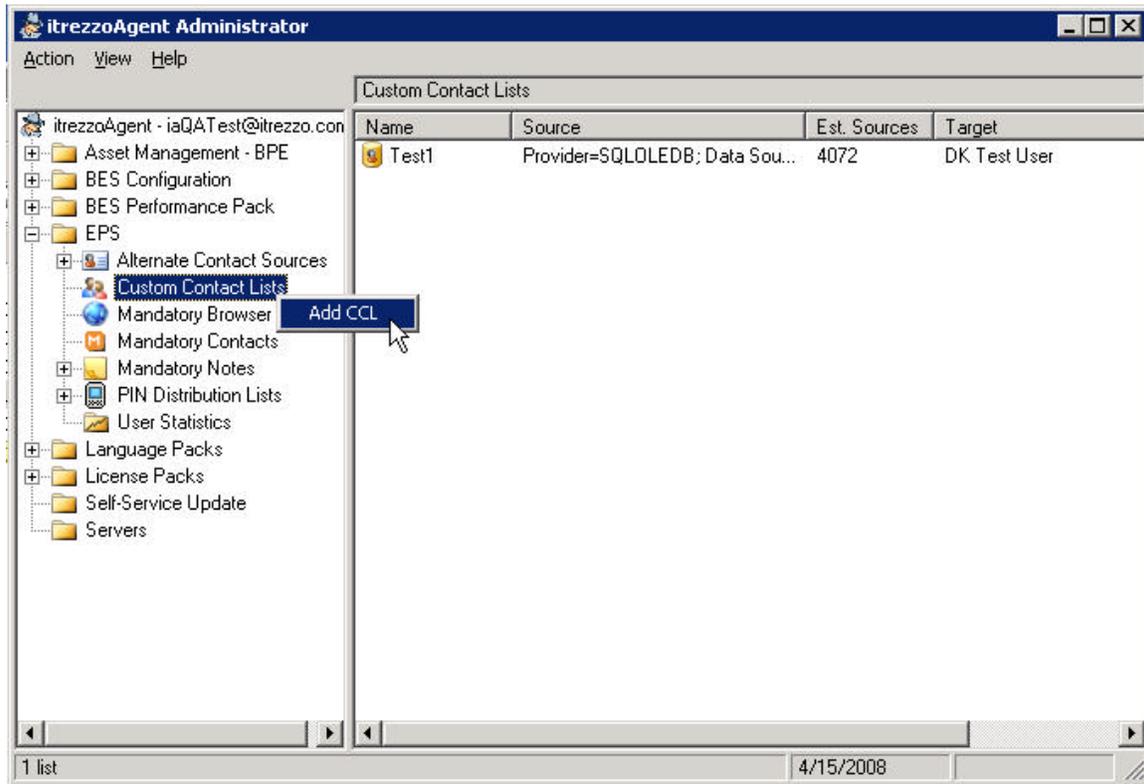


itrezzo Agent Custom Contact Lists

Custom Contact Lists (CCLs) provide a way to replicate contacts from a back-end database to users' Outlook folders and handheld address books.

Configuration



You create a list from the context menu of the Custom Contact Lists container in IA-Admin. Within that container you can view, modify, inactivate or reactivate one or more CCLs.

