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Client Data System®

E-mail Posting for Microsoft Office Outlook
User Guide

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Introduction

Client Data System E-Mail Posting for Microsoft Office Outlook is an add-on feature that interfaces Client Data System® with Microsoft® Office® Outlook®. This feature enables the CDS user to have a seamless interface with MS Outlook and enables the user to use MS Outlook as an e-mail client. Use MS Outlook to compose mail and post those messages to the CDS SmartPad™. This feature supports Microsoft Outlook 2003.

Installing CDS E-Mail Posting for Microsoft Office Outlook

1. During the installation of CDS 6.0, the E-mail and Calendar Synchronization Installation dialog box displays.

   Select the appropriate synchronization option(s) and then click Next to continue:

   ⦿ Microsoft Office Outlook 2003 for Client Data System

   ⦾ Lotus Notes for Client Data System

   ⦾ None of the above

2. By default, the Microsoft Office Outlook 2003 for Client Data System option will be selected. Click the **Next** button to proceed.

   Select the appropriate synchronization option(s) and then click Next to continue:

   ☑ Microsoft Office Outlook 2003 E-Mail Posting for Client Data System

   ☐ Microsoft Office Outlook 2003 Calendar / Contact Synchronization for Client Data System
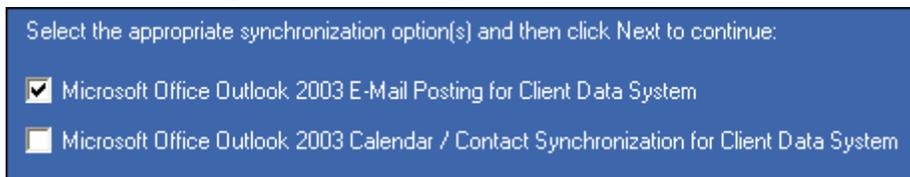
3. Select the **Microsoft Office Outlook 2003 E-mail Posting for Client Data System** option and then click the **Next** button to display the InstallShield Wizard Complete dialog box.
4. Click the **Finish** button. When the CDS Outlook E-mail Posting is installed, the CDS Post button is added in MS Outlook.

SmartPad Postings from MS Outlook

The CDS Post button enables the user to post e-mail messages from MS Outlook to CDS.

Posting a Message from the Microsoft Outlook Folder

1. Select the message to be posted to CDS and then click the **CDS Post** button.

2. The posting dialog box displays the specified message information.

- Subject of the message.
- Date/Time of the message.
- Keywords.
- List of CDS Contacts associated with the message.
- List of Contacts not found in CDS.
- List of Contacts that the message was posted to.
- In the Contacts for Posting (CDS) section, contacts from CDS whose e-mail address matches with the e-mail address in the To, Cc, or Bcc field of the selected mail are listed.
- In the Contact E-mail not found in CDS section, contacts whose e-mail addresses are present in the To, Cc, or Bcc field of the selected mail are listed. No matching contacts in CDS with that e-mail address are listed.
- In the Contacts (Posted) section, contacts from CDS to whom the selected mail has been posted are displayed.

Posting a Message to Additional Contacts

1. To post the message to CDS contact records that are not listed in the posting dialog box, click the **Add/Search Contacts** button to open the Find Contact Information dialog box.

2. The Find Contact Information dialog box is used to search for Individual or Business records.

3. Enter the search criteria and then click the **OK** button to open a dialog box listing all of the records that meet the criteria. Select the appropriate record(s) and then click the **OK** button. The selected record(s) display in the posting dialog box. For the additional selected record(s) in the Contacts for Posting (CDS) section of the posting dialog box, CDS will display in the Source column.

Posting a Message to a Key Relation

1. To post the message to a key relation of a CDS Contact, select the Contact from the Contacts for Posting (CDS) list and then click the **Key Relation(s)** button.
2. The Key Relation(s) dialog box opens, listing all of the key relations for the Contact in CDS. To select the key relations to whom to post the message, click the associated checkbox for the appropriate key relations and then click the **OK** button.

3. Click the **Post** button from the posting dialog box to post the message to the selected contacts from the Contacts for Posting (CDS) list as well as for the selected key relations.

Posting a Message to a Newly Added Contact

Use the Outlook E-mail Interface application to create new CDS Contacts from the posting dialog box and post messages to that Contact's SmartPad.

1. In MS Outlook, select a message and then click the **CDS Post** button.
2. From the posting dialog box, click the **Add/Search Contacts** button to open the Find Contact Information dialog box.

