SmartLink for Outlook
User Guide

SmartOffice®

Table of Contents

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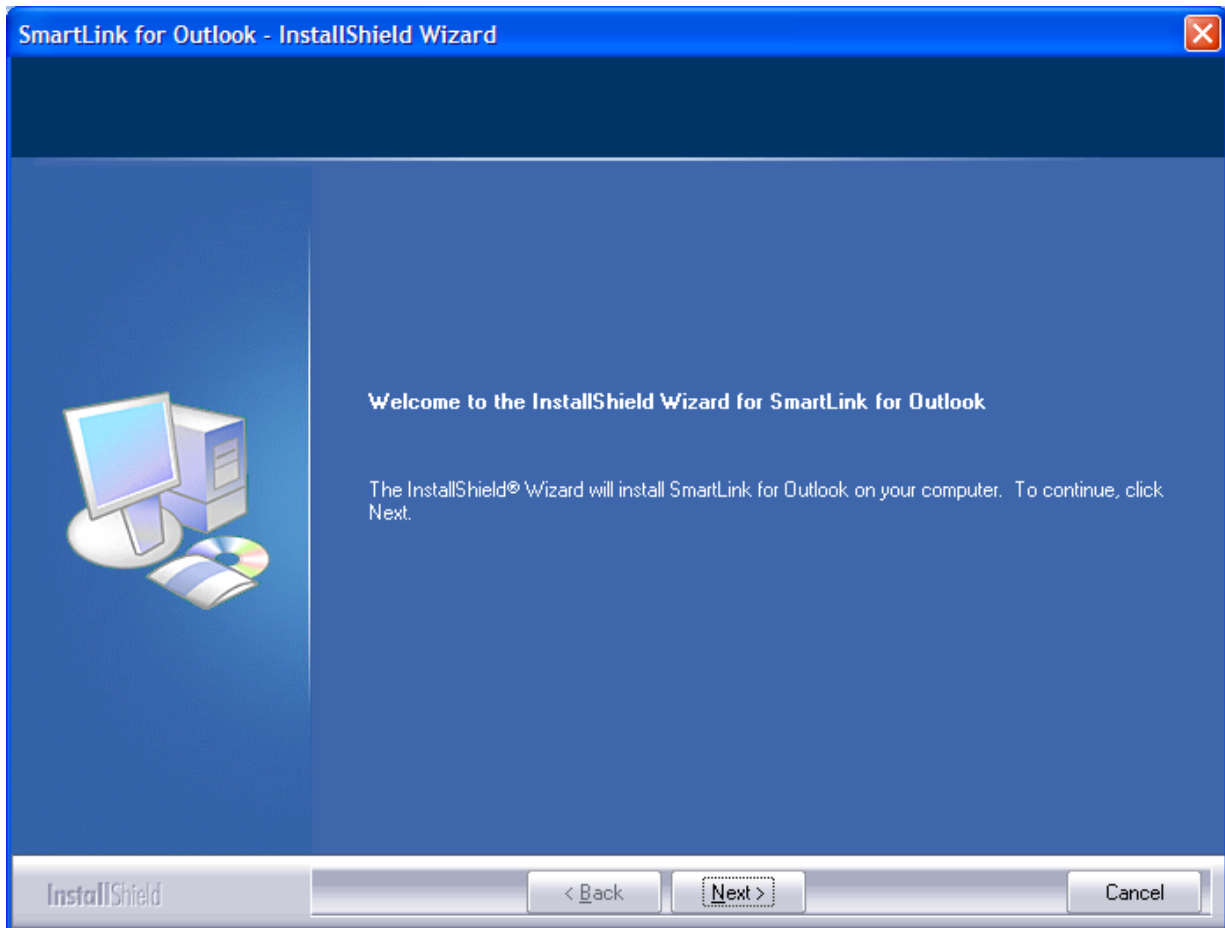
5. Click the **Next** button to proceed with the installation.
6. The SmartLink for Outlook components will be installed on the local computer.
7. When the installation completes, click the **Finish** button.
8. When SmartLink for Outlook has been successfully installed, verify that the SmartLink toolbar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

Set up SmartLink for Outlook

1. In Microsoft Outlook, click the **SmartLink** button to open a list of options.
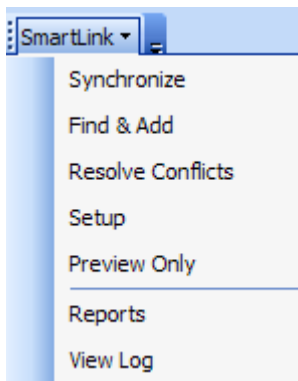
2. Select the **Setup** option to open the SmartLink Setup dialog box.