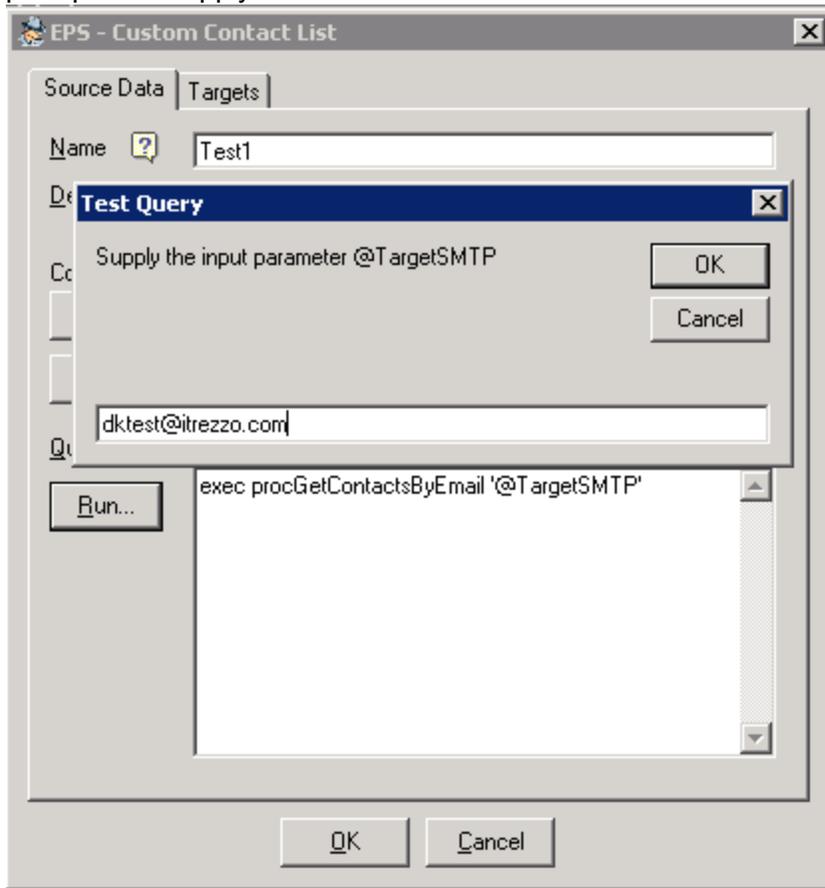
Each list must be assigned a name, along with a connection string and the database query. The database will be queried separately for each user who is a target of the list. If the query contains an input parameter (a single word prefixed with an @ symbol) then that parameter will be replaced by the primary SMTP address of the targeted user when the query is submitted.

The screenshot shows a dialog box titled "EPS - Custom Contact List" with two tabs: "Source Data" and "Targets". The "Targets" tab is selected. The dialog contains the following fields and controls:

- Name:** A text box containing "Test1".
- Description:** An empty text box.
- Connection String:** A text box containing "Provider=SQLOLEDB; Data Source=sj2-sql1.itrezzo.net; Initial Catalog=BlackstoneCRM; User ID=bcm; Password=*****;". To the left are buttons for "Edit..." and "Test...".
- Query String:** A text box containing "exec procGetContactsByEmail '@TargetSMTP'". To the left is a button for "Run...".

At the bottom of the dialog are "OK" and "Cancel" buttons.

Click the Run... button to test the query; if it includes a parameter then you will be prompted to supply it.



If the query succeeds then a grid will show the resultset; otherwise an error will be displayed.

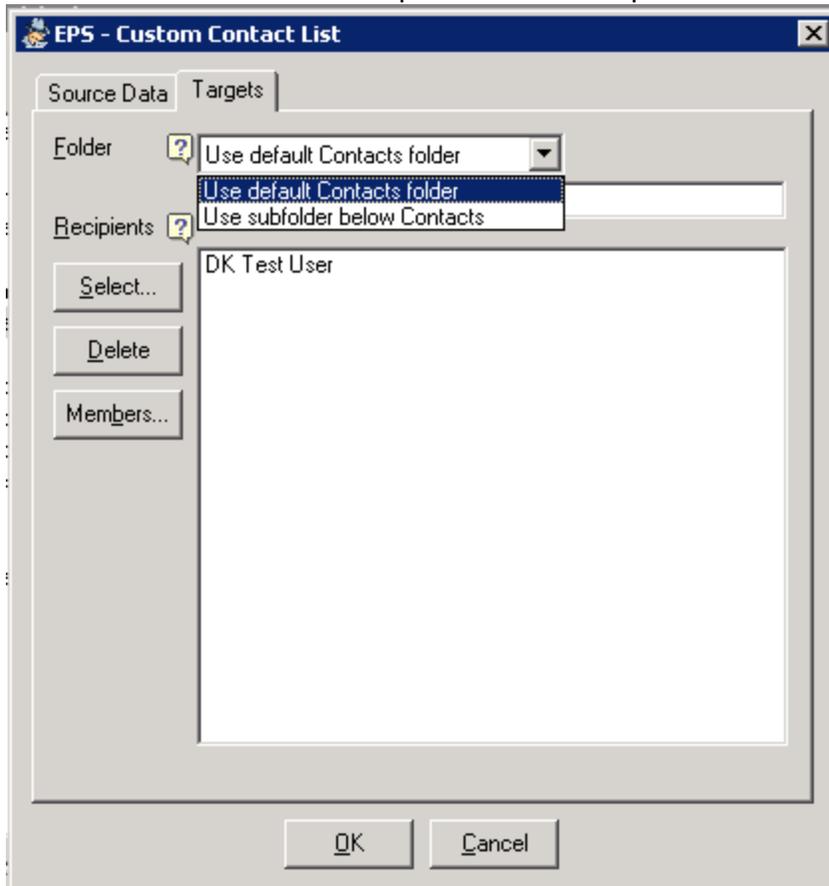
The screenshot shows the itrezzoAgent Admin console with a dialog box titled "Test1 - Results for Mapped Fields". The dialog displays a query result for the email address "dktest@itrezzo.com". The query returned 4072 records. The results are shown in a table with the following columns: UniqueID, FileAs, BusinessFax, and LastName.

