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## Introduction

SmartLink for Lotus Notes synchronizes Contact, Calendar and To Do information between SmartOffice® and IBM® Lotus Notes® 2003.

## Creating a SmartLink (Lotus Notes) User

1. Log into SmartOffice as an Admin user. Admin users can set up access rights for other users, including Lotus Notes Synchronization.
2. Select **Office Settings** from the expanded **Office Setup** menu to open a list of available offices.
3. Select the appropriate office and then click the **Licenses** tab.
4. Select the **Lotus Notes Integration Module** option and then click the **Save** button to record the change.
5. Select the **User Setup** menu option to open an additional list of options.
6. Select **User Management** to open a list of users for the selected office.
7. Select the user name to be configured and then click the **User Roles/Licenses** tab.

The screenshot shows a window titled "User Roles/Licenses" with four tabs: "Summary", "Detail (P)", "User Roles/Licenses", and "Module Access Control". The "User Roles/Licenses" tab is active, displaying a list of options with checkboxes. The options are grouped into sections: "User Role", "E-mail Interface", "Contact/Calendar Synchronization", and "Advanced Contact Management Features".

User Role	
<input checked="" type="checkbox"/>	Mass Modification
<input checked="" type="checkbox"/>	Mass Correspondence
<input checked="" type="checkbox"/>	Mass Activity Creation
<input checked="" type="checkbox"/>	Mass Assignments

E-mail Interface	
<input type="checkbox"/>	SmartMail for Outlook
<input checked="" type="checkbox"/>	SmartMail for Lotus Notes

Contact/Calendar Synchronization	
<input type="checkbox"/>	SmartLink for Outlook
<input checked="" type="checkbox"/>	SmartLink for Lotus Notes

Advanced Contact Management Features	
<input checked="" type="checkbox"/>	SmartView for Clients - Button
<input checked="" type="checkbox"/>	Convert Contact Type - Button
<input checked="" type="checkbox"/>	Contact Copy - Button
<input checked="" type="checkbox"/>	Show Business Hierarchy - Button
<input checked="" type="checkbox"/>	Household-Key Relations Sync - Button
<input checked="" type="checkbox"/>	Contact Merge - Button

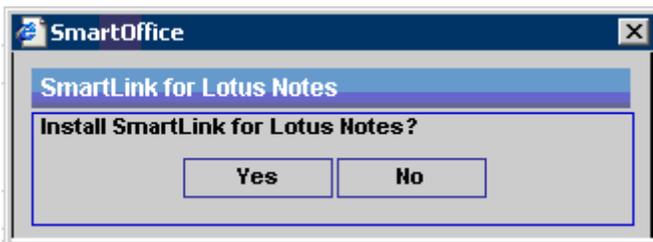
8. In the Contact/Calendar Synchronization section, select the **SmartLink for Lotus Notes** option and then click the **Save** button.
9. The user now has the SmartLink for Lotus Notes user role enabled.
10. Select **Installations** from the expanded **User Setup** menu to display the Installations Summary.
11. The SmartLink for Lotus Notes hyperlink to download the installation for SmartLink Lotus Notes Synchronization is now available.

## Installing SmartLink for Lotus Notes

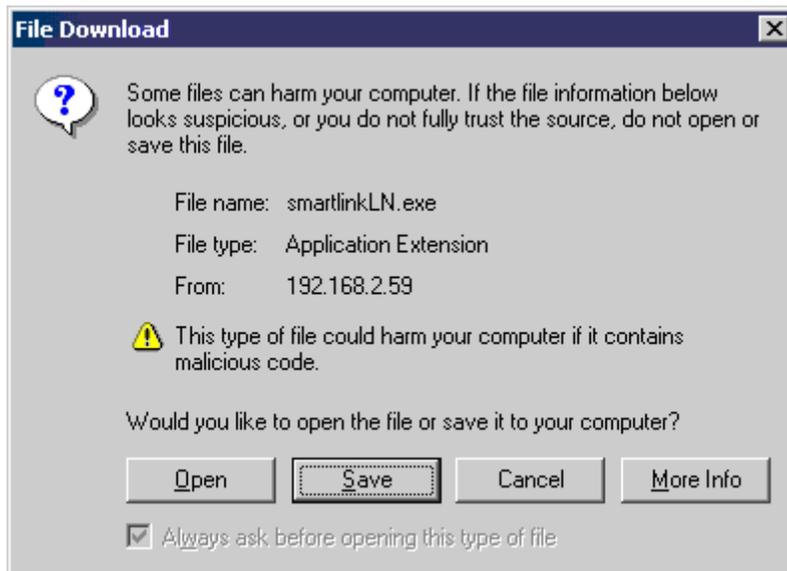
1. Before starting the installation, please make certain Lotus Notes is not running.
2. From the side menu, click **User Setup** and then select **Installations** to open a list of additional components that can be installed from SmartOffice.

Installations	
Download	Description
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.
SmartDialer	If using a modem or network telephony system, allows phone numbers to be dialed directly from SmartOffice
SmartLink for Lotus Notes	Enables SmartOffice contacts and activities to synchronize with Lotus Notes.
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.

3. Select the **SmartLink for Lotus Notes** hyperlink. Note that if a warning displays that asks for permission to download an application from E-Z Data, Inc., click the **Yes** button to begin the download.

