

SmartMail for Outlook
User Guide

SmartOffice[®]



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Introduction

SmartMail for Outlook is an add-on feature of SmartOffice® that integrates SmartOffice with Microsoft® Outlook® and creates a seamless interface between the two, enabling users to continue using MS Outlook as their e-mail client. Users can compose MS Outlook e-mail messages directly from SmartOffice and post messages to the SmartPad™. SmartMail for Outlook requires either Microsoft Outlook version 2002 (XP) or 2003. This document provides step-by-step instructions for the installation and use of SmartMail for Outlook.

Installing SmartMail for Outlook

1. Make sure Outlook is not running prior to the installation of SmartMail.
2. From the side menu, click **User Setup** and then select **Installations** to open a list of additional components that can be installed from SmartOffice.
3. Click **SmartMail for Outlook** to begin installation.
Note: If a warning displays that asks for permission to download an application from E-Z Data, Inc., click the **Yes** button to allow the download to occur.
4. After the installation is complete, MS Outlook will open automatically.

The screenshot shows the SmartOffice web application interface. The main content area is titled "Installations" and contains a table with the following data:

Download	Description
SmartOffice Mobile	Enables synchronization of SmartOffice data with a notebook PC.
SmartOffice Mobile for Palm and Pocket PC	Enables synchronization of SmartOffice data with Palm OS and Pocket PC devices.
SmartLink for Outlook	Enables SmartOffice contacts and activities to synchronize with Microsoft Outlook.
SmartLink for Word	Enables SmartOffice to import and export documents to and from Microsoft Word.
SmartScanner	Enables a scanner interface. Allows embedding of scanned documents.
SmartDiabler	If using a modem or network telephony system, allows phone numbers to be dialed directly from SmartOffice
SmartLink for Spreadsheet Export	Enables SmartOffice to export spreadsheet data in Comma Separated Values, Tab Separated Values, and XML formats into the Browser, Notepad, Microsoft Excel and Microsoft Word applications.
SmartLink for Excel Reports	Enables SmartOffice to export report data to Microsoft Excel.
SmartMail for Outlook	Enables SmartOffice to use Microsoft Outlook for sending e-mail messages and posting them to the SmartPad.
Adobe Acrobat Reader Site	Downloads Adobe Reader, used for printing spreadsheets and reports.
Download SmartOffice Static Content	Downloads static pages into cache. Makes SmartOffice run faster.
Download Crystal Reports Viewer	Downloads Crystal Reports Viewer, used to display and print reports available on the Crystal Server.
SmartLink for Windows Explorer	Enables the posting of files from Windows Explorer to various areas of SmartOffice.

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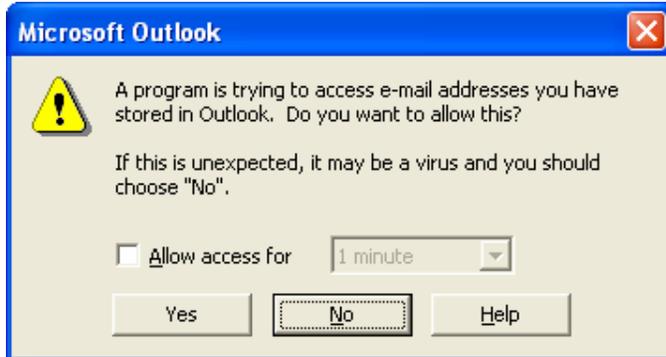
Posting Messages to the SmartPad

Following installation, a SmartMail button will be available in MS Outlook for posting e-mail messages from MS Outlook to SmartOffice.