UniqueID	FileAs	BusinessFax	LastName
4	Rusoff, Lawrence	(203) 435-1111	Rusoff
14	Baldwin, A. Jay	(908) 630-0801	Baldwin
15	Thornton, Frank	(203) 965-3300	Thornton
16	Francis, Conrad	(203) 965-3300	Francis
19	Brandi, David	(313) 271-2572	Brandi
23	Sheets, Betty	(914) 642-3088	Sheets
27	Chilton, Collette		Chilton
35	Walsh, Jim		Walsh
37	Cameron, Brendan	(212) 837-1301	Cameron
39	Unrein, Lawrence	(212) 837-1301	Unrein
41	Gigliotti, Carmen	(302) 477-6010	Gigliotti
48	Toth, David	(301) 897-6557	Toth
52	Schmid, Mark		Schmid
61	Ulrey, Linda	(513) 983-0706	Ulrey
63	Kloesz, Kurt		Kloesz
65	Kresa, Kent		Kresa

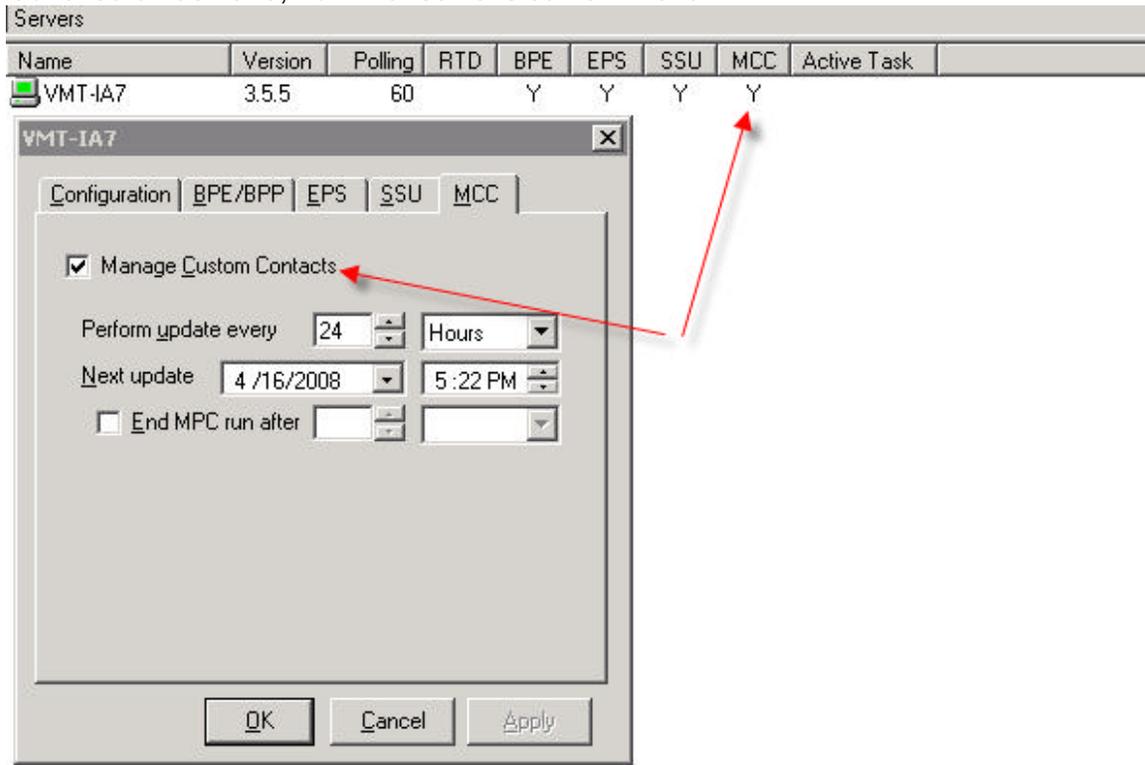
The dialog also includes a "Close" button and a status bar at the bottom showing "1 list".

