

Fast•Class File

SmartOffice

Volume 47: SmartLink for Outlook E-mail

Before using SmartLink for Outlook E-mail you must have Microsoft Outlook (version 2003 or later) installed on your computer.

Installation

- Ensure that Outlook is closed before installing **SmartLink for Outlook Email**.
- From the SmartOffice main menu, click **User Setup** then click **Installations**.
- In the installations page, click **SmartLink for Outlook Email**.
- Depending on security settings on your system, you may see a security warning. If the **Security Warning** window appears, click **Yes** and continue with the installation.
- When the installation is complete, open **Outlook** to verify that the installation was successful.

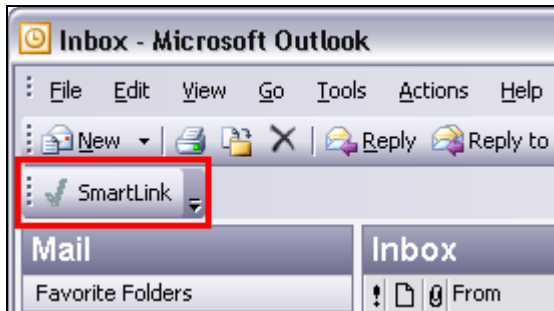


Figure 1: The SmartLink button in the Outlook toolbar.

You will see a new **SmartLink** button on the Outlook toolbar. When the link between Outlook and SmartOffice is active, the **SmartLink** button will have a check mark on it. If the link is not active, the checkmark will be replaced with an 'x.'

The SmartLink button can be easily re-located on the toolbar by left-clicking and dragging the button to the desired location.

SmartLink for Outlook Settings

- To manage the settings for SmartLink for Outlook Email, select **Tools** in the Outlook menu bar then select **Options**.
- In the **Options** window, select **SmartLink**.



Figure 2: The SmartLink Options tab.

SmartLink options work as follows:

- The first option will allow you to manually select which messages in outlook should be posted to Contact SmartPad records in SmartOffice. This option will also allow you to post the message to Contact SmartPad records even if the contact is not one of the message recipients. The second part of the manual post option determines whether or not a 'prompt-to-post' message will be displayed after each email sent. For this example, I will leave these two options selected.
- The second option will automatically display the 'prompt-to-post' message for each e-mail sent provided that SmartOffice is open. However, this option will only post the email to a contact records with email addresses in SmartOffice that match email addresses associated with the message.



- The third option will not give you any prompts but will ensure that email messages will be automatically posted to contact records in SmartOffice based on email matching, provided that SmartOffice is open when a message is sent.
- You have the option to choose which address fields in Outlook will be used to match email addresses in SmartOffice Contact Records.

Using SmartLink for Outlook Email

- Select a contact to send an email to. On the contact detail tab, click the contact's email address.
- An Outlook **New Message** window will open. Compose the email message.
- Click **Send** when finished.
- SmartLink will display a 'Prompt-to-Post' window.

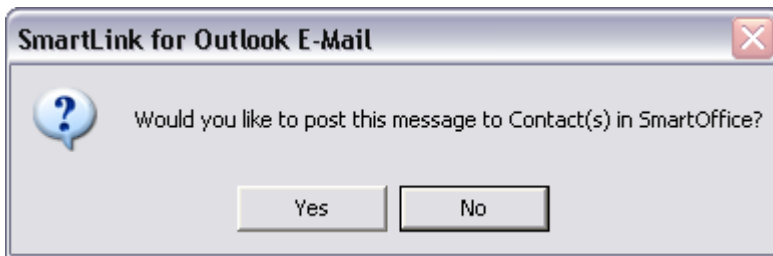


Figure 3: The Prompt-to-Post window.

- Click **Yes** to post email to a contact SmartPad record.

*Note: Before you can post an e-mail from Outlook to a contact record in SmartOffice, you may be prompted to enable permission for the two programs to communicate with each other. Outlook will launch a permission window informing you that a program is trying to access e-mail address information. You need to allow this communication in order to post the e-mail to a contact record in SmartOffice. Click on the **Allow access for** checkbox and choose a period of time from the pull down field. One minute is sufficient to post one e-mail message. The most time you can select is ten minutes.*

- SmartLink will display a list of SmartOffice contacts with email addresses matching those associated with the Outlook email.
- Based on your SmartLink option selection, you may be able post the email to any contact in SmartOffice.
- To add a contact for posting, click the **Search** button and search for the desired contact. When you select a contact from a search, the contact will automatically be selected for posting.
- Select the contacts for posting and click **Post**.

To Post a Received Email to Contact SmartPad

- Select the email to be posted in Outlook and click the **SmartLink** button.
- Based on options selected on the **SmartLink** options tab, you may be prompted to select contacts for posting. Contact selection will be determined by email matching in SmartOffice.
- Due to SmartLink option selection, you may also be able post the email to any contact in SmartOffice.
- To add a contact for posting, click the **Search** button and search for the desired contact. When you select a contact from a search, the contact will automatically be selected for posting.
- Select other contacts for posting and click **Post**.

