

3. Connector Configuration

Main settings, Exchange type selection, and Microsoft 365 or Exchange Server configuration.

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Opening and Configuring Exchange Connector

Global configuration is available under **Settings > Exchange Connector**.

From this page, the administrator selects the Exchange type and chooses which data should be synchronized.

Connectivity requirements

Important requirement: connectivity differs between EWS and Microsoft Graph

With Exchange Server/EWS, it is enough for the vtenext server to reach Exchange: vtenext opens and maintains the streaming connection, so the CRM does not need to be publicly reachable from the Internet. With Microsoft 365/Graph, the vtenext endpoint must be reachable by Microsoft servers in order to receive push notifications.

If Microsoft 365/Graph is used and vtenext cannot be published or reached from the Internet, standard inbound notifications cannot work correctly. A cron-based synchronization can be set up manually, but it is a custom configuration, is not available as a self-service option and is strongly discouraged compared with the standard push-notification architecture.

License activation

If the connector is not yet active, enter the license key and click **Verify**. Once validated, the full configuration becomes available.

Main settings

- **Exchange Version;**
- Events synchronization;
- Contacts synchronization;
- Tasks synchronization;

- Organizations synchronization;
- optional deletion of Contacts for inactive users;
- Microsoft 365 connection mode when Office365 is used.



Save Cancel

Version
⌵

SERVER NAME

VERSION

Office365

USE CUSTOM APP ☐ ⓘ

DELETE CONTACTS ON USER DEACTIVATION ☐

VERBOSE LOG (DEBUG) ☐

Synchronization
↻

☒ CONTACTS SYNCHRONIZATION

Assigned User

☒ EVENTS SYNCHRONIZATION

☒ TASKS SYNCHRONIZATION

☒ ACCOUNTS SYNCHRONIZATION

Assigned User

Selecting the Exchange version

- **Office365** for Microsoft 365 / Exchange Online;
- **Exchange 2016**;
- **Exchange 2019**;
- **Exchange SE** for Exchange Server Subscription Edition.

The selected version determines the connection method used by the connector.

Before saving

Verify that the Exchange type is correct and enable only the functions that should actually be synchronized. After saving, continue with user configuration.

Configuring Microsoft 365

For Microsoft 365 / Exchange Online, select **Office365** as the Exchange version.

If the Mail Server field is empty, the connector normally proposes `outlook.office365.com`.

Network requirement for Microsoft Graph

vtenext must be reachable by Microsoft servers

With Microsoft 365/Graph, the connector uses push notifications to receive events and changes from Microsoft. The public vtenext endpoint used by the connector must therefore be reachable over the Internet by Microsoft servers. If Microsoft cannot reach the endpoint, standard inbound event handling does not work correctly.

Before going live, verify that the vtenext instance is published correctly over HTTPS and that firewalls, reverse proxies or other security systems do not block Microsoft from reaching the connector endpoint.

Installations not reachable from the Internet

A periodic cron-based synchronization can technically be configured manually instead of push notifications. This is **strongly discouraged**, is not the standard connector architecture and is not available as a self-service configuration: it requires a specific custom setup.

Choosing the connection method

vtenext Proxy

This is the simplest option when the customer does not want to configure and manage a Microsoft application directly in their own tenant. It does not require manually entering Tenant ID, Client ID or Client Secret. Each user still completes their own Microsoft login through **Connect**.

 **Version**

SERVER NAME

VERSION

USE CUSTOM APP ☐ 

DELETE CONTACTS ON USER DEACTIVATION ☐

VERBOSE LOG (DEBUG) ☐

Custom Microsoft App

Use this option when the customer wants to manage the application directly in their Microsoft tenant, for example for specific security, governance or corporate policy requirements.

Enter:

- **Tenant ID;**
- **Client ID;**
- **Client Secret.**

The Microsoft application must use the vtenext redirect URI:

```
https://YOUR-VTENEXT/modules/Exchange/oAuth2/AuthorizationCode.php
```

Replace `https://YOUR-VTENEXT` with the actual CRM address.



Version

SERVER NAME

outlook.office365.com

VERSION

Office365

USE CUSTOM APP ☒ ⓘ

TENANT ID

XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX ⓘ

CLIENT ID

ⓘ

CLIENT SECRET

Leave empty to keep existing ⓘ

DELETE CONTACTS ON USER DEACTIVATION ☐

VERBOSE LOG (DEBUG) ☐

Required permissions

The application must allow users to authorize access to Calendar, Contacts, Tasks / To Do and offline access required to renew the session.