The targets or recipients of the list are selected from the GAL as one or more individual address entries or distribution lists. A recipient is only valid if that user has been assigned to an EPS license pack; names that appear in the target list but do not belong to an EPS license will be skipped.

The contacts retrieved by the source list query will be replicated to a folder in the user's Exchange mailbox. This can either be the default Contacts folder or a Contact-type subfolder directly below it. If a subfolder with the specified name does not exist then it will be created when the list is pushed to the recipient.



In order to push the CCLs you must enable a v.3.5.5 or later server to perform the Manage Custom Contacts task (MCC). The task runs on schedule and can also be launched on demand, from that server's context menu.



The “Manage Custom Contacts” Task

The first step in the MCC task is to assemble all active Custom Contact Lists and read in their properties. This includes the CCL name, which is just a convenient label for the admin and can be changed at will; each list has a GUID that is assigned automatically when it is created and which functions as the persistent unique identifier. The target list for each CCL is expanded and parsed for the licensed EPS users.

Each list is processed as a unit. If the itrezzo Agent is unable to open the database connection then no other action is performed on that list – in particular no contacts are removed from user folders if the data can't be retrieved or if the list has been deactivated.

If the DB connection opens then the task walks through the targets for that CCL.

For each user the agent first attempts to logon to the mailbox and then open or create the target folder. Once the folder is available the user's database query is performed supplying the primary SMTP address as the input parameter if the query includes one. The set of contacts returned by the DB query is compared to the existing contacts in the folder, using the ID of the list along with the recordset's UniqueID column as a composite key.

- Any contacts in the folder that were originally from the list but which do not currently appear in the recordset are deleted.

- A new contact is created for each DB record that does not exist in the folder.
- The server and local versions of a contact are compared if there has been a change (based on the LastEditedDate for the server record or the LastModificationTime for a user contact) that is more recent than the last completed update for the CCL for this user. The MMC sync is always from server to client, so if the two versions are different the user's contact will be changed to match the server.

The specific action (write, overwrite or clear) for each field is inherited from the EPS data settings, matching the checked options under the Mandatory Contacts group of the data fields control grid (EPS properties > Data tab > Fields button).

Important Points

Duplicates

The MCC task creates and maintains its own set of contacts to replicate the records in a backend database. It does not attempt to match or merge those records with contacts created by the user, the itrezzo Agent's EPS task, or any other process. This means that duplicates are possible – both within the Outlook folder and in the handheld Address Book. If the database query returns duplicates then MCC will faithfully replicate all versions to the user's folder.

The EPS task (on v.3.5.5 servers and later) has been modified so that it will ignore any contact marked with a CCL list ID. This prevents EPS from attempting to update contacts from a CCL, which could generate churn, but because EPS won't try to merge any of its contacts with those that come from a CCL it will generate a duplicate record if it has a match.

Note that EPS and MCC are compatible; both tasks can be used to maintain contacts within the same mailbox whether in the same or different folders.

Conservative Deletion

The MCC task will only delete contacts that no longer belong to a CCL if it is able to retrieve a current resultset for a user. If the list has been inactivated, or the user has been removed as a target, or if the DB connection or query fails for some reason then contacts which are actually now "obsolete" will not be removed. This reduces the chance of deleting contacts that the user should have as the result of a transient network error or a database logon change.