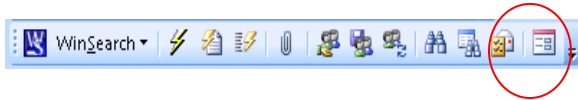


WS Outlook Processing Options

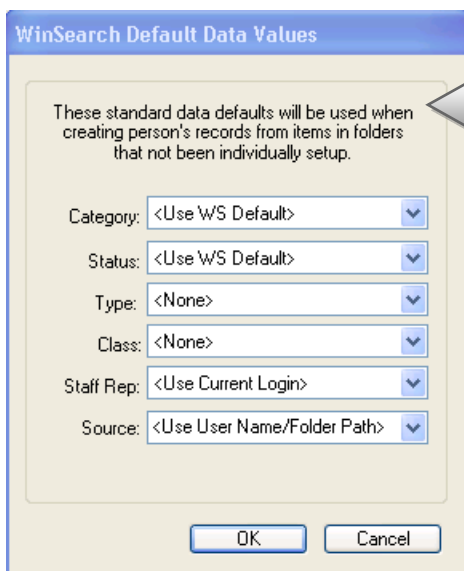
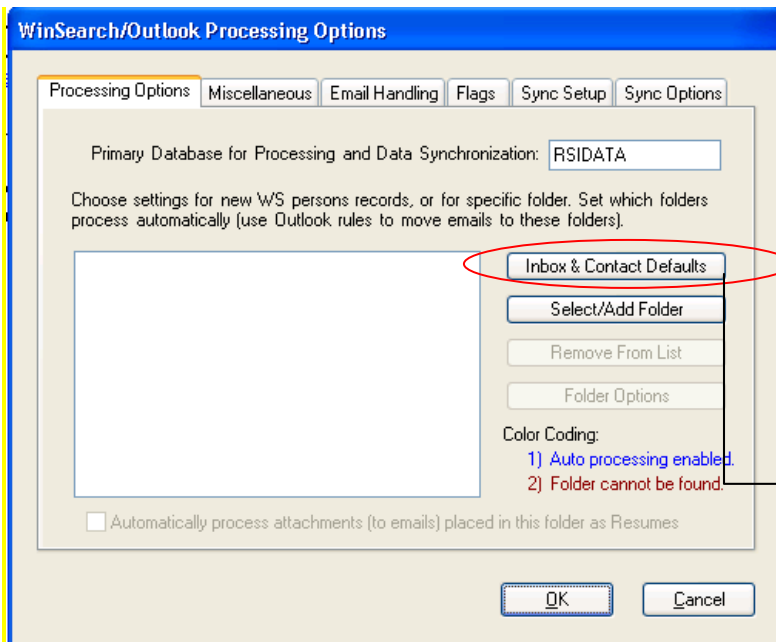
Overview

This document describes the settings associated with the WinSearch/Outlook integration. These options are available from the last button on the WinSearch toolbar in Outlook.



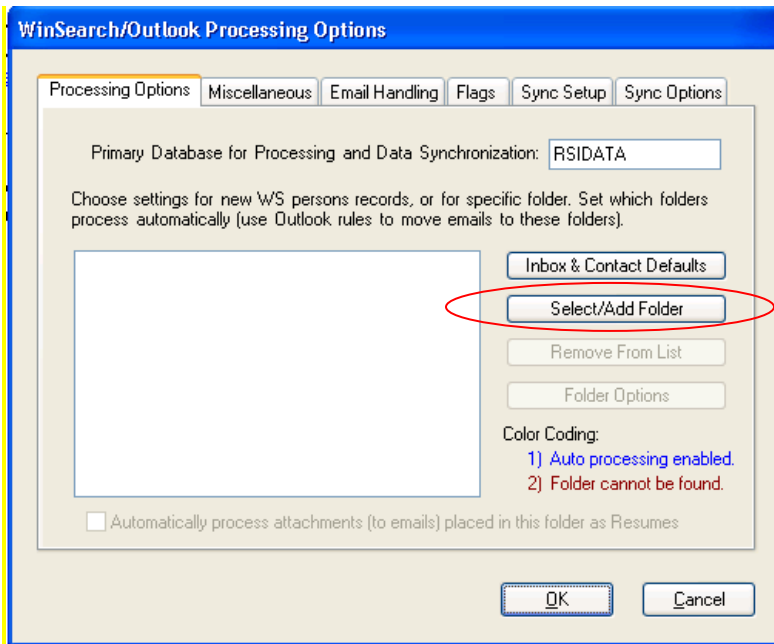
Processing Options

Inbox & Contact Defaults

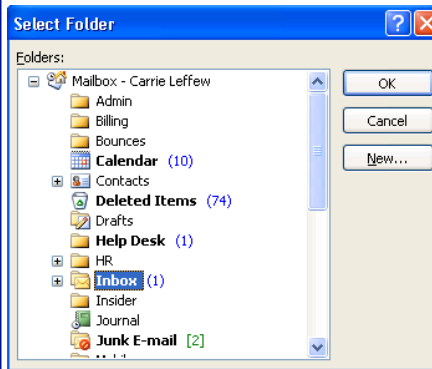


The Inbox and Contact Defaults option provides the initial entries for Category, Status, Type, Class, StaffRep and Source for all new records created directly from your Inbox.

