



Client Data System^{*} Outlook Synchronization User Guide



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Introduction

Users of Client Data System® (CDS) can synchronize Contacts, Activities and SmartPad entries in CDS with Microsoft® Office® Outlook®. This document explains the synchronization options, how to synchronize CDS data with MS Outlook data and outlines the corresponding fields used in each application.

The CDS Outlook Synchronization application only supports MS Outlook 2003, MS Exchange Server 2000 and MS Exchange Server 2003.

Installing CDS Outlook Synchronization

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

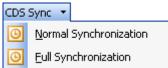


2. By default, the Microsoft Office Outlook 2003 for Client Data System option is selected. Click the **Next** button to display the next E-mail and Calendar Synchronization Installation dialog box.

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

🗹 Microsoft Office Outlook 2003 Calendar / Contact Synchronization for Client Data System

- 3. Select the Microsoft Office Outlook 2003 Calendar / Contact Synchronization for Client Data System option and then click the Next button.
- 4. When Microsoft Office Outlook 2003 Calendar / Contact Synchronization for Client Data System has been successfully installed, the InstallShield Wizard Complete dialog box displays. Click the **Finish** button.
- 5. When CDS Outlook Synchronization is installed, the CDS Sync button is added in MS Outlook.



6. The user is able to initiate Normal Synchronization or Full Synchronization from Outlook.

Setup for Outlook Synchronization

In order to view the options related to Outlook Synchronization, the CDS Outlook Synchronization component needs to be successfully installed and the Default Contact list should be set to **Microsoft Office Outlook**.

To set the Contact list option:

- 1. Launch the Internet Explorer browser.
- 2. From the **Tools** menu, select **Internet Options**.
- 3. From the Internet Options dialog box, click the **Programs** tab.

Internet Options					? 🔀
General Security	Privacy	Content	Connections	Programs	Advanced
Internet programs You can specify which program Windows automatically uses for each Internet service.					
<u>H</u> TML (editor:	Microsoft C)ffice Word		~
<u>E</u> -mail:	I	Microsoft C)ffice Outlook		~
<u>N</u> ewsgr	roups:	Outlook Ex	press		~
Internet	t call:	VetMeeting)		~
<u>C</u> alenda	ar: I	Microsoft C)ffice Outlook		~
Contact list: Microsoft Office Outlook					
<u>Reset Web Settings</u> You can reset Internet Explorer to the default home and search pages.					
<u>Manage Add-ons</u> Enable or disable browser add-ons installed on your computer.					
Internet Explorer should check to see whether it is the default browser					
		ОК	Ca	ncel	Apply

- 4. Verify that the default Contact list is set to **Microsoft Office Outlook**.
- 5. Click the **OK** button.

To set up for Outlook Synchronization:

- 1. In CDS, click the **Database** menu to open an additional list of options.
- 2. Select the Modify Current User's Profile option to display the Personal Information tab.

User Profile				×
Outlook Integration	Proxy List Things	Done 🌓 Mis	c. Information	
Personal Information	Security Information Contact C	ptions Activi	ity Options Po	olicy/Investment
User Information		Assistants/Associates	;	
Database	DEMO	Assistant-1	~	
Login Name	DEMO	Assistant-2	~	
Linked Contact		Assistant-3	~	
Linked Agent/Producer	Odell, Daniel	Assistant-4	~	
Status	Active	Assistant-5	~	
Last Logged In	12/16/2005			
E-mail	ezdatatest@ez-data.com			
OK Cancel Help				

- 3. Enter the e-mail address of the logged in Outlook Profile in the **E-mail** field.
- 4. Click the **Outlook Integration** tab.

User Profile		×	
Personal Information Secu	urity Information Contact Options Activity Options Policy/Investment	Ì	
Outlook Integration Proxy L	List Things Done Misc. Information		
Outlook Synchronization Options	Synchronization Timer Options		
Outlook Profile Ou	utlook 🔽 🗌 Enable Timer		
CDS Outlook Synchronization Set	tup Summary		
	📚 🏹 🞯 📖		
Created By Modified By	Created Modified SyncType Full		
OK Cancel <u>H</u> elp			

5. From the Outlook Synchronization Options section, select the Outlook Profile with which you would like to perform synchronization. If there is more than one profile, all the profiles will be listed in the drop-down list and the default profile will remain selected.

6. From the CDS Outlook Synchronization Setup Summary section, click the Add Record button to open the Outlook Synchronization Setup Wizard – Outlook Synchronization Options dialog box. In this step, the user will specify what type of records to synchronize. The user has the option to either synchronize only Contacts and Notes, just Activities or both. By default, the All of the above option will be selected to synchronize Contacts, Notes and Activities.