1. Select the e-mail message(s) for posting and then click the **SmartMail** button.



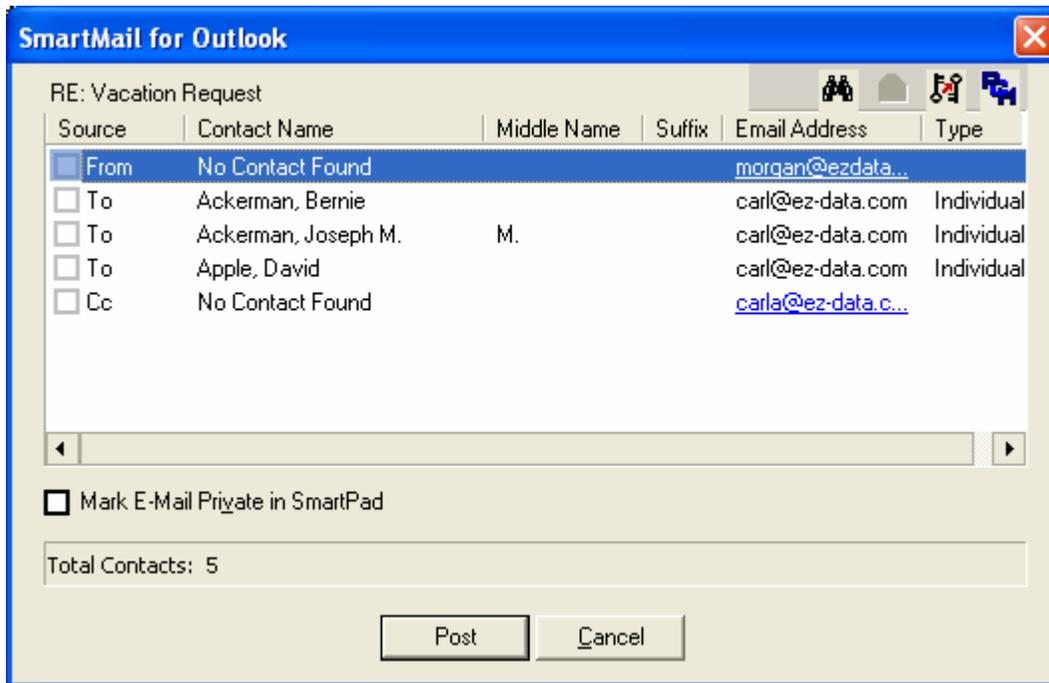
Note: Depending on the version of MS Outlook installed and the updates applied, the following security dialog box may be displayed when posting messages to SmartOffice.



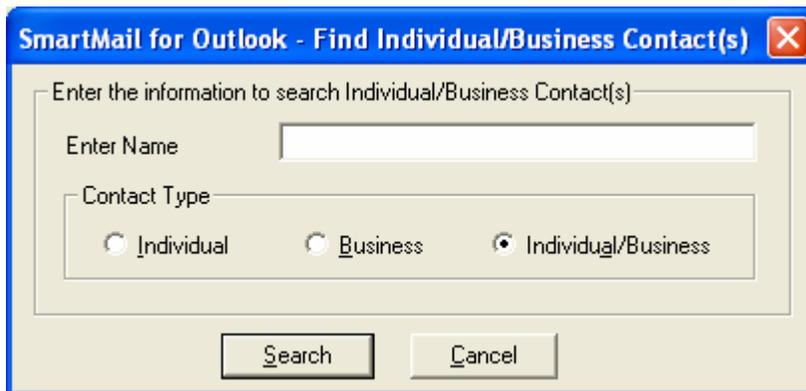
2. From the dialog box, select the **Allow access for** option to access the duration drop-down list, select **10 minutes** and then click the **Yes** button to proceed with posting.