3. Enter the search criteria and then click the **OK** button to display a dialog box of contact record(s) matching the search criteria.
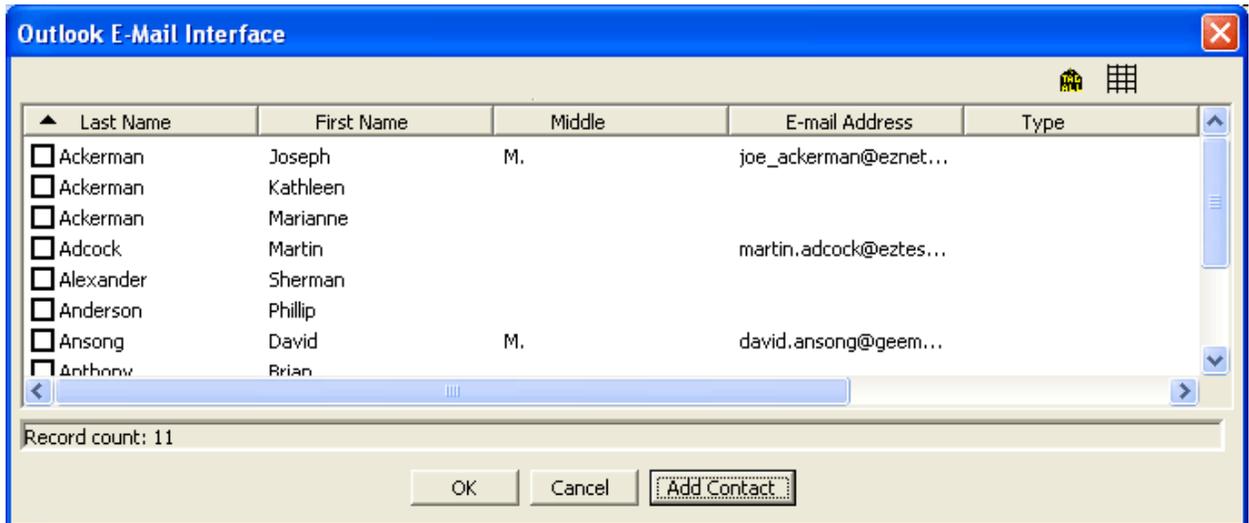
4. Click the **Add Contact** button to display the Quick Add – Contact dialog box.
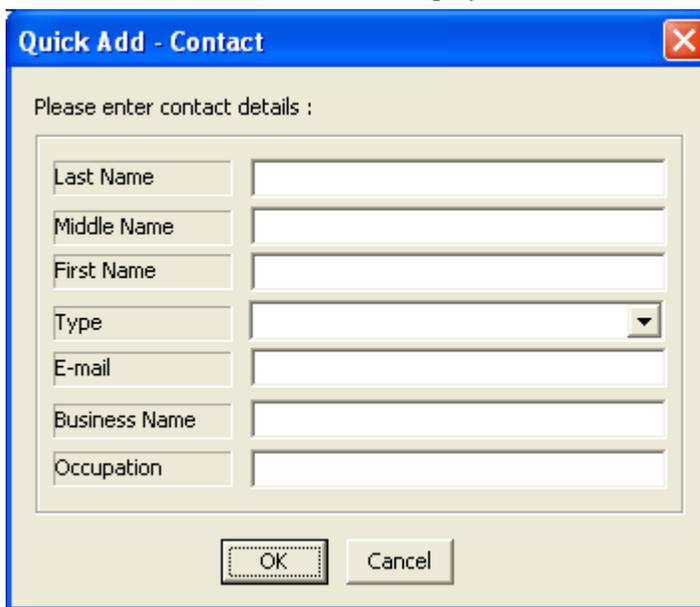
5. Enter all the required Contact information and then click the **OK** button.

6. Click the **OK** button to display the newly added contact record in the posting dialog box.

Posting a Message to a Newly Added Business Record

1. In MS Outlook, select a message and then click the **CDS Post** button.
2. From the posting dialog box, click the **Add/Search Contacts** button to display the Find Contact Information dialog box.
3. Select the **Business** option to change the title of the dialog box to Find Business Information.
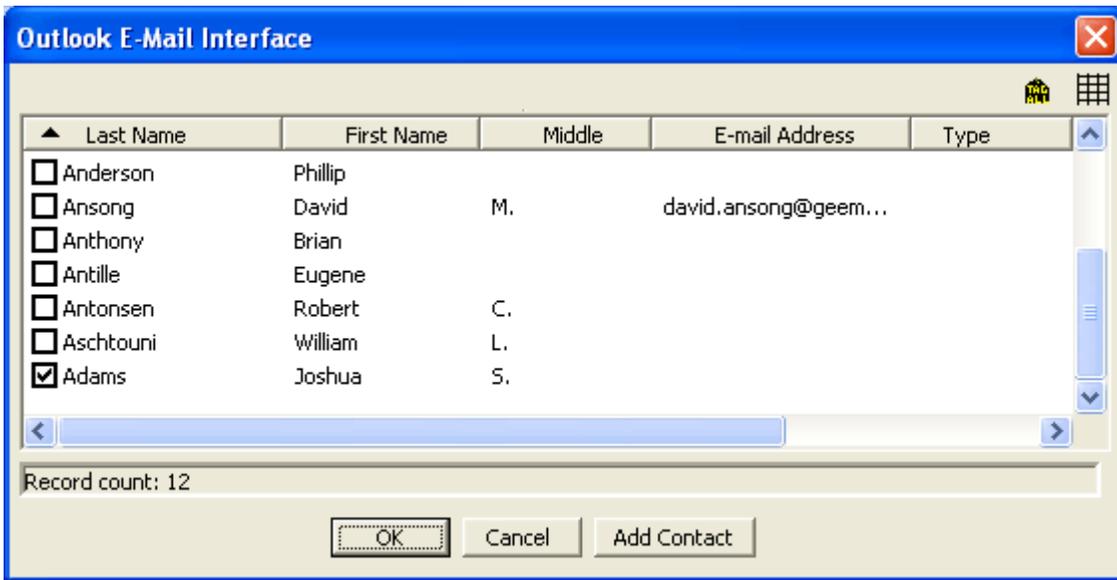4. Enter the search criteria and then click the **OK** button to display a dialog box with contact record(s) matching the search criteria.

5. Click the **Add Business** button to display the Quick Add – Business dialog box.
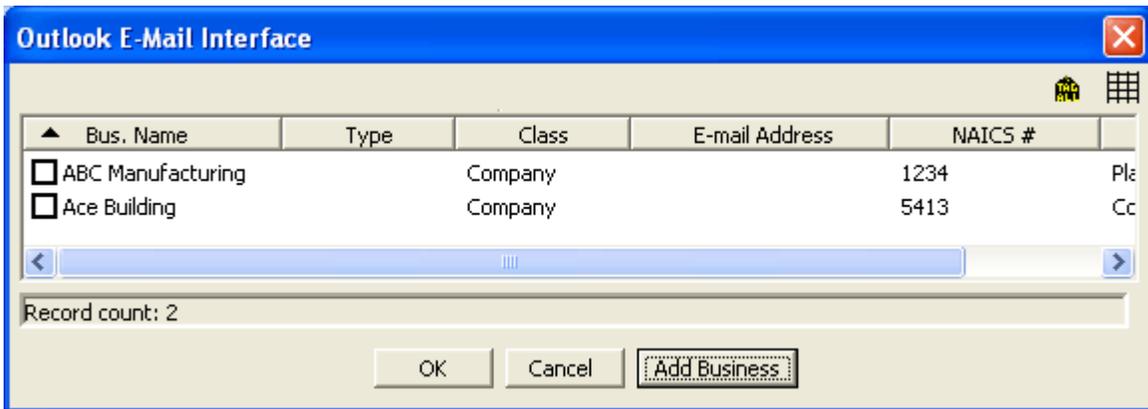