Outlook Synchronization Setup Wizard		
Outlook Synchronization Options		
Welcome to the Outlook Synchronization Setup Wizard.		
Please select the type of records to be synchronized.		
Select the appropriate option Contacts and Notes Activities All of the above		
Help < Back Next > Close		

7. Click the **Next** button to display the Contact Record Selection dialog box.

Outlook Synchronization Setup Wizard			
Contact Record Selection			
Please select the range of contact records to be synchronized. All Contacts - All Contact records in the database that meet the setup criteria will be synchronized.			
Selected Contacts - Contact records that meet the specified set criteria will be synchronized.			
Select the appropriate choice below All Contacts Selected Contacts Sync Birthdays			
Help < Back Next > Close			

- 8. Select the type of Contacts to synchronize and then click the **Next** button.
 - Select the **All Contacts** option and then click the **Next** button to synchronize all contact records from CDS and MS Outlook.
 - To synchronize specific contact records, select the **Selected Contacts** option to display a **Set** button below the Selected Contacts option.
 - Click the **Set** button to open the Find Sets dialog box.
 - Enter the name of the set to be used for synchronization and then click the **OK** button.
 - The specified set name will display in the **Set** field.
 - If the user does not know the name of the set, he or she needs to click the **OK** button from the Find Sets dialog box to display the **Set List** spreadsheet which lists all of the available sets in the database.

Outlook Synchronization Setup Wizard			
Contact Record Selection			
Please select the range of contact records to be synchronized. All Contacts - All Contact records in the database that meet the setup criteria will be synchronized. Selected Contacts - Contact records that meet the specified set criteria will be synchronized.			
Select the appropriate choice below All Contacts Set TEST Sync Birthdays			
Help < Back Next > Close			

• If the user selects the **Selected Contacts** option without specifying the Set and clicks the **Next** button, the following dialog box will display:

Client D	ata System 🛛 🛛 🔀	
8	Please select a Set for Contact Selection.	
	ОК	

• Select the **Sync Birthdays** option to synchronize the contact's birthdays. When this option is selected, expect the synchronization time to increase since Outlook will create calendar entries for the birthdays of all the contacts being synchronized.

9. After specifying the Contact Record Selection, click the **Next** button to display the SmartPad Record Selection dialog box. By default, only the recent three SmartPad entries within the last four months will synchronize for each contact record. These options can be modified as necessary. A maximum of nine SmartPad entries within the last twelve months can be synchronized. Select the **Sync Private Notes** option to synchronize all the SmartPad records marked as private that fall in the specified date range.

Outlook Synchronization Setup Wizard		
SmartPad Record Selection		
Set the appropriate options for synchronizing SmartPad entries.		
 Set the number of SmartPad entries to be downloaded for each contact. 		
 Set the timeframe and decide if Private Notes will be included. 		
Specify the SmartPad Options SmartPad entries not to exceed 3 in number SmartPad entries for last 4 months SmartPad entries Notes		
Help < Back Next > Close		

10. Click the **Next** button to display the Activity Record Selection dialog box.

Outlook Synchronization Setup Wizard
Activity Record Selection
Please enter the date range of the activities to be synchronized. Enter a number of days for both the Next and Previous fields to synchronize all activities in that range. To also include Private activities, select the Sync Private Activities option.
Specify the Date Range Next 30 day(s) Previous 15 day(s) Sync Private Activities
<u>H</u> elp < <u>B</u> ack <u>N</u> ext > Close

By default, only those activities of the next 30 days and previous 15 days will synchronize. The date range can be modified by the user if necessary. Maximum activities of the next 90 days and the previous 45 days can be synchronized. Select the **Sync Private Activities** option to synchronize all activities marked as private that fall between the specified date range. If this option is not checked, private activities from MS Outlook and CDS will be ignored during sync.

11. Click the **Next** button to display the Confirm Record Deletion dialog box.

Outlook Synchronization Setup Wizard
Confirm Record Deletion
Select the appropriate option for record deletion.
Confirmation - The user will be prompted prior to a record being deleted.
No Confirmation - This user will not be notified prior to a record being deleted.
Specify the Record Deletion Option Specify the Record Deletion Option Confirmation for Deletion No Confirmation for Deletion
Help < Back Next > Close

- Select the **Confirm for Deletion** option to be notified of any deleted records from either MS Outlook or CDS. With this option selected, a list of records deleted from Outlook or CDS after the last sync will be displayed during synchronization and the user will have an opportunity to add back the deleted record if he/she intends to.
- Select the **No Confirmation for Deletion** option to not be notified of any deleted records from either MS Outlook or CDS.

12. Click the Next button to display the Conflict Resolution dialog box.

Outlook Synchronization Setup Wiz	ard	
Conflict Resolution		
Select the appropriate option for conflict res	olution between CDS and Outlook.	
	Specify the Conflict Resolution Option	
	• Notify the user when a conflict occurs	
	O Always use the CDS Database information	
	O Always use the Microsoft Office Outlook	
<u>H</u> elp < <u>B</u> ac	k Next > Close	

- Select the **Notify the user when a conflict occurs** option to be notified of any conflicting records.
- Select the **Always use the CDS Database information** option to override the Outlook data with CDS data for any conflicting records.
- Select the **Always use the Microsoft Office Outlook** option to override the CDS data with Outlook data for any conflicting records.
- 13. Click the **Next** button to display the Outlook Synchronization Setup dialog box.

Outlook Synchronization Setup Wizard
Outlook Synchronization Setup
The synchronization has been configured with the following options:
 The user will be responsible for resolving any conflicts.
* The user will be prompted prior to deleting records.
* Activities in the range of next 30 days and previous 15 days will be synchronized.
* SmartPad entries not exceeding 3 and for last 4 months will be synchronized.
Click the Finish button to save this Setup.
Full Synchronization - Yes or No
O Yes ○ No
Help < Back Einish Close

This step summarizes the setup criteria specified by the user. To run a full synchronization, select the **Yes** option in the **Full Synchronization** section. Click the **Finish** button to save the setup criteria.