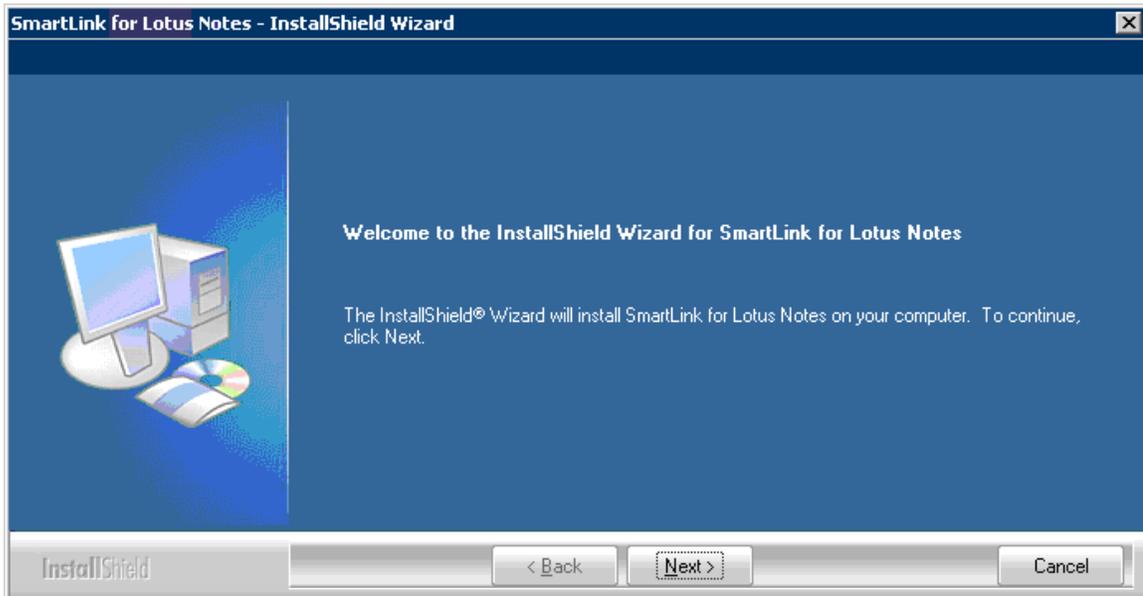


4. From the **SmartLink for Lotus Notes** dialog box, click the **Yes** button to open the File Download dialog box.



5. Select the location to save the installation package (.exe) and then click the **Save** button.
6. Once the download completes, run the installation package (.exe) to start installing the **SmartLink for Lotus Notes** components.

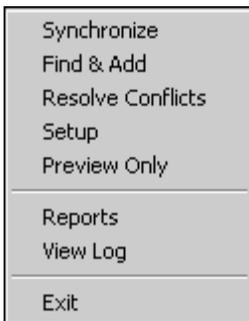
7. Running the installation package (.exe) will open the SmartLink for Lotus Notes - InstallShield Wizard.



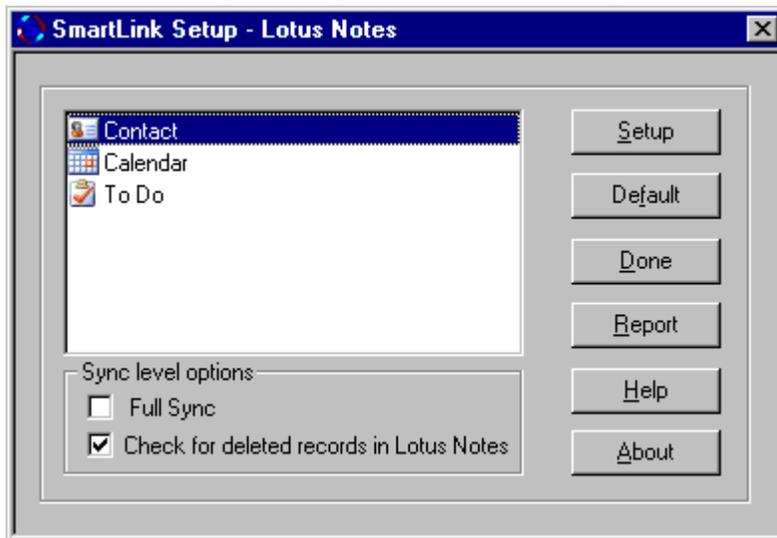
8. Click the **Next** button to proceed with the installation.
9. The SmartLink for Lotus Notes components will be installed on the local computer.
10. When the installation completes, click the **Finish** button.
11. When SmartLink for Lotus Notes has been successfully installed, verify that the SmartLink button displays in the system tray.

## Set up SmartLink for Lotus Notes

1. Right-click the SmartLink button to display a list of options.



2. Select the **Setup** option to open the SmartLink Setup – Lotus Notes dialog box.



The SmartLink Setup dialog box enables the user to specify the way information will synchronize between SmartOffice and Lotus Notes. The Contact, Calendar and To Do options enable these sections to be configured independently by selecting the section to be configured and then clicking the **Setup** button.

Synchronization-level options contain additional setup options:

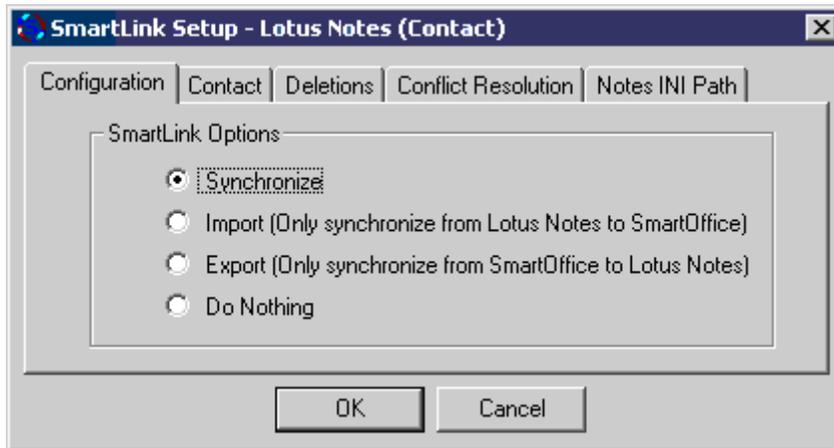
- **Full Sync** - This is checked by default during the first synchronization and will be required whenever synchronization settings are modified.
- **Check for deleted records in Lotus** - This option will check for records that were deleted from Lotus Notes during the synchronization and delete the corresponding records from SmartOffice if setup options and user rights allow. Any records deleted from SmartOffice will always be deleted from Lotus Notes based on setup options.

