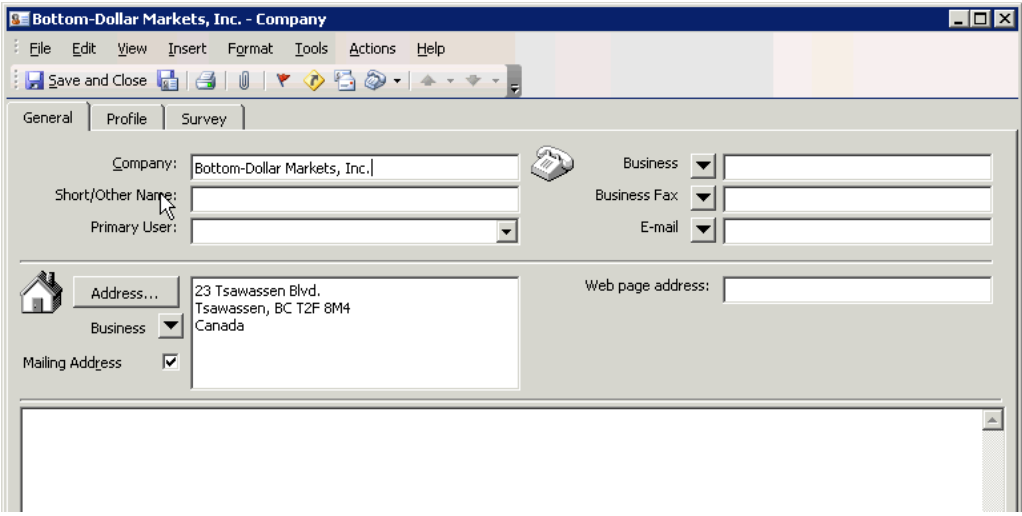
1 Introduction

Since Microsoft began 'de-emphasizing' Public Folders in Exchange Server a few years back (see the article 'The Future of Public Folders', it seems not many folks are using the Organizational Forms library. But this still remains an incredibly useful mechanism for storing/maintaining custom forms for both Private and Public Folders. This article describes how to activate the Organizational Forms Library and use it for storing/publishing Outlook custom forms used in both Private/Mailbox folders and Public Folders.

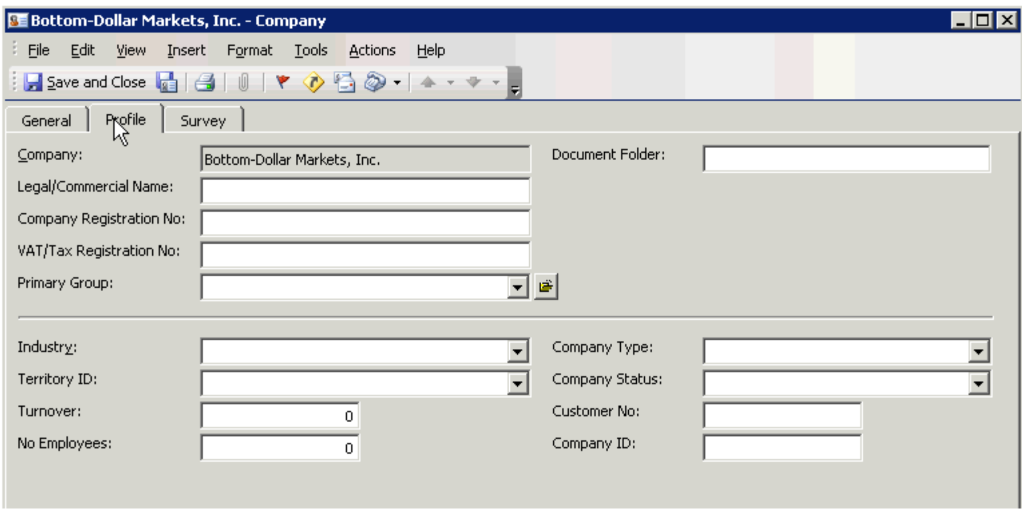
2 Organizational Forms

2.1 Overview

Exchange Server has a mechanism known as Organizational Forms which allows a custom Outlook form to be set as the default form for any Outlook/Exchange folder. So for example, if you create a Companies custom folder in Outlook, you can design and publish a custom form tailored to accommodate the typical company data fields, as shown below:



Data fields that categorise and classify the company could be shown/updated on the Profile page:



