
Client Data System™ (CDS™)

CDS Outlook E-mail Interface User Guide



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Introduction

The CDS Outlook E-mail Interface is an add-on feature that interfaces CDS with Microsoft® Outlook®. This feature enables the CDS user to have a seamless interface with Microsoft® Outlook® and enables the user to use Microsoft® Outlook® as an e-mail client. Use Microsoft® Outlook® to Compose mail and post those messages to the CDS SmartPad™. This feature supports Microsoft Outlook 2000 and above.

Installing the CDS Outlook E-mail Interface

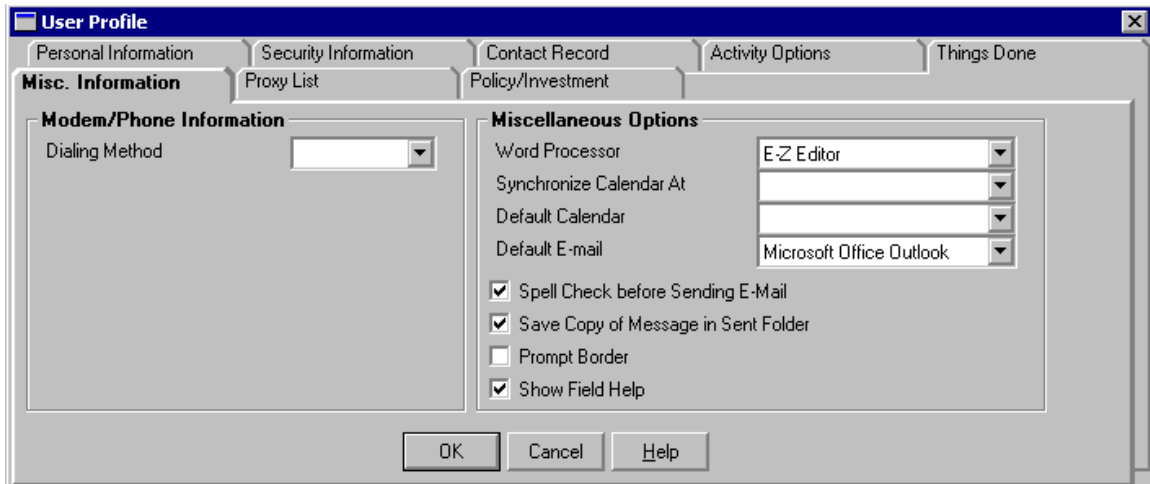
The Outlook E-mail Interface module is being introduced in Client Data System™ (CDS)™ Version 4.2, as part of the base system installation. For existing users, a patch installation will be provided.

When the CDS Outlook E-mail Interface has been successfully installed, verify that the **Post** button is enabled in Microsoft® Outlook®.