The buttons enable the user to access specific functions:

- **Setup** - Enables the user to configure the Contact, Calendar, or To Do sections of SmartLink.
- **Default** - Restores the default synchronization settings of SmartLink.
- **Done** - Closes the SmartLink Setup dialog box and saves any changes that were made.
- **Report** - Enables the user to select and review Reports from previous synchronizations. This functionality can also be accessed from the Reports option in the SmartLink toolbar.
- **Help** - Enables the user to access helpful information regarding the use of SmartLink for Lotus Notes.
- **About** - Enables the user to access the build and version information for SmartLink for Lotus Notes.

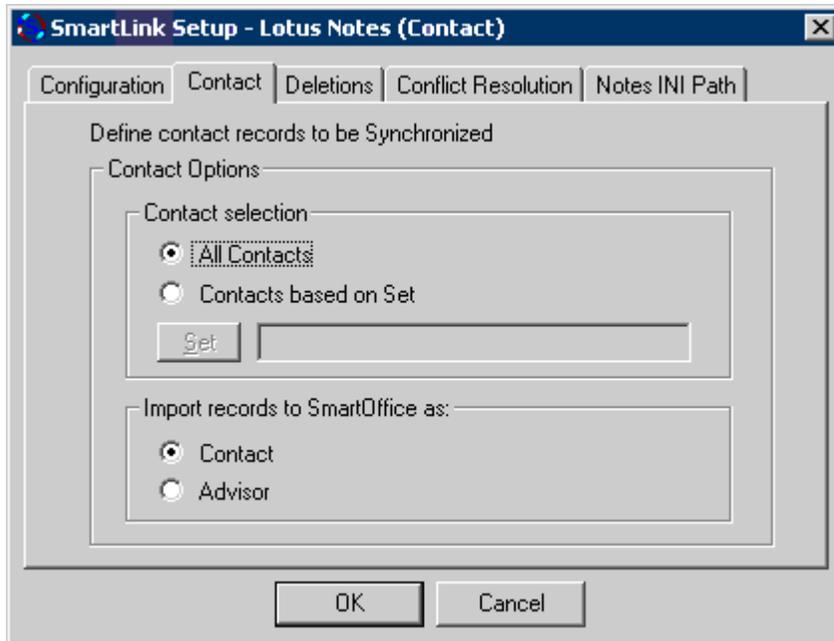
## Contact Setup

From the SmartLink Setup dialog box, select the **Contact** option and then click the **Setup** button to display the Configuration tab.



- **Synchronize** – Enables the user to perform a two-way synchronization between SmartOffice and Lotus Notes. This is the default option.
- **Import (Only synchronize from Lotus to SmartOffice)** – Enables the user to perform a one-way synchronization from Lotus Notes to SmartOffice.
- **Export (Only synchronize from SmartOffice to Lotus)** – Enables the user to perform a one-way synchronization from SmartOffice to Lotus Notes.
- **Do Nothing** – This option will not transfer any data between SmartOffice and Lotus Notes.

## Contact Tab



There are two options to choose from when defining the contact records to be synchronized:

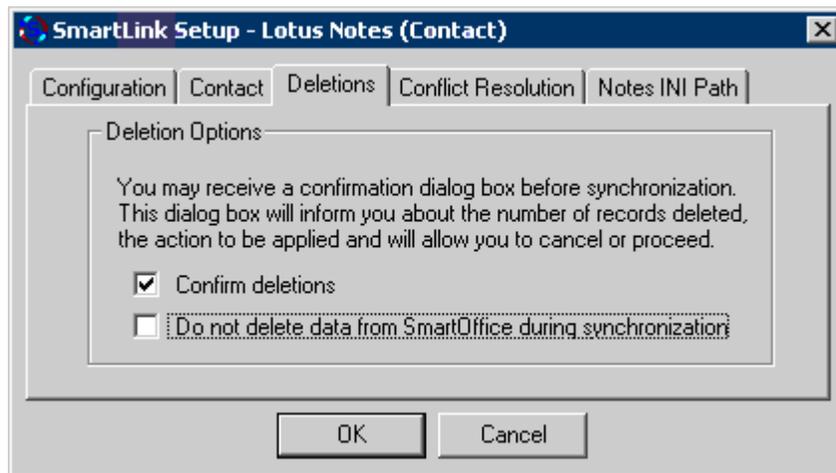
- **All Contacts** – Synchronizes all of the contacts from SmartOffice to Lotus Notes.
- **Contacts based on Set** – Enables the user to specify a Set of contacts in SmartOffice that will synchronize with Lotus Notes.

**Note:** When synchronizing **Contacts based on a Set**, Sets in SmartOffice that are designated as “Filter Only” cannot be used.

Users also have two options to choose from when determining the type of records to create when importing into SmartOffice:

- **Contact** – A record added in Lotus Notes will be imported as a contact record in SmartOffice. The contact type will be left blank.
- **Advisor** – A record added in Lotus Notes will be imported as an advisor record in SmartOffice.

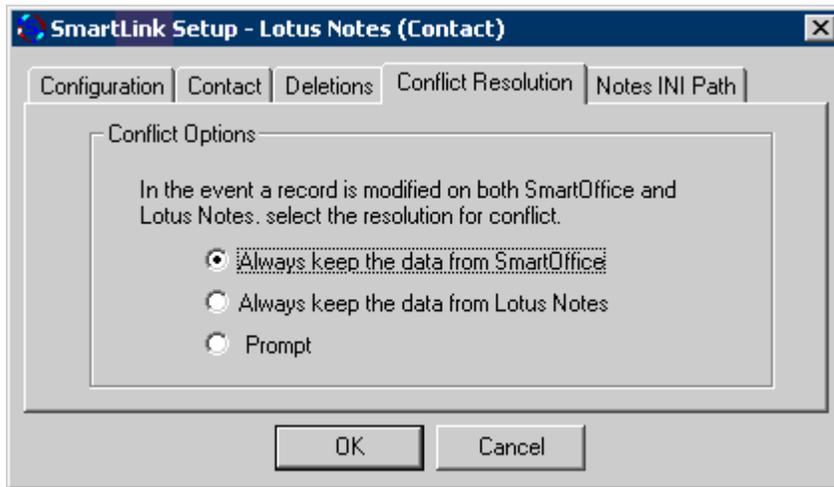
### Deletions Tab



- **Confirm deletions** – When this option is selected, the user will be asked for confirmation prior to any records being deleted during synchronization. When this option is not selected, no confirmation will be required when data is deleted. This option is selected by default.
- **Do not delete data from SmartOffice during synchronization** – When this option is selected, data deleted in Lotus Notes will not be deleted from SmartOffice during synchronization. When this option is not selected, data deleted in Lotus Notes will be deleted from SmartOffice during synchronization depending on the setup options and the user’s rights. This option is not selected by default.

