CHAPTER 7: OUTLOOK INTEGRATION

This chapter introduces a feature in the Sales & Marketing area – Outlook Integration. This feature gives you the ability to synchronize contacts, salespeople and to-dos in Microsoft® Business Solutions–Navision® with contacts, tasks, and calendar items in Microsoft® Outlook®.

This chapter contains the following sections:

- Introduction to Outlook Integration
- Setting Up Outlook Integration
- Synchronizing Contacts and Salespeople in Real-time
- Synchronizing To-dos in Real-time
- Viewing Outlook Items from Microsoft Navision and Microsoft Navision Records from Outlook
- Synchronization Batch Jobs
- Conflict Resolution and Error Handling
- Exercises

Introduction to Outlook Integration

In today's business environment, Outlook is an important tool for interacting with external contacts. Current software allows you not only to send messages, but also to plan work tasks, make appointments, and collect relevant information about your business contacts. Therefore, it is extremely important to have the ability to integrate Microsoft Navision products with Outlook.

In order to allow everybody in an organization to know as much as possible about the ongoing relations with a contact, it is essential to have as much of the exchanged information stored for public use as possible. This will allow any salesperson to continue working exactly where another salesperson "left off" with a customer after the last interaction. It will also allow you to plan your meetings and appointments in Outlook and immediately access the same information in Microsoft Navision. This will save you a lot of time and prevent you from doing unnecessary duplicate work.

This solution includes synchronization of Outlook contacts, tasks, and calendar items with Microsoft Navision contacts and to-dos. Once these items are synchronized, they become available to salespeople, even those who are not connected to Microsoft Navision.

With the help of the Microsoft Navision and Outlook integration functionality, you can do the following:

- Synchronize calendar items, such as appointments, meetings, and events in Outlook, with to-dos in Microsoft Navision.
- Synchronize tasks in Outlook with to-dos in Microsoft Navision.
- Transfer contacts from Outlook to Microsoft Navision and back.
- Transfer salespeople from Microsoft Navision to Outlook.

Setting up Outlook Integration

To set up Outlook Integration, do the following:

1. Click SALES & MARKETING→SALES→SALESPEOPLE. The Salesperson/Purchaser Card appears.
2. On the **General** tab, make sure that the current salesperson has been assigned an e-mail address.
3. On the **Outlook Integration** tab, select the **Enable Synchronization** check box.

All the other fields on the tab are activated now.

4. In the **Navision User ID** field, specify your User ID (defined either in the Database Logins or in Windows Logins) by clicking the **AssistButton** to the right of the field and selecting from the list.

5. In the **Outlook Profile Name** field, specify the name of the Outlook profile by clicking the **AssistButton** and selecting from the list. You can choose a profile only if Outlook is set up as a default mail client. You should use the same profile to run Outlook and to set up Outlook synchronization in Microsoft Navision.

***NOTE**: To be able to set up Outlook Integration, each salesperson must have a unique Outlook user name. If an Outlook user name is already assigned to another salesperson, a message will appear informing you that this Outlook user name is already in use.*

---

6. Click **Browse** next to the **Outlook Contacts Folder Name** field. A window will appear which displays all the available folders in Outlook. Select the Outlook folder where you want to store the synchronized Microsoft Navision contacts and salespeople. Make sure that this folder is currently empty.

   – If you are operating several business entities or companies (if for example, your company has several subsidiaries), create different folders for contacts at different companies. If you use the same Outlook contact folder to store contacts from different companies, the contacts from one company will be imported into the contact folder of another company when you synchronize with Microsoft Navision.
   – To avoid erroneous synchronization of contacts from Outlook to Microsoft Navision, do not store your private contacts in the contact folder that is synchronized with Microsoft Navision. If you do store them in this folder, mark them as Private.

7. Click **Browse** next to the **Outlook Tasks Folder Name** field. A window will appear which displays all the available folders in Outlook. Select the Outlook folder where you want to store the synchronized Microsoft Navision to-dos of the Blank or Phone Call type.