2.2 Advantages of Organizational Forms

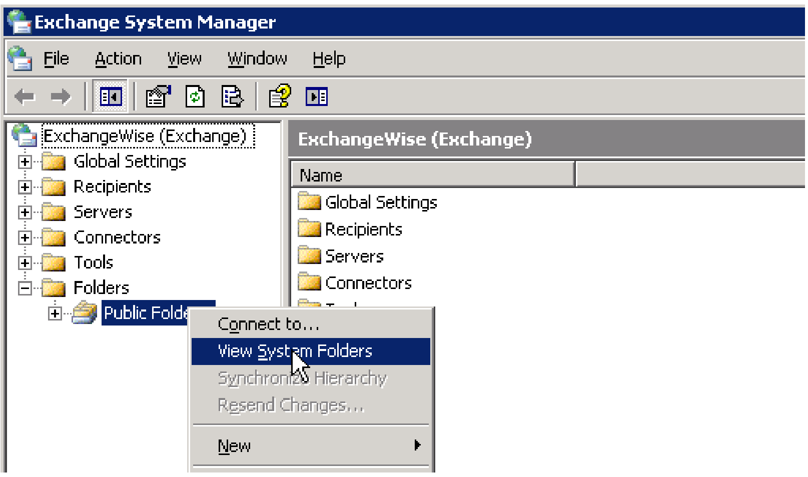
The use of Organizational Forms has several key benefits:

- Forms are maintained in a central repository, which means any changes to the form are automatically loaded by each user the next time he or she opens an item in the folder utilising that form.
- Standard Outlook/Exchange functionality is utilised for maintaining information. The standard Outlook Forms Designer is used for making changes to the forms design. VB Script on the form is used to code any business logic required.
- No client installation is necessary for displaying/deploying custom forms. This reduces the support burden on the IT department.
- Forms are synchronized to one's Cached Mode folders and so are available offline. However, as mentioned above, forms are automatically updated when a connection to the Exchange Server is re-established.
- Forms can be designed for each language environment so that each user sees the form in his or her own language.
- Forms can be replicated from one Exchange Server to another.

2.3 Creating the Organization Forms Library

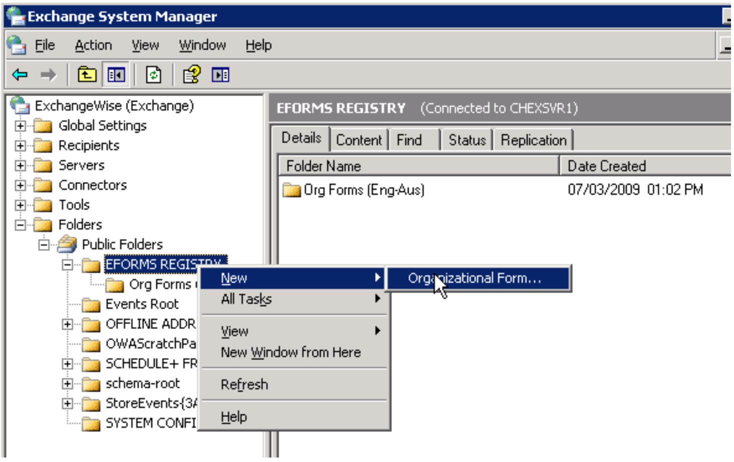
To create a new Organizational Forms Library in Exchange:

1. Start Exchange System Manager.
2. Expand the **Organization** object.
3. Expand your **Administrative Group**.
4. Expand **Folders**.
5. Right-click **Public Folders**.
6. Click **View System Folders**:

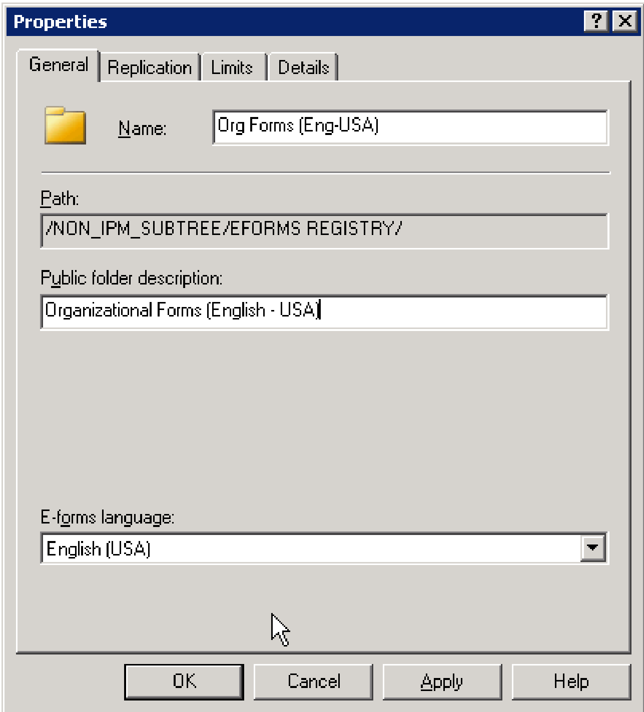


7. In the list of folders present in the right-hand pane, click the **EFORMS Registry** folder.

8. Right click on the **EFORMS Registry** folder and select **New->Organizational Form**:



9. Enter a name for your Organizational Forms Library, and then click **OK**:

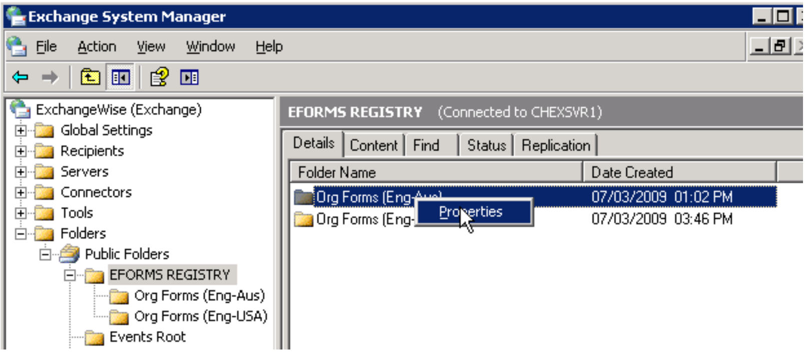


10. Repeat these steps for multiple libraries for each language. Note that you can only have only one Organizational Forms Library for each language per organization.

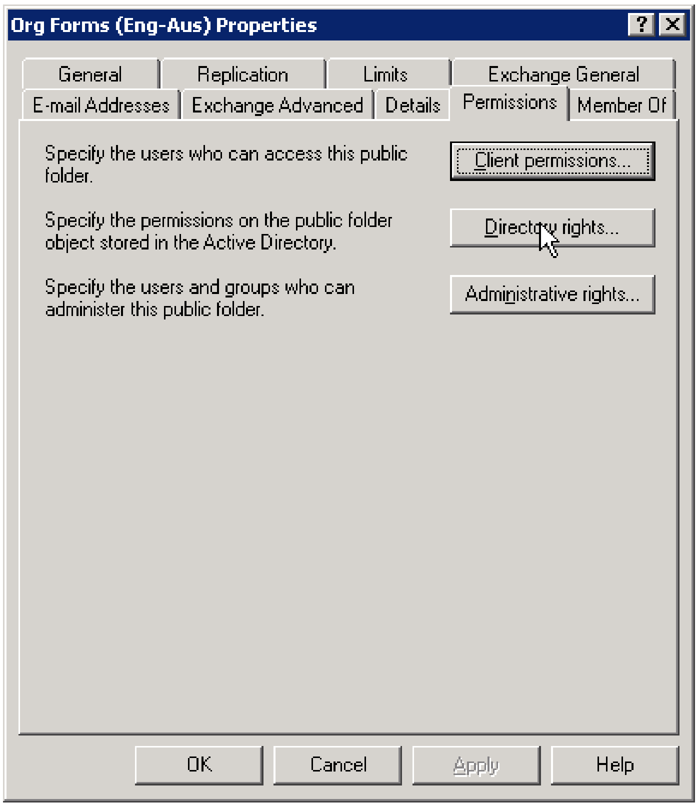
2.4 Setting Permissions for the Users

To set the permissions for the Organization Forms Library, do the following:

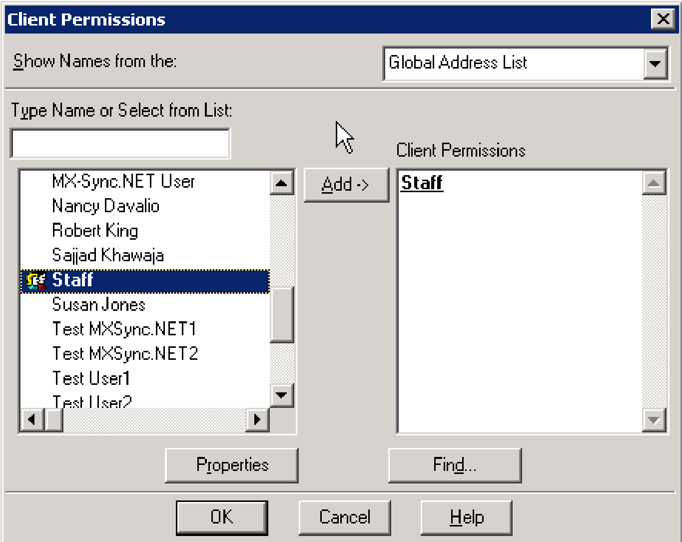
1. Right click on the appropriate **Organizational Forms** Library for your language and select **Properties**:



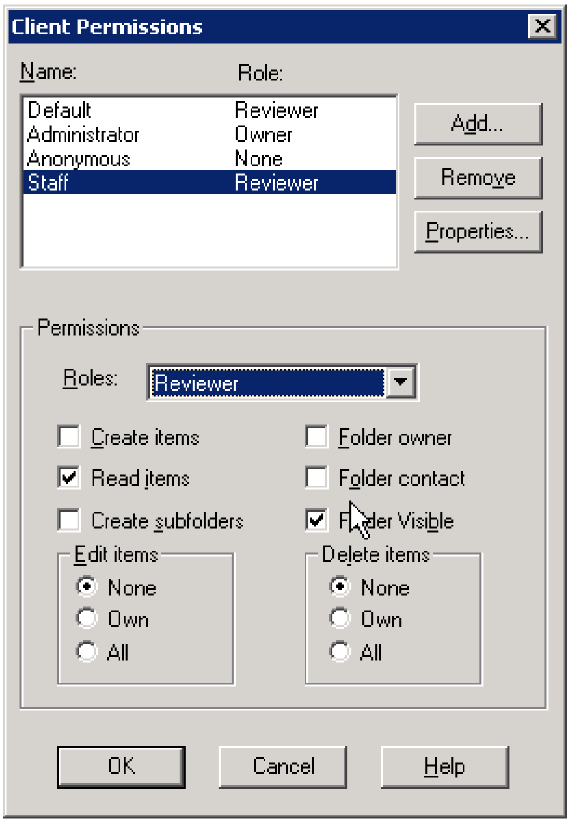
2. Select the **Permissions** Tab:



3. Click **Client Permissions...** and add the Group of users that needs access to this form (**Staff** in this example):



4. Grant the Group **Reviewer** permissions:

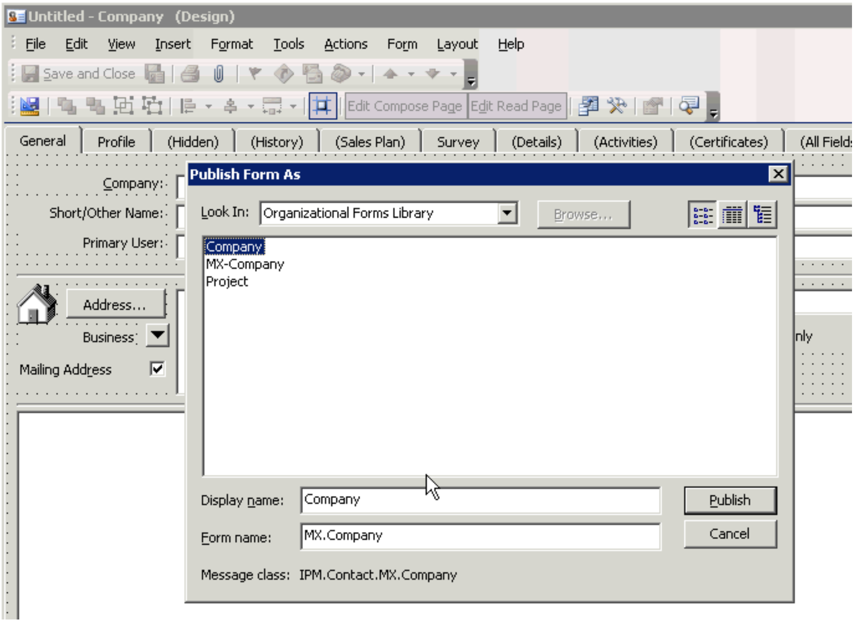


5. Click **OK** to close the **Client Permissions** dialog.
6. Click **OK** to close the **Org Forms Properties** dialog.
7. Note that you will need to grant **Owner** permissions to users who intend to design forms for the library.