Full Synchronization

For full synchronization, the user will be prompted to select the Contact folder that is to be used for synchronization and the respective default folders will be used for the Calendar, Tasks or Notes. The full synchronization will synchronize all records from CDS and MS Outlook that meet the setup criteria. A full synchronization is recommended if the Outlook Profile that was being used for the synchronization is changed on the Outlook Integration tab.

Subsequent (Normal) Synchronization

For subsequent synchronizations, only those records that were added/modified after the last synchronization will be synchronized. If the setup is changed, upon subsequent synchronization, only those records that satisfy the new setup criteria and were added/modified after the last synchronization will be synchronized.

Running Synchronization

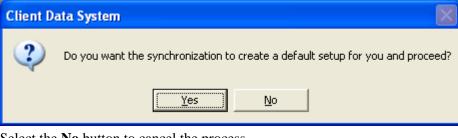
There are several ways to initiate synchronization:

- Click the **CDS Sync** button in MS Outlook to present the user with the option to either run a normal or full synchronization.
- Use the shortcut key (**Ctrl+S**) in CDS.
- Select the **Run Outlook Synchronization** option from the **Tools** menu in CDS.

When the user initiates synchronization without defining the setup criteria, the following message box displays:



Click the **OK** button to display the following dialog box:



Select the No button to cancel the process.

Client D	ata System 🛛 🔀
8	Outlook synchronization cancelled.
	ОК

Click the **Yes** button to add a default synchronization setup for the user (with the following criteria) and start the synchronization process.

De	fault	Sync	hroniza	tion	Setup	Criteria

Outlook Synchronization Description	
Outlook Synchronization Options	Activity Record Selection
Specify the appropriate option. Contacts and Notes Activities All of the above	Enter the Date Range of the activities. Next 30 day(s) Previous 15 day(s) Sync Private Activities
Contact Record Selection	Confirm Record Deletion
Select the type of Contacts to be downloaded. All Contacts Sync Birthdays	Specify the appropriate action. Confirmation for Deletion No Confirmation for Deletion
SmartPad Selection	Conflict Resolution
Set the appropriate options. SmartPad entries not to exceed 3 in number SmartPad entries for last 4 months Sync Private Notes 3	Select the appropriate option for conflict resolution between CDS and Microsoft Office Outlook. Notify the user when a conflict occurs Always use CDS database information Always use Microsoft Office Outlook database
Full Synchronization	
QK	

During the synchronization, the CDS Outlook Sync Interface – Contact Folder Selection dialog box displays:

CI	os o	utlook Sync Interface - (Contact Folder Selection	×	
	Plea	se select a contact folder for sy	nchronization.		
		Folder Name	Path		
		Contacts	EZMail		
	☑	CDS Contacts	EZMail\Contacts		
		OK	Cancel		

The CDS Outlook Sync Interface – Contact Folder Selection dialog box lists all of the existing Contact folder(s) in MS Outlook. Select the appropriate Contact folder to synchronize with and then click the **OK** button.

If the user does not want to use the default synchronization setup criteria and would like to specify his or her own, the user can do this by going through the Outlook Synchronization Setup Wizard mentioned earlier.

E-mail Reconciliation

The following message displays when the synchronization profile selected by the logged in CDS user does not match the current Outlook Profile.



Click the **OK** button to display the following message:

Client D	ata System 🛛 🔀
8	Outlook synchronization cancelled.
	OK

Once the user clicks the **OK** button, he or she will need to select the correct synchronization profile in CDS in order for synchronization to work.

The following message displays when the e-mail address for the current user in CDS does not match the e-mail address of the logged in Outlook profile.

CDS Out	look Sync Interface 🛛 🔀
8	The email address specified for the current user in the CDS user profile 'test@ez-data.com' does not match the e-mail address of the logged in Outlook profile 'ezdatatest@ez-data.com'.
	ОК

Click the **OK** button to display the following dialog box:



Click the **OK** button and then enter the correct e-mail address in the CDS user profile in order for synchronization to run.

If Outlook is closed and synchronization is initiated from CDS, the following dialog box displays:

Client D	ata System 🛛 🕅
2	Microsoft Outlook is not currently open. Launch Microsoft Office Outlook?
	Yes No

Click the **Yes** button to open MS Outlook. Once Outlook is open, the following dialog box displays:

Client Data System
Start CDS-Outlook Synchronization?
Yes No

Click the Yes button to start the synchronization.

Outlook Contacts vs. CDS Contacts

Below are some points regarding Contact records that the user should be aware of:

- If the Last Name and First Name are not provided and only the Company name is provided in Outlook, it is considered a Business record once it synchronizes over to CDS.
- The various types of contact records (Contact, Business, Agent) in CDS display in the Categories field on the Outlook Contact Detail tab once synchronization occurs.
- Any contact records in Outlook or CDS without a Last Name will not be synchronized. In order to prevent duplicate contact records, CDS Outlook Synchronization requires a minimum of the Last Name and First Name fields to be populated.
- When synchronizing with a Set, any Contact record added in Outlook will be added as a member of the Set.
- When synchronizing with a Set, only the activities, to do items and notes that fall within the specified range that are not linked to any contact or are linked to a contact which is part of the Set, will be synchronized to Outlook. An activity which is linked to a contact that is not in the set will not be synchronized.