**Note:** The **Do not delete...** option may appear inactive if the user does not have delete rights in SmartOffice or if this option has been made mandatory in certain implementations.

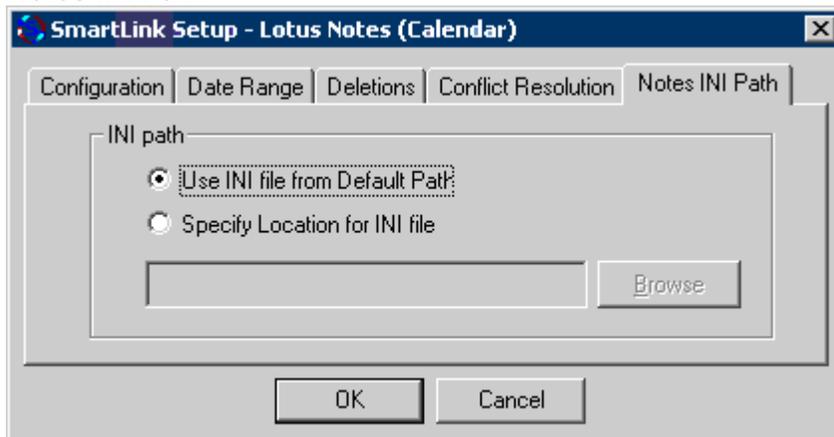
## Conflict Resolution Tab



There are three options for resolving data conflicts that may occur:

- **Always keep the data from SmartOffice** – The user will not be notified of any data conflicts. When a conflict occurs the data will synchronize to Lotus Notes the way it currently appears in SmartOffice. This is the default setting.  
**Note:** This option will be disabled if the user selects the **Import (Only synchronize from Lotus to SmartOffice)** option from the **Configuration** tab.
- **Always keep the data from Lotus Notes** – The user will not be notified of any data conflicts. When a conflict occurs, the data will synchronize to SmartOffice the way it currently appears in Lotus Notes.  
**Note:** This option will be disabled if the user selects the **Export (Only synchronize from SmartOffice to Lotus Notes)** option from the **Configuration** tab.
- **Prompt** - The user will be notified of any data conflicts and will be able to select the data to keep.  
**Note:** This option will be disabled if the user selects either the **Import (Only synchronize from Lotus Notes to SmartOffice)** or **Export (Only synchronize from SmartOffice to Lotus)** option from the **Configuration** tab.

## Notes INI Path



## What is an .INI File?

The Lotus Notes INI file named **notes.ini** is a customizable settings file that contains information about your use of Lotus Notes and contains the configuration information for the application. The default path for the file is in the Notes Program directory (e.g., C:\Program Files\lotus\notes\notes.ini).

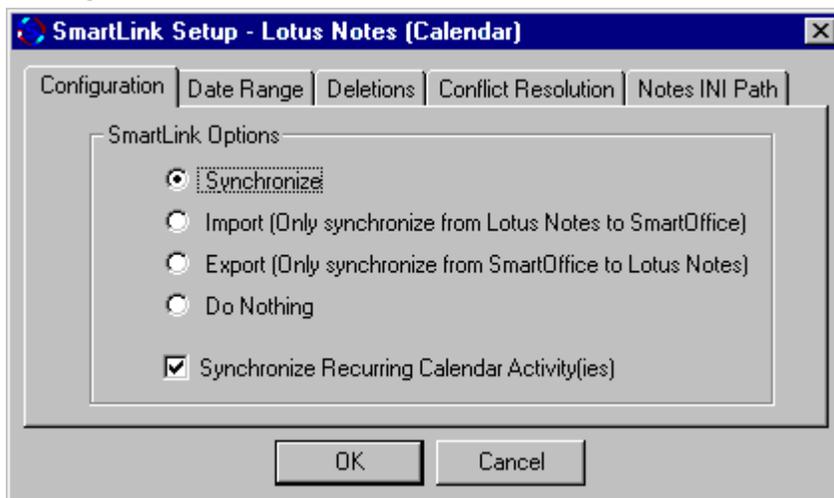
The Notes INI Path tab provides options to specify the location of the INI file:

- **Use INI file from default Path** – Selecting this option automatically enables the application to retrieve the INI file from its default location. (e.g., C:\Program Files\lotus\notes\notes.ini).
- **Specify Location for INI file** - This option enables the user to browse to the location of the INI file if it is not available in the default path.

## Calendar/To Do Setup

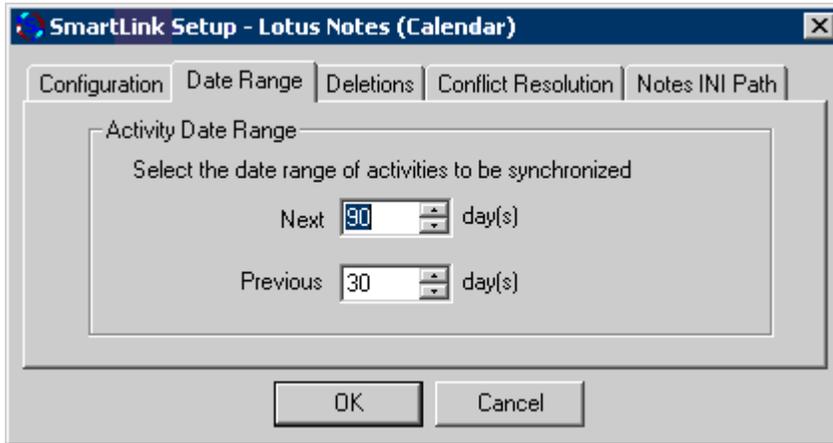
The Setup options for Calendar and To Do are exactly the same. The Deletions and Conflict Resolution tabs are just like the options for setting up the Contact section. The only new tabs specific to the Calendar and To Do sections are the Configuration and Date Range tabs.