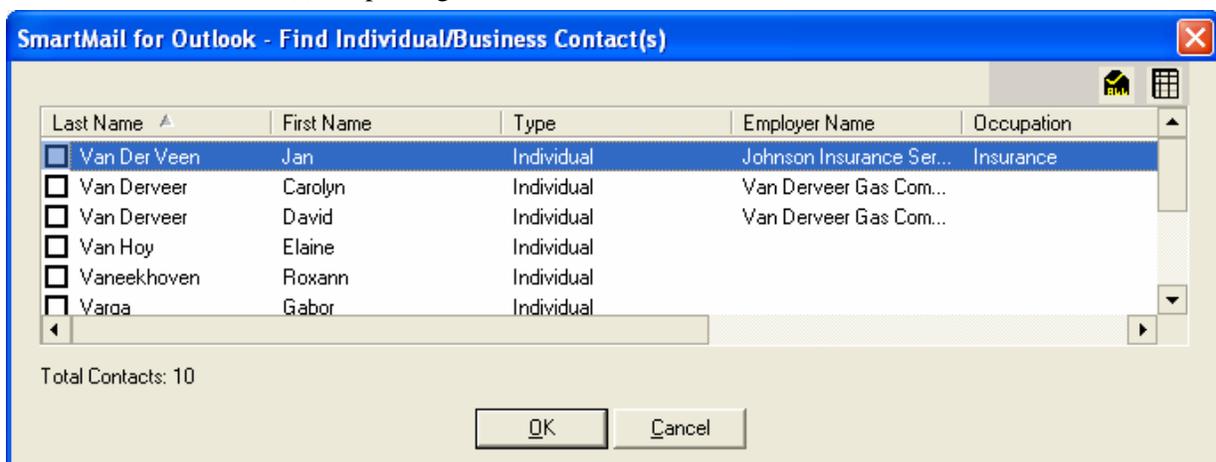
- To post the selected message to additional contacts, click the **Search Contacts** button.



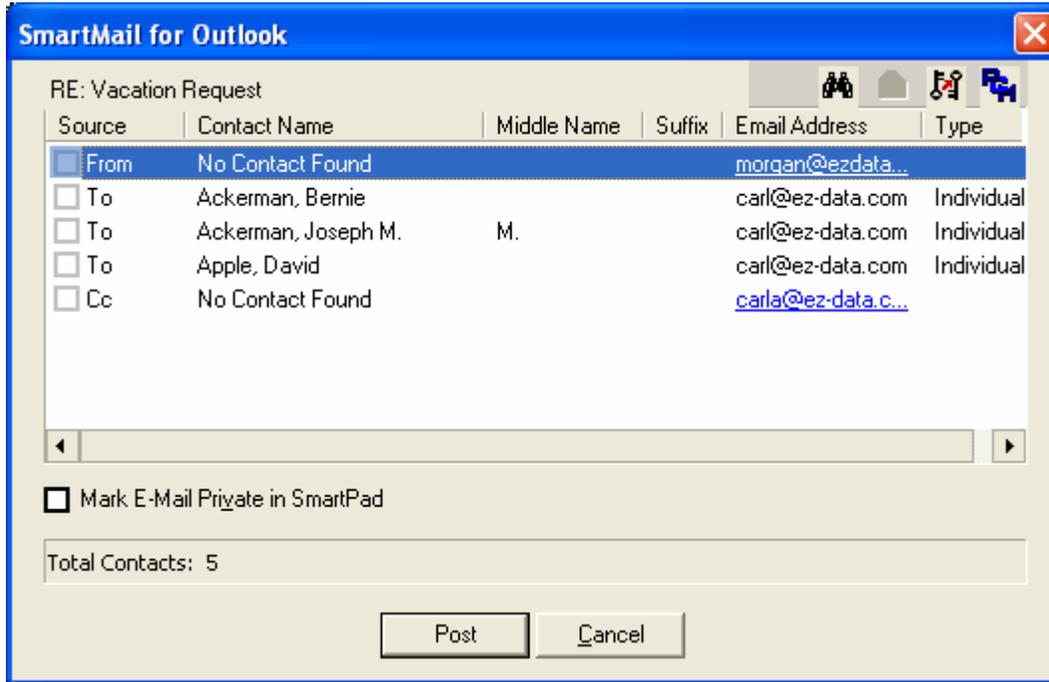
- Enter search criteria to locate a contact or business record for posting.