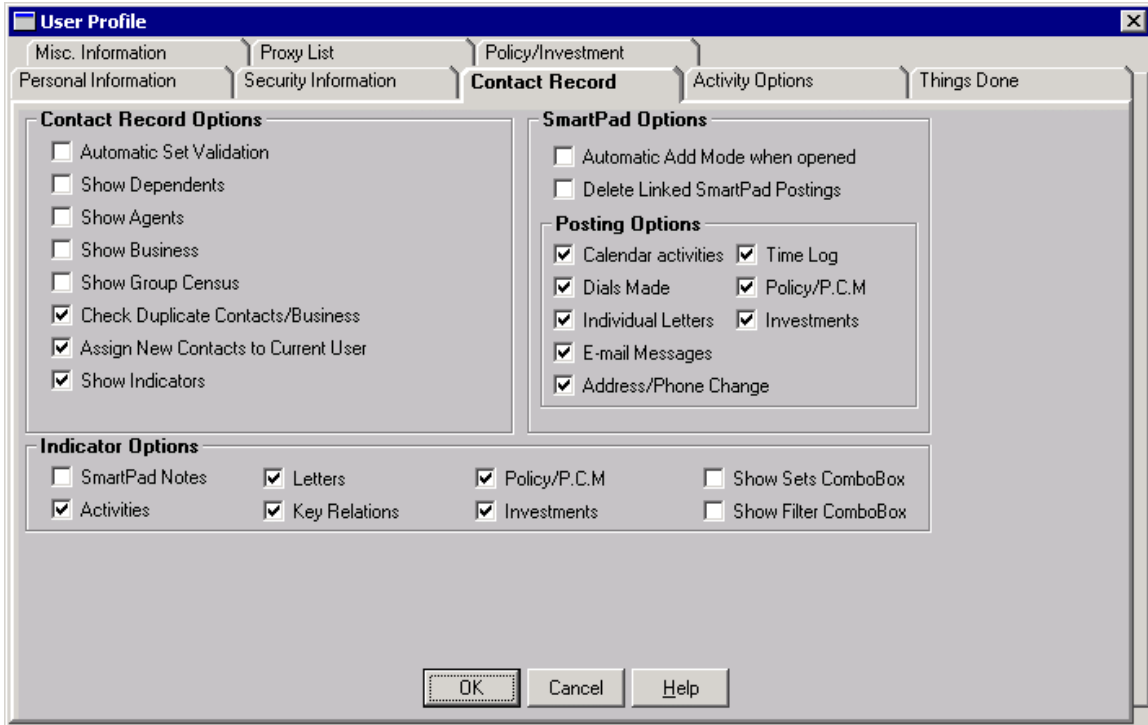


Setup for the Outlook E-mail Interface

1. In CDS, click the **Database** menu to open an additional list of options.
2. Select the **Modify Current User's Profile** option.
3. Click the **Misc. Information** tab.
4. In the **Miscellaneous Options** section, select the **Microsoft Office Outlook** option from the Default E-mail drop-down list and then click **OK**.



By default, the **E-mail Messages** option in the **Posting Options** section will be selected.



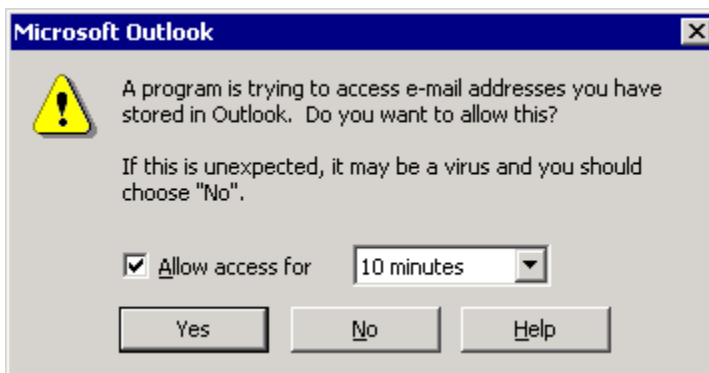
SmartPad Postings from Microsoft® Outlook®

After installing the CDS Outlook E-mail Interface application successfully, the **Post** button is enabled in Microsoft® Outlook®. This enables the user to post the e-mail messages from Microsoft® Outlook® to CDS.

Posting a Message from the Microsoft® Outlook® Folder

1. Select the message to be posted to CDS and then click the **Post** button.

Note: Depending on the installed version of Microsoft® Outlook®, the following dialog box may be displayed when posting messages to CDS.



2. Select the **Allow access for** checkbox to access the duration drop-down list and then select **10 minutes**. Click the **Yes** button to proceed with the posting.

Depending on the CDS E-mail Posting option selected, the outcome will be slightly different. The default CDS E-mail Posting option will be used throughout the User Guide. The selection does not affect the posting from any of the Outlook mail folders.

3. From the dialog box, click the **Yes** button and the posting dialog box will display the specified message information.
 - Subject of the message
 - Date/Time of the message
 - List of Outlook Contacts associated with the message
 - List of CDS Contacts associated with the message
 - List of Contacts that the message was posted to

The screenshot shows a dialog box titled "Outlook E-Mail Interface". It has three main sections, each with a table of contacts. The first section is "Contacts related to the Message (Outlook)" with columns for Source, Contact Name, and E-Mail Address. The second section is "Contacts for Posting (CDS)" with the same columns. The third section is "Contacts (Posted)" with columns for Contact Name and E-Mail Address. At the bottom, there are "Post" and "Cancel" buttons and a "Record count: 0" label.

- In the **Contacts Related to the Message (Outlook)** section, contacts whose e-mail address is present in the To, Cc or Bcc field of the selected mail will be listed. No matching contact in CDS with that e-mail address will be listed.
- In the **Contacts for Posting (CDS)** section, contacts from CDS whose e-mail address matches with the e-mail address in the To, Cc or Bcc field of the selected mail will be listed.
- In the **Contacts (Posted)** section, contacts from CDS whom the selected mail has been posted to will be displayed.

Posting a Message to Additional Contacts

1. In Outlook, select the message to be posted to a Contact's SmartPad and then click the **Post** button.

A posting dialog box will display the selected message information (e.g., Subject and Date/Time) along with any matched CDS contact record(s).

2. To post the message to CDS contact records that are not listed in the posting dialog box, click the **Add/Search Contacts** button.

The screenshot shows the 'Outlook E-Mail Interface' dialog box. At the top, the 'Subject' is 'Meeting to discuss further on the Business Logic for Integration Modules' and the 'Date/Time' is 'Thu 07/29/2004 10:55 AM'. Below this, there are three sections of contact information:

- Contacts related to the Message (Outlook)**: A table with columns 'Source', 'Contact Name', and 'E-Mail Address'. It lists 'Jonathan Spiegel' (jonathan.spiegel@hotmail.com) and 'ezmailtest' (ezmailtest@ez-data.com).
- Contacts for Posting (CDS)**: A table with columns 'Source', 'Contact Name', and 'E-Mail Address'. It lists 'Lindo, Michael' (michael.lindo@hotmail.com) and 'Johnson, Kelly' (kelly.johnson@hotmail.com). Each row has a checkbox in the 'Source' column, both of which are currently unchecked. The record count is 2.
- Contacts (Posted)**: A table with columns 'Contact Name' and 'E-Mail Address'. It is currently empty. The record count is 0.