6. Enter all the required information for the Business and then click the **OK** button.

7. Click the **OK** button to display the newly added contact record in the posting dialog box.

Indication of Posted Message(s) in Outlook

In MS Outlook, without having to go to the posting dialog box of a message, the user can identify whether it has been posted to a Contact's record in CDS.

1. In MS Outlook, select the folder from where you want to post an e-mail message (i.e., Inbox, Sent Items).
2. On the **View** menu, point to the **Current View** and then select the **Customize Current View** option.
3. From the **View Summary** dialog box, click the **Fields** option.
4. From the Select Available Fields From dialog box, select the **User-defined fields in Inbox** option.
5. If you have already posted a message from this folder, the **Posted** field name displays on the Available Fields list.
6. Select the **Posted** field from the list and then click the **Add** button.
7. The field can also be positioned in the view by using the Up and Down buttons.

8. In the selected folder view, a checkbox displays in the Posted column for all of the messages that have already been posted to contacts in CDS.

Viewing a Posted Message from the SmartPad

Once the user has posted a message to a Contact record in CDS, he or she can view the posted message from the Contact's SmartPad.

1. In order to view the content of the message, select the message and then click the **View Posted E-mail Message** button.
2. If the user posted an e-mail, the Type column of the Contact's SmartPad spreadsheet will display E-mail. Click the **View Posted E-mail Message** button to display the e-mail in the following format.
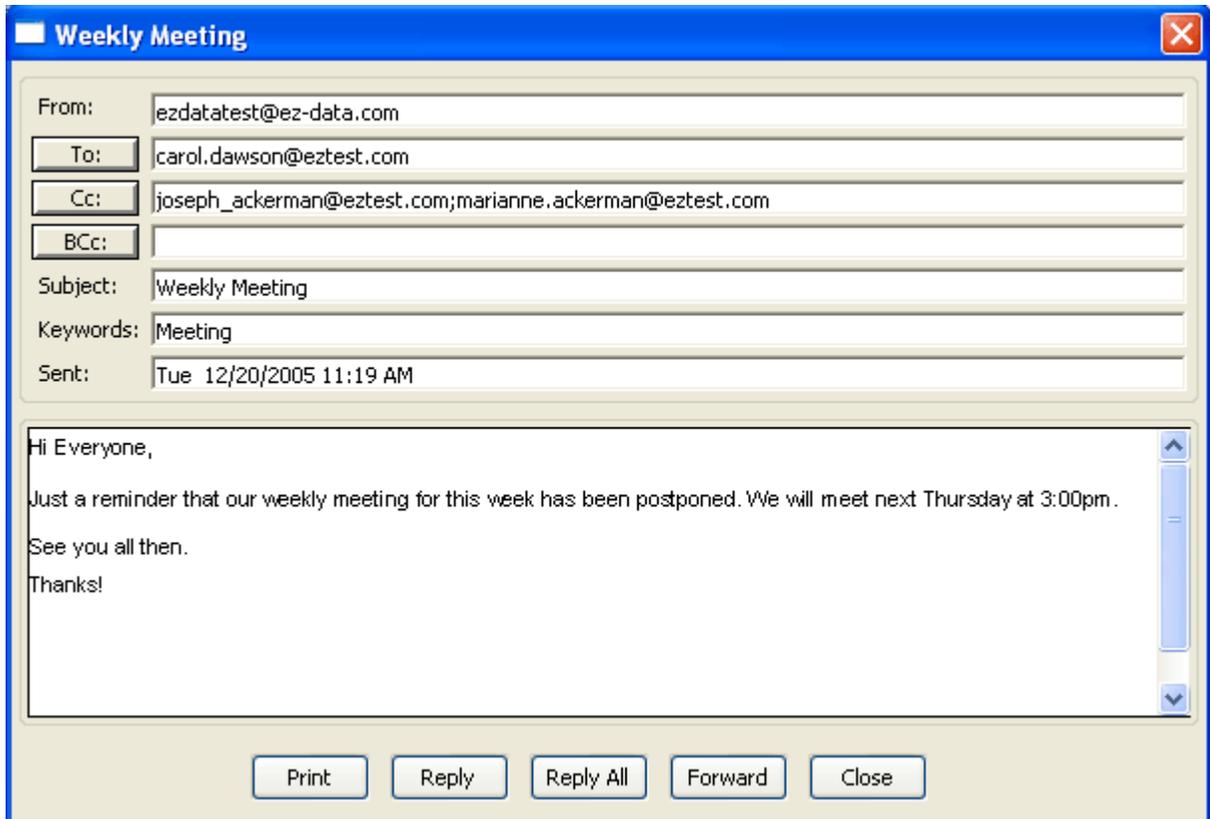
3. If the user posted an e-mail address with an attachment, the Type column of the Contact's SmartPad spreadsheet will read E-mail with Attachment. By clicking the **View Posted E-mail Message** button, the mail will be displayed in the following format.
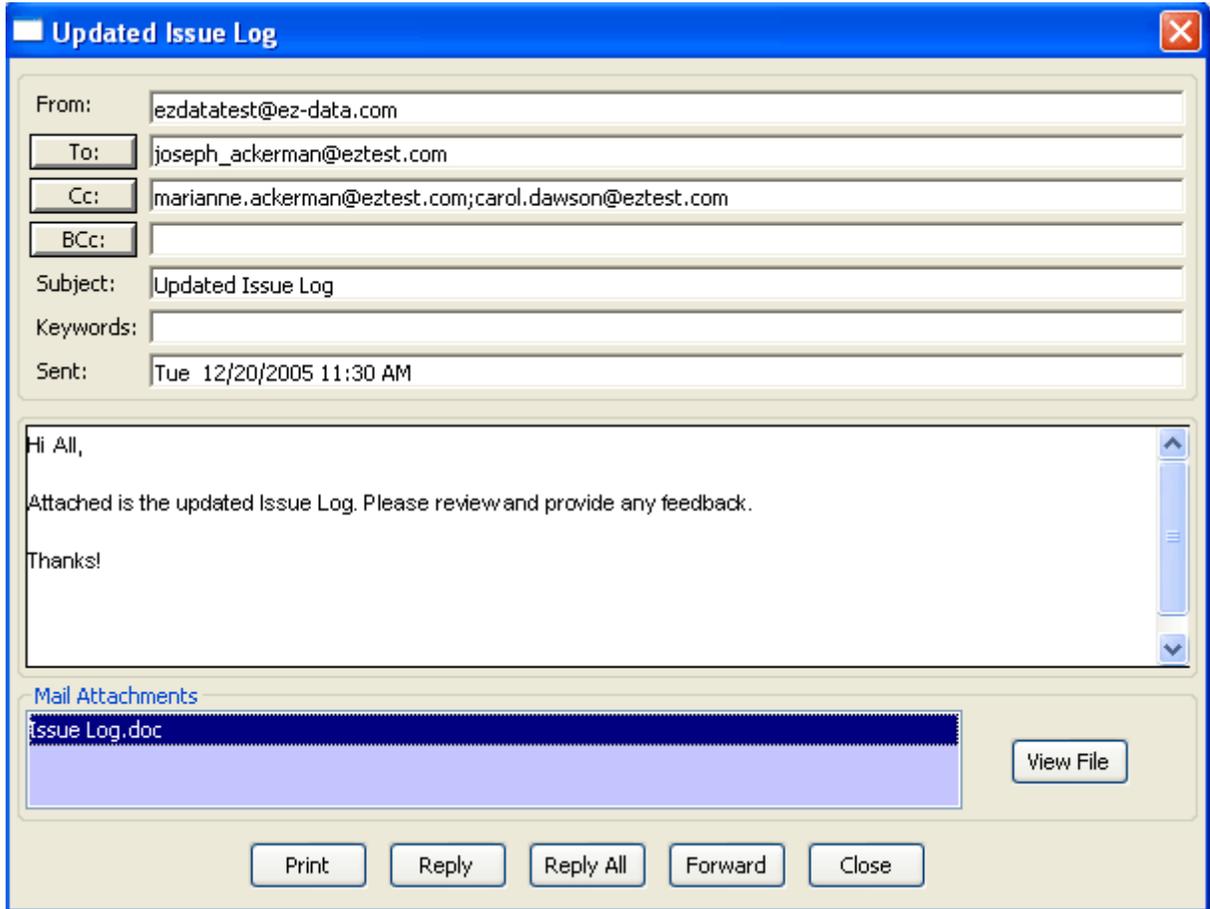
4. The Mail Attachments section displays the attachment(s). In order to see the content of the attachment file, highlight the attachment and then click the **View File** button.