   When you accept a task that has been assigned or reassigned to you in Outlook, the accepted task is put in the default Outlook Tasks folder. If you are using a Tasks folder, which is not a default folder, the accepted tasks will not be synchronized with Microsoft Navision. The default task folder must be your synchronization folder for you to be able to take tasks assigned to you by other people and synchronize them with Microsoft Navision.

8. Click **Browse** next to the **Outlook Calendar Folder Name** field. A window will appear which displays all the available folders in Outlook. Select the Outlook folder where you want to store the synchronized Microsoft Navision to-dos of the Meeting type. The default calendar folder must be your synchronization folder for you to be able to receive responses to meeting requests.

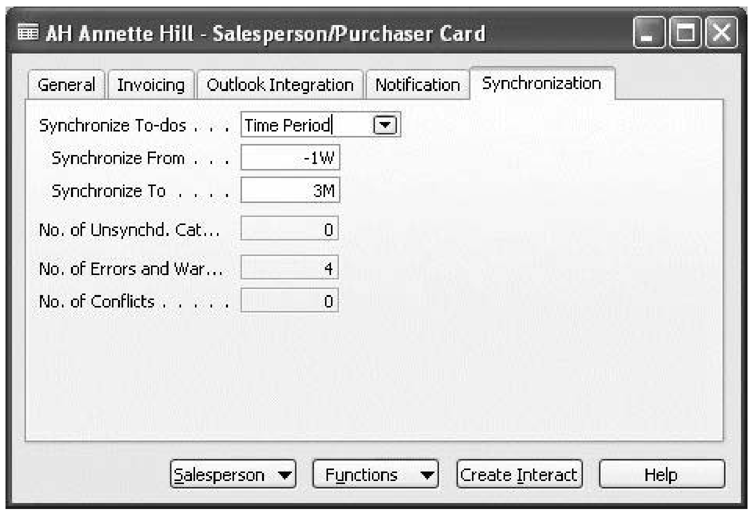
***NOTE**: When you change an Outlook folder that contains synchronized items, all Microsoft Navision records that you subsequently synchronize will be stored in a new folder. However, the records synchronized before the change will continue to be synchronized with the items in the old folder.*

*To ensure that all items are synchronized in the new folder, use the Synchronize with Outlook batch job to get the latest data in both applications, and then delete the synchronized Outlook items in the old folder. On the **Outlook Integration tab** of the Salesperson/Purchaser Card, specify the new folder and then run the Synchronize with Outlook batch job. All Microsoft Navision records will now be synchronized in the new folder.*

Once you have designated these three mandatory synchronization folders, you must restart Microsoft Navision. The program is now ready to start automatic synchronization of Microsoft Navision contacts and to-dos with Outlook contacts, tasks, and calendar events. From now on, when you start Microsoft Navision, the program will offer you the chance to synchronize your data with Outlook.

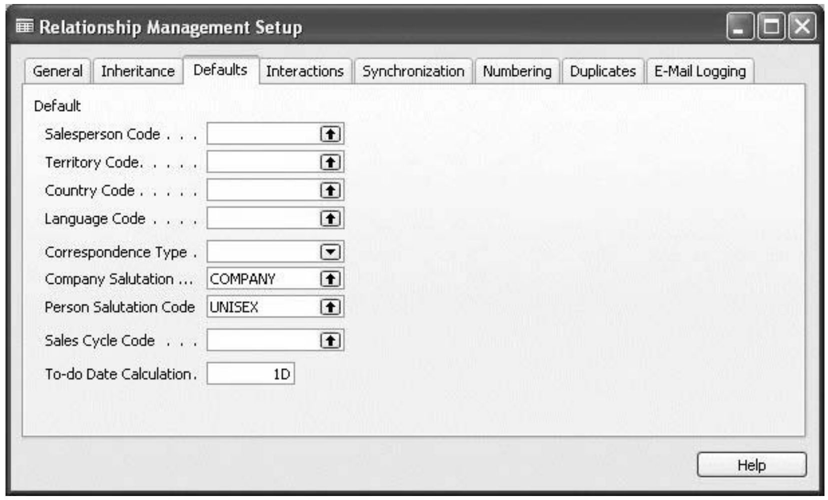
You can also set the following optional parameters:

1. On the **Synchronization** tab, you can set up the period for which you want to synchronize your to-dos with Outlook tasks and calendar items. This period will only be used by the Synchronize with Outlook batch job. To set this period of time, select the Time Period option in the **Synchronize To-dos** field, and then enter the date formulas in the **Synchronize From** and **Synchronize To** fields. The default values in the two fields are -1W and 3M respectively. For a task or calendar item to be synchronized with Microsoft Navision, the start date must be within the period defined by the **Synchronize From** and **Synchronize To** fields.



***NOTE**: The program will use the system date as today's date when calculating the synchronization period each time you run the Synchronize with Outlook batch job.*

2. If you have not entered any due date in the Outlook task, Microsoft Navision will use today's date. If you would like the program to calculate a due date for this kind of tasks, then Click SALES & MARKETING→SETUP→MARKETING SETUP. On the **Defaults** tab in the **Default To-do Date Calculation** field, enter the to-do date calculation formula that you want the program to use to calculate the ending date for to-dos.



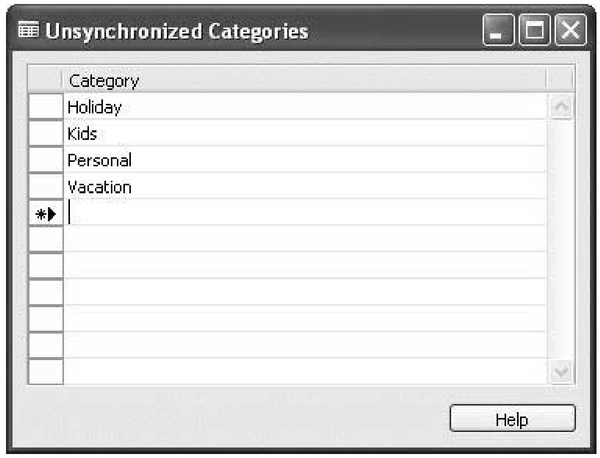
Defining Categories that will not be Synchronized

You do not have to synchronize all calendar and task items from Outlook to Microsoft Navision. For example, if you do not want holidays or your private tasks and appointments to be synchronized, you can exempt them from synchronization.

To exempt a category of Outlook items, add that category to the list of unsynchronized categories for the current salesperson:

1. On the Salesperson/Purchaser Card of a salesperson click SALESPERSON→UNSYNCHRONIZED CATEGORIES.

2. In the **Category** field, type the name of the category of items you do not want to be synchronized from Outlook to Microsoft Navision.



Now, when you synchronize from Outlook to Microsoft Navision, the items in the category you have just chosen will not be synchronized. However, these items will still be synchronized from Microsoft Navision to Outlook if the Outlook items were synchronized from Microsoft Navision before the unsynchronized categories were set up.

If you would like to be notified every time another salesperson changes your contacts or to-dos in Microsoft Navision, you can set up Microsoft Navision to automatically send e-mail notifications about these changes to your Outlook Inbox. To do so, select the check boxes in the corresponding fields on the **Notification** tab in the Salesperson/Purchaser Card window.

Synchronizing Contacts and Salespeople in Real-time

Once you enable synchronization of contacts between Microsoft Navision and Outlook, contact-related information is automatically exported from one of the applications to the other whenever both applications are running. This saves you the trouble of manually copying your contacts
.
Consequently, when you create, update, or delete contacts that have been assigned your salesperson code, the corresponding contacts will be created, updated, or deleted in Outlook. Similarly, when you create or update contacts in the Outlook folder, you have specified for synchronization, the corresponding contacts will automatically be created or updated in Microsoft Navision as well.