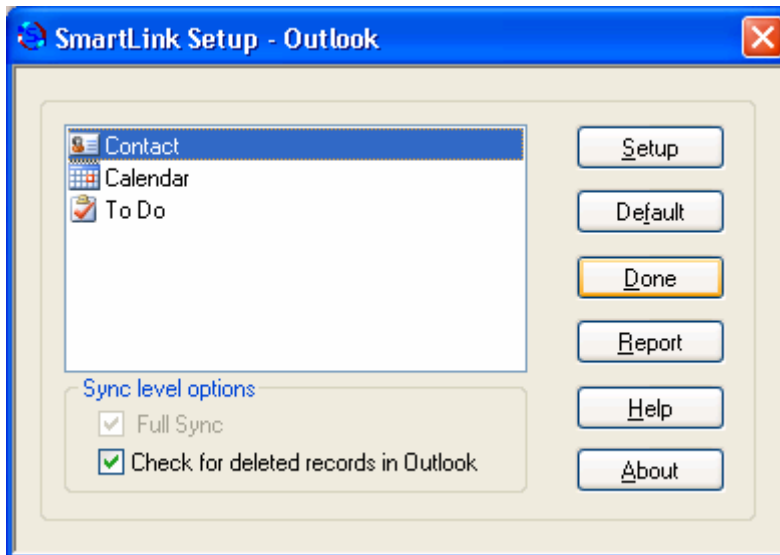The SmartLink Setup dialog box enables the user to specify the way information will synchronize between SmartOffice and MS Outlook. The Contact, Calendar, and To Do options enable these sections to be configured independently by selecting the section to be configured and then clicking the Setup button.

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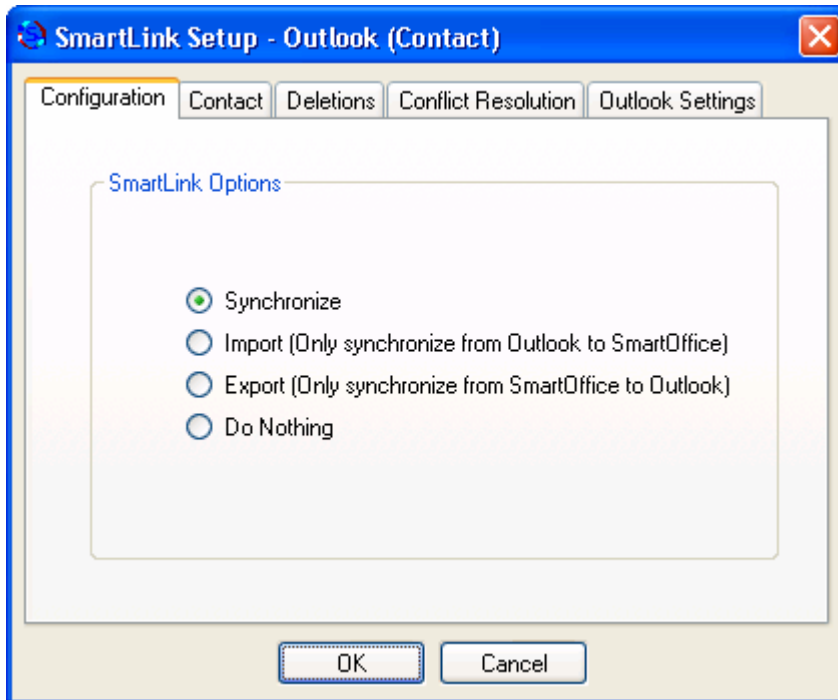
- **Synchronize** – Enables the user to perform a two-way synchronization between SmartOffice and Microsoft Outlook. This is the default option.
- **Import (Only synchronize from Outlook to SmartOffice)** – Enables the user to perform a one-way synchronization from Microsoft Outlook to SmartOffice.
-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

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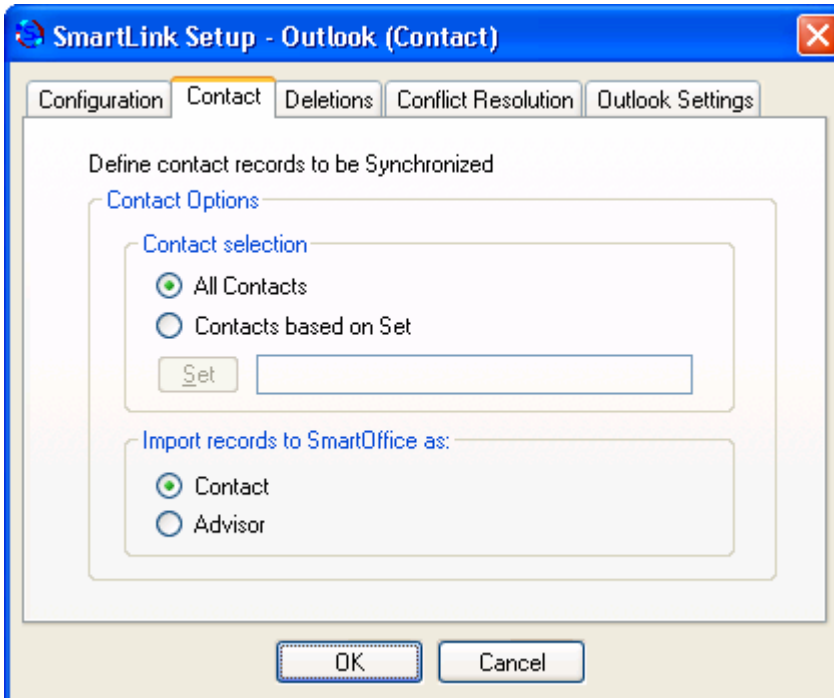
There are two options to choose from when defining the contact records to be synchronized:

- **All Contacts** – Synchronizes all of the contacts from SmartOffice to 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
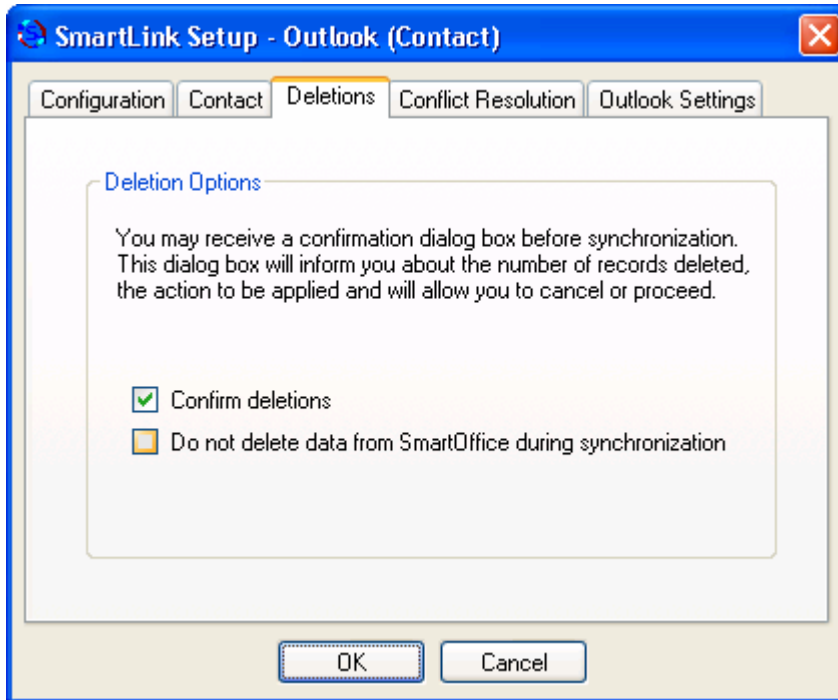
- **Confirm deletions** – When this option is selected, the user will be asked for confirmation prior to any records being deleted during synchronization. When this option is not selected, no confirmation will be required when data is deleted. This option is selected by default.

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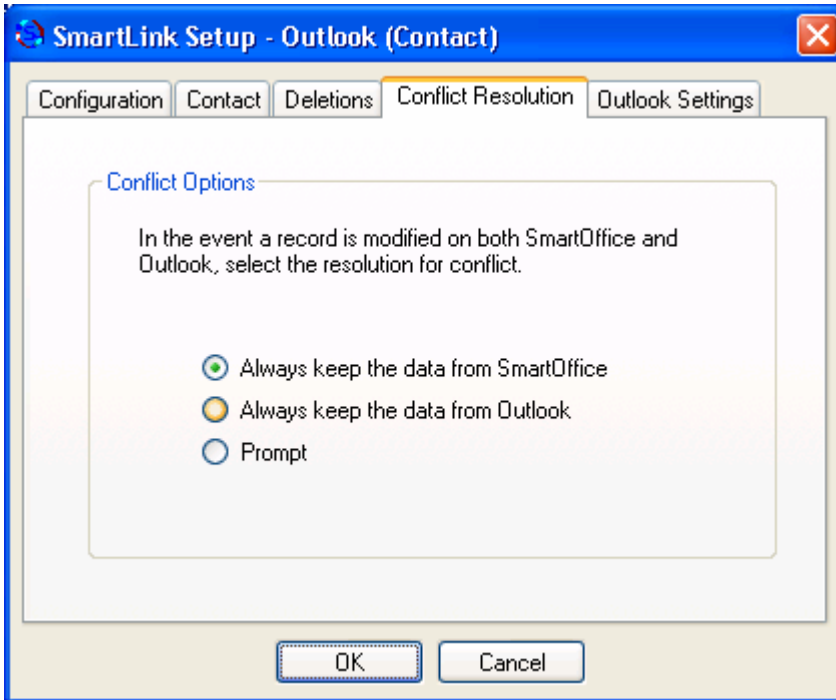
There are three options for resolving data conflicts that may occur:

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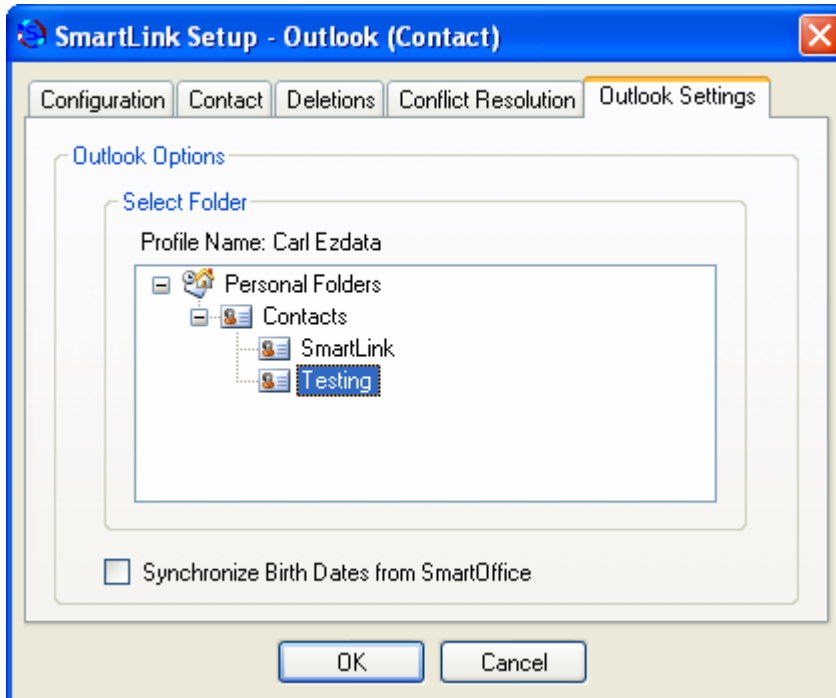
In the Select Folder section, select the MS Outlook Contacts folder that will be used for synchronizing contacts from MS Outlook to SmartOffice. Only one folder can be selected.

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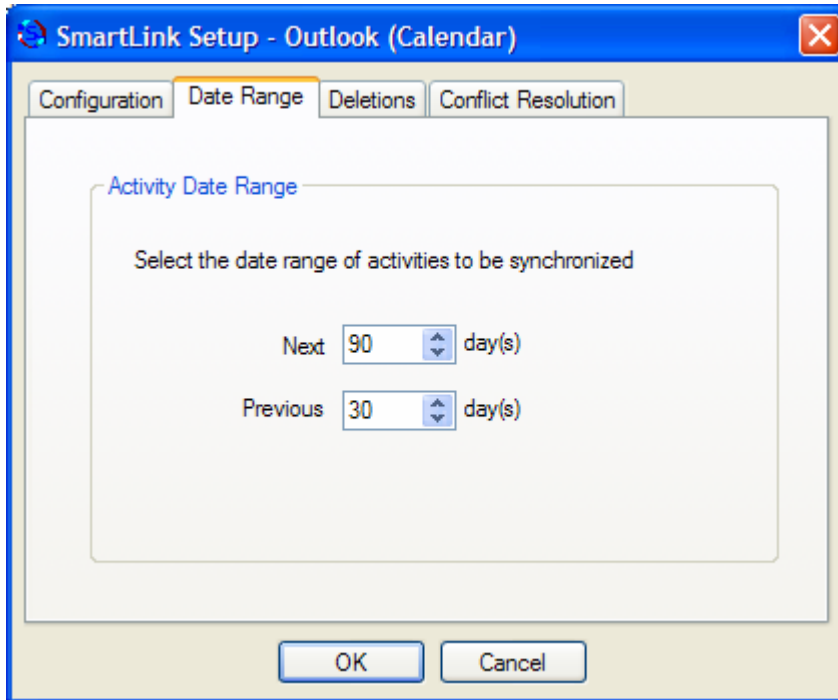
Specify the number of days in the future to synchronize Calendar/To Do activities as well as the number of days in the past to synchronize Calendar/To Do activities. The default setting is to synchronize the Next 90 and Previous 30 days.