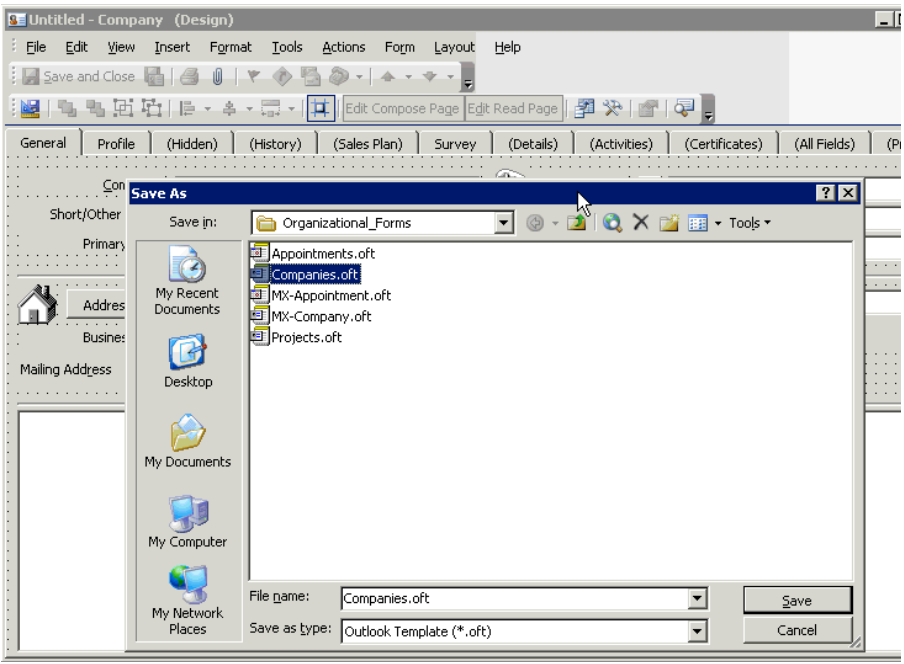
2.5 Publishing a Form to the Organizational Forms Library

To publish a form to the Organization Forms Library, do the following:

1. Open a standard Contact form and design it accordingly.
2. Click **Tools->Forms->Publish Form As**:



3. Enter **Company** in the **Display Name** and **MX.Company** in the **Form Name**. Click **Publish**.
4. Click **File->Save As** and save the form as an **.oft** file on the file system as a backup:

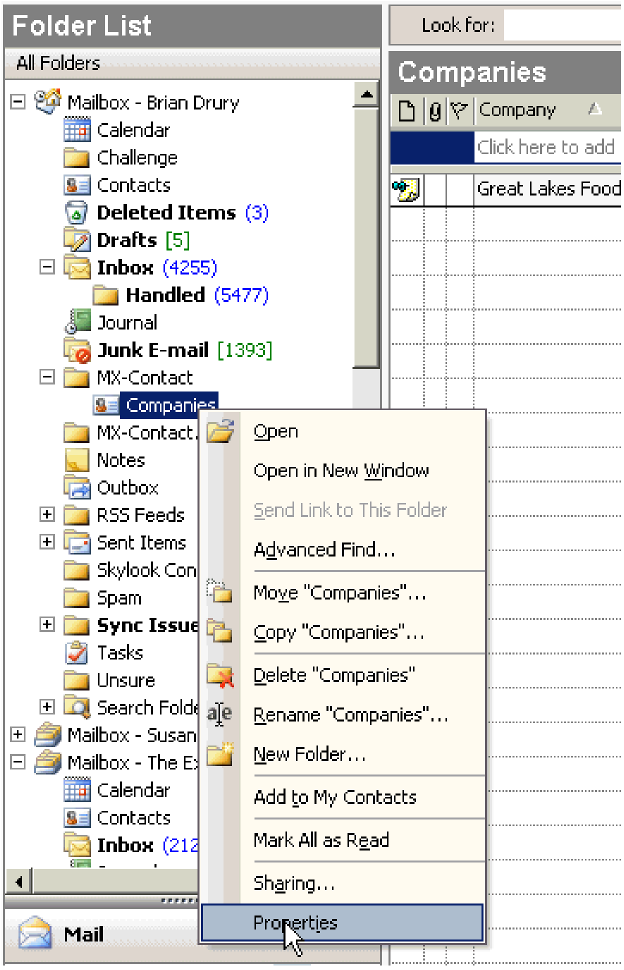


5. Close the form and do not save changes.

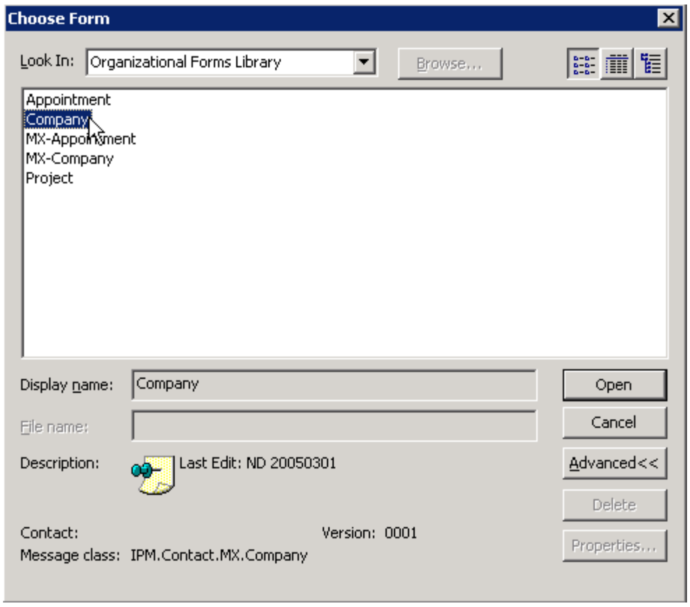
2.6 Setting the Organizational Form as the Default Form on a Folder

To set a custom form in the Organization Forms Library as the default form for the folder, do as follows:

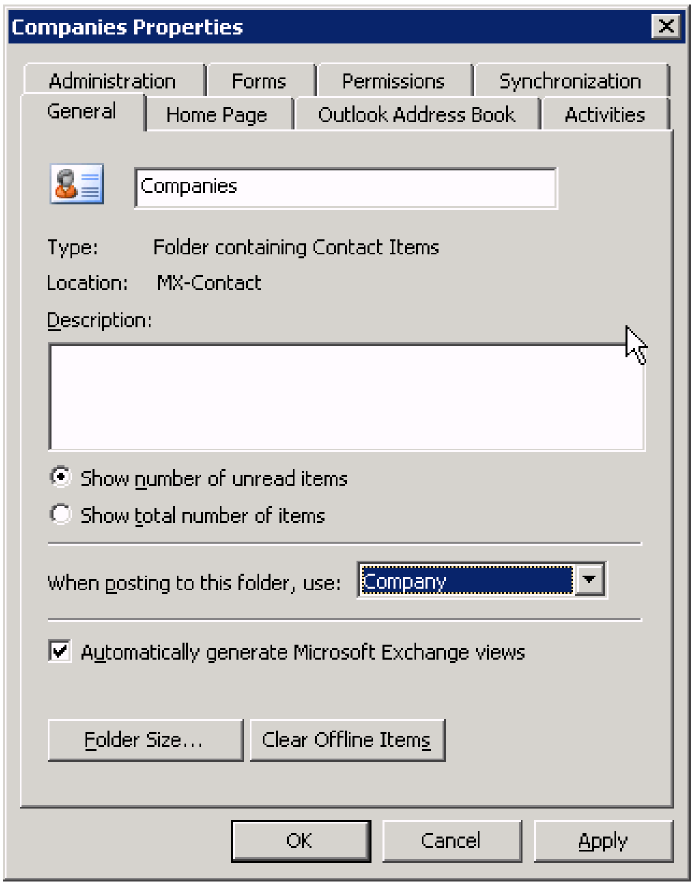
1. Right click on the folder (**Companies** in this example) and select **Properties**.



2. The Companies Properties window will appear. In the dropdown labeled **When posting to this folder, use:** select **Forms**:
3. Choose the **Company** form from the Organizational Forms library.