NOTE*: If you delete a contact in Microsoft Navision, the corresponding contact in Outlook will be deleted as well. However, if you delete a contact in Outlook, the corresponding contact in Microsoft Navision will not be deleted. This asymmetry is intended as a check against accidental loss of Microsoft Navision data.*

It is possible to create a contact of type Company in Microsoft Navision from Outlook. To do this, create a contact in Outlook, fill in the **Company** field and leave the **Full Name** field blank. If you later fill in the **Full Name** field for this contact, then a new contact of type person will be created in Microsoft Navision and assigned to this company.

Salespeople in Microsoft Navision are linked to contacts in Outlook. When you create, update, or delete a salesperson in Microsoft Navision, the corresponding contact will be created, updated, or deleted in Outlook. Similarly, when you update a salesperson in the Outlook folder you have specified for synchronization, the corresponding contact will automatically be updated in Microsoft Navision as well. It is not possible to create contacts in Outlook that will be linked to salespeople in Microsoft Navision.

NOTE*: Whenever a to-do is synchronized, all the contacts and salespeople in Microsoft Navision that are attendees of the to-do will also be synchronized.*

Synchronizing the Company Name and Country Fields

When synchronizing contacts between Outlook and Microsoft Navision, the **Company Name** and **Country** fields may require additional attention. In Microsoft Navision, the possible values for these fields must be on a list of registered companies or countries. When either of these fields is synchronized from Outlook and the value of the field is not registered in Microsoft Navision, a conflict occurs. When the next user accesses Microsoft Navision, the Outlook Integration Statistics window will be visible. From this window, the user will be able to access information on this conflict along with other conflicts, errors, and warnings recorded during the synchronization.

1. When a new contact is created in Outlook and the company assigned to it is registered in Microsoft Navision, a new contact is created in Microsoft Navision and assigned to this company.
2. If a contact in Outlook has already been assigned a company and the user changes this company to another one in Outlook, this contact is reassigned to the new company in Microsoft Navision. However, there are some situations when it is not possible to change the **Company Name** for a Microsoft Navision contact, such as if the contact is assigned to a segment that has not yet been logged or if its business relation does not correspond to a business relation for the newly assigned company.
3. When a contact in Outlook has already been assigned a company and the user resets its company name, the company name of the corresponding contact in Microsoft Navision is also reset. However, there are some situations in which it is not possible to reset the **Company Name** for a Microsoft Navision contact, for example, when the contact has a **Login ID** assigned.

If any of these complications arise, a warning is logged in the Outlook Integration Error Log, and when the user next accesses Microsoft Navision, the Outlook Integration Statistics window will be visible. From this window, the user will be able to access information on this warning along with other conflicts, errors, and warnings recorded during the synchronization. The **Company Name** of the Outlook contact will be restored.

If a contact is reassigned to another company in Microsoft Navision, then it inherits all the data from the new company based on the settings on the **Inheritance** tab in the Relationship Management Setup window.

Synchronizing the Post Code and City fields

The **Post Code** and **City** fields on the Contact Card in Microsoft Navision can either be filled in with a value selected from the list of registered post codes and cities or filled in manually with any value.

When the user changes the **Post Code** and **City** for a contact in Outlook, and the combination of Post Code and City is not found in the list of post codes and cities registered in Microsoft Navision, a warning will appear in the Outlook Integration Error Log. In this case, when the user next accesses Microsoft Navision, the Outlook Integration Statistics window will be visible. From this window, the user will be able to access information on this warning along with other conflicts, errors, and warnings recorded during the synchronization. However, the **Post Code** and **City** for the Contact in Microsoft Navision will still be changed to the corresponding Outlook values.