Authorization is delegated to each individual user: every user connects their own Microsoft account.

Changing the connection method

Reauthorization required

When switching from **vtenext Proxy** to **Custom Microsoft App**, or vice versa, existing Microsoft user connections must be authorized again.

After changing the mode, save the configuration, reconnect users with **Connect**, verify their folders and run a synchronization test.

Do not change the mode directly in production

Plan user reauthorization and validation tests before making the change.

Configuring Exchange Server

If the customer uses an Exchange Server installed on their own infrastructure, select the correct version:

- **Exchange 2016;**
- **Exchange 2019;**
- **Exchange SE** for Exchange Server Subscription Edition.

Network requirements with EWS

vtenext does not need to be publicly reachable from the Internet

With Exchange Server/EWS, the connector uses event streaming: vtenext opens the connection to Exchange and keeps it active to receive updates. The CRM can therefore remain unavailable from the public Internet.

The essential requirement is that **the vtenext server can reach the Exchange Server** and has the required outbound connectivity. No inbound connection from Exchange to a public vtenext endpoint is required.

Mail Server

In the **Mail Server** field, enter the Exchange server used by the company. The address must be reachable from the vtenext server.

User credentials

With Exchange Server, each user normally uses their own Exchange credentials. These are configured in the user profile, not in the global connector settings.

Folders

After valid credentials have been entered, the user selects the folders used for Calendar, Tasks and Contacts. The connector can display both default folders and custom mailbox folders.

Resource and Impersonation

If resource mailboxes or impersonation are used, enable these options only when the Exchange environment has already been configured for that access model. Enabling a flag in vtenext does not grant permissions on Exchange.

Recommended check

1. Test username and password.
2. Select the required folders.
3. Save the user.
4. Test an event in both directions.
5. Test Contacts and Tasks if enabled.

Choosing What to Synchronize

In the connector configuration, the main synchronization functions can be enabled or disabled independently.

Events / Calendar

Enable this option when appointments and events must remain aligned between vtenext and Exchange. Also test recurring events and, with Microsoft 365, online meetings if used.

Contacts

Enable Contact synchronization when contacts should also be available in Exchange. The field mapping determines which values are transferred, such as e-mail, phone and address.

Tasks

Enable this option when tasks must be synchronized with Microsoft / Exchange tasks. With Microsoft 365, the task folder corresponds to a Microsoft To Do list selected by the user.

Organizations

Organization synchronization transfers company data according to the configured mapping.

Specific user or “same as entity”

For Contacts and Organizations, synchronization can use either a **specific user** or **same as entity**, which follows the record assignee. Selecting a specific user sends all records to a predefined mailbox, which can then be used on the Exchange side for shared lists or shared access scenarios.

Contacts and inactive users

Enable deletion of Contacts for inactive users only if that behavior is explicitly required. In environments with shared Contacts, test it first with one user and a small number of records.

Practical rule

Do not enable a function simply because it is available. Synchronize only the modules that are actually required and review the corresponding mapping first.

Changing Exchange Type or Connection Method

Changing the Exchange type on a connector already in use must be treated as a **configuration migration**.

Delicate procedure

Do not change the Exchange type or connection method directly in production without planning the change. Users may need to authenticate again, reselect folders and wait for a new synchronization alignment.

Switching between Exchange Server and Microsoft 365

When changing from Exchange Server to **Office365**, or vice versa, vtenext displays a confirmation message. After confirmation, the connector resets the connection state required for synchronization.

After saving, users may need to:

- sign in again;
- re-enter or verify credentials;
- select folders again;
- wait for a new connector alignment.

Field mappings and original vtenext records are not deleted simply because the provider changes.

Switching between vtenext Proxy and Custom Microsoft App

User reauthorization

When switching between **vtenext Proxy** and **Custom Microsoft App**, existing Microsoft authorizations must be completed again by the affected users.

1. Select the new mode.
2. Enter the app parameters if required.
3. Save and confirm the warning.
4. Open each Exchange user.
5. Run **Connect** again.
6. Check the selected folders.
7. Run a synchronization test.

When to make the change

Perform the change in a controlled maintenance window and avoid simultaneous bulk imports, mapping changes, mass record updates or large folder moves in Exchange. First complete the provider change and verify that synchronization is stable.