4. The **Company** form should now be the default form for the folder:

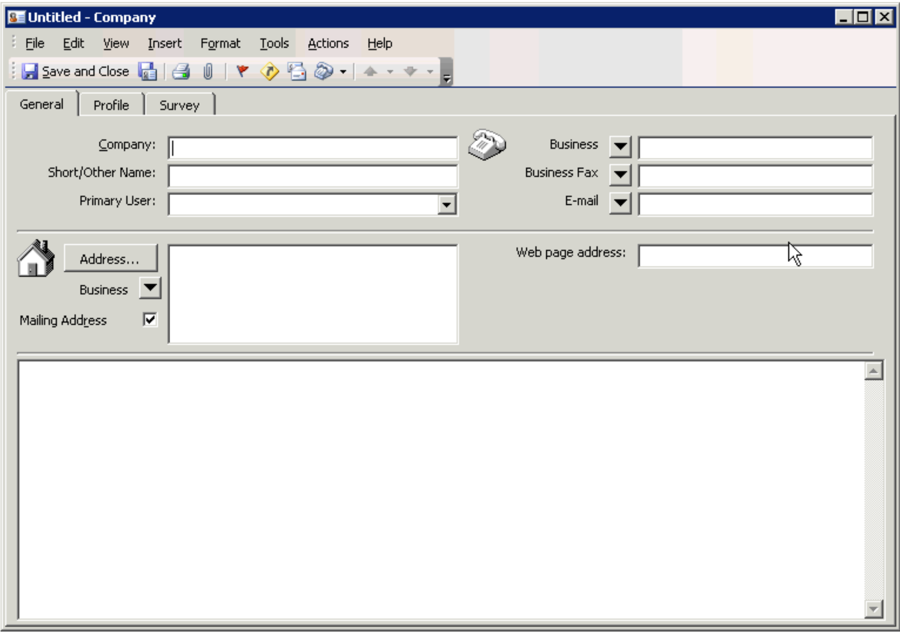


5. Click **OK** to close the **Companies Properties** dialog.

2.7 Creating New Items in the Companies Folder

To create a new 'company' in the Companies folder, do as follows:

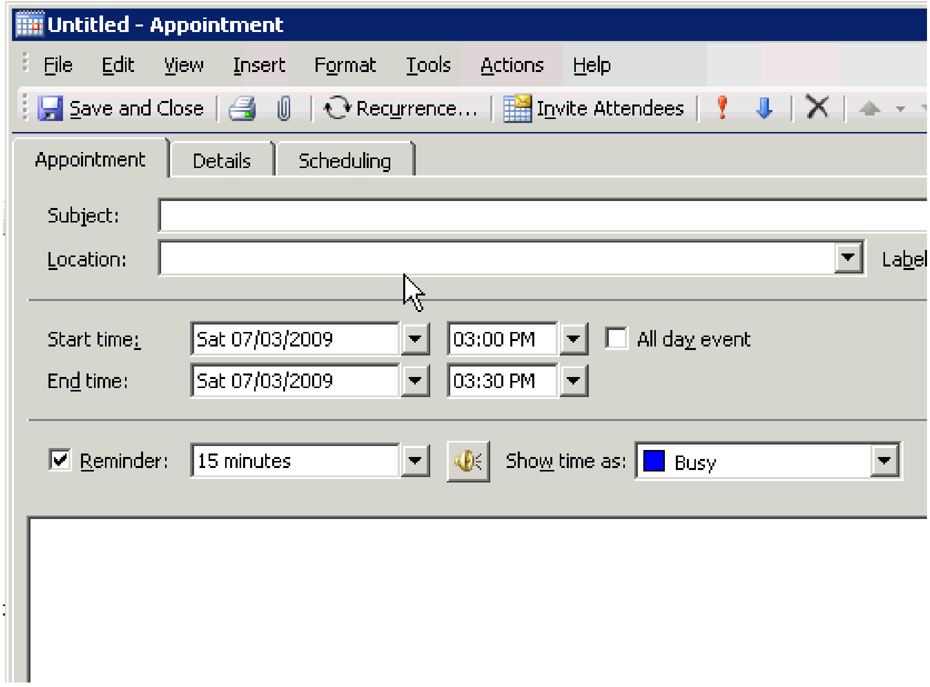
1. Click **New** on the **Companies** folder. Your custom Company form should open.