Changing another Salesperson's Contacts

If other salespeople have permission to create, modify, or delete Outlook items in your synchronized Outlook Contacts folder, then the following scenarios are possible:

- When another salesperson creates, modifies or deletes the contacts assigned to you in Microsoft Navision, these changes are synchronized with your Outlook. If the other salesperson does not have permission to edit your Outlook items, the change will only be saved in Microsoft Navision. In this case, you must run the Synchronize with Outlook batch job in order to synchronize these changes with Microsoft Navision.
- When another salesperson creates, modifies or deletes contacts in your Outlook, these changes are synchronized with Navision. If your Microsoft Navision client is not running, these changes will only be saved in Outlook. In this case, you must run the Synchronize with Outlook batch job in order to synchronize these changes to Microsoft Navision.

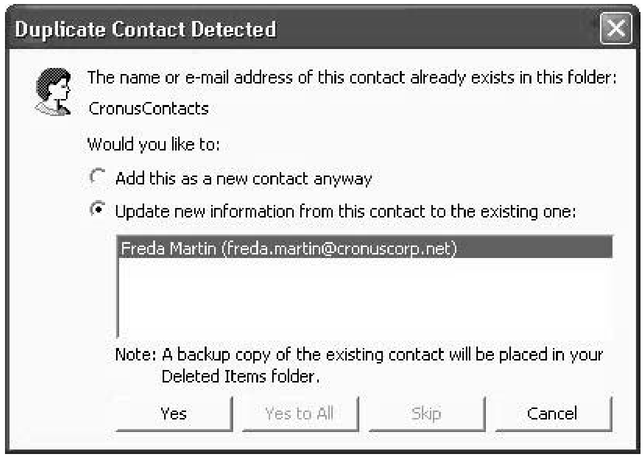
If, during synchronization setup, you have chosen to receive notifications when other salespeople modify your records in Microsoft Navision, you will be notified about these changes by e-mail.

Restoring Deleted Outlook Contacts

You can restore Outlook contacts that have been deleted in Outlook. To do so, move the contact from your Deleted folder back to the contacts folder that is synchronized with Microsoft Navision. If the corresponding Microsoft Navision contact still exists, the program will restore the link between these two contacts and they will be synchronized. If the corresponding Microsoft Navision contact has been deleted, a new corresponding contact will be created in Microsoft Navision immediately.

When you restore an Outlook contact that is a person, and the contact company it belongs to has been deleted in Microsoft Navision, the corresponding contact in Microsoft Navision will be created as a contact, not linked to any company. However, if the company still exists, this contact will be created and assigned to it in Microsoft Navision.

If you restore a deleted Outlook contact whose corresponding contact in Microsoft Navision was changed after it had been deleted in Outlook and then later create another contact in Outlook with the same name or e-mail address, the following message will appear:



Depending on the option you select, either a new contact will be added to your Outlook contacts folder along with a new corresponding contact in Microsoft Navision for the same company, or the existing contact will be updated. In the latter case, all the changes that might have been made to the contact in Microsoft Navision since the corresponding Outlook contact was deleted will be overwritten by the data from this restored contact.

Synchronizing To-Dos in Real-Time

You can now synchronize to-dos in Microsoft Navision with appointments and tasks in Outlook. Previously, for example, when you created to-dos of the Meeting type in Microsoft Navision, in order to have this event in your Outlook calendar, you had to create it in Outlook as well. Synchronizing to-dos saves you time because you do not have to go through a similar procedure twice. If you create a to-do in Microsoft Navision, it will appear immediately in the corresponding Outlook folder and vice versa. This functionality works from everywhere you can create to-dos.