Reply, Reply All and Forward Options for Posted Message(s)

Once a message has been posted to a Contact's SmartPad, the user can choose to **Reply, Reply All** or **Forward** the message.

In CDS, open a Contact record and then click the **SmartPad** icon. From the SmartPad, select an entry type as either **E-mail** or **E-mail With Attachment** and then click the **View Posted E-mail Message** button. By doing this, the user is able to view the content of the message. The format of the message displays exactly as it does in MS Outlook.

*   Click the **Reply** button to open the message in the MS Outlook compose UI with the **To** and the **Subject** fields filled as per the posted mail.

*   Click the **Reply All** button to open the message in the MS Outlook compose UI with the **To**, **Cc** and **Subject** fields filled as per the posted mail.

*   Click the **Forward** button to open the message in MS Outlook with only the **Subject** field filled as per the posted mail.

CDS E-mail Posting Options

There are several e-mail posting options available when sending mail from MS Outlook.

1. In MS Outlook, click the **Tools** menu to open an additional list of options.
2. Select **Options** and then click the **CDS E-mail Posting Options** tab. By default, the following options are selected.
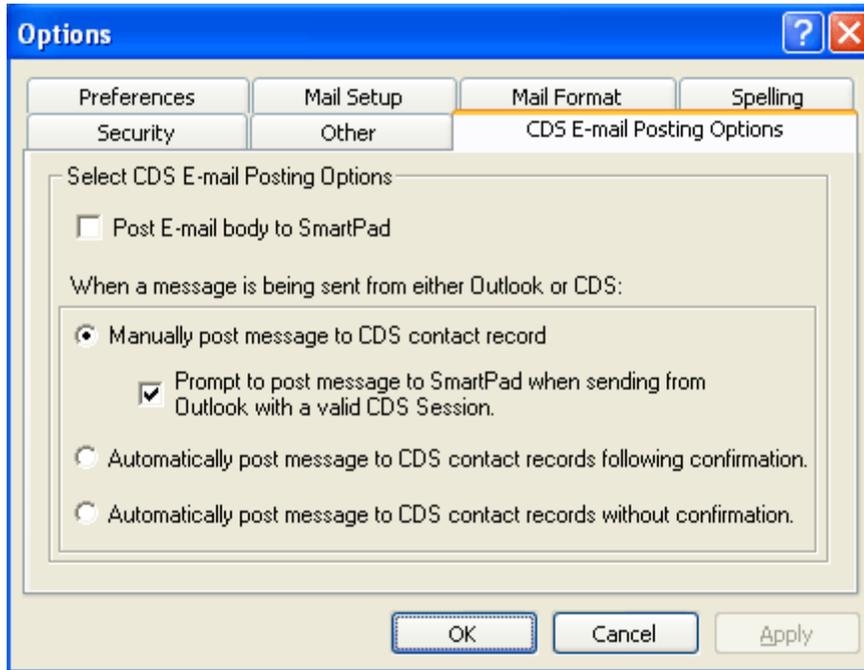
- When the **Post E-mail body to SmartPad** option is not selected, the subject of the posted message will be displayed in the Notes section of the SmartPad Summary. In this case, the user must open the SmartPad record in order to view the body of the e-mail.
- When the **Post E-mail body to SmartPad** option is selected, the body of the posted message will be displayed in the Notes section of the SmartPad Summary.