Synchronization

1. Once the Setup has been completed, synchronization is initiated from the **SmartLink** toolbar by selecting the **Synchronize** menu item.
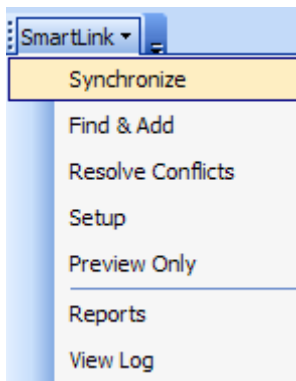
2. The synchronization process begins and a progress bar monitors the status of the synchronization.
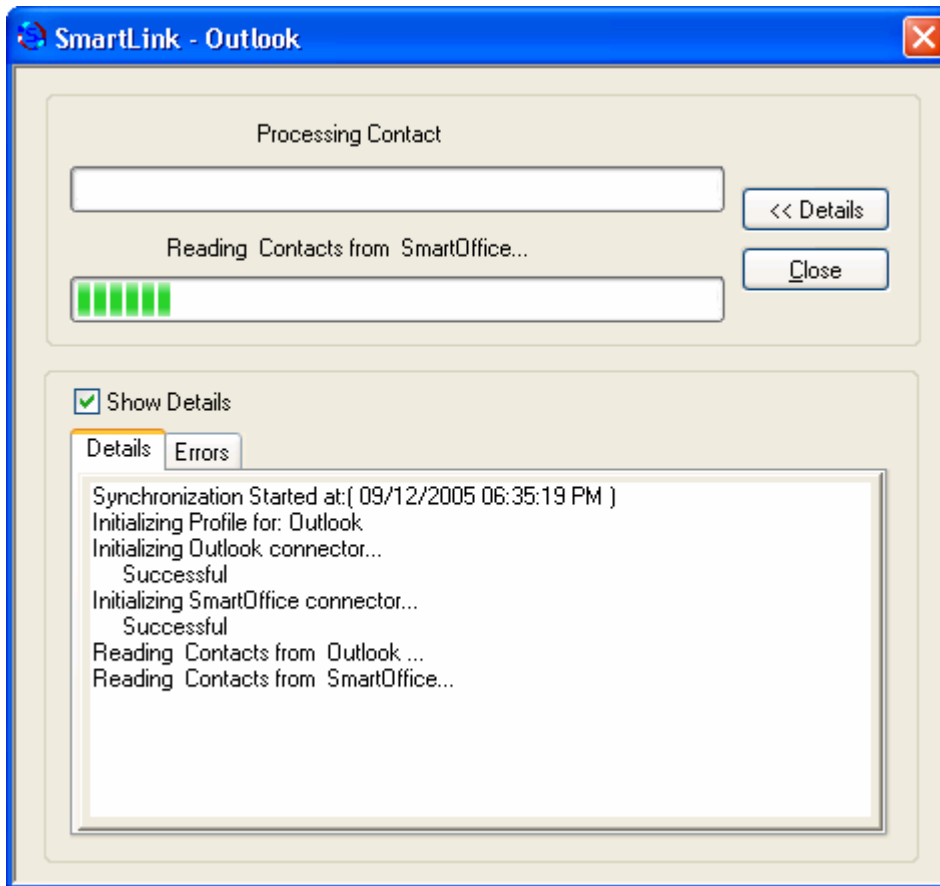
3. When synchronization completes, the following prompt displays.
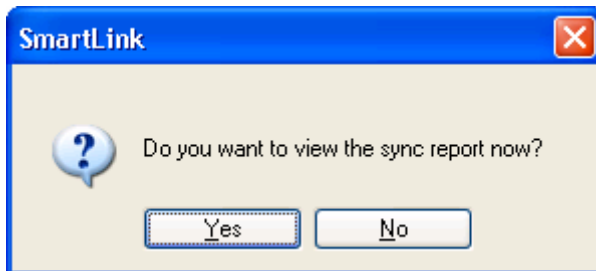
4. Selecting **Yes** will display a report of changes made during the synchronization that just completed. Selecting **No** will simply close the synchronization dialog box.

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.
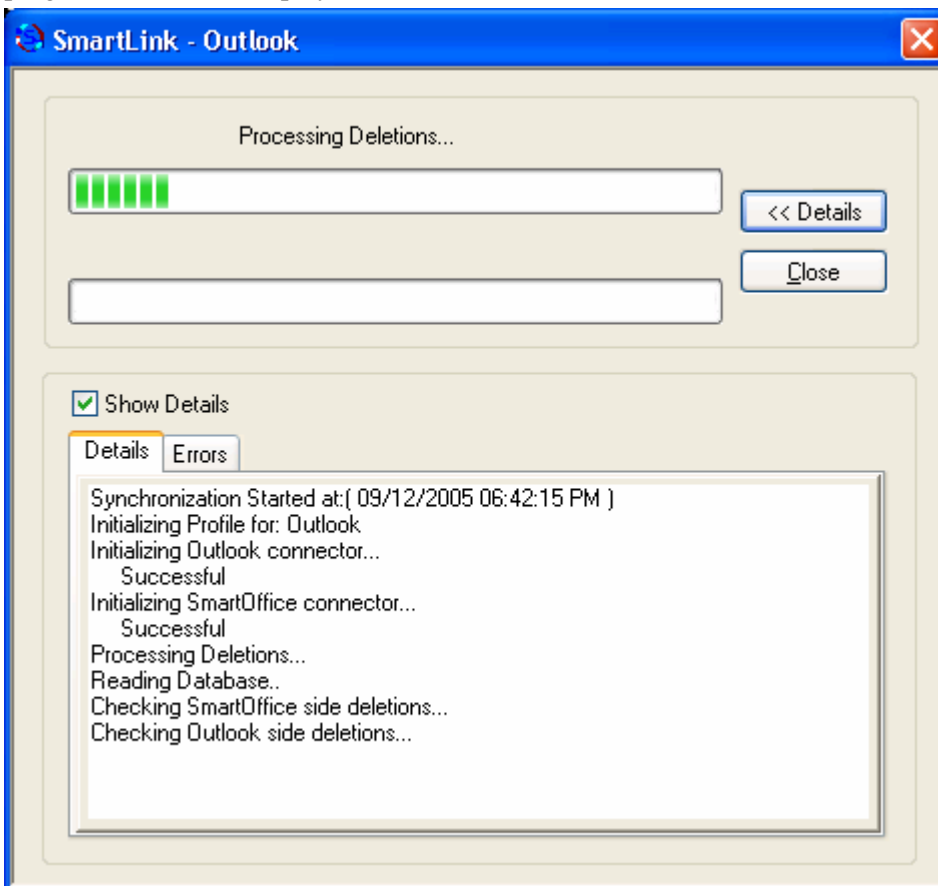
Confirm Deletions