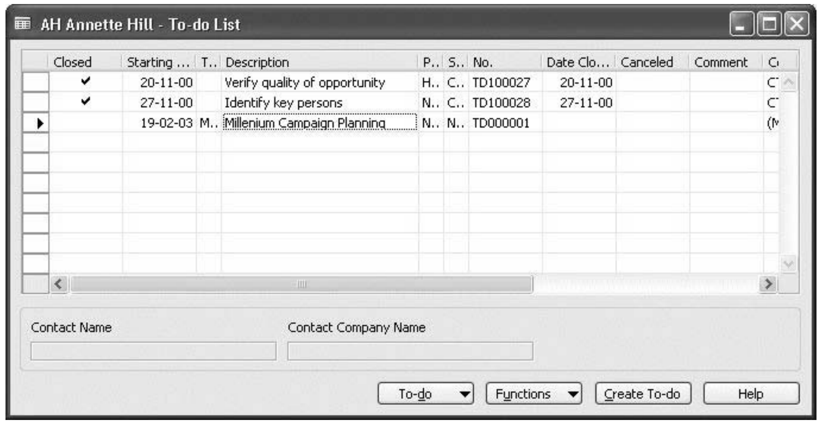
To synchronize to-dos, you must first set up the feature.

If you create a to-do of the Meeting type in Microsoft Navision, an appointment will be created in Outlook. If you create a to-do of the Phone Call type or do not specify the type, a task will automatically be created in Outlook.

***NOTE**: To-dos that have already been closed are not synchronized with Outlook. To-dos of type blank or Phone Call that are assigned to teams are also not synchronized with Outlook.*

To synchronize a Microsoft Navision to-do of type meeting with Outlook, do the following:

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. Find your salesperson card, and then click SALESPERSON→TO-DOS.



3. In the To-do List window, click **Create To-do**. The Create To-do wizard appears.
4. Set the type of to-do to Meeting. Fill in the mandatory fields and any relevant optional fields in the first window of the wizard, and click **Next**.
5. In the second wizard window, select the template and language code for the e-mail invitation if you would like to send meeting invitations to the Attendees. The **Attachment** field shows whether the invitation for this to-do has an attachment. To view and edit the attachment, click the **AsisstButton** in the field.

6. Specify meeting attendees and fill in the fields for each attendee. You can select attendees from among your contacts and salespeople:

***NOTE**: If you select attendees of attendee type salesperson, they have synchronization enabled, and they have the appropriate permission set in Outlook, then you can view their Outlook Calendar. To do this, click the **Show Calendar** option. Only the default Outlook Calendar folder is accessible using this feature.*

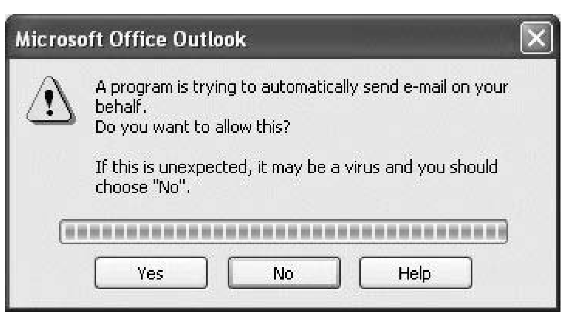
*The **Send Invitation** option is only available for contacts and salespeople with an e-mail address.*

---

7. If you want to send invitations to meeting attendees immediately after completing the Create To-do Wizard, select the **Send invitation(s) when I click Finish** check box. Otherwise, you can send invitations later from the Attendee Scheduling window. Invitations will be sent only to those attendees who have the **Send invitation(s) when I click Finish** check box selected.

