




Creating WinSearch Activities from Outlook

You can create WinSearch activities from within Outlook. Use this function to manually record emails that were not automatically recorded. Or, use this function to create activities for people who are both in Outlook and WinSearch.


To create a WinSearch activity in Outlook:

- Highlight an email or an Outlook contact.
- Click the Create Activity For Selected Item(s) toolbar button ()

The Activity Records dialog box opens up and starts the activity with as much information as possible. The activity code for this new activity depends upon where you started creating this activity. If you started from the Sent Items folder, it is the same activity code as is used for outgoing emails sent from WinSearch. If the activity is created from any other mailbox folder, the activity code is the one used for logging incoming emails. Activities created from an Outlook contact or calendar start off with the same initial activity code as when you create an activity in the main WinSearch program. From this point, it is just like creating an activity in WinSearch.

The links also include those WinSearch people whose email matches those in the WinSearch database or those whom are linked to the current Outlook email, contact or calendar item. The activity knows to not include you as a link, even if you have a persons record storing your email address in WinSearch. The links include all people who match, even if their email is marked to be excluded from logging emails automatically. You will want to review that the people linked to the activity are the ones you expect. For example, if you create an activity from a contact who is not linked to a WinSearch person, then that person is not included even if you later import the Outlook contact to your WinSearch database. You will receive a warning before the activity window appears as a reminder. However, if you create an Outlook appointment for a contact who is not yet connected to a WinSearch person, that person may be brought into the WinSearch database, depending upon how your settings are configured.

Activities created this way only appear on your Outlook calendar when the activity's On Calendar check box is selected.

If you have several emails highlighted when you click and click the Create Activity For Selected Item(s) toolbar button () , you will create one activity out of all emails. The text from all emails is put into the notes of the one activity. This means one activity is created out of the N number of emails rather than N number of activities.