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.
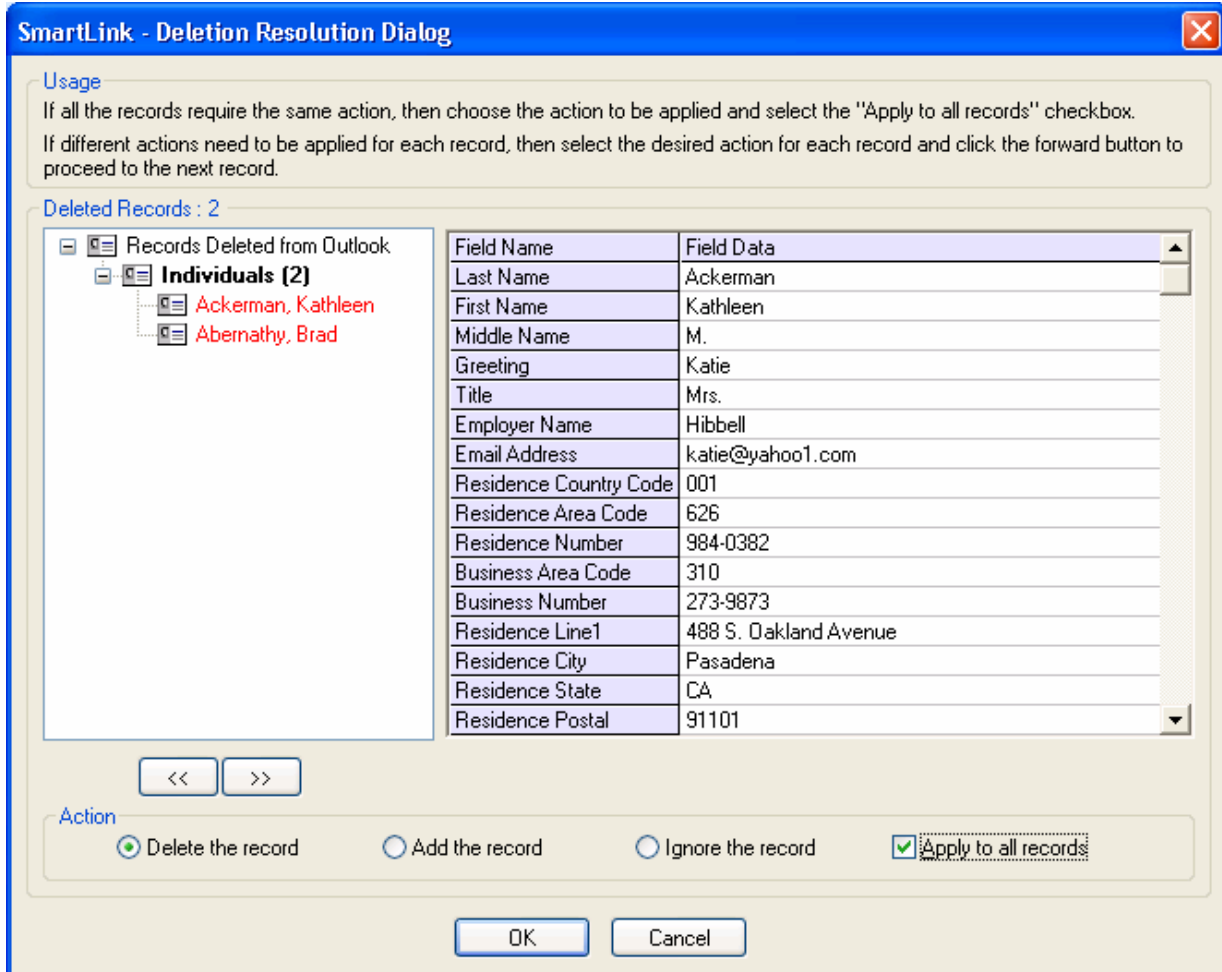

In the Deletion Resolution dialog box, the left hand panel will display a list of records deleted since the last synchronization. When one of these records is selected, detailed information about the selected record will display in the right hand panel. The information in the right hand panel will change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