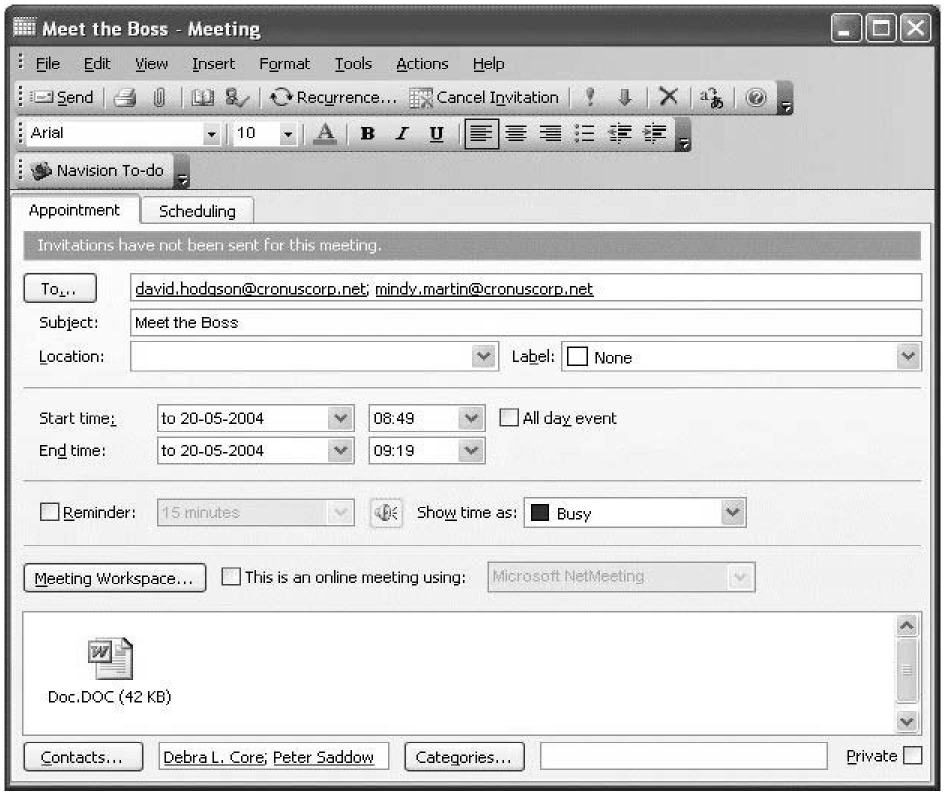
8. Fill in the other relevant fields in the following wizard windows. Click **Finish**.

If you have chosen to send invitations upon completion of the Create To-do Wizard, the following security warning will appear:

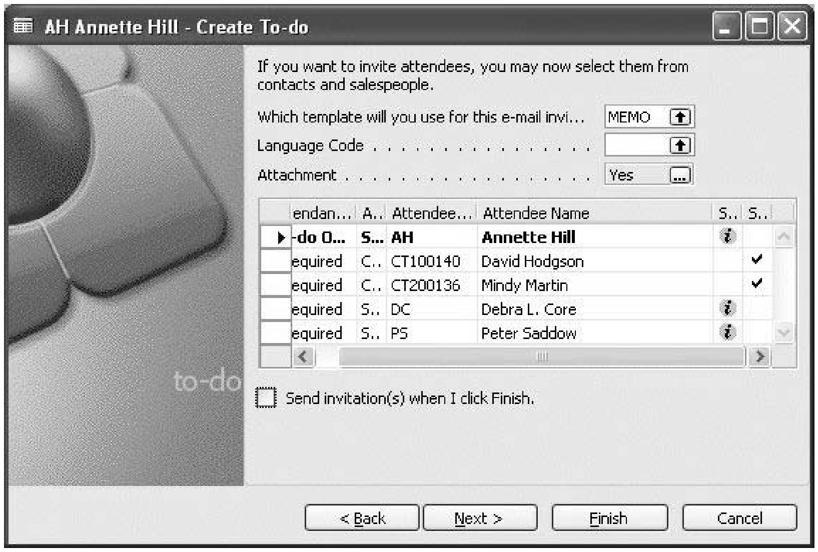


Click **Yes** to allow the program to send invitations.