At the bottom of the dialog, there are 'Post' and 'Cancel' buttons, and a 'Record count: 0' label.

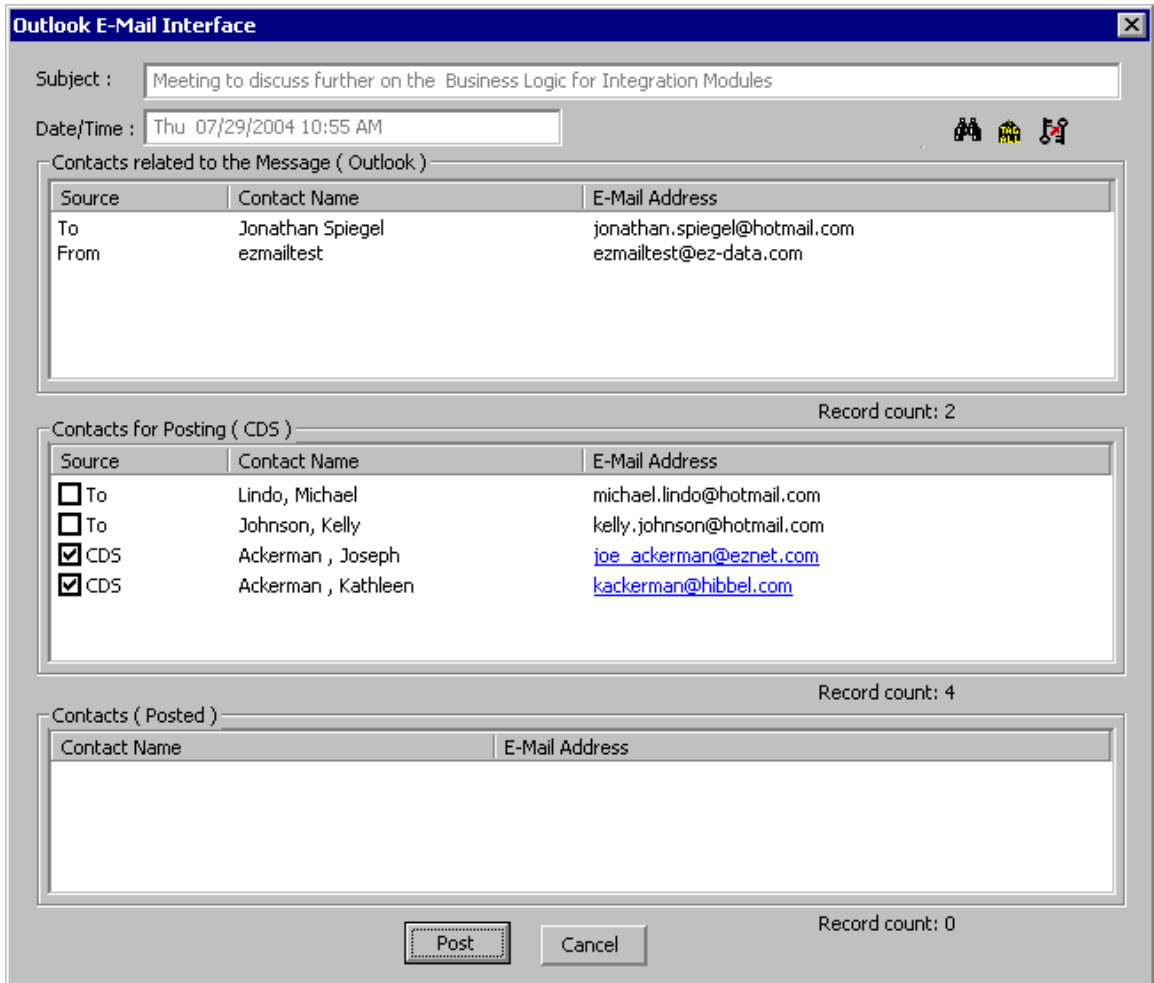
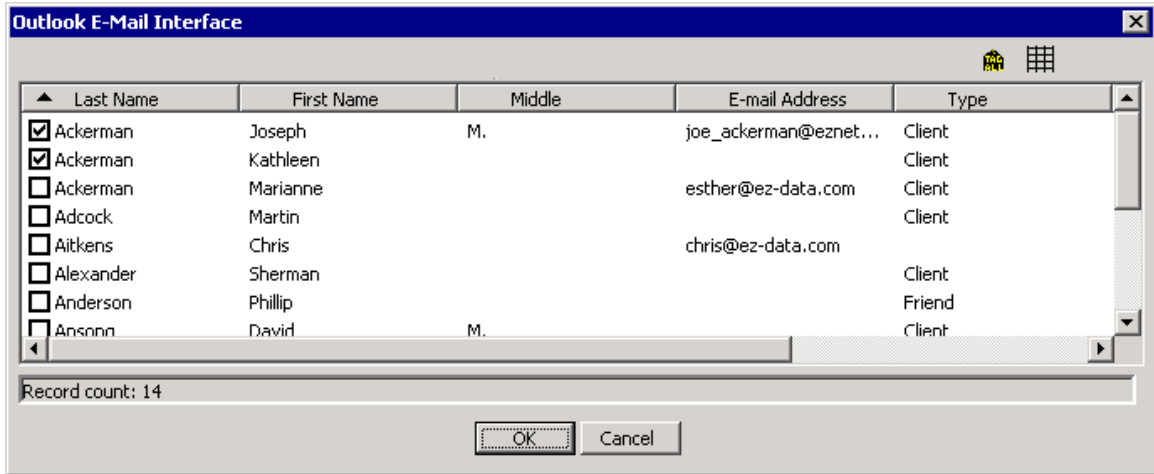
In the **Find Contact Information** dialog box. The user can search for Individual or Business records.

