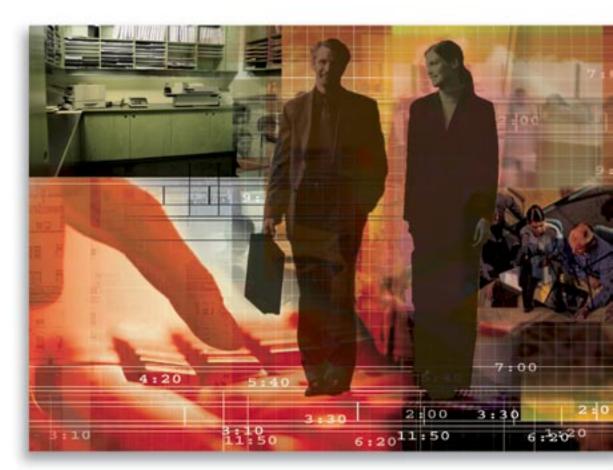
SmartLink for Outlook User Guide

# Smart Office



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# Introduction

SmartLink for Outlook synchronizes Contact, Calendar, and To Do information between SmartOffice® and Microsoft® Outlook® 2003.

# Installing SmartLink for Outlook

- 1. Before starting the installation, please make certain MS Outlook 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.
- 3. Select the **SmartLink for Outlook** hyperlink.
- 4. When prompted to Open or Save the installation, select **Open** to display the InstallShield Wizard.

SmartLink for Outlook - In:	stallShield Wizard	×
	<b>Welcome to the InstallShield Wizard for SmartLink for Outlook</b> The InstallShield <sup>®</sup> Wizard will install SmartLink for Outlook on your computer. To continue, click Next.	
InstallShield	< Back Next> Cancel	

- 5. Click the **Next** button to proceed with the installation.
- 6. The SmartLink for Outlook components will be installed on the local computer.
- 7. When the installation completes, click the **Finish** button.
- 8. When SmartLink for Outlook has been successfully installed, verify that the SmartLink toolbar displays in MS Outlook.

# Set up SmartLink for Outlook

1. In Microsoft Outlook, click the SmartLink button to open a list of options.



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

le SmartLink Setup - Outlook	
Contact Calendar I To Do	<u>S</u> etup De <u>f</u> ault <u>D</u> one <u>R</u> eport
Sync level options           Sync           Full Sync           Check for deleted records in Outlook	Help About

The SmartLink Setup dialog box enables the user to specify the way information will synchronize between SmartOffice and MS Outlook. 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.

Sync 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 Outlook This option will check for records that were deleted from MS Outlook 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 MS Outlook 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 for using SmartLink for Outlook.
- About Enables the user to access build and version information about SmartLink for Outlook.

## **Contact Setup**

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

#### **Configuration Tab**

😂 SmartLink Setup - Outlook (Contact)	$\mathbf{X}$
Configuration Contact Deletions Conflict Resolution Outlook Settings	
SmartLink Options	
<ul> <li>Synchronize</li> <li>Import (Only synchronize from Outlook to SmartOffice)</li> <li>Export (Only synchronize from SmartOffice to Outlook)</li> </ul>	
O Do Nothing	
OK Cancel	

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

#### **Contact Tab**

SmartLink Setup - Outlook (Contact)	×		
Configuration Contact Deletions Conflict Resolution Outlook Settings			
Define contact records to be Synchronized			
Contact Options			
Contact selection			
All Contacts      Contacts based on Set			
Set			
Import records to SmartOffice as:			
<ul> <li>Contact</li> </ul>			
O Advisor			
OK Cancel			

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 Microsoft Outlook.
- **Contacts based on Set** Enables the user to specify a Set of contacts in SmartOffice that will synchronize with MS Outlook.

Note: When synchronizing Contacts based on a Set, Sets in SmartOffice that are "Filter Only" cannot be used.