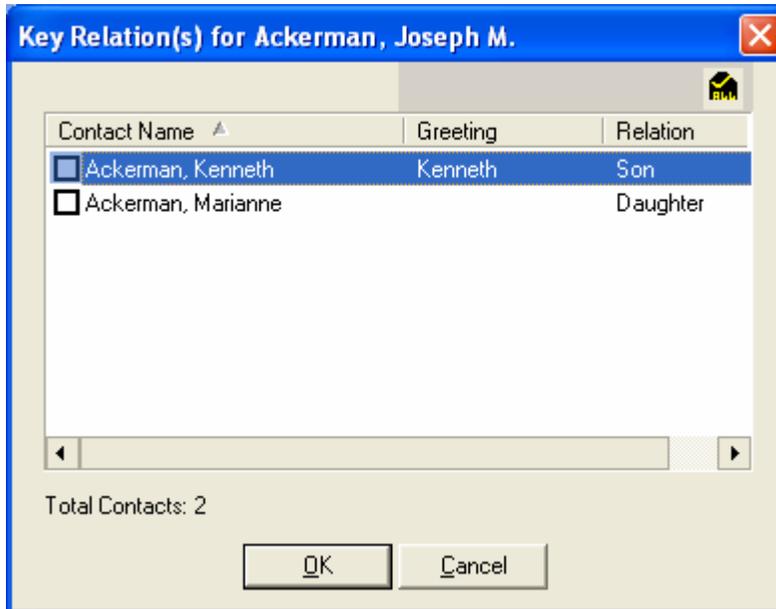
- Select additional contact(s) for posting.



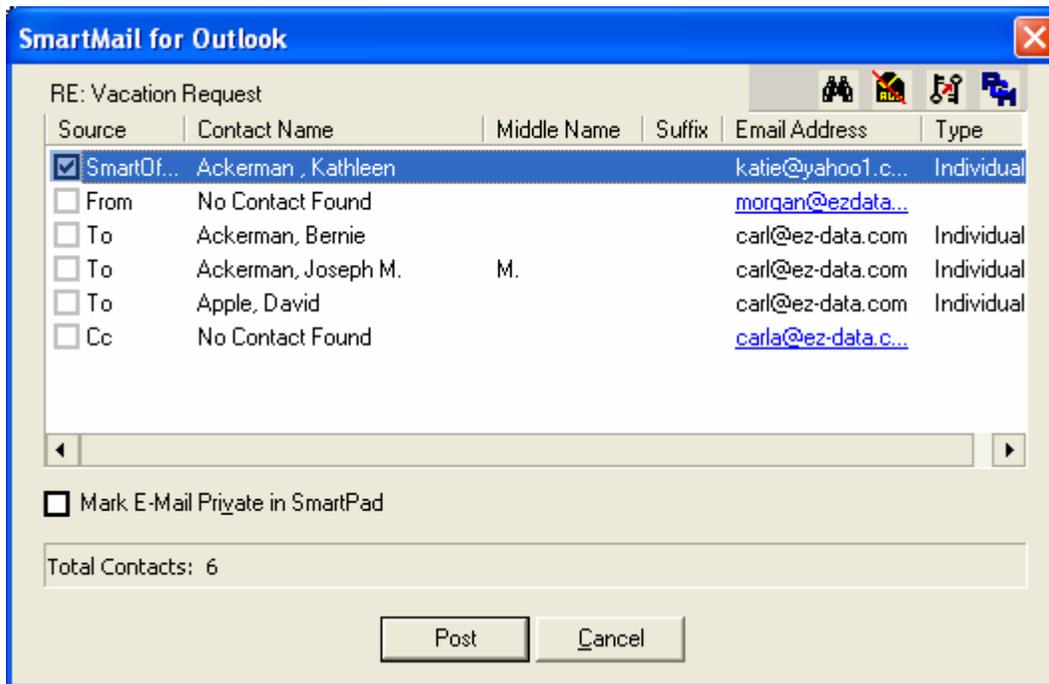
- To post e-mail to a contact's Key Relations, select the contact and then click the **Key Relations** button.