The image shows two side-by-side dialog boxes for searching contacts. Both have a search field containing the letter 'a' and radio button options for 'Contact' and 'Business'.

- Find Contact Information**: The search field is labeled 'Last Name <,First Name>'. The 'Contact' radio button is selected.
- Find Business Information**: The search field is labeled 'Business Name'. The 'Business' radio button is selected.

Both dialog boxes include an 'OK' button and a 'Cancel' button, and a prompt to 'Enter the search information and click OK.'

- Enter the search criteria and then click **OK** to open a dialog box listing all of the records that meet the criteria. Select the appropriate record(s) and then click **OK**. The selected record(s) display in the posting dialog box. For the additional selected record(s) in the **Contacts for Posting (CDS)** section of the posting dialog box, **CDS** will display in the Source column.



Posting a Message to a Key Relation

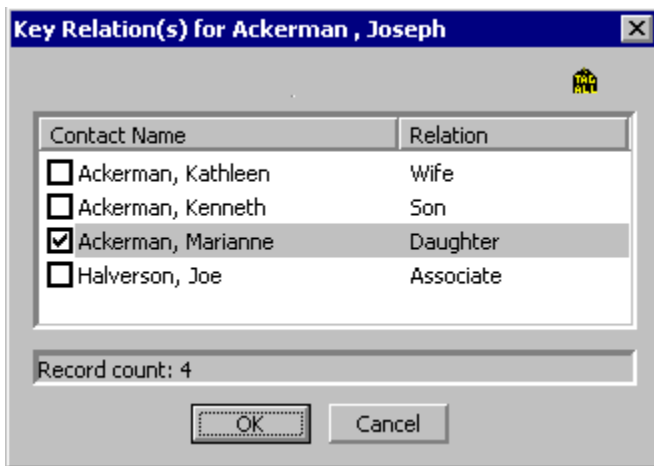
1. In Outlook, select the message to be posted to a Contact's SmartPad and then click the **Post** button.

A posting dialog box will open and display the selected message information (e.g., Subject and Date/Time) along with any matched CDS contact record(s).

2. To post the message to a key relation of a CDS Contact, select the Contact from the **Contacts for Posting (CDS)** list and then click the **Key Relation(s)** button.



3. The **Key Relation(s)** dialog box opens, listing all key relations for the Contact in CDS. To select the key relations to whom to post the message, click the associated check box for the appropriate key relations and then click **OK**.



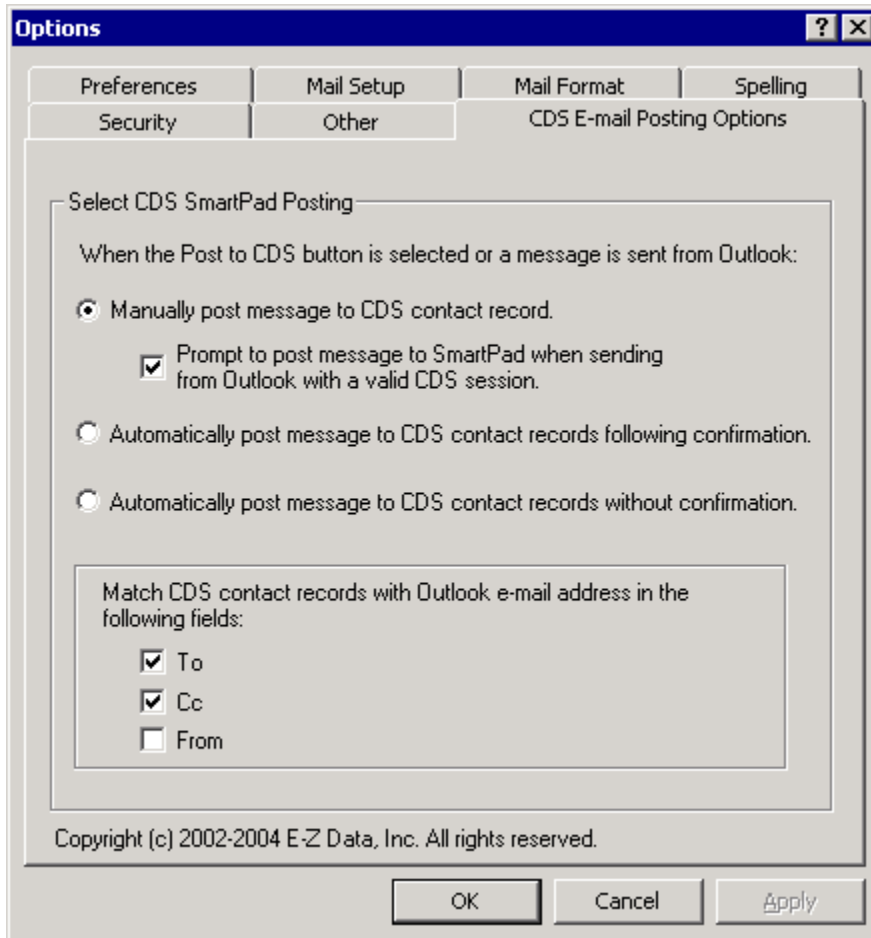
When the user clicks the **Post** button from the posting dialog box, the message will be posted to the selected contacts from the Contacts for Posting (CDS) list as well as for the selected key relations.