Outlook Notes vs. CDS SmartPad

The CDS Outlook Synchronization maps the Notes in MS Outlook to the SmartPad in CDS. On full synchronization, the number of entries specified for SmartPad in the setup criteria meeting the timeline will be synchronized to Outlook Notes. These criteria are applied on a per contact record basis.

For example, the user has specified that the SmartPad entries are not to exceed 4 in number and should include SmartPad entries for the last 6 months. Upon synchronization, it will synchronize the 4 most recent SmartPad entries per contact within the last 6 months in Outlook Notes. For subsequent synchronizations, any additional SmartPad entries added in CDS for the synchronized contacts meeting the timeline will be added to Outlook Notes.

In MS Outlook, any activity related SmartPad entries are displayed in blue and any note-related SmartPad entries are displayed in yellow.

Outlook Calendar vs. CDS Activity

The CDS Outlook Synchronization maps the Calendar in MS Outlook to Activities in CDS. On full synchronization, activities in MS Outlook and CDS that fall within the date range specified in the setup will be synchronized.

Adding an Activity Linked to a Contact in Outlook

- 1. Open a new Calendar window.
- 2. Enter the required information for the activity.
- 3. From the lower left corner of the Calendar window, click the **Contacts** button to open the Select Contacts dialog box.

Select Contacts		×
Look in:		
 Carl		
🛅 Carla		
🚞 Caroleanne		
🚞 Charles		
🚞 Chithra		
Chris		
Christopher		
See Contacts		~
Items:		
 □ g Filed As	Job Title	Company
S ABC Manufacturing		ABC Manufacturing
S Ace Building		Ace Building
😼 🛛 Ackerman, Joseph M.	Chief Of Staff	Joseph M. Ackerman, M.D., Inc.
🔙 Ackerman, Kathleen		Hibbell, Sims, & McAlester, Inc.
🔙 Ackerman, Kenneth M.		
S Ackerman, Marianne		
Sa Adcock, Jennifer		✓
		OK Cancel Apply

- 4. Select a contact and then click the **OK** button.
- 5. The selected Contact Name displays in the Contacts field of the Calendar.
- 6. Click the **Save and Close** button to save the activity.
- 7. Synchronize.

8. In CDS, open this activity. The linked Contact Name of the activity added in Outlook will display in the LastNm, First field.

🏶 Activity I	Detail				
Last Nm,First Type/Sub Keywords Due Date	Ackerman, Joseph Appointment V Business	Priority Status Assigned To Pri <u>v</u> ate	Important Active DEMO Intative	Tracked	Created By DEMO Created On 12/01/2005
Subject Place	Activity added in Outlook with a linked Conta Office	act	Send E-mail I		UserHame
Start Time End Time Reminder	Mon 12/19/2005 Mon 12/19/2005 0 minutes 0 minu	[All day event		
Testing				×	
	ОК	Cancel	Options Help	·	

Adding an Activity Linked to a Contact in CDS

- 1. Open a new Activity Detail window.
- 2. Enter the required information for the activity.
- 3. Click the LastNm, First field label to open the Find Contact Information dialog box.
- 4. Enter the search criteria and then click the **OK** button.

🛎 Find Contact Information 🛛 🔀
Last Name <,First> Ack
Contact OBusiness
Enter the information to search on (blank searches all), then click the OK button.
OK Cancel <u>H</u> elp

- 5. The Contact List displays all of the contact records with the matching search criteria.
- 6. From the Contact List, select the applicable contact and then click the **Ok**, **Select** button.
- 7. The selected Contact's name displays in the LastNm, First field.
- 8. Click the **OK** button to save the activity.
- 9. Synchronize.

10. In MS Outlook, open this activity. The linked Contact Name of the activity added in CDS displays in the Contacts field as shown below.

1 2			
Activity added in CDS with a linked Contact	Meeting		- • ×
Ele Edit View Insert Format Tools Actions	Help		
🕴 🖃 Send 🎯 🌒 🛄 🖏 🕂 Recyrrence 📆 Co	ncel Igvitation 📍 👪 🗡 🛛 🕢 🛃 🕴 Arial	• <u>10</u> • <u>A</u> B <i>I</i> U m高温注读	年。
Appointment Scheduling			
Invitations have not been sent for this meeting.			
To ₄			
Subject: Activity added in CDS with a linked Contact			
Location: Office		Label: None	~
Start time: Tue 12/20/2005 S:00 AM Eng time: Tue 12/20/2005 12:00 PM	V All day event		
Reminder: O minutes	time as: 📕 Busy 💌		
Meeting Workspace This is an online meeting usin	g: Microsoft NetMeeting		
Testing			~
			~
Contacts Joseph M. Ackerman M.D.		Categories	Private

Adding an Activity for Additional Contacts and Participants

In Outlook, the user can add additional contacts and participants when creating an activity.