- When the user either selects the second or third option from the CDS E-mail Posting Options tab, an additional section displays. In this section, by default, the **To** and **Cc** checkboxes are selected. Upon the automatic posting of the message, it will match the CDS Contact Records with a MS Outlook e-mail address in the specified **To**, **Cc**, **From** and **Bcc** fields and then post the message to those contacts' SmartPad records.
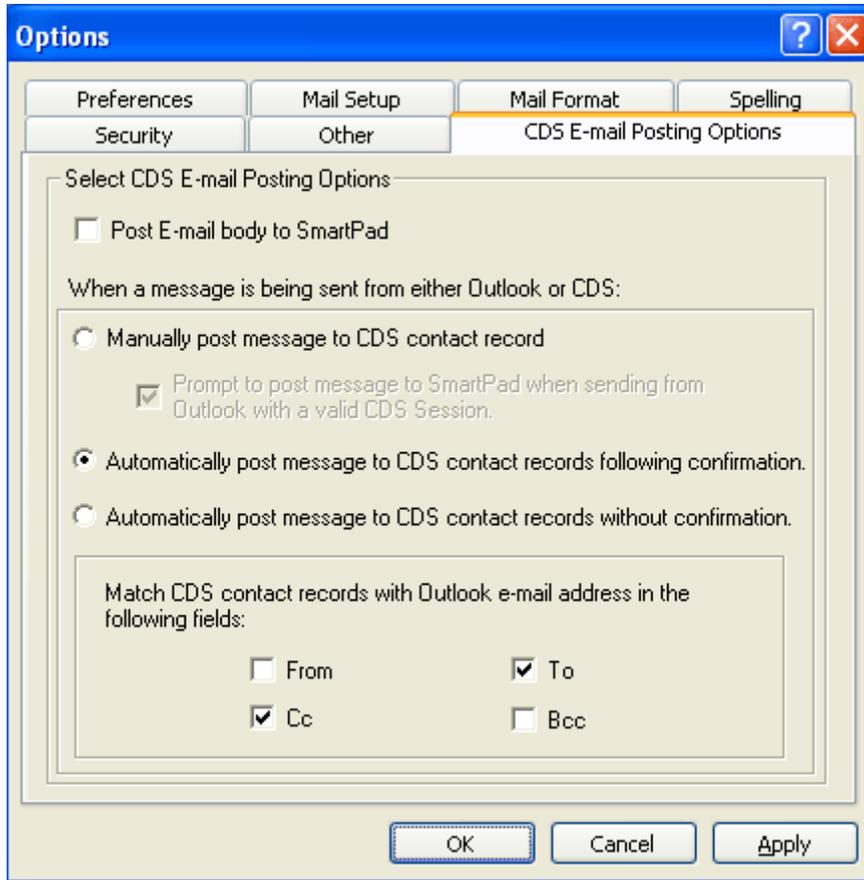
- **Manually Post the Message to the CDS Contact Record:** In Outlook, compose a message and then click the **Send** button to send the message to the Sent Items folder. Open the **Sent Items** folder, select the message which was sent and then click the **CDS Post** button. The user can then specify which Contacts in CDS to post the message to.
- **Manually Post the Message to the CDS Contact Record and Prompt to Post the Message to SmartPad when sending from Outlook with a valid CDS session:** In Outlook, compose a message and then click the **Send** button to be prompted to post the message to a Contact in CDS. If **Yes** is selected, the posting dialog box will display where the user can specify to which Contacts in CDS to post the message.
- **Automatically Post Message to CDS Record(s) Following Confirmation:** In Outlook, compose a message and then click the **Send** button to be prompted to post the message to Contacts in CDS. If **Yes** is selected, it will automatically post the message to all of the matching CDS Contact records with an Outlook e-mail address in the specified **To**, **Cc**, **From** and **Bcc** fields.
- **Automatically Post Message to CDS Contact Record(s) without Confirmation:** In Outlook, compose a message and then click the **Send** button to automatically post to all of the matching CDS Contact records with an Outlook e-mail address in the specified **To**, **Cc**, **From** and **Bcc** fields.

Note that depending on the CDS E-mail Posting option selected, the outcome will be slightly different. The default CDS E-mail Posting option will be used throughout the user guide. The selection does not affect the posting from any of the MS Outlook mail folders.

Composing a Message from MS Outlook

Both message(s) that already exist in MS Outlook and newly composed message(s) can be posted.

1. Compose a message and then click the **Send** button. The following prompt will display if the default settings in the CDS E-mail Posting Options were selected.