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.
    - o Ignore the records – Black
    - o Prefer SmartOffice Data – Green
   - o 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.
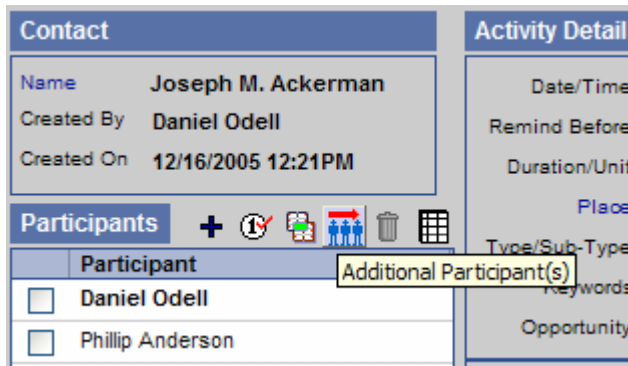
Participants in SmartOffice are the same as Attendees in MS Outlook. Any Attendees invited to a Meeting in MS Outlook will display in the Participants section of the SmartOffice Activity if they are SmartOffice users in the office being synchronized. Attendees that are not SmartOffice users can be accessed 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.
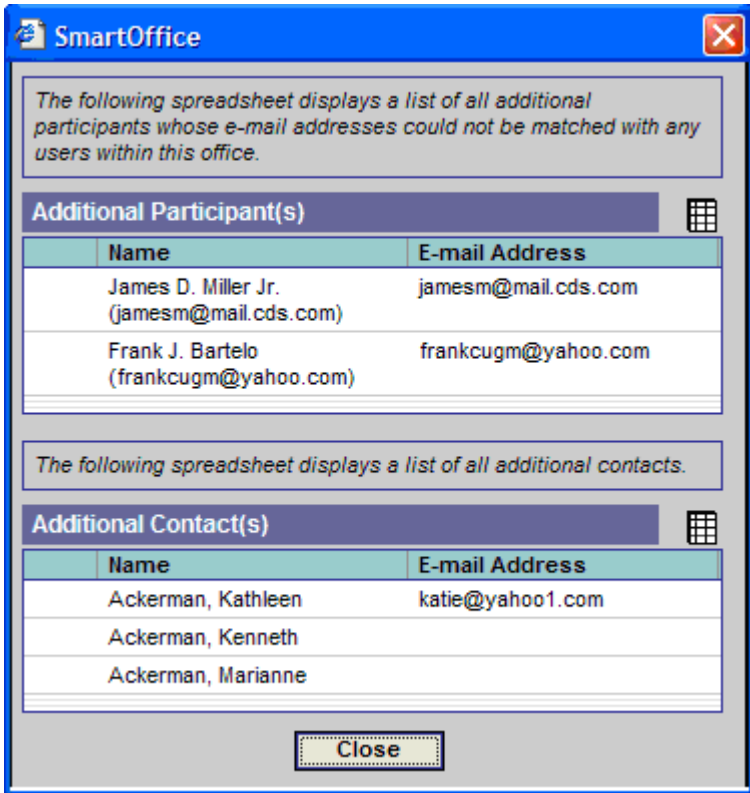
Find & Add Contacts

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.
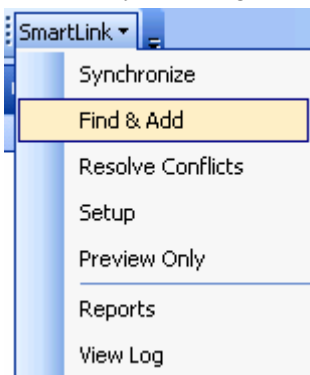
2. From the Find Individual/Business Contact(s) dialog box, enter the name of the Contact to search for, specify the Contact Type and then click the **Search** button.
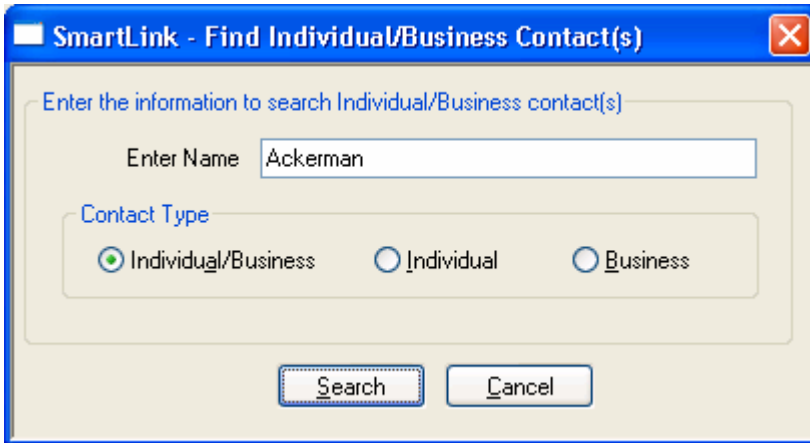
3. The Search Results dialog box displays.
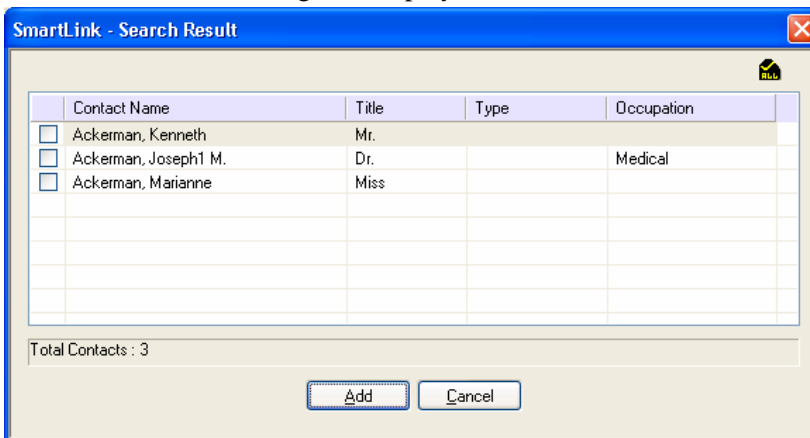
4. Select one or more of the contacts from the search results and then click the **Add** button to add the contact(s) to MS Outlook.