### Configuration Tab



- **Synchronize** – Enables the user to perform a two-way synchronization between SmartOffice and Lotus Notes. This is the default option.
- **Import (Only synchronize from Lotus Notes to SmartOffice)** – Enables the user to perform a one-way synchronization from Lotus Notes to SmartOffice.
- **Export (Only synchronize from SmartOffice to Lotus Notes)** – Enables the user to perform a one-way synchronization from SmartOffice to Lotus Notes.
- **Do Nothing** – This option will not transfer any data between SmartOffice and Lotus Notes.
- **Synchronize recurring Calendar/To Do Activity(ies)** – This option allows the user to choose to synchronize recurring activities. By default, the option for “Synchronize Recurring Calendar/To Do Activities” will be selected.

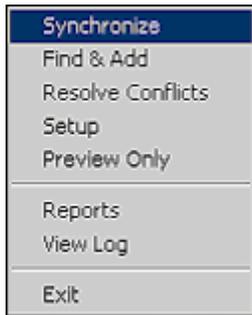
## Date Range Tab



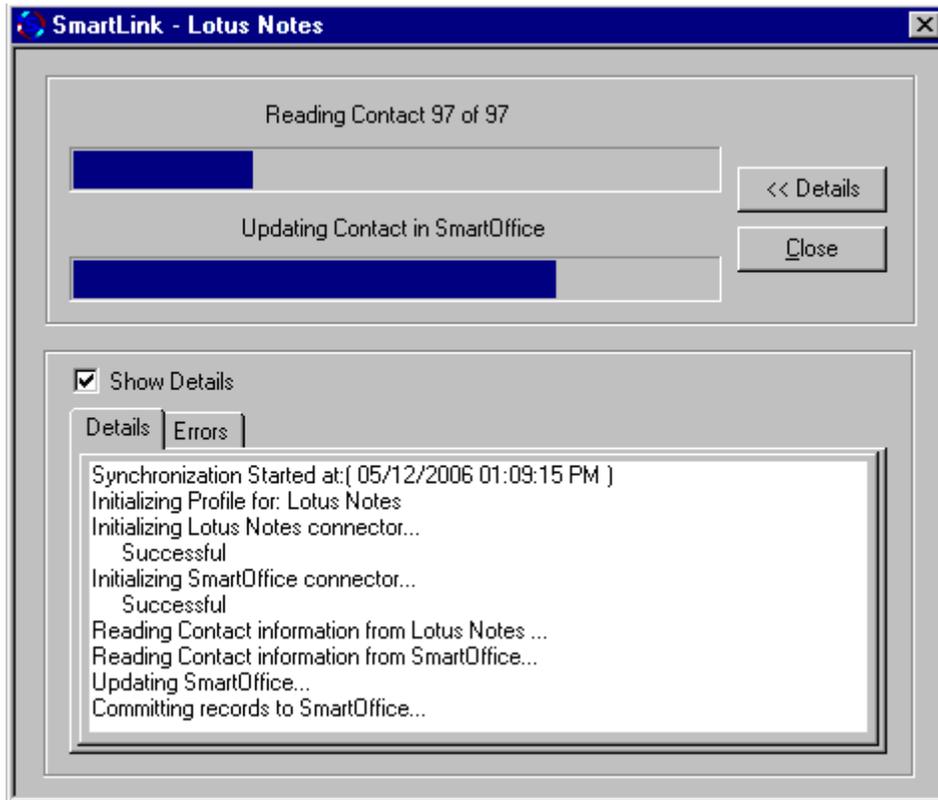
Specify the number of days in the future to synchronize Calendar/To Do activities as well as the number of days in the past to synchronize Calendar/To Do activities. The default setting is to synchronize the Next 90 and Previous 30 days.

## Synchronization

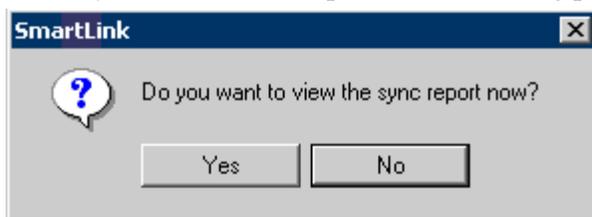
1. Once the Setup is complete, right-click the **SmartLink** button in the systray and then select the **Synchronize** option from the expanded menu.



- The synchronization process begins and a progress bar monitors the status of the synchronization.



- When synchronization completes, the following prompt displays.