2. Click the **Yes** button.
3. A posting dialog box will open and display the composed message information (e.g., Subject and Date/Time) along with any matched CDS contact record(s).
4. If the message finds a match with any CDS contact records, a bold checkbox will display under the Source column. To post the message to this contact, select the checkbox and then click the **Post** button.
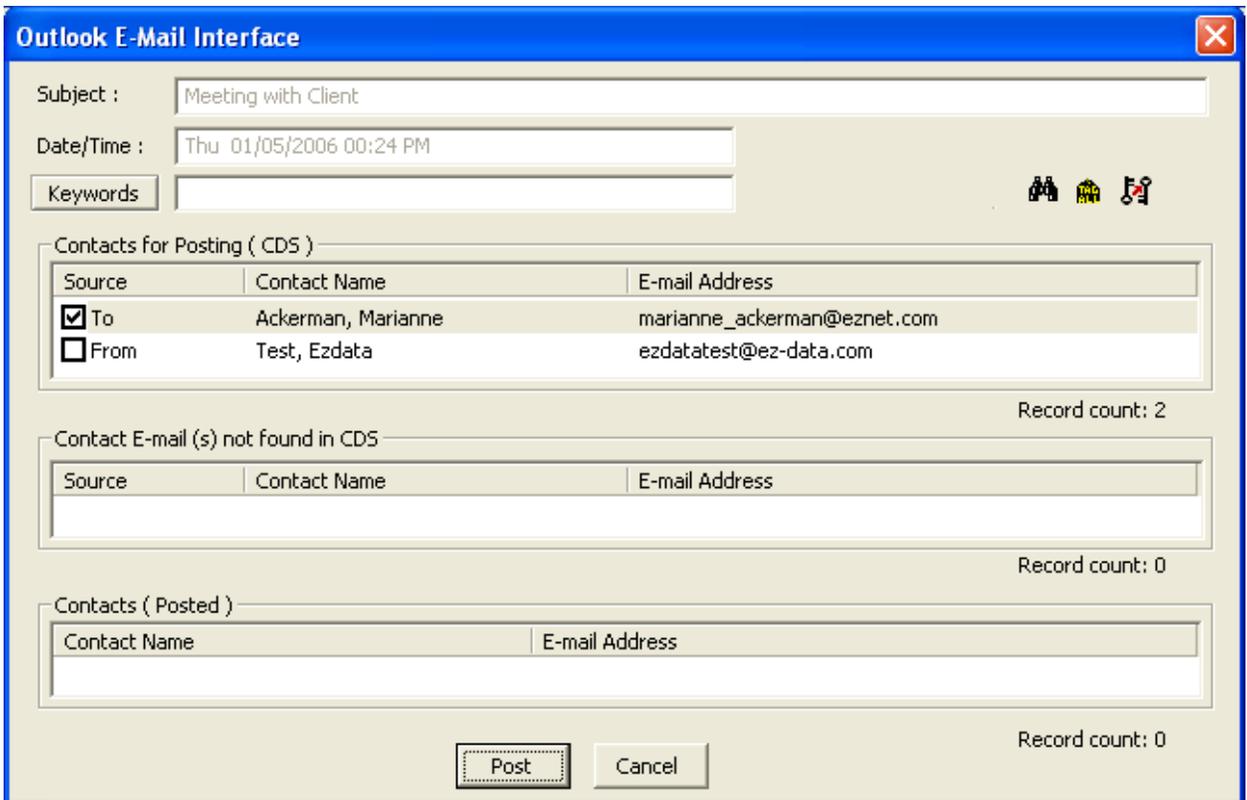
Form Letters

The Outlook E-mail Interface application also enables the user to send form letters from CDS to the selected contacts directly through MS Outlook.

E-mailing a Form Letter as an E-mail

1. In CDS, click the **Reports** menu and then select the **E-mail Form Letters** option to open the Find Form Letter dialog box.
2. Click the **OK** button to display the E-mail Form Letter dialog box.

3. Select the Form Letter to be e-mailed. By default, the Description of the selected Form Letter will display in the Subject field.
4. Click the **Contacts** button to display the Select Contact dialog box.

- **Contact Selection Using Set/Filter:** Specify a set or filter to e-mail the selected Form Letter to.
- **Ad hoc Contact Selection:** Specify contact(s) to e-mail the selected Form Letter to.
- **Select All Contacts:** Send the selected Form Letter to all contacts in the CDS database.

- When the **Ad hoc Contact Selection** option is selected, follow the following steps:
    1. Click the **Find** button to display the Find Contact Information dialog box.
    2. Click the **OK** button to display the Contact List.
    3. Select the Contact(s) to e-mail the Form Letter to and then click the **Ok, Select** button.
    4. The selected Contact(s) will display in the Selected Contact List.

    5. Select each of the Contacts to e-mail the Form Letter to and then click the **OK** button.
    6. In the E-mail Form Letter dialog box, click the **E-mail** button to e-mail the Form Letter to the selected Contact(s).

E-mailing a Form Letter with an Attachment

1. In CDS, click the **Reports** menu and then select the **E-mail Form Letters** option to open the Find Form Letter dialog box.
2. Click the **OK** button to open the E-mail Form Letter dialog box.
3. Click the **Add (Images/Documents)** option to display the Images/Documents spreadsheet.
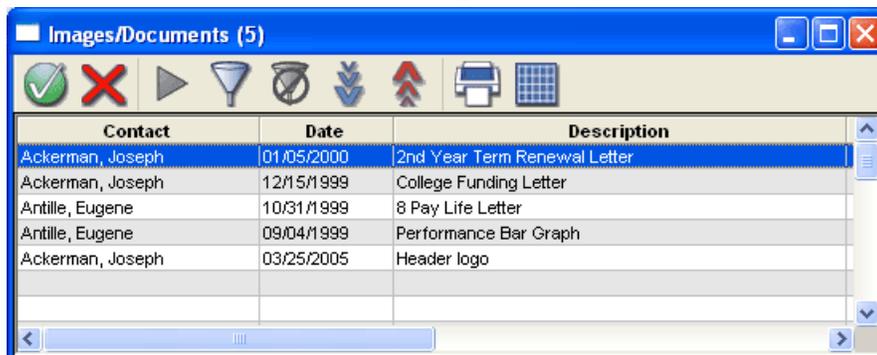
4. Select the image or document to be sent as an attachment along with the Form Letter and then click the **Ok, Select** button.