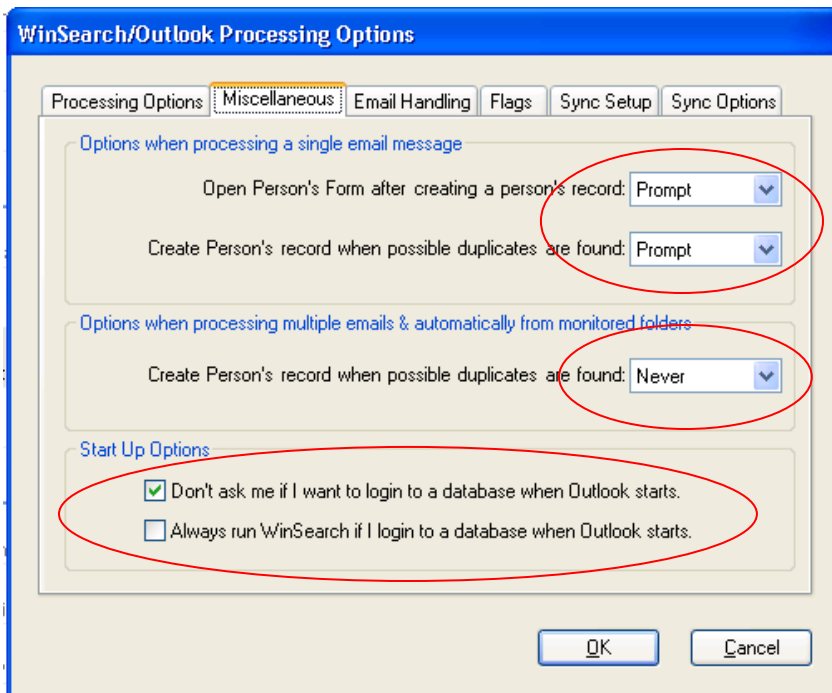
Select/Add Folder



Select/Add Folder will allow you to choose a folder that you want to have automatically processed. Once you choose a folder you will see the Folder Options button below is now available where you can set the default information for automatic processing.



Miscellaneous

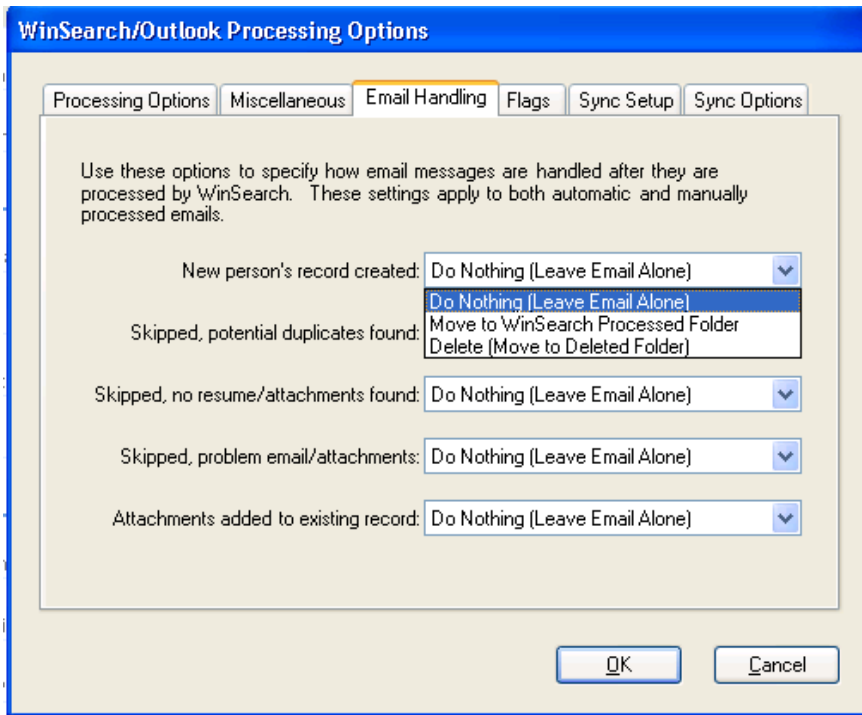


The first two options allow you tell WinSearch what do when you are processing a *single* email message.

This option allows you to tell WinSearch what to do with duplicates when you are processing multiple emails at the same time.

The Start Up Options allow you to choose how WinSearch behaves when you open Outlook.