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.

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.
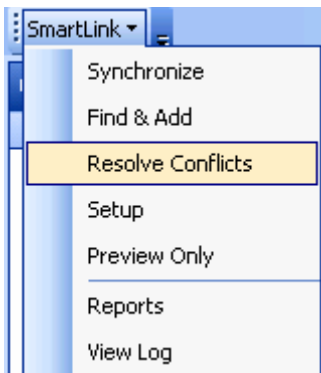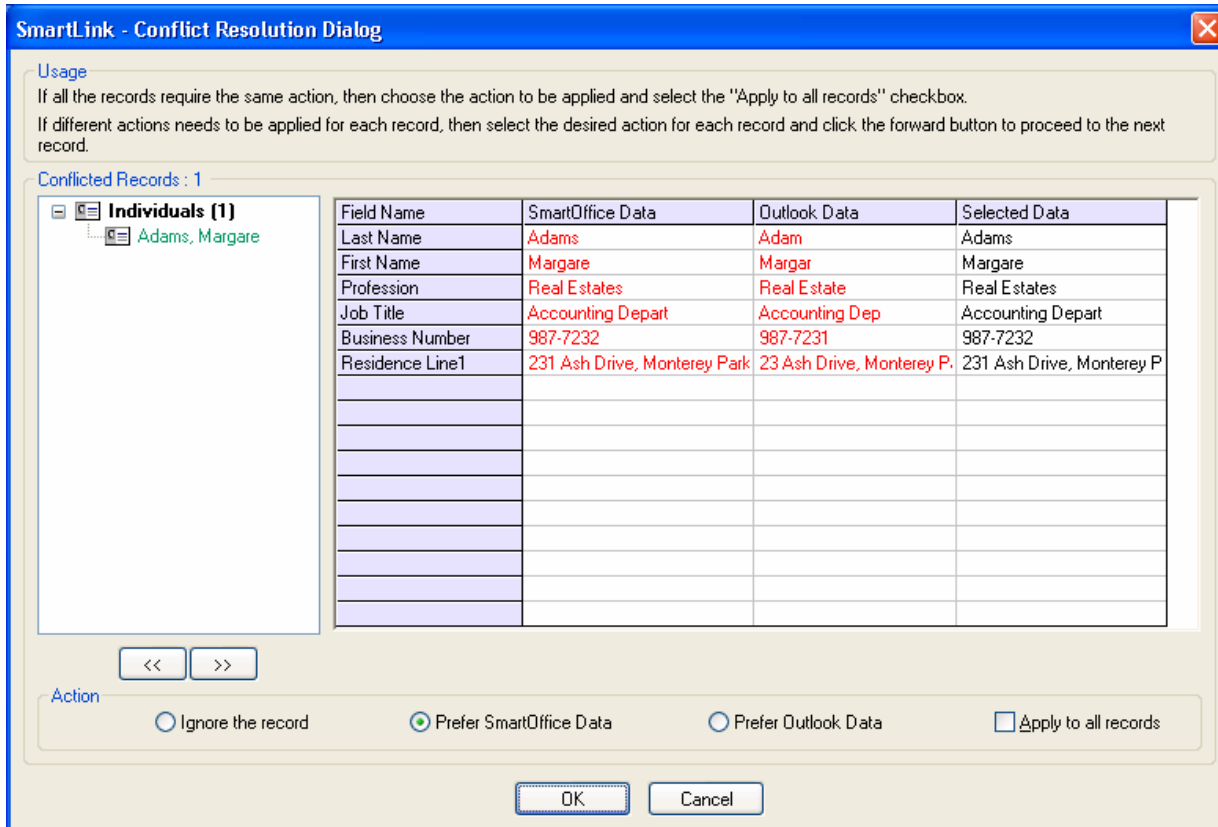

Preview Only

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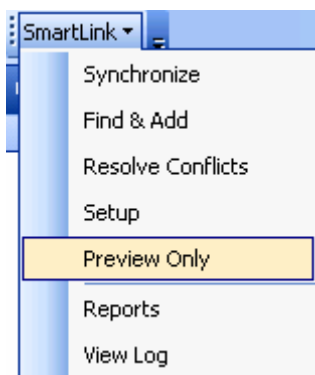
After the report is generated, the user is prompted to view it.

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.

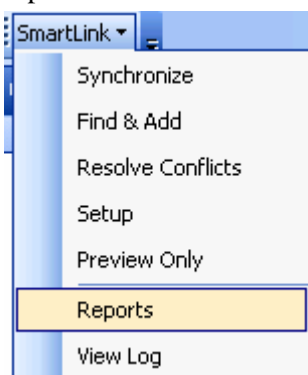A report summary displays where all Regular, Find & Add, and Preview Only synchronizations since the last full sync are listed. Select a report and then click the **Run Report** button to display the report.

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

	Outlook Contacts	SmartOffice Contacts
Contact Information	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
Telephone Number	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)