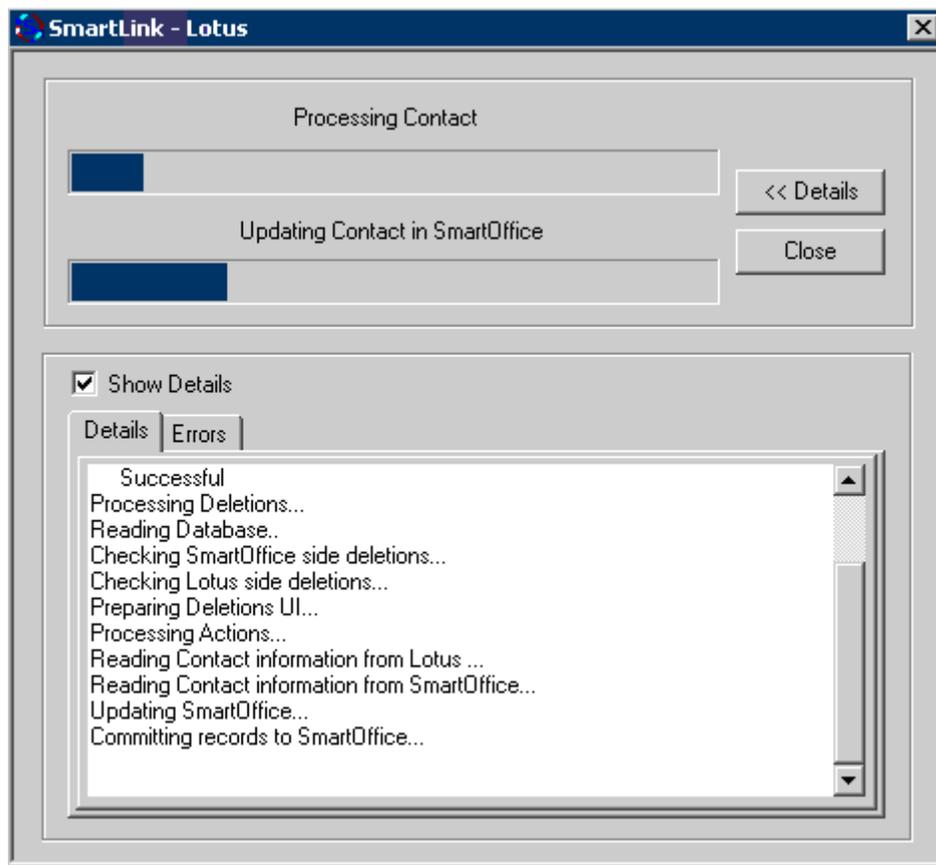


- Selecting **Yes** will display a report of the changes made during the synchronization that just completed. Selecting **No** will close the synchronization dialog box.

**Important:** It is highly recommended that a **Preview Only** synchronization is performed prior to the first actual synchronization.

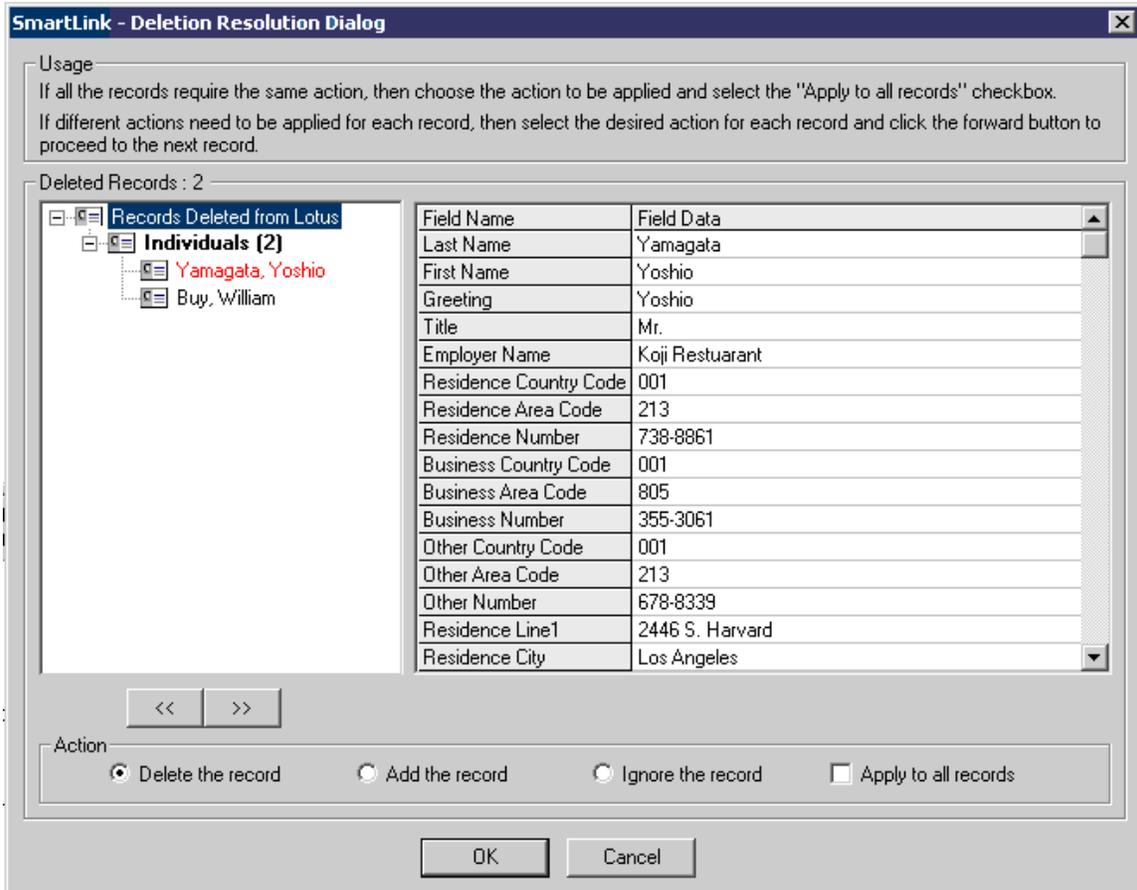
## Subsequent Synchronization

Subsequent synchronizations are initiated the same way as the initial synchronization and a similar progress screen is displayed.



## Confirm Deletions

Based on the setup options, subsequent synchronizations will check Lotus Notes for any information that was deleted since the last synchronization. Deletions made in SmartOffice or Lotus Notes will be handled based on the way the setup options were selected on the Deletions tab. If the **Confirm Deletions** option is selected, then the following screen will display when a deletion is detected.



In the Deletion Resolution dialog box, the left hand panel will display a list of records deleted since the last synchronization. When one of these records is selected, detailed information about the selected record will display in the right hand panel. The information in the right hand panel will change with the selection made in the left hand panel.

Move from one record to the next using the Previous and Next buttons. The following options display:

- **Delete the record** – If the record was deleted in SmartOffice, the record will be also deleted from Lotus Notes and vice versa. This is the default selection.
- **Add the record** – If the record was deleted in SmartOffice, it will be added back to SmartOffice. If the record was deleted from Lotus Notes, it will be added back to Lotus Notes.
- **Ignore the record** – Even though the record was deleted in one application (SmartOffice or Lotus Notes), it will not be deleted from the other application.
- **Apply to all records** – Enables the user to apply the selected actions for all the deleted records that display on the Deletions dialog box.