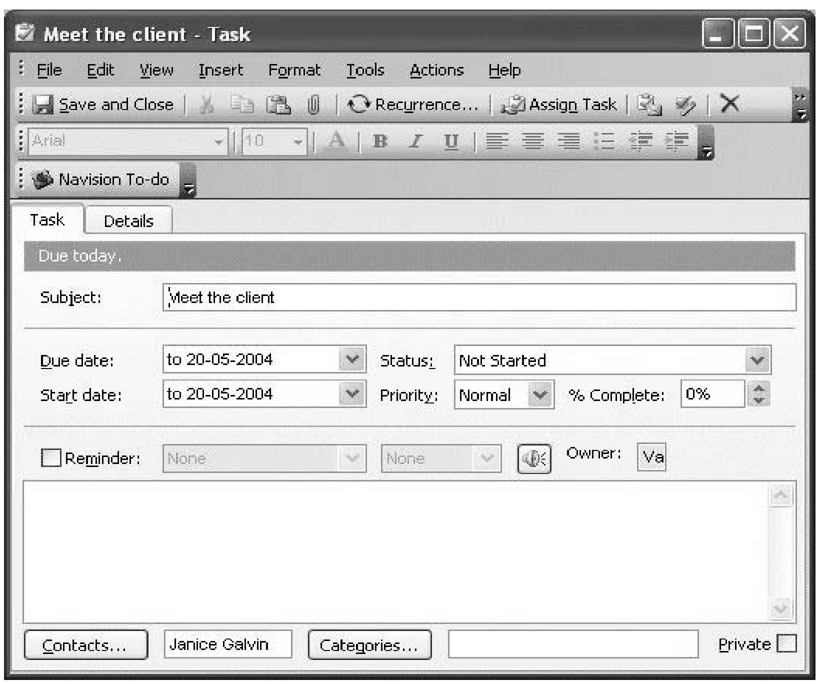
An appointment in Outlook is created. Note that attendees with the **Send invitation(s) when I click Finish** check box selected are displayed as Meeting Recipients, and attendees without this check mark selected are displayed as Related Contacts. If you have selected an attachment on the Create To-do Wizard, it is also attached to this Outlook appointment.



When the meeting attendees reply to your invitation, the **Response** field on the **Tracking** tab of the Outlook appointment is updated. These responses are synchronized to Microsoft Navision and are displayed in the **Invitation Response Type** field on the Attendee Scheduling window.



When you create a to-do of type blank or of type phone call and assign a contact to this to-do, then the assigned contact will appear in the **Related Contacts** field for the corresponding task in Outlook.



You will not receive Outlook reminders about appointments that were to take place in the past. You will also not receive a reminder about a task or an appointment if it starts within half an hour. In other cases, your Outlook settings determine whether or not you will receive a reminder.

If a to-do of the Meeting type is created using the Assign Activities function, it is created in Outlook as an All Day Event. You can manually adjust the start time and duration of the to-do later.

When you close a to-do of the Blank or Phone Call type in Microsoft Navision, the program closes the corresponding Outlook task. However, if you close a to-do of the Meeting type, the corresponding Outlook calendar item stays open because you cannot close a calendar item in Outlook.

If you cancel a to-do in Microsoft Navision, the program will delete the corresponding Outlook item. It will then send a notification message to your Outlook Inbox stating that this to-do has been canceled in Microsoft Navision, and the corresponding Outlook item has been deleted. The message also contains the number, the starting date, and the subject of the to-do.

When you reopen a closed task in Outlook, the corresponding to-do in Microsoft Navision is also reopened. If you reopen a closed to-do in Microsoft Navision, the corresponding Outlook task will also be reopened.

Due to the different ways Microsoft Navision and Outlook treat recurrence, full synchronization of recurring items between Microsoft Navision and Outlook is not possible. However, one-way synchronization of recurring tasks/calendar items and to-dos is supported. This means that when the recurrent to-do is closed in Microsoft Navision, and a new one is created there, the same occurs in the Outlook – a new task or calendar item is created. If you create a recurrent task or calendar item in Outlook, a non-recurrent to-do will be created in Microsoft Navision. When you delete or close one of the occurrences of the task or calendar item in Outlook, the rest of the occurrences will still be linked to the same to-do in Microsoft Navision.

Changing another Salesperson’s To-dos

If other salespeople have permission to create, modify or delete Outlook items in your synchronized Outlook Calendar or Task folders, then the following scenarios are possible:

- When another salesperson creates, modifies or deletes the to-dos assigned to you in Microsoft Navision, these changes are synchronized with