- Select the Key Relation(s) for posting and then click the **OK** button.

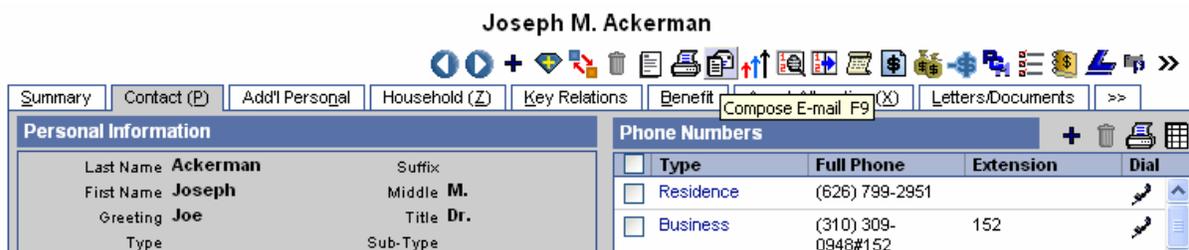


- Click the **Post** button to copy the e-mail message(s) to the SmartPad of the selected (checked) contacts and their Key Relation(s).

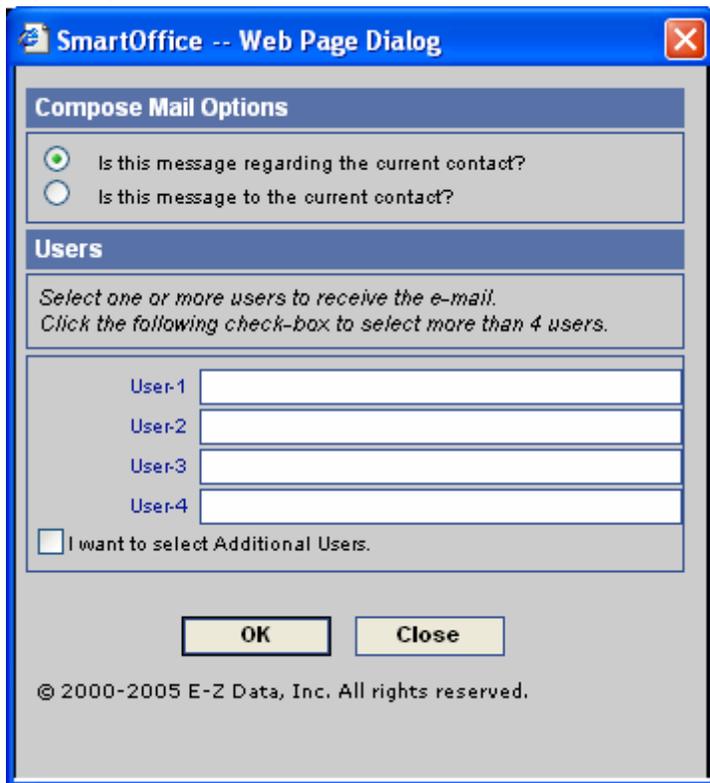


Compose Mail from SmartOffice

- From an open Contact record, click the **Compose Mail** button.



- Determine if the message being sent is to the selected contact or to another SmartOffice user regarding the selected contact.



- A MS Outlook compose window displays. When the message is sent, it will be posted to the SmartPad of the recipient(s).
Note: Any e-mail message composed from Outlook can be posted to the SmartPad while the user is logged into SmartOffice. When the user clicks the **Send** button in MS Outlook, a “Would you like to post the e-mail to SmartPad™?” message displays. Selecting **Yes** opens a contact selection dialog box.