Weekly Meeting - Meeting		ē 🔀
Ejle Edit Yjew Insert Format Iools Actions Help		
🗄 🖃 Şend 🛛 🎒 🕼 🔛 🍇 / 🕀 Recyrrence 🕎 Cancel Igvitation 🛛 🏌 🦊 🖌 🛞 🍃 👘 Árial	•]10 •] 🔺 B Z 🗵) 🧱 喜 亜 注 課 課 💂	
Appointment Scheduling		
Invitations have not been sent for this meeting.		
To martin.adcock@eznet.com; eileen@eznet.com		
Subject: Weekly Meeting		
Location: Conference Room	Label: None	~
Start time; Fri 12/16/2005 Image: Start time; 9:00 AM Image: All day event End time: Fri 12/16/2005 Image: Start time; 10:00 AM Image: Start time;		
Reminder: 15 minutes Get Show time as: Busy		
Meeting Workspace This is an online meeting using: Microsoft NetMeeting		
Hi All,		^
Please be prepared to discuss the status of the current build.		
Thanksl		
Contacts Eugene Antile; Joseph M. Ackerman M.D.	Categories Pri	vate 📃

After synchronization has been completed, open this activity in CDS. The first contact displayed in the Contacts field of the Outlook Calendar is shown as the linked Contact in CDS.

🔗 Activity Detail		X
Last Nm,First Antille, Eugene Type/Sub Appointment V	Priority Important Status Active Assigned To	Created By DEMO Created On 12/01/2005
Due Date //	Private Ientative Tracked	Participants
Subject Weekly Meeting Place Conference Room	Send E-mail Invitations	UserName
Start Time Fri 12/16/2005 O9:00 AM End Time Fri 12/16/2005 10:00 AM	All day event	DEMO
Reminder 15 minutes		
reason Hi All,		
Please be prepared to discuss the status of the current b	iild.	
OK Cancel	Options) Edditional Contacts/Attendees	<u>t</u> elp

Any additional Contacts will be displayed when the user clicks the **Additional Contacts/Attendees** button from the CDS Activity Detail dialog box as shown below.

Additional Contacts	/ Attendees	×
Contacts		
Name	E-Mail	<u>^</u>
Ackerman,Joseph	joe_ackerman@eznet.com	
		~
	-	
Attendees		
Name	E-Mail	<u>^</u>
martin.adcock@eznet.com	martin.adcock@eznet.com	
		~
ОК	Cancel <u>H</u> elp	

For those participants in the Outlook Calendar who have a matching e-mail address with a CDS user, that activity will be assigned to that user in CDS after synchronization completes. If there are multiple CDS users with matching e-mail addresses from the participant list in Outlook, those users will be listed on the Participants spreadsheet from the CDS Activity Detail dialog box. The activity will be assigned to all matching users.

All participants in the Outlook Calendar whose e-mail addresses do not match with any of the CDS users will be listed in the Attendees spreadsheet of the Additional Contacts/Attendees dialog box.

Additional Contacts	/ Attendees	
Contacts		
Name	E-Mail	<u>^</u>
Ackerman, Joseph	joe_ackerman@eznet.com	
		-
· · · · · · · · · · · · · · · · · · ·		
Attendees		
Name	E-Mail	<u>^</u>
martin.adcock@eznet.com	n martin.adcock@eznet.com	
		~
<u></u>		
ОК	Cancel <u>H</u> elp	
<u> </u>		

Outlook Tasks vs. CDS To Do Items

The CDS Outlook Synchronization maps the Tasks in MS Outlook to To Do's in CDS. In MS Outlook, it enables users to create tasks without having to specify the Start Date; however, in the CDS Outlook Synchronization application, we need the Start Date to be specified in order for those tasks to synchronize with CDS. Only those tasks that have a Start Date and fall between the given date range will be synchronized.

By design, the recurring tasks are not synchronized both ways. The synchronization of the additional contacts and participants for tasks/to do items follow the same logic as with the activity/calendar section.

Record Deletion

Ignore Record Deletion

If this option was selected in the CDS Outlook Synchronization Setup Wizard, the user will not be notified of any deleted records from either MS Outlook or CDS. Wherever the record was initially deleted, it will remain deleted but will still exist in the other application.

For example, if Joseph Ackerman's record was deleted in CDS, with the **Ignore Record Deletion** option selected, his record will remain deleted in CDS; however, it will still exist in MS Outlook.

Confirm Record Deletion

If this option was selected in the CDS Outlook Synchronization Setup Wizard, the user will be notified of any deleted records from either MS Outlook or CDS since the last synchronization. During the synchronization process, the CDS Outlook Sync Interface – Confirm Deletions dialog box displays.

Depending on which application (MS Outlook or CDS) the records were deleted from, the title of the dialog box may display:

- CDS Outlook Sync Interface Confirm Deletions from Microsoft Office Outlook
- CDS Outlook Sync Interface Confirm Deletions from Client Data System

The Confirm Deletions dialog box displays any contact, activity or note records that have been deleted from either application after the last synchronization. Having the option to confirm record deletion provides the user with the opportunity to either add back the deleted record from the application in which it was deleted from, or delete the record from the other application as well. If records were deleted from both MS Outlook and CDS, upon the subsequent synchronization, the Confirm Deletions from Microsoft Office Outlook dialog box will display first and once those records have been resolved, it will display the Confirm Deletions from Client Data System dialog box.

There are several options available for handling deleted records. The user can select an option specific to each deleted record by selecting the appropriate option and moving on to another record; or, the same option can be applied for all deleted records by selecting the **Apply to all records** option.