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

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

### **Deletions Tab**

SmartLink Setup - Outlook (Contact)	×			
Configuration Contact Deletions Conflict Resolution Outlook Settings	_			
C Deletion Options				
You may receive a confirmation dialog box before synchronization. This dialog box will inform you about the number of records deleted, the action to be applied and will allow you to cancel or proceed.				
Confirm deletions Do not delete data from SmartOffice during synchronization				

- **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 MS Outlook will not be deleted from SmartOffice during synchronization. When this option is not selected, data deleted in MS Outlook 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**

SmartLink Setup - Outlook (Contact)	×
Configuration Contact Deletions Conflict Resolution Outlook Settings	
Conflict Options	
In the event a record is modified on both SmartOffice and Outlook, select the resolution for conflict.	
<ul> <li>Always keep the data from SmartOffice</li> </ul>	
Always keep the data from Outlook	
O Prompt	
OK Cancel	

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 MS Outlook 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 Outlook to SmartOffice) option from the Configuration tab.

• Always keep the data from Outlook – 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 MS Outlook.

**Note:** This option will be disabled if the user selects the **Export (Only synchronize from SmartOffice to Outlook)** 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 Outlook to SmartOffice)** or **Export (Only synchronize from SmartOffice to Outlook)** option from the **Configuration** tab.

### **Outlook Settings Tab**

😔 SmartLink Setup - Outlook (Contact) 🛛 🛛 🔀
Configuration Contact Deletions Conflict Resolution Outlook Settings
Outlook Options
Select Folder
Profile Name: Carl Ezdata
Personal Folders     Contacts     SmartLink     Sei Testing
Synchronize Birth Dates from SmartOffice
OK Cancel

In the Select Folder section, select the MS Outlook Contacts folder that will be used for synchronizing contacts from MS Outlook to SmartOffice. Only one folder can be selected.

The **Synchronize Birth Dates from SmartOffice** option provides the user with the option to synchronize the birth date field from contacts in SmartOffice. This option is cleared by default.

**Note:** Birth Dates synchronized to MS Outlook automatically create birthday reminders in the MS Outlook calendar.

## Calendar/To Do Setup

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

#### Date Range Tab

😂 SmartLink Setup - Outlook (Calendar)				
Configuration Date Range Deletions Conflict Resolution				
Activity Date Range				
Select the date range of activities to be synchronized				
Next 90 🛟 day(s)				
Previous 30 🔷 day(s)				
OK Cancel				

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

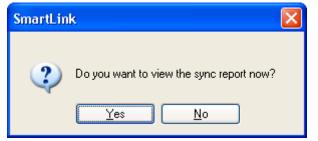
1. Once the Setup has been completed, synchronization is initiated from the **SmartLink** toolbar by selecting the **Synchronize** menu item.



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

SmartLink - Outlook	X
Processing Contact	
Reading Contacts from SmartOffice	<< Details
Show Details	
Details Errors Synchronization Started at:( 09/12/2005 06:35:19 PM ) Initializing Profile for: Outlook Initializing Outlook connector Successful Initializing SmartOffice connector Successful Reading Contacts from Outlook Reading Contacts from SmartOffice	

3. When synchronization completes, the following prompt displays.



4. Selecting **Yes** will display a report of changes made during the synchronization that just completed. Selecting **No** will simply 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 will display.

SmartLink - Outlook	
Processing Deletions	
	<< Details
Show Details Details Errors	
Synchronization Started at:(09/12/2005 06:42:15 PM ) Initializing Profile for: Outlook Initializing Outlook connector Successful Initializing SmartOffice connector Successful Processing Deletions Reading Database Checking SmartOffice side deletions Checking Outlook side deletions	

#### **Confirm Deletions**

Based on the setup options, subsequent synchronizations will check MS Outlook for any information that was deleted since the last synchronization. Deletions made in SmartOffice or MS Outlook 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.

