





## Adding Outlook Contacts to WinSearch

WinSearch 7 and WSO Outlook provide the ability of transferring your Outlook contacts to WinSearch and vice versa. For instance, if you just started using WinSearch, you can quickly dump your Outlook contacts and populate your WinSearch database.

### To transfer your Outlook contacts into WinSearch:

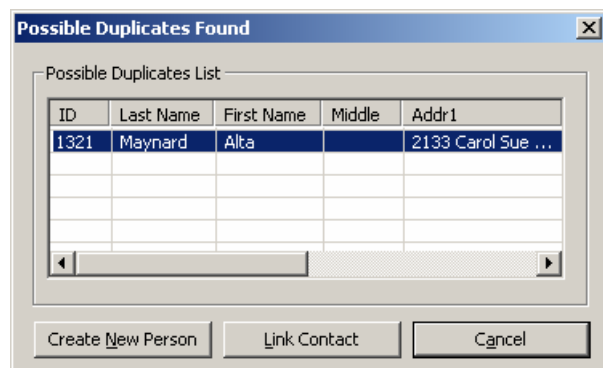
1. Highlight the contact(s) in Outlook. It does not matter which Outlook view of contacts you use.
2. Click the Export Contacts To Database toolbar button (  ). At this point, WinSearch verifies whether the person has already been added to a WinSearch database.
3. Click OK to the confirmation prompt that you want to add the person to the specified database.
4. Choose Yes to open the persons form for the person you have just added or No to close the form for that person. You only see this prompt if you are adding one person at a time.

The new persons initial settings are those set with the Processing Options toolbar button (  ) after selecting INBOX AND CONTACT DEFAULTS on the Data & Processing tab. This provides the initial entries for Category, Status, Type, Class, Staff Rep and Source.

Any automatic activities that are created when new people are added are created at this point for the people added to the WinSearch database.

Once linked, as you make changes to the person in WinSearch or in Outlook, they can have their information updated in the other program by synchronizing Outlook with WinSearch as described later.

If WSO Outlook identifies the person as a duplicate, you will see a dialog box asking what to do. You can choose CREATE NEW PERSON when the person is different or LINK CONTACT to link the Outlook contact to the WinSearch person. However, when you link a person, either their WinSearch or Outlook data may be overwritten. Often, you are better off choosing CANCEL then deleting that Outlook contact and importing the person from WinSearch.



Outlook contacts are also transferred to WinSearch if you have an Outlook appointment linked to an Outlook contact. When you synchronize WinSearch and Outlook, Outlook appointments transferred to WinSearch also transfers the contact connected to the appointment as a person in WinSearch.

Outlook and WinSearch have some entries in common and other entries that are unique to one or the other. Thus, bringing a person from Outlook into WinSearch only shows those entries in WinSearch that are common between the two. Other ones are not. This means that entries like Outlook's Other address will not appear in WinSearch.

People must have both a first and last name to be transferred from Outlook into WinSearch. Thus, if someone needs their name fixed to be transferred, open the Outlook contact record then click the FULL NAME button and fix their name. Also, if their name appears in quotes in Outlook then the quotes transfer over as part of their name into WinSearch.

This transfer only works for people. WSO Outlook does not create company records out of Outlook contacts nor does WSO Outlook create company records for the contacts' companies that are transferred into WinSearch.

If people are imported from a non-default folder, they are imported but future changes to the Outlook contact or the WinSearch person are not synchronized.