CDS E-mail Posting Options

There are several e-mail posting options available to the users when he/she is sending a mail from Outlook.

1. In Microsoft® Outlook®, click the **Tools** menu, to open an additional list of options.
2. Select **Options** and then click the **CDS E-mail Posting Options** tab.

By default, the following options are selected.



What are the Options?

Manually Post the Message to the CDS Contact Record

In Outlook, compose a message and then click the **Send** button to send the message to the Sent Items folder. Open the **Sent Items** folder and then click the **Post** button. The user can then specify to which Contacts in CDS to post the message to.

Manually Post a Message to the CDS Contact Record and Prompt to Post the Message to SmartPad when Sending from Outlook with a Valid CDS Session

In Outlook, when the user composes a message and clicks the **Send** button, they will be prompted to post the message to a Contact in CDS. If **Yes** is selected, the posting dialog box will display where the user can specify to which Contacts in CDS to post the message.

Automatically Post Message to CDS Contact Record(s) Following Confirmation

In Outlook, when the user composes a message and clicks the **Send** button, they will be prompted to post the message to Contacts in CDS. If **Yes** is selected, it will automatically post the message to all of the matching CDS Contact records with an Outlook e-mail address in the specified fields: **To**, **Cc** and **From**.

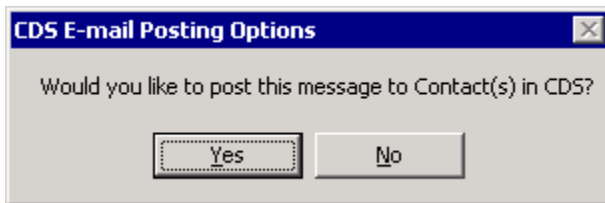
Automatically Post Message to CDS Contact Record(s) without Confirmation

In Outlook, when the user composes a message and clicks the **Send** button, the message will automatically post to all of the matching CDS Contact records with an Outlook e-mail address in the specified fields: **To**, **Cc** and **From**.

Composing a Message from Microsoft® Outlook®

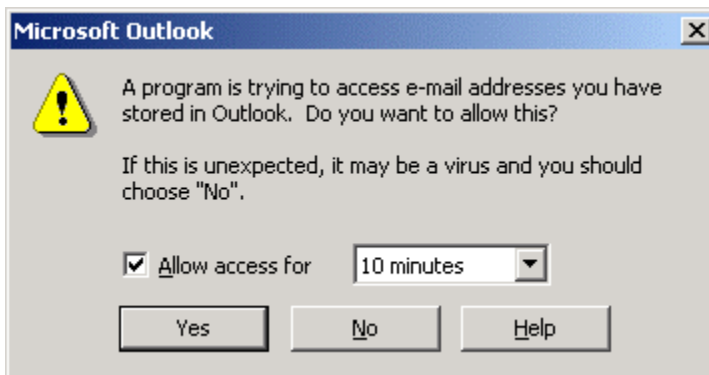
Both message(s) that already exist in Microsoft® Outlook® and newly composed message(s) can be posted.

1. Compose a message and then click the **Send** button. The following prompt will display if the user has the default settings in the CDS-E-mail posting options as explained above.



2. Click the **Yes** button.

Note: Depending on the version of Microsoft® Outlook® installed, the following dialog box may be displayed when posting messages to CDS.



3. Select the **Allow access for** option and then select **10 minutes** from the drop-down list. Click the **Yes** button to proceed with the posting.

Once the user clicks the **Yes** button, a posting dialog box will open and display the composed message information (e.g., Subject and Date/Time) along with any matched CDS contact record(s).