5. The selected image or document will display in the Attachments section.

- Click the **View Attachment** button to view the selected attachment.
- Click the **Remove Attachment** button to remove the selected attachment.
- Specify an attachment by clicking the **Browse** button.

E-mailing a Form Letter as an Attachment

1. In CDS, click the **Reports** menu and then select the **E-mail Form Letters** option to open the Find Form Letter dialog box.
2. Click the **OK** button to open the **E-mail Form Letter** dialog box.

3. Select the Form Letter to be e-mailed. By default, the Description of the selected Form Letter will display in the Subject field.
4. From the E-mail Options section, select the **E-mail as Attachment** option to display a drop-down menu. By default, HTML will be selected.

5. Select the format in which the attachment should be sent and then click the **Contacts** button to display the Select Contact dialog box.

6. Select the applicable option and then click the **OK** button.
7. In the E-mail Form Letter dialog box, click the **E-mail** button to e-mail the Form Letter as an attachment to the selected Contact(s).

E-mail Options

Aside from being able to send a Form Letter as an E-mail or as an E-mail Attachment, there are several options when sending a Form Letter.

- **Save copies of messages in Sent Items folder:** Select this option to save a copy of the sent message to the MS Outlook Sent Items folder.
- **Request a delivery receipt:** Select this option to request a delivery receipt.
- **Request a read receipt:** Select this option to prompt the individual receiving the message with the following dialog box.


    Click the **Yes** button to send a receipt.

- **Importance: High:** Select this option to mark the message being sent with a priority of Importance: High.

Sending Internal Messages as E-mail

1. In CDS, click the **Messages** button to display the Messages – Inbox tab.
2. Click the **New Message** button to display the Message Recipients dialog box.

3. From the Message Recipients dialog box, select the users to send the message to and then click the **OK** button to display the While You Were Out dialog box.

   Note that selecting none of the users will send the message to all of the users listed in the Message Recipients dialog box.
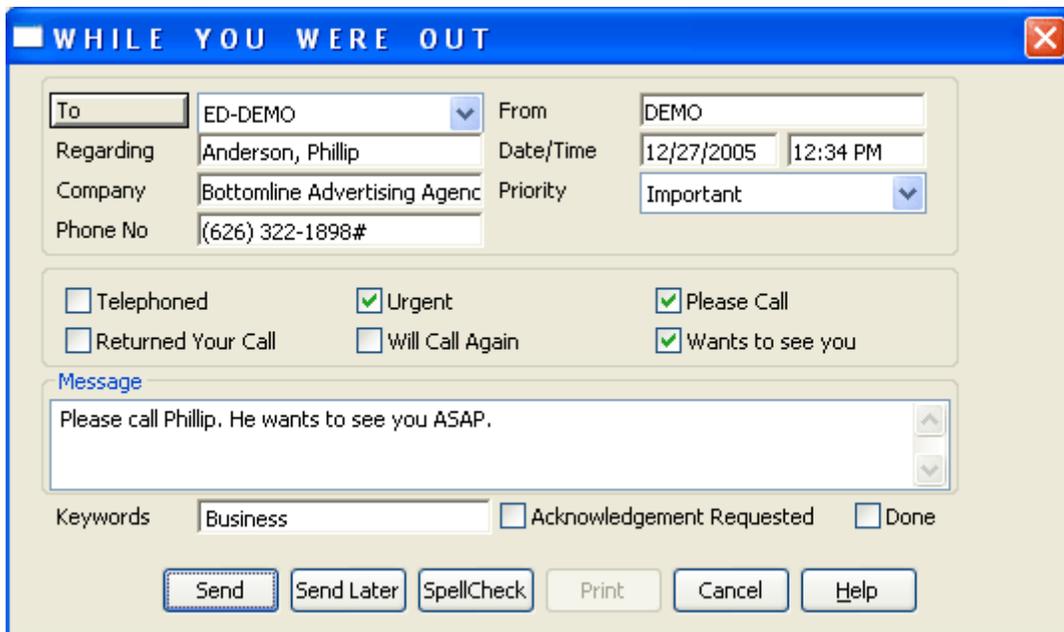
4. Enter all the required information and then click the **Send** button. Note that the recipient user must have an e-mail address specified in the User Profile.

Sending CDS Activities as Online Invitations

1. In CDS, open the Activity Detail dialog box.
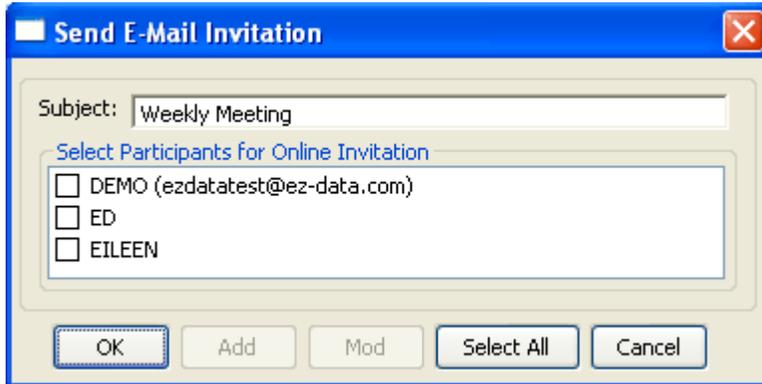

2. Enter all the required information and then click the **Add Record** button in the Participants section to display the Database Users list.

3. Select the appropriate users and then click the **Ok, Select** button.
4. In the Activity Detail dialog box, select the **Send E-mail Invitations** option.
5. Click the **OK** button to display the Send E-mail Invitation dialog box.

6. Select the participants for the online invitation and then click the **OK** button. To send an online invitation to a participant, an e-mail address must be specified for that participant.