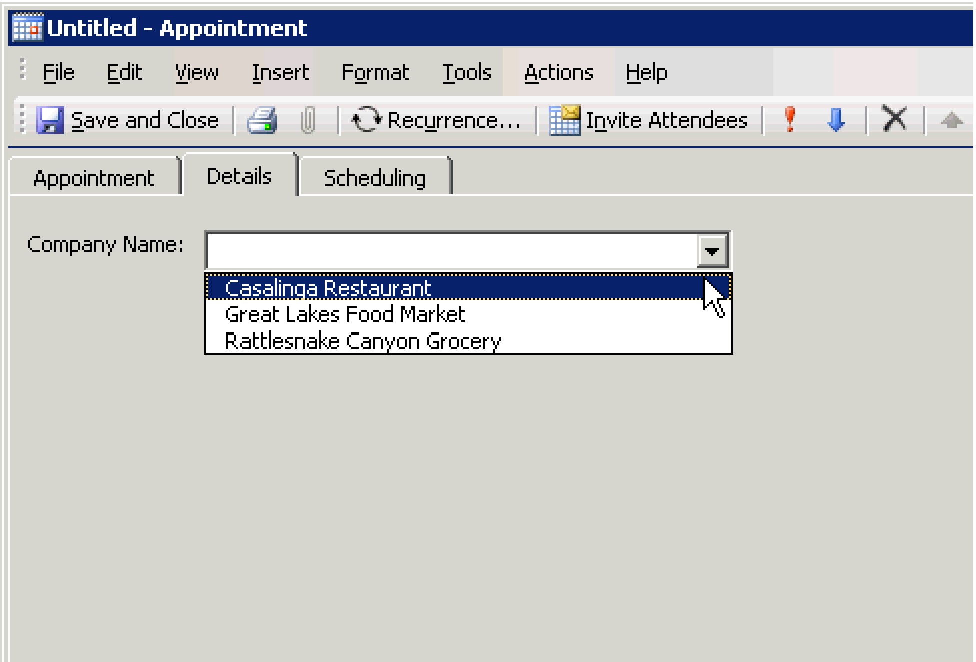
2.8 Linking Items using Custom Forms

Below is an example of an appointments form used to link to a company in the Companies folder:

1. A custom appointment form with a Details tab is deployed on the Appointments folder:



2. The **Details** tab has a **Company Name** dropdown field that loads a list of the companies from the **Companies** folder:



3 Integrating Outlook Data with your Back-End CRM or ERP System

Having the ability to create custom folders and forms in Outlook to extend Outlook's functionality beyond simple contact management is one thing. But the real benefit in all this usually lies in being able to integrate this data with your corporate accounting or CRM database.

This integration can be achieved by utilizing a utility like MX-Sync. MX-Sync is an Exchange Server to Database synchronization utility. So it is used to synchronize Outlook/Exchange with any back-end database, be it SQL Server, MySQL, Oracle, Sybase, etc.

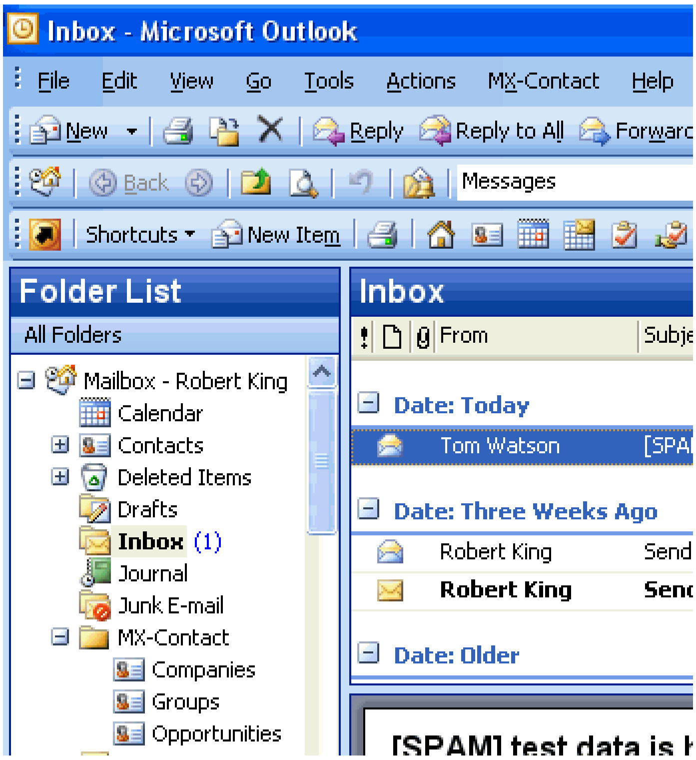
For more information on MX-Sync visit www.mxsync.com.

3.1 Custom Folders

MX-Sync will synchronize data bi-directionally between Outlook/Exchange custom folders and a SQL (or other) database in the same way it syncs any other Outlook/Exchange folder.

So in the example shown below, MX-Sync can be used to synchronize not only Inbox, Sent Items, Contacts, Calendar, Tasks, etc, but also the 3 custom folders (**Companies**, **Groups** and **Opportunities**) that appear below the **MX-Contact** folder.

(Note that when MX-Sync runs, it can be set to create the required custom folders in each user's mailbox automatically).



MX-Sync will also synchronize the custom (non-Outlook) fields associated with the corresponding table in SQL Server. So for example, if an Opportunities table exists in SQL, with custom fields like **Stage**, **Status**, etc. MX-Sync will sync these data fields down to Outlook and create the necessary custom fields.

3.2 Links Between Items

Aside from simply synchronizing the data, MX-Sync can also create links in the SQL database between items/records. So if your Outlook Company form has the ability to create links to Contacts (see the article on Extending Outlook's Functionality with the use of Custom Forms) then MX-Sync can create the necessary links between the company and contact item in the SQL database.