CDS Outlook Sync Interface - Confirm Deletions from Microsoft Office Outlook						
The following records were deleted in Microsoft Office Outlook but remain in Client Data System. Select the appropriate action for each record and then click the Apply Action button.Select the Apply to all records checkbox to apply a selected action to all of the records. Records that appear in red are linked to a policy or investment record and cannot be deleted from CDS.Click the Display Linked Records button to show a list of this type of records.						
Field Name Field Value Activity Record type Activity Activity with History Modification Date 11/24/2005 22:11:52 Meeting with Client AlDay FALSE Agent Start Time 11/23/2005 00:00:00 Due Date 11/23/2005 00:00:00 Modification Date 11/23/2005 00:00:00 Priority Normal ABC Manufacturing Status Activity In Progress Activity Alarm Private No						
Notes Body testing1 Subject To Do 1 Recurring Activity 0 Participant 1 DEMO						
C Add the record back to Microsoft Office Outlook Apply to all records Apply Action Display Linked Records Close						

In the CDS Outlook Sync Interface – Confirm Deletions from Microsoft Office Outlook dialog box, the deleted records display in an expanded tree format with the following Record Types: Activity, Activity with History, Agent, Business, Contact and Notes. The user can easily view which record has been deleted in Outlook along with the corresponding fields of the record shown in the right pane of the dialog box.

For the deleted records in Outlook, the user can select one of the following options:

- **Ignore the deleted record** The selected record will remain deleted in Outlook but will still exist in CDS.
- Add the record back to Microsoft Office Outlook The selected record will be added back into MS Outlook.
- Delete the record from Client Data System The selected record will be deleted in CDS.

By default, the **Ignore the deleted record** option will be selected.

The steps to apply the action for each deleted record are as follows:

- 1. Highlight the deleted record (i.e., To Do 1) as shown previously.
- 2. Select the appropriate action for the selected record (i.e., Ignore the deleted record).
- 3. Click the **Apply Action** button.
- 4. Once the action has been applied, the List of deleted records in Microsoft Office Outlook will refresh and that record will be removed from the list.
- 5. The Total count of the deleted records is updated as well.

CDS Outlook Sync Interface - Confirm Deletions	from Microsoft O	ffice Outlook			
The following records were deleted in Microsoft Office Outlook but remain in Client Data System. Select the appropriate action for each record and then click the Apply Action button.Select the Apply to all records checkbox to apply a selected action to all of the records. Records that appear in red are linked to a policy or investment record and cannot be deleted from CDS.Click the Display Linked Records button to show a list of this type of records.					
List of deleted records in Microsoft Office Outlook					
Activity	Field Name	Field Value			
🛓 💜 Activity with History					
Meeting with Client					
Agent					
Agency					
Business					
ABC Manufacturing					
e Contact					
Notes					
Created On : 11/29/2005 14:45:00 Appc					
	ļ				
\Box Select the appropriate action for the selected record(s)		Total : 5			
 Ignore the deleted record 					
C Add the record back to Microsoft Office Outlook					
C Delete the record from Client Data System Apply Action Display Linked Records					
	Close				

The steps to apply the same action for all deleted records are as follows:

- 1. Select the appropriate action (i.e., Delete the record from Client Data System).
- 2. Select the Apply to all records option.
- 3. Click the **Apply Action** button.
- 4. Once the action has been applied to all records, the List of Deleted Records in Microsoft Office Outlook will refresh and all the records except for the ones in red will be removed from the list.
- 5. The total count of the deleted records will be updated as well.

CDS Outlook Sync Interface - Confirm Deletions	from Microsoft Offic	e Outlook	×	
The following records were deleted in Microsoft Office Outlook but remain in Client Data System. Select the appropriate action for each record and then click the Apply Action button. Select the Apply to all records checkbox to apply a selected action to all of the records. Records that appear in red are linked to a policy or investment record and cannot be deleted from CDS. Click the Display Linked Records button to show a list of this type of records.				
Activity	Field Name	Field Value		
Activity with History Agent Business ABC Manufacturing Contact Ackerman, Joseph Notes	BusNo Company Category Business Address Business City Business State Business Postal Code Business Telephone N	1 ABC Manufacturing Business 55 N. Main Street Pasadena CA 91106 (310)-237-4882		
Select the appropriate action for the selected record(s)	,	Total : 2		
C Add the record back to Microsoft Office Outlook C Delete the record from Client Data System		Apply to all records Apply Action Display Linked Records		
	Close			

6. The records that display in red are linked to policy or investment records and cannot be deleted from CDS. Only the **Ignore the deleted record** or **Add the record back to Microsoft Office Outlook** actions can apply to such records. Click the **Display Linked Record** button to open a notepad which lists such records.

