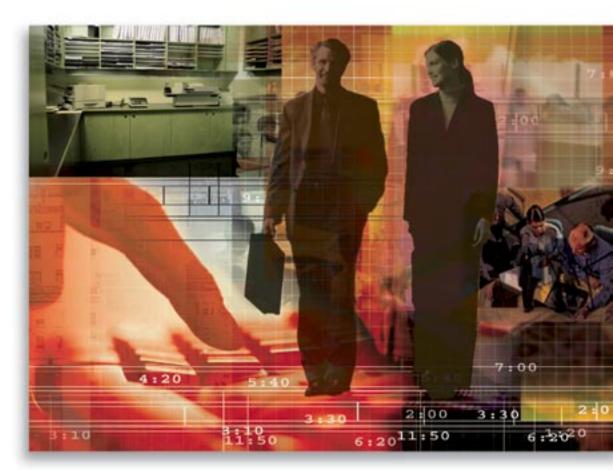
SmartLink for Outlook User Guide

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 | × |
|-----------------------------|--|---|
| | Welcome to the InstallShield Wizard for SmartLink for Outlook The InstallShield [®] 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 | |
| Synchronize Import (Only synchronize from Outlook to SmartOffice) Export (Only synchronize from SmartOffice to Outlook) | |
| 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: | | | |
| Contact | | | |
| 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. | |
| | |
| Always keep the data from SmartOffice | |
| 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

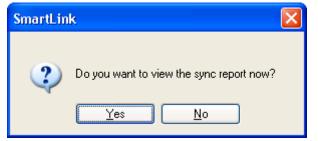
1. Once the Setup has been completed, synchronization is initiated from the **SmartLink** toolbar by selecting the **Synchronize** menu item.



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 | | | | | |
| | Ignore the record | ◯ 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

| | 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) |