**Note:** Record counts will display in the left hand panel and the display color of the records will change based on the selection made:

- Delete the records – Red
- Add the records – Green
- Ignore the records – Black

After the deletions have been confirmed, click the **OK** button to continue with the synchronization.

## Resolve Conflicts

A conflict occurs on an initial synchronization when the data for the same record in SmartOffice has some discrepancies in Lotus Notes. A conflict occurs on a subsequent synchronization when the same field is modified in both SmartOffice and Lotus Notes for a record in between synchronizations. When there is a discrepancy between data in SmartOffice and data in Lotus Notes, the conflict will display in red.



## Private Records

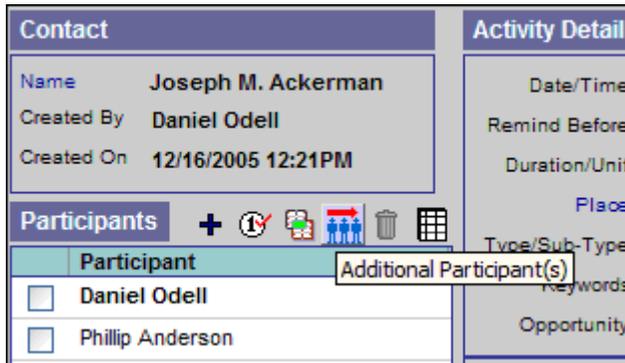
The way synchronization is handled for private records in the SmartOffice and Lotus Notes applications differ.

- In Lotus Notes, there is no option to make a contact Private, whereas, a Calendar and To Do activity is provided with the option to make the record Private.
- In SmartOffice, when a record is marked as private, upon subsequent synchronization, this record will be imported to Lotus Notes as a private record.

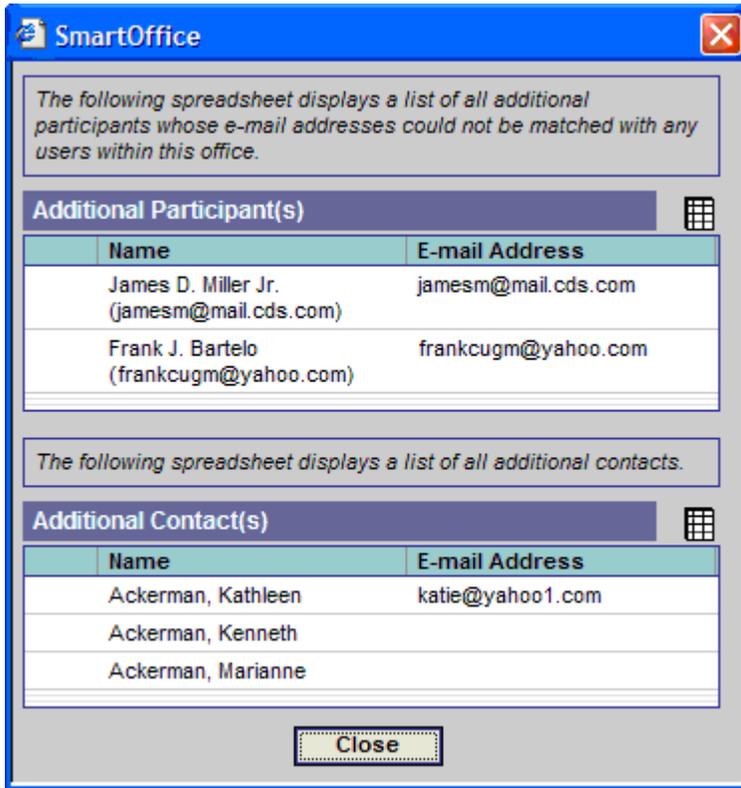
**Note:** When a contact record marked as private in SmartOffice is imported to Lotus Notes, the contact record will be internally maintained as a Private record. This is done so that the corresponding record in SmartOffice is not disturbed even when a modification is made in Lotus Notes.

## Contacts and Participants

SmartOffice only allows a single Contact to be linked with an Activity, while Lotus Notes allows multiple Contacts to be linked to an activity. The first Contact listed in Lotus Notes that is found in SmartOffice will be listed as the Contact in the SmartOffice Activity following synchronization. The remaining Contacts can be accessed by selecting the Additional Participant(s) button from the SmartOffice Activity Detail dialog box.

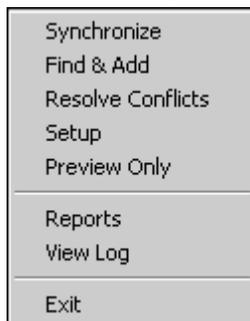


Participants in SmartOffice are the same as Invitees in Lotus Notes. Any Invitees invited to a Meeting in Lotus Notes will display in the Participants section of the SmartOffice Activity if they are SmartOffice users in the office being synchronized. Invitees that are not SmartOffice users can be accessed by selecting the **Additional Participant(s)** button from the SmartOffice Activity Detail dialog box. When the Additional Participant(s) button is selected, a new dialog box will display with additional Participants listed in the upper section and additional Contacts listed in the lower section.