DeletedList.txt - Notepad	
Eile Edit Format View Help	
List of records deleted from Outlook and linked to policy or investment in CDS : List of Business :	
ABC Manufacturing	
List of Contacts :	
Ackerman, Joseph	
	\sim

CDS Outlook Sync Interface – Confirm Deletions from Client Data System

CDS Outlook Sync Interface - Confirm Deletions f	rom Client Data Sy	stem	×
The following records were deleted in Client Data System to Select the appropriate action for each record and then clict action to all of the records.		Office Outlook. on.Select the Apply to all records checkbox to apply a selected Field Value No	I
Meeting with Client Recurring Activity Test Agent Business Contact Ackerman, Joseph Ackerman, Joseph Created On : 11/29/2005 14:45:00 Appoir	Private Location Subject Alarm AllDay Start Time End Time Record type Priority Body Modification Date Participant 1	No Office Meeting with Client 0 FALSE 11/30/2005 08:00:00 11/30/2005 09:30:00 Timed Activity Normal to discuss the new insurance policies 11/29/2005 15:01:33 Esther Chang	
Select the appropriate action for the selected record(s) — G Ignore the deleted record Add the record back to Client Data System Delete the record from Microsoft Office Outlook	Close	Total : 5 Apply to all records Apply Action	

In the CDS Outlook Sync Interface – Confirm Deletions from Client Data System dialog box, the deleted records display in an expanded tree format with the following Record Types: Activity, Agent, Business, Contact and Notes. Here, the user can easily view which record has been deleted in CDS along with the corresponding fields of the record shown in the right pane of the dialog box.

For the deleted records in CDS, the user can select one of the following options:

- **Ignore the deleted record** The selected record will remain deleted in Outlook but will still exist in CDS.
- Add the record back to Client Data System The selected record will be added back to CDS.
- **Delete the record from Microsoft Office Outlook -** The selected record will be deleted in MS Outlook as well.

By default, the **Ignore the deleted record** option will be selected.

The steps to apply an action for each deleted record or applying the same action for all the deleted records is the same as mentioned earlier.

The differences between the Confirm Deletions from CDS and Confirm deletions from MS Outlook dialog boxes are:

- 1. The Activity with History section is not displayed in the expanded tree format.
- 2. The deleted records with linked policies and investments will not be displayed in red. The Display Linked Records button is not shown.

Conflict Resolution

A conflict occurs when a contact or an activity that has been synchronized between MS Outlook and CDS is modified in both of these applications after the last synchronization.

Notify the user when a Conflict Occurs

If this option was selected in the CDS Outlook Synchronization Setup Wizard, the user will be notified of any conflicting records. During the synchronization process, the CDS Outlook Sync Interface – Conflict Resolution dialog box displays.

The option to be notified of conflicting records presents the user with the opportunity to compare the data in CDS with MS Outlook to help decide which data to keep.

There are several options available for handling conflicting records. The user can select an option specific to each conflicting record by selecting the appropriate option and moving on to another record; or, the same option can be applied for all conflicting records by checking the **Apply to all records** option.

CDS Ou	tlook Sync Interface -	Conflict Resolut	ion			×
	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, highlight the record and select the appropriate action.					
Conflic	t Resolution Action Selection		1icrosoft Office Outlook	Ignore Record	C Select Data	
🗆 Арі	ply to all records					
List of	conflicting records					
₽~	Activity	Field Name	Outlook	CDS	Merged Data	
Ī	Activity added in Out	Start Time	12/19/2005 11:00:00	12/19/2005 15:00:00		
L	Agent	End Time	12/19/2005 12:00:00	12/19/2005 12:00:00		
	A Grant, Christopher	Priority	Urgent	Other		
s	Business	Primary Contact		Ackerman Joseph		
	Contact					
	📲 Ackerman, Joseph					
····· []	Notes					_
			ОК	Cancel		

In the CDS Outlook Sync Interface – Conflict Resolution dialog box, the conflicting records display in an expanded tree format with the following Record Types: Activity, Agent, Business, Contact and Notes.

For the conflicting records, the user can select one of the following options:

- Client Data System Overwrite the Outlook record with CDS data.
- Microsoft Office Outlook Overwrite the CDS record with Outlook data.
- **Ignore Record** Ignore the conflict and keep both records as they are.
- Select Data Select the appropriate data from both CDS and Outlook.

By default, the Ignore Record option will be selected.

The steps to apply for conflicting records are as follows:

- 1. Highlight a conflicting record as shown above.
- 2. Select the appropriate action for the selected record.
- 3. Highlight the next conflicting record.
- 4. Select the appropriate action for the selected record.
- 5. Continue this pattern until the appropriate action has been applied to all the conflicting records.
- 6. Click the **OK** button to proceed with synchronization.

The steps to apply the same action for all conflicting records are as follows:

- 1. Select the appropriate action to be applied to all the conflicting records.
- 2. Select the Apply to all records option.
- 3. Click the **OK** button.

If the **Client Data System** option is selected for a record, the CDS data will be populated in the Merged Data column.

CDS Outlook Sync Interface -	Conflict Resolut	ion					
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, highlight the record and select the appropriate action.							
Conflict Resolution Action Selection		Microsoft Office Outlook	C Ignore Record	C Select Data			
Apply to all records List of conflicting records							
🗟 🛞 Activity	Field Name	Outlook	CDS	Merged Data			
Meeting with Client	Location	Green Street Restaurant	Conference Room	Conference Room			
Agent	Subject	Meeting with Client	Weekly Meeting	Weekly Meeting			
Paladian, Mark	Start Time	12/19/2005 12:00:00	12/19/2005 13:30:00	12/19/2005 13:30:00			
	End Time	12/19/2005 14:00:00	12/19/2005 14:00:00	12/19/2005 14:00:00			
Ace Building	Priority	Normal	Other	Other			
	Body	To discuss about new insura	Status follow-up	Status follow-up			
e 🐴 Contact	Primary Contact	Adcock, Jennifer	Bartelo Frank	Bartelo Frank			
Ackerman, Joseph							
••••••••••••••••••••••••••••••••••••••							
·							
		OK Ca	ncel				

If the **MS Outlook** option is selected for a record, the Outlook data will be populated in the Merged Data column.