S	SmartLink - Deletion Resolution Dialog				
Usage If all the records require the same action, then choose the action to be applied and select the "Apply to all records" checkbox. If different actions need to be applied for each record, then select the desired action for each record and click the forward button to proceed to the next record.					
c	Deleted Records : 2				
	🖃 🖭 Records Deleted from Outlook	Field Name	Field Data	•	
	🖃 💷 Individuals (2)	Last Name	Ackerman		
		First Name	Kathleen		
	Abernathy, Brad	Middle Name	М.		
		Greeting	Katie		
		Title	Mrs.		
		Employer Name	Hibbell		
		Email Address	katie@yahoo1.com		
		Residence Country Code	001		
		Residence Area Code	626		
		Residence Number	984-0382		
		Business Area Code	310		
		Business Number	273-9873		
		Residence Line1	488 S. Oakland Avenue		
		Residence City	Pasadena		
		Residence State	CA	_	
		Residence Postal	91101	-	
	Action • Delete the record Add	the record Olg	phore the record		
	OK Cancel				

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.

The user can move from one record to the next using the Previous and Next buttons and has the following options:

- **Delete the record** If the record was deleted in SmartOffice, the record will be also deleted from MS Outlook 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 MS Outlook, it will be added back to MS Outlook.
- **Ignore the record** Even though the record was deleted in one application (SmartOffice or MS Outlook), 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 MS Outlook. A conflict occurs on a subsequent synchronization when the same field is modified in both SmartOffice and MS Outlook for a record in between synchronizations. When there is a discrepancy between data in SmartOffice and data in MS Outlook, the conflict will display in red.

Resolving conflicts is similar to confirming deletions. The left hand panel will display a list of records with conflicts. Selecting records in the left hand panel will display detailed information about this record in the right hand panel with a column for how the record looks in SmartOffice, how the record looks in MS Outlook and how the record will look in both SmartOffice and MS Outlook following synchronization (Selected Data).

Si	SmartLink - Conflict Resolution Dialog 🛛 🔀					
	Usage If all the records require the same action, then choose the action to be applied and select the "Apply to all records" checkbox. If different actions needs to be applied for each record, then select the desired action for each record and click the forward button to proceed to the next record.					
	Conflicted Records : 1					
	Individuals (1) Individuals (1) Bush, Maria	Field Name Last Name	SmartOffice Data Bush	Outlook Data Bush	Selected Data	-
		First Name Profession	Maria Sr. SE	Maria SE		
		Job Title Email Address	ACE2 mariabush@xvz1.com	ACEs mariabush@xyz.com		
		Residence Phone Business Phone	+1 (001) 235-1113 +1 (001) 528-7453	+1 (001) 235-1112 +1 (001) 528-7451		
		Business Line1	No 67 East Park View,	No 67 East Park View.		
	Action					
	<ul> <li>Ignore the record</li> </ul>	◯ Prefer Sm	nartOffice Data	Prefer Outlook Data	Apply to all records	
	OK Cancel					

The user can move from one record to the next using the Previous and Next buttons and has the following options:

• **Ignore the records** – Enables the user to ignore the conflict leaving the data in SmartOffice the way it currently is and leaving the data in MS Outlook the way it currently is. Conflicts that have been ignored can be resolved later by selecting the **Resolve Conflicts** option from the SmartLink toolbar. This is the default selection.

- **Prefer SmartOffice Data** Enables the user to keep the data the way it currently is in SmartOffice, overwriting any differences in MS Outlook.
- **Prefer Outlook Data** Enables the user to keep the data the way it currently is in MS Outlook, overwriting any differences in SmartOffice.

**Note:** With the **Prefer SmartOffice Data** or **Prefer Outlook Data** option selected, individual fields can still be selected from either the SmartOffice or Outlook column and moved to the Selected Data column by double-clicking the value to be selected.

• **Apply to all records** – Enables the user to apply the selected action for all the records with conflicts that display on the Conflict Resolution 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.

- Ignore the records Black
- Prefer SmartOffice Data Green
- Prefer Outlook Data Blue

After the conflicts have been resolved, click the **OK** button to continue with the synchronization.