4. If the message finds a match with any CDS contact records, a bold checkbox will display under the **Source** column. To post the message to this contact, select the checkbox and then click the **Post** button.

Indication of Posted Message(s) in Outlook

In Outlook, without having to go to the posting dialog box of a message, the user can identify whether it has been posted to a Contact's record in CDS.

1. In Outlook, select the folder from where you want to post an e-mail (i.e., Inbox, Sent Items).
2. On the **View** menu, point to **Current View** and then select the **Customize Current View** option.
3. From the **View Summary** dialog box, click the **Fields** option.
4. From the **Select available fields from** combo box, select the **User-defined fields in Inbox** option.
5. If you have already posted a message from this folder, the **Posted** field name should be visible in the **Available Fields** list.
6. Select the **Posted** field from the list and then click the **Add** button.
7. Also, the user can position the field in the view by using the move up and move down buttons.
8. Now, in the selected folder view, the user will be able to see a checkbox in the **Posted** column for all the messages that have already been posted to some contacts in CDS.

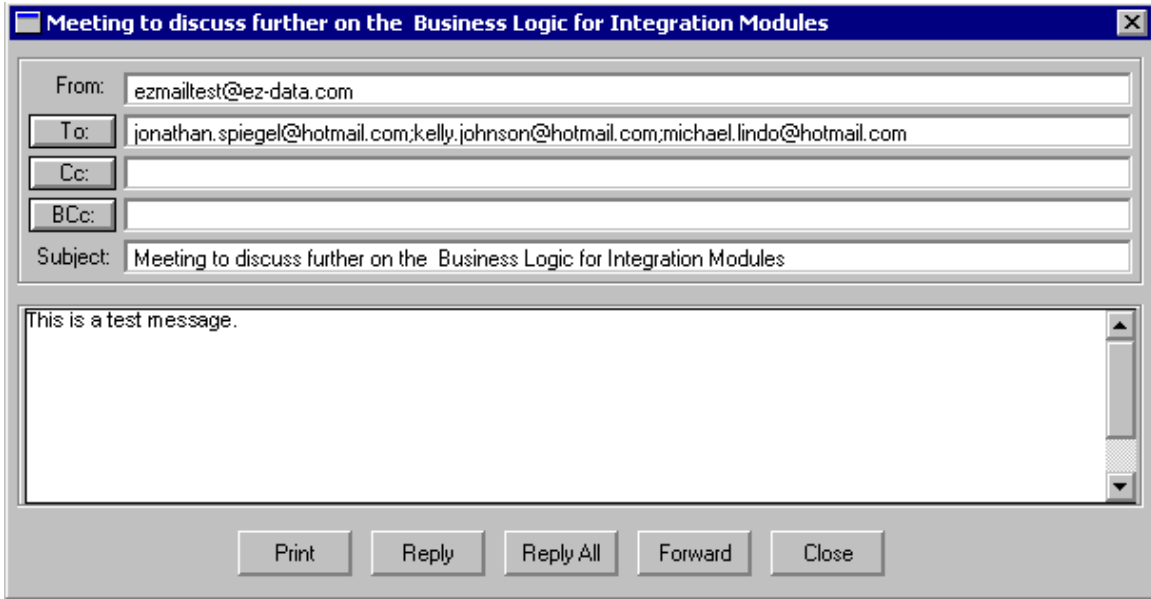
Viewing a Posted Message from the SmartPad

Once the user has posted a message to a Contact record in CDS, he or she can view the posted message from the Contact's SmartPad.

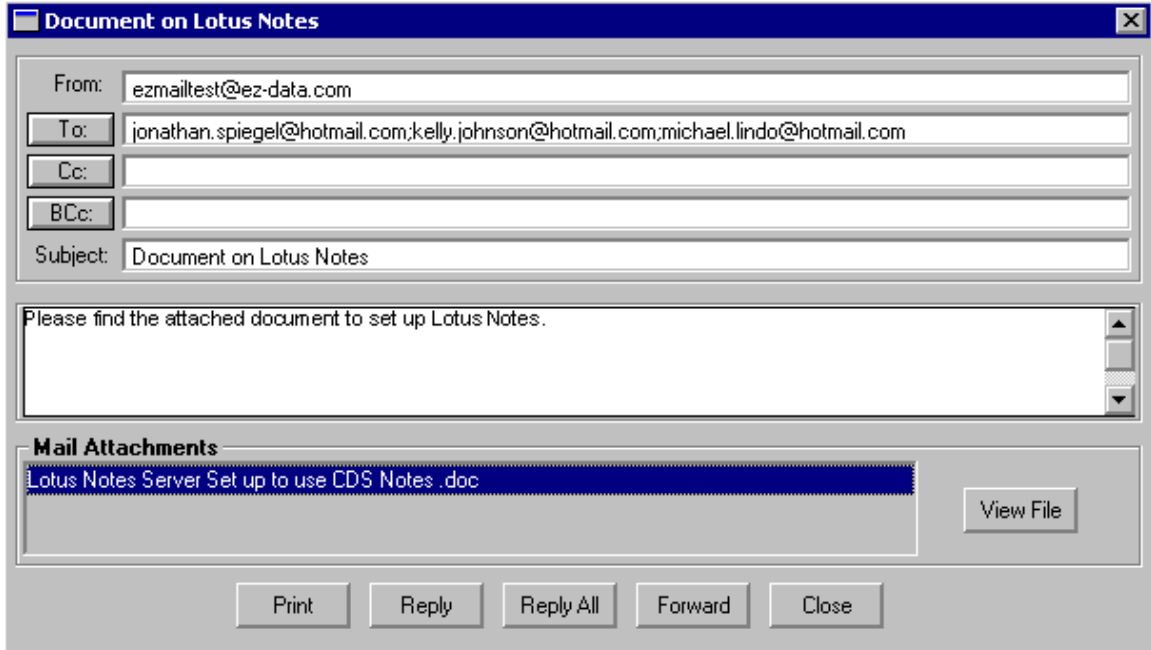
In order to view the content of the message, select the message and then click the **View Posted E-mail Message** button.



