

# Outlook Synchronization

## Outlook Preparation

1. For Outlook synchronization to function, the Outlook profile name must match exactly your first and last name in the Service Master database.
  - For Outlook connecting to an Exchange Server mailbox this will be your Mailbox or User name.
  - For other Outlook connections (i.e. POP, IMAP, HTTP etc.) this will be the “Your Name” field in the ‘User Information’ section of Outlook Internet E-mail Settings.
2. Create an Outlook Category called ‘!Update’

## Synchronized Data

### Contacts

The process synchronizes the following data to Outlook Contacts:

- All users (active only)
- All client locations (active only)
- All tech database entries

If a client is made inactive all their locations and employees are removed from Outlook. Re-activated Clients have their [active] locations populated back to Outlook,

When a client is made inactive all related employees are also inactivated. Therefore, those employees need to be re-activated individually to be synchronized back to outlook.

### Tasks

The process synchronizes the following data to Outlook Tasks:

- All ‘In progress’ Service Identifiers
- All ‘Completion Requested’ Service Identifiers

## Using Outlook to update the Service Master Database

### Contacts

Please review the ‘Outlook Field Mapping’ support file for which fields are updatable.

New contacts cannot be created in Outlook.

1. Make appropriate changes to the *updatable* fields
2. Add the ‘!Update’ category to the contact
3. Save - and run the synchronization

### Tasks – Creating New

1. Enter a valid task description (mandatory)
2. Assign the 'client name' outlook category (mandatory)
3. Select any other fields listed in the 'Outlook Field Mapping' support file (optional)
4. Save - and run the synchronization

Note: Every client has one location marked as 'Main'. When creating a task without specifying a location as a contact, the task will use the 'Main' location by default. If the task needs to be assigned to a non 'Main' location, you must select it as a contact.

Assigning any client user or service agent as a contact will add them to the SI.

### Tasks - Modifying

1. Make appropriate changes to the *updatable* fields
2. Add the '!Update' category to the contact
3. Save - and run the synchronization

### Outlook tasks 'Status'

The following table matches SI and Outlook status levels:

SI Status	Outlook Status
In Progress	In Progress
Completion Requested	Waiting on someone else
Closed	Completed

You can change an Outlook task status to 'Completed' and synchronize without any further action. This will change its corresponding SI status to 'Closed'.

This process only works for Outlook tasks with status 'Waiting on someone else'.

### Understanding the Sync Process

The synchronization process is date and time stamped.

Additionally, each data record is time stamped when it was last changed.

The synchronization loops through all records, and only synchronizes those records that have time stamps that are newer than the synchronization time stamp.

The synchronization time stamp is only updated if changes to any records have occurred since the last synchronization.

### Resolving Synchronization Problems

In you believe your Outlook data does not match the Service Master information you can force the synchronization to update all the Outlook data records:

1. Click on 'Reset Outlook Sync Dates' from your employee data record
2. Rerun the synchronization

If duplication or mismatched records appear in Outlook after the above process, then delete all records from Outlook which have duplicates or mismatched data and re-run the above process. Always backup your Outlook data before deleting any records.