## **Private Records**

Marking records private in SmartOffice and MS Outlook have different purposes and are handled differently during synchronization. Records marked private in SmartOffice will be synchronized to MS Outlook based on the synchronization setup and will be marked private in MS Outlook; however, records marked private in MS Outlook will not be synchronized to SmartOffice.

# **Contacts and Participants**

SmartOffice only allows a single Contact to be linked with an Activity, while MS Outlook allows multiple Contacts to be listed on an activity. The first Contact listed in MS Outlook 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.

Contact	Activity Detail
Name Joseph M. Ackerman	Date/Time
Created By Daniel Odell	Remind Before
Created On 12/16/2005 12:21PM	Duration/Unit
Participants 🛛 🕂 🕑 强 👬 📋 🏢	Place
	articipant(s)
Daniel Odell	
Phillip Anderson	Opportunity

Participants in SmartOffice are the same as Attendees in MS Outlook. Any Attendees invited to a Meeting in MS Outlook will display in the Participants section of the SmartOffice Activity if they are SmartOffice users in the office being synchronized. Attendees 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.

🗿 SmartOffice 🛛 🔀				
The following spreadsheet displays a list of all additional participants whose e-mail addresses could not be matched with any users within this office.				
Addit	ional Participant(s)		Ħ	
	Name	E-mail Address		
	James D. Miller Jr. (jamesm@mail.cds.com)	jamesm@mail.cds.com		
	Frank J. Bartelo (frankcugm@yahoo.com)	frankcugm@yahoo.com		
The fo	ollowing spreadsheet displays a	list of all additional contac	ts.	
Addit	ional Contact(s)		Ħ	
	Name	E-mail Address		
	Ackerman, Kathleen	katie@yahoo1.com		
	Ackerman, Kenneth			
	Ackerman, Marianne			
Close				

# **Find & Add Contacts**

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



2. 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.

SmartLink - Find Individual/Business Contact(s)	×	
Enter the information to search Individual/Business contact(s)		
Enter Name Ackerman		
Contact Type		
⊙ Individual/Business ○ Individual ○ Business		
Search Cancel		

3. The Search Results dialog box displays.

SmartLink - Search Result				E
				1
Contact Name	Title	Туре	Occupation	
Ackerman, Kenneth	Mr.			
📃 Ackerman, Joseph1 M.	Dr.		Medical	
📃 Ackerman, Marianne	Miss			
Total Contacts : 3		-		
Add Cancel				

4. Select one or more of the contacts from the search results and then click the **Add** button to add the contact(s) to MS Outlook.

# **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 expanded **SmartLink** menu.

ł	Smar	rtLink 🕶 🖕
Ē	Synchronize	
	Find & Add	
ľ	Resolve Conflicts	
Setup Preview Only Reports View Log		Setup
		Preview Only
		Reports
		View Log

Selecting the **Resolve Conflicts** option will display the same Conflict Resolution dialog box that displays when resolving conflicts during synchronization with all the same functionality for selecting data.

SmartLink - Conflict Resolution Dialog						
	Usage If all the records require the same action, then choose the action to be applied and select the "Apply to all records" checkbox. If different actions needs to be applied for each record, then select the desired action for each record and click the forward button to proceed to the next record.					
ſ	Conflicted Records : 1					
	🖃 🖭 Individuals (1)	Field Name	SmartOffice Data	Outlook Data	Selected Data	
	🛄 🖳 Adams, Margare	Last Name	Adams	Adam	Adams	
		First Name	Margare	Margar	Margare	
		Profession	Real Estates	Real Estate	Real Estates	
		Job Title	Accounting Depart	Accounting Dep	Accounting Depart	
		Business Number	987-7232	987-7231	987-7232	
		Residence Line1	231 Ash Drive, Monterey Park	23 Ash Drive, Monterey P	231 Ash Drive, Monterey P	
	Action O Ignore the record	⊙ Prefer Sm	nartOffice Data OPr	efer Outlook Data	Apply to all records	
	OK Cancel					

# **Preview Only**

The Preview Only option generates a report, summarizing how synchronization will impact the data without actually making any changes. It is recommended that this feature be used prior to synchronization to make certain there are no surprises when data is synchronized between SmartOffice and MS Outlook. To run the preview report, select the **Preview Only** option from the expanded **SmartLink** menu.