If the user posted an e-mail, the **Type** column of the Contact's SmartPad spreadsheet will display **E-mail**. By clicking the **View Posted E-mail Message** button, the e-mail will be displayed in the following format.



If the user posted an e-mail with an attachment, the **Type** column of the Contact's SmartPad spreadsheet will read **E-mail With Attachment**. By clicking the **View Posted E-mail Message** button, the mail will be displayed in the following format.



The **Mail Attachments** section will display the attachment(s). In order to see the content of the attachment file, highlight the attachment and then click the **View File** button.

Reply, Reply All, and Forward Options for Posted Message(s)

Once a message has been posted to a Contact's SmartPad, the user can choose to **Reply**, **Reply All** or **Forward** the message.

In CDS, open a Contact record and then click the **SmartPad** icon. From the SmartPad, select an entry type as either **E-mail** or **E-mail With Attachment** and then click the **View Posted E-mail Message** icon. By doing this, the user is able to view the content of the message. The format of the message appears exactly as it does in Microsoft® Outlook®.

- Click **Reply** to open the message in the Outlook Compose UI with the **To** and the **Subject** field filled as per the posted mail.
- Click **Reply All** to open the message in Outlook Compose UI with the **To**, **Cc** and the **Subject** field filled as per the posted mail.
- Click **Forward** to open the message in Outlook with only the Subject field filled as per the posted e-mail.

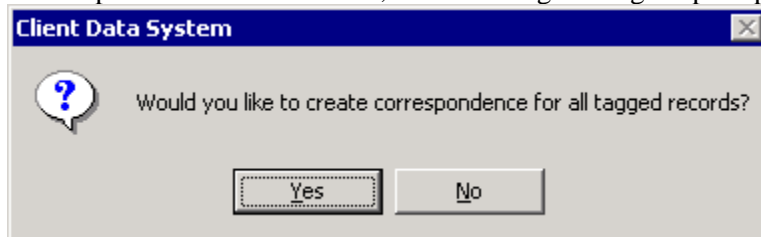
Form Letters

The Outlook E-mail Interface application also enables the user to send form letters from CDS to the selected contacts directly through Outlook.

In CDS, the user can send Form Letter(s) to Contacts as either an e-mail or an attachment.