CDS Outlook Sync Interface	Conflict Resolut	ion		X		
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, highlight the record and select the appropriate action.						
Conflict Resolution Action Selection criteria						
Apply to all records List of conflicting records						
🖯 🖓 Activity	Field Name	Outlook	CDS	Merged Data		
Agent Agent Business Contact Ackerman, Joseph Notes	Location Subject Start Time End Time Priority Body Primary Contact	Green Street Restaurant Meeting with Client 12/19/2005 12:00:00 12/19/2005 14:00:00 Normal To discuss about new insura Adcock,Jennifer	Conference Room Weekly Meeting 12/19/2005 13:30:00 12/19/2005 14:00:00 Other Status follow-up Bartelo Frank	Green Street Restaurant Meeting with Client 12/19/2005 12:00:00 12/19/2005 14:00:00 Normal To discuss about new insuran Adcock,Jennifer		
		Car	ncel			

If the **Select Data** option is selected for a record, it requires the user to double-click on the applicable CDS or Outlook data and that data will be populated in the Merged Data column.

flict Resolution Action Selectio		Microsoft Office Outlook	C Ignore Record	Select Data
Apply to all records of conflicting records				
🟈 Activity	Field Name	Outlook	CDS	Merged Data
Meeting with Client	Location	Green Street Restaurant	Conference Room	Green Street Restaurant
Agent	Subject	Meeting with Client	Weekly Meeting	Weekly Meeting
Paladian, Mark	Start Time	12/19/2005 12:00:00	12/19/2005 13:30:00	12/19/2005 12:00:00
Business	End Time	12/19/2005 14:00:00	12/19/2005 14:00:00	12/19/2005 14:00:00
-	Priority	Normal	Other	Normal
Ace Building	Body	To discuss about new insura	Status follow-up	Status follow-up
Sontact	Primary Contact	Adcock, Jennifer	Bartelo Frank	Adcock, Jennifer
🔤 🏰 Ackerman, Joseph				
† Notes				

The Apply to all Records option is disabled after selecting the **Select Data** option. If the user clicks the **OK** button while there are still conflicting records to be resolved, the following dialog box will display:

CDS Outlook Sync Interface				
2	There are still conflicting records to be resolved. Continue			
	<u>Y</u> es <u>N</u> o			

From this dialog box, if the user clicks the **Yes** button, it will proceed with synchronization. If the user clicks the **No** button, it will bring the user back to the Conflict Resolution dialog box to resolve the remaining conflicting records.

Always use the CDS Database Information

If this option was selected in the CDS Outlook Synchronization Setup Wizard, the user will not be notified of any conflicting records. During the synchronization process, if it detects any conflicting records, it will overwrite the Outlook record with CDS data.

Always use the Microsoft Office Outlook Database

If this option was selected in the CDS Outlook Synchronization Setup Wizard, the user will not be notified of any conflicting records. During the synchronization process, if it detects any conflicting records, it will overwrite the CDS record with Outlook data.

CDS Outlook Synchronization Log

In CDS 6.0, a new feature was added where a synchronization log is generated so that the user can view what took place in each synchronization process.

After synchronization, use the shortcut key **Ctrl** + **L** in CDS to open the following dialog box:

🗖 Outlook Synchronization Log 💦 🚺			
Date Range			
From	11/30/2005		
Thru	11/30/2005		
Special Date Ranges O Year to Date O Last 7 Days			
O Month to Date	🔾 Last 30 Days		
ОК	Cancel <u>H</u> elp		

Depending on the specified date range, only those synchronization(s) which took place within the date range will be listed. Click the **OK** button to display the Outlook Synchronization Log.

	🗉 Outlook Synchronization Log (15)							
×	< ▶	2	🚷	70	- C			
	Sync User	Sync Profile	Sync Folder	Sync Date	Sync Start Time	Sync End Time	^	
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:08:38 PM	11/30/2005 4:10:06 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:12:01 PM	11/30/2005 4:12:05 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:12:58 PM	11/30/2005 4:13:01 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:29:03 PM	11/30/2005 4:29:07 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:30:33 PM	11/30/2005 4:30:37 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:32:07 PM	11/30/2005 4:32:14 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:33:30 PM	11/30/2005 4:33:32 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:34:01 PM	11/30/2005 4:34:09 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:34:41 PM	11/30/2005 4:34:44 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:35:44 PM	11/30/2005 4:35:49 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:36:07 PM	11/30/2005 4:36:19 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:40:44 PM	11/30/2005 4:42:26 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:42:30 PM	11/30/2005 4:43:51 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:49:28 PM	11/30/2005 4:49:49 PM		
	DEMO	Outlook	Contacts	11/30/2005	11/30/2005 4:50:02 PM	11/30/2005 4:50:05 PM		
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Select a specific log to view and then click the **Run** button to generate a report displaying the details of all the records added/modified/deleted during the selected synchronization process.