ł	Smar	rtLink 🔻 🖕	
		Synchronize	
		Find & Add	
		Resolve Conflicts	
		Setup	
		Preview Only	
		Reports	
		View Log	

After the report is generated, the user is prompted to view it.

**Note:** During Preview Only synchronization, the prompt to resolve conflicts will not display, but the report will specify where there are potential conflicts.

# 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 expanded **SmartLink** menu.

Smar	'tLink 🔻 🖕	
	Synchronize	
	Find & Add	
	Resolve Conflicts	
	Setup	
	Preview Only	
	Reports	
	View Log	

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 toolbar to open a log of the last synchronization.

# Appendix

The tables below show how fields in MS Outlook are mapped to the corresponding fields in SmartOffice.

## **Contact Mapping**

	<b>Outlook Contacts</b>	SmartOffice Contacts
<b>Contact Information</b>	Title	Title
	First	First Name
	Last	Last Name
	Middle	Middle
	Suffix	Suffix
	Job Title	Job Title
	Company	Employer
Address	Business	Business
	Home	Residence
	Other	Other
	Street	Street
	City	City
	State	State
	ZIP	ZIP Code
	Country	Country
<b>Telephone Number</b>	Business	Business
	Business Fax	Business Fax
	Home	Residence
	Mobile	Mobile
	E-mail	E-mail

Web Page	Web Site
Profession	Occupation
Nick Name	Greeting
Birthday	Birth Date
Body (There is no such column heading. This refers to the huge text area in the contact screen.)	Remarks

## **Calendar Mapping**

Outlook Calendar	SmartOffice Timed Activities
Subject	Subject
Location	Place
Start time	Time
End time	Duration (in minutes, days or hours)
All day event	Start Time: 09/23/2005 12:00 AM
	End Time: 09/24/2005 12:00 AM Duration: 1440
Importance not selected	Priority: Normal
Importance: High	Priority: Urgent / Important
Importance: Low	Priority: Tentative
Body (There is no such column heading. This refers to the huge text area in the Detail screen.)	Reason
Reminder	Remind Before
Contacts	Contact Name

## Task/To Do Mapping

	Outlook Tasks	SmartOffice Un-timed Activities
	Subject	Subject
	Start Date (this must be entered in order to sync with SmartOffice)	Date
Status	Not Started	Active
	In Progress	Active
	Completed	Done
	Waiting on someone else	Active
	Deferred	Discontinued
Priority	Low	Tentative
	Normal	Normal
	High	Urgent / Important
	Body (There is no such column heading. This refers to the huge text area in the Detail screen.)	Reason
	Contacts	Contact Name

## Phone Type Mapping

Outlook	SmartOffice
Assistant	Other
Business	Business
Business 2	Business (Second record)
Call back	Other
Car	Other
Company	Other
Home	Residence
Home 2	Residence (Second record)
Home Fax	Residence Fax
ISDN	Other
Other	Other
	Vacation
	Marine
	Corporate office
	Regional Office
	Emergency
	Temporary
	Modem/ Date line
Other fax	Other
Pager	Pager (beeper)
Primary	Other
Radio	Other
Telex	Other
TTY/TDD	Other

## Address Type Mapping

Outlook	SmartOffice
Business	Business
Home	Residence
Other	Other
	Vacation
	Regional Office
	Temporary
	Previous
	Billing

## E-mail Type Mapping

Outlook	SmartOffice
E-mail	E-mail
E-mail 2	E-mail (second record)
E-mail 3	E-mail (third record)