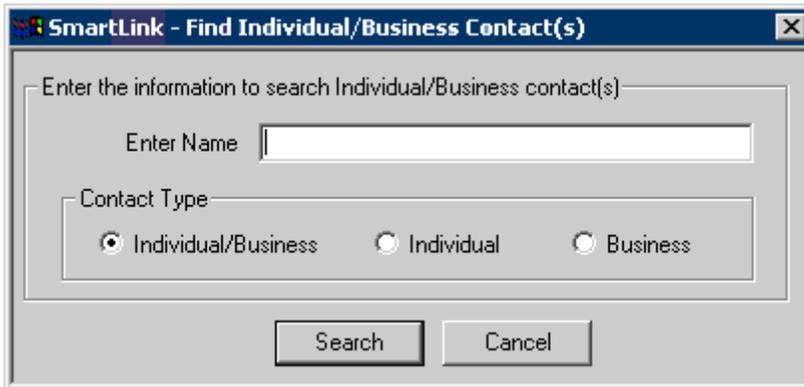


## Find & Add Contacts

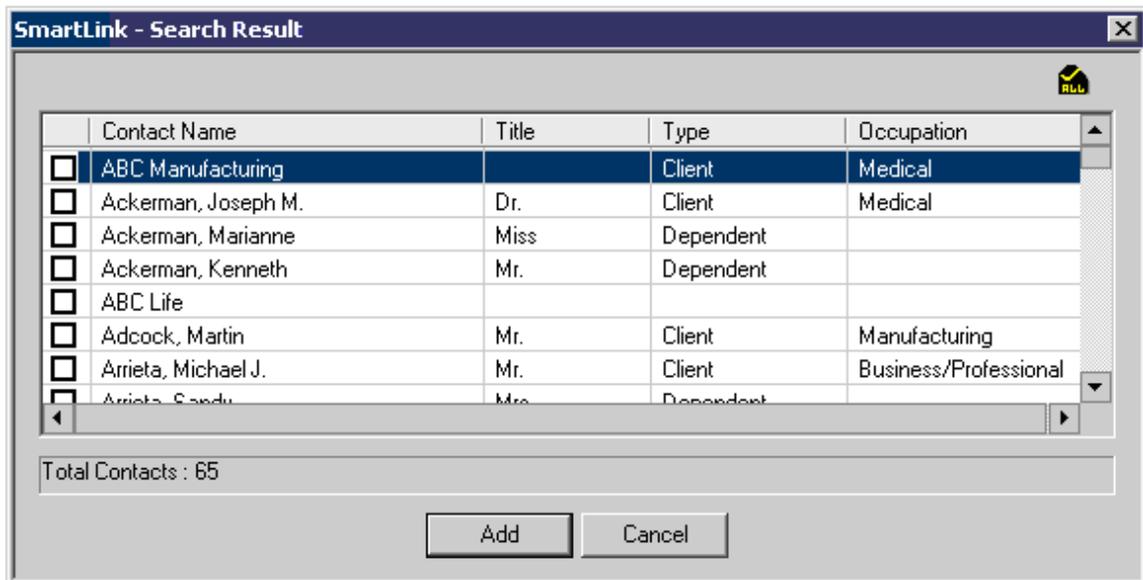
1. Following the initial synchronization, a single contact from SmartOffice can be added to Lotus Notes by selecting the **Find & Add** option from the expanded **SmartLink** menu.



- From the Find Individual/Business Contact(s) dialog box, enter the name of the Contact to search for, specify the Contact Type and then click the **Search** button.



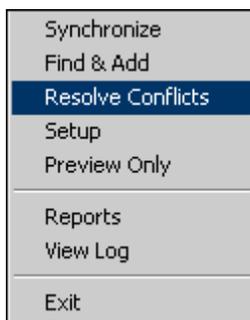
- The Search Results dialog box displays.



- Select one or more of the contacts from the search results and then click the **Add** button to add the contact(s) to Lotus Notes.

## Resolve Conflicts

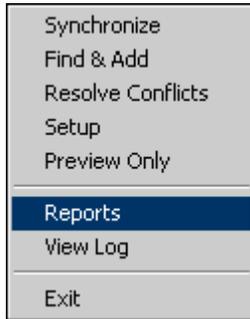
As described earlier, a user can choose to ignore conflicts that are found during synchronization. The user can then resolve these conflicts later by selecting the **Resolve Conflicts** option from the **SmartLink** menu.





## Reports

The results of previous synchronizations can be reviewed at any time by viewing synchronization reports. To access these reports, select the **Reports** option from the **SmartLink** menu.



A report summary displays where all Regular, Find & Add, and Preview Only synchronizations since the last full sync are listed. Select a report and then click the **Run Report** button to display the report.

## View Log

Select the **View Log** option from the **SmartLink** menu to open the log for the last synchronization.

## Appendix

The tables below show how fields in Lotus Notes are mapped to the corresponding fields in SmartOffice.

### Lotus Notes Contact Field Mapping with SmartOffice Contact Fields

The table below displays the Lotus Notes Contact fields that correspond to SmartOffice Contact fields.

Category	Lotus Notes Contacts	SmartOffice Contacts
<b>Contact Information</b>	Title	Title
	First	First Name
	Last	Last Name
	Middle	Middle Name
	Job Title	Job Title
	Suffix	Suffix
	Company	Employer
	Short Name	Greeting
	Birthday	Birth Date
<b>Address</b>	Business	Business
	Home	Residence
	Street	Street
	City	City
	State/Province	State
	ZIP/Postal	ZIP Code
	Country/Region	Country
<b>Telephone Number</b>	Office Phone	Business
	Office Fax	Business Fax

	Home Phone	Residence
	Cell Phone	Mobile
	Pager	Pager
<b>E-mail / Web Address</b>	E-mail	E-Mail
	Web Page	Web Site

## Lotus Notes Calendar Field Mapping with SmartOffice Calendar Activity Fields

The table below displays the Lotus Notes Calendar fields that correspond to the SmartOffice Timed Activity fields.

<b>Lotus Notes Calendar</b>	<b>SmartOffice Timed Activities</b>
Subject	Subject
Where: Location	Place
Starts	Start Date Time
Ends	End Date Time
All day event	All day event
Description	Reason
Mark Private	Private
Categorize	Keywords
Notify Me	Remind Before

## Lotus Notes To Do Field Mapping with SmartOffice To Do Activity Fields

The table below shows the Lotus Notes Task fields that correspond to the SmartOffice Un-timed Activity fields.

<b>Lotus Notes To Do Item</b>	<b>SmartOffice Un-timed Activities</b>
Subject	Subject
Start by (this must be entered in order to sync with SmartOffice)	Start Date
Due by	Due date
In Progress	Active
Completed	Done
Deferred	Discontinued
Low	Low
Medium	Normal
High	High
None	Low
Description	Reason
Mark Private	Private
Categorize	Keyword