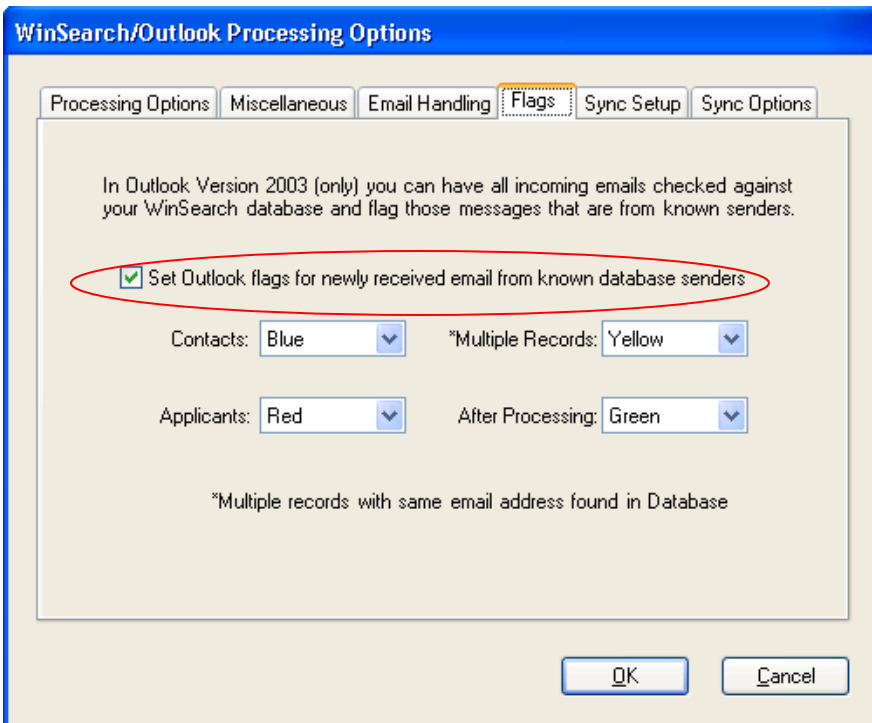
Email Handling



All of the options on the Email Handling tab allow you to specify how email messages are handled *after* they are processed by WinSearch.

For all 5 scenarios, you have three options; you can Do Nothing which will leave the original email as it is. You can Move to a WinSearch Folder, (i.e. Processed, Skipped or Problems), which will simply move the original email to a folder inside of your Outlook, or you can select Delete which will delete the original. In general, deleting is not recommended.

Flags



The flags tab allows you to designate flag colors for your incoming emails. When an email comes in WSO Outlook looks up the sender in WinSearch, and based on the persons Category the email will be flagged the color you select here.

Also on this tab you can turn flagging on or off using the checkbox that reads 'Set Outlook flags for newly received emails from known database senders'.

Please note email flagging options work in both Outlook 2003 and 2007.

Sync Setup

The screenshot shows the 'WinSearch/Outlook Processing Options' dialog box with the 'Sync Setup' tab selected. The 'Calendar Options' section has a dropdown menu for 'Activity Code for Appointments Exported to WinSearch' set to 'Appt'. The 'Actions for Database Synchronization' section has two dropdown menus: 'Action for Appointments' and 'Action for Contacts', both set to 'Synchronize in Both Directions'. The 'Conflicts occur when the same record is changed in both the WinSearch Database and Outlook. Choose how to handle these conflicts.' section has two dropdown menus: 'On Appointment Conflicts' and 'On Contact Conflicts', both set to 'Always/Only Overwrite Database'. The 'OK' and 'Cancel' buttons are at the bottom.

On the Sync Setup tab, you can specify which activity code is used for Outlook appointments synced to WinSearch.

The next two options allow you to select how appointments and contacts are synchronized between WinSearch and Outlook. The section below details these options.

Conflicts can occur anytime you are syncing two sources of information. These options allow you to specify whether WinSearch or Outlook should be overwritten in the event of a conflict.

Sync Options

The screenshot shows the 'WinSearch/Outlook Processing Options' dialog box with the 'Sync Options' tab selected. The text reads: 'Set how to map WinSearch phone numbers to Outlook. If you sync with a PDA, pick which technology your PDA uses to synchronize.' Below this is a list of radio button options: 'Outlook Label Priority (Default if not synchronizing to a PDA)', 'GoodLink Technologies', 'Microsoft ActiveSync', 'Palm Operating System', 'Windows Mobile (Pocket PC)', 'BlackBerry' (which is selected), and 'Other PDA's'. At the bottom, there is a note: 'This only affects new WinSearch people brought into Outlook. To alter existing Outlook contacts, delete them in Outlook, then re-import them from WinSearch.' The 'OK' and 'Cancel' buttons are at the bottom.

The Sync Options tab allows you to specify what type of handheld device you have.

These settings only apply if you are syncing your Outlook contacts to a handheld. They are there because the various handheld vendors handle data, specifically phone numbers, a little differently.