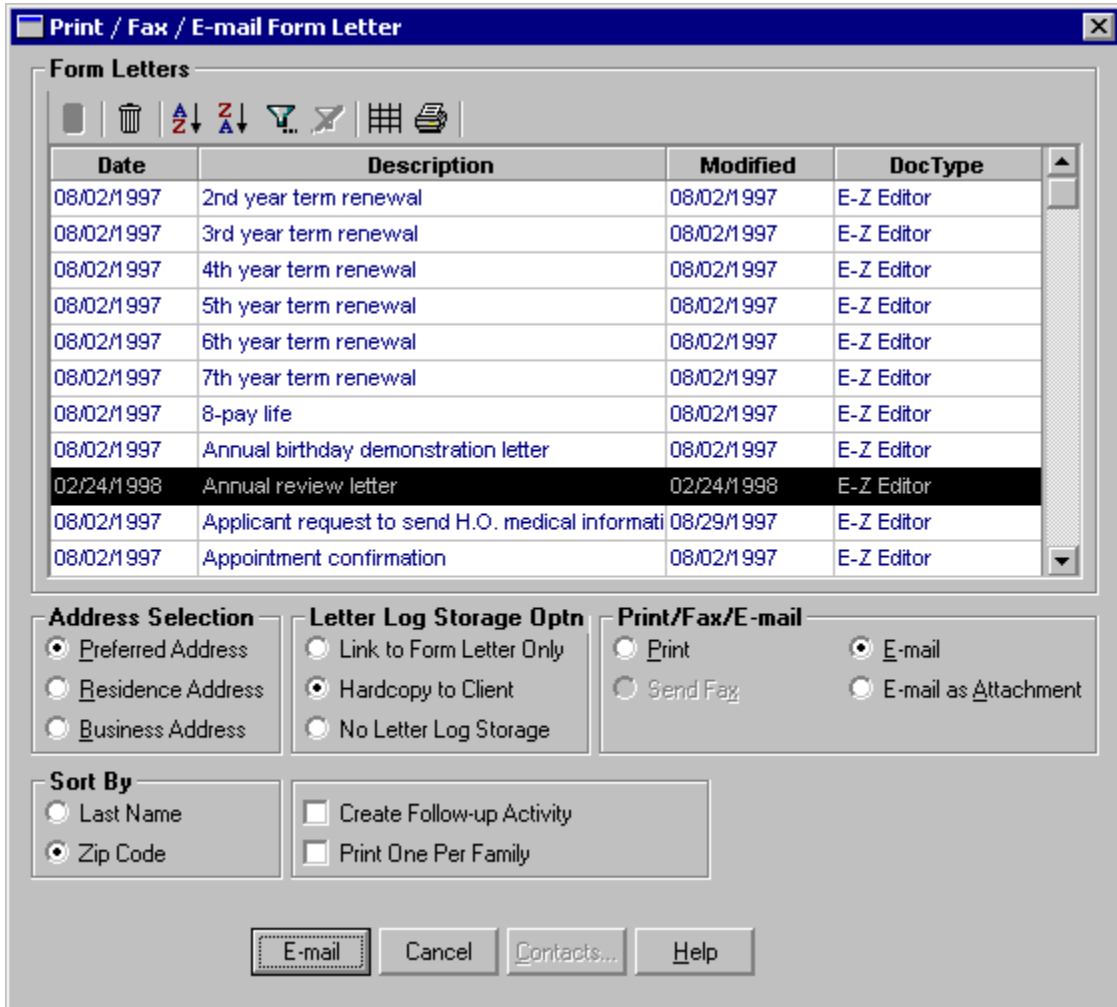
1. From the Contact Summary spreadsheet, select the appropriate contacts.
2. Click the **Spreadsheet Correspondence** button.
3. From the **Spreadsheet Correspondence** dialog box, click the **Form Letter** button.

If multiple contacts are selected, the following message is prompted:



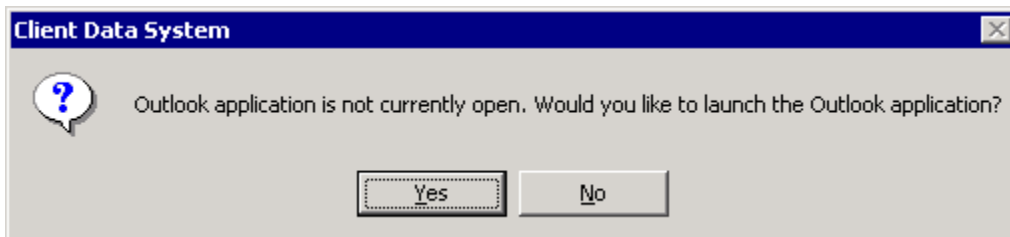
4. Click the **Yes** button to display the Find Form Letter dialog box.

- Click the **OK** button after applying filter conditions to open the Print/Fax/E-mail Form Letter dialog box.



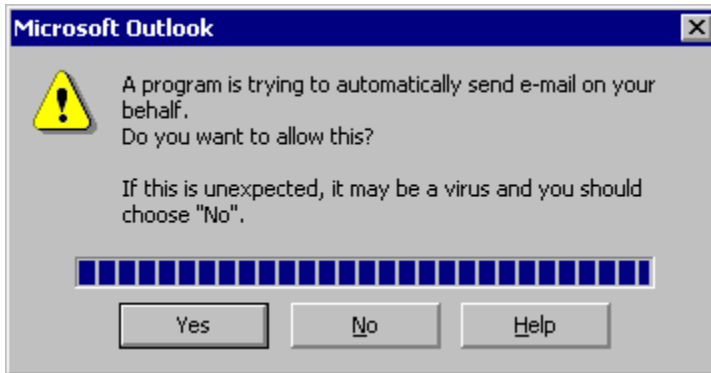
- In the **Print/Fax/E-mail** section, choose to either send the Form Letter as an **E-mail** or **E-mail as Attachment** by selecting the corresponding radio button. Click the **E-mail** button to send the Form Letter to the specified Contacts.

If Outlook is currently not running in the user's computer, the user will be prompted with the following message:



7. Select **Yes** to launch the Outlook application before sending the form letters.

Note: Depending upon the version of Microsoft® Outlook®, the following dialog box may display during the sending process.



8. Click the **Yes** button to proceed.

Once the letters are sent to the selected contacts, there should be a copy of the Form Letter for each of the Contacts it was sent to in the **Sent Items** folder of Outlook.

9. Post the sent Form Letter to any contact in CDS from the **Sent Items** folder, by selecting it and then clicking on the **Post** button.