To add an e-mail address for a participant from the Send E-mail Invitation dialog box:

1. Select the Participant and then click the **Add** button to open the Add/Modify E-mail for Participant dialog box.
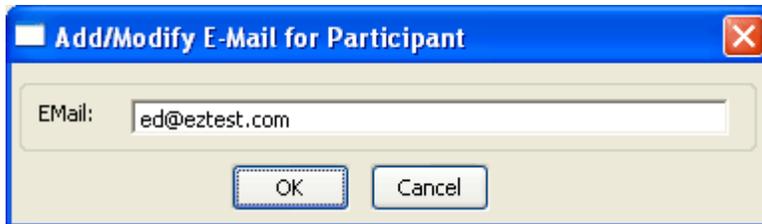
2. Enter the e-mail address for the participant and then click the **OK** button.
3. The added e-mail address displays in the Send E-mail Invitation dialog box next to the Participant's name.

To modify an e-mail address for a participant from the Send E-mail Invitation dialog box:

1. Select the Participant and then click the **Modify** button to display the Add/Modify E-mail for Participant dialog box.
2. Modify the e-mail address and then click the **OK** button.
3. The modified e-mail address displays in the Send E-mail Invitation dialog box next to the Participant's name.

## Exporting CDS Contact Information in the vCard (.vcf) Format

1. In CDS, from the Contact Summary, select a contact record and then click the **E-mail Contact as .vcf file** button.


2. The Outlook Compose dialog box displays with the selected contact record as a .vcf attachment.
3. Enter the appropriate message recipient(s) and then click the **Send** button.

To import the Contact record into MS Outlook:

1. In MS Outlook, open the message with the .vcf attachment.
2. Double-click the attachment to display the Opening Mail Attachment dialog box.
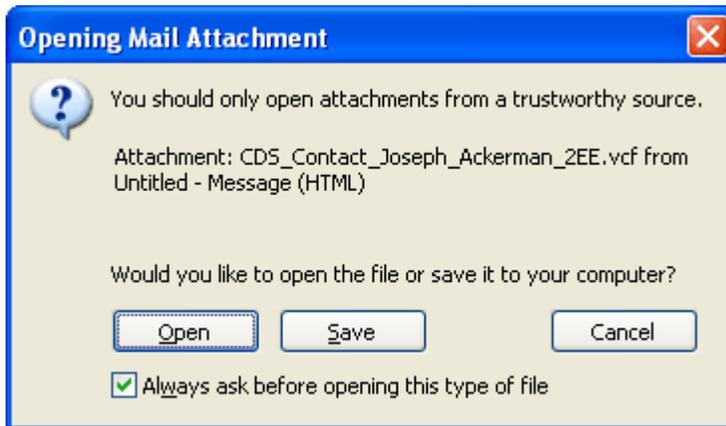
3. Click the **Open** button to display the Contact record in vCard format.
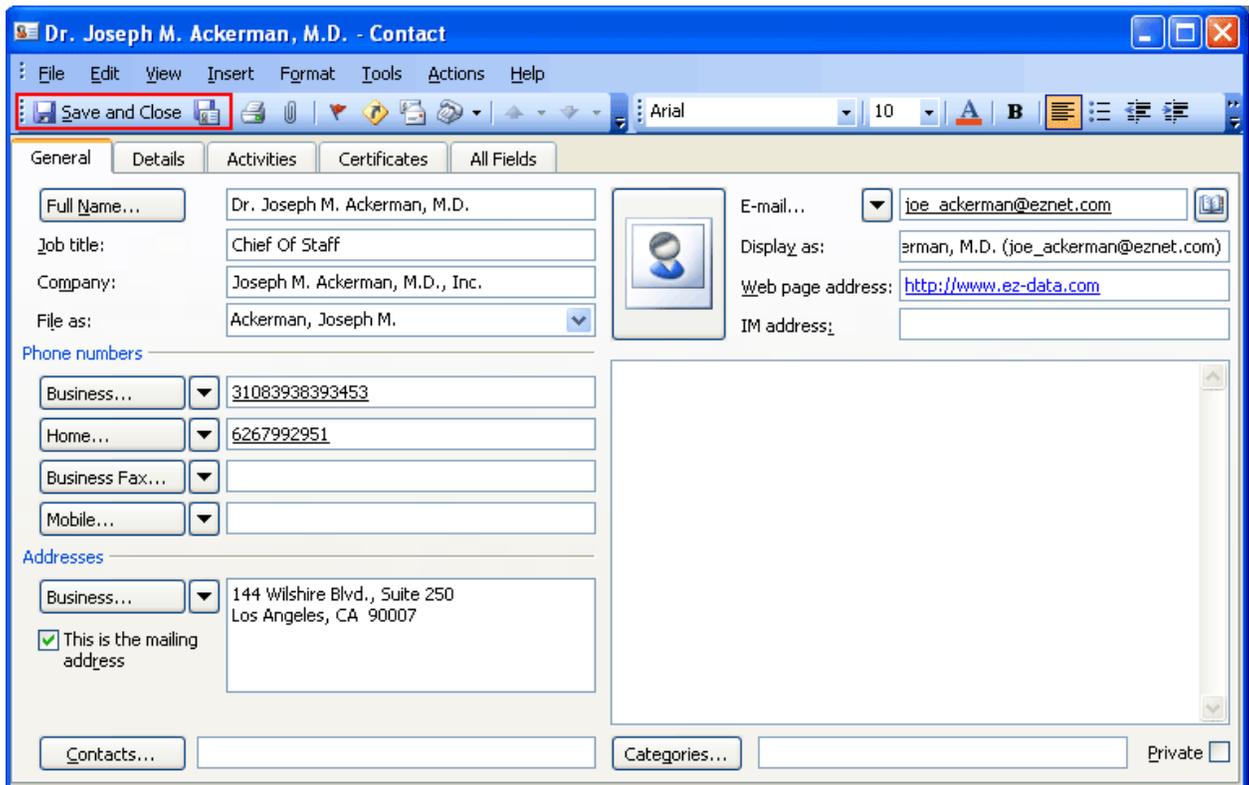
4. Click the **Save and Close** button to save the contact record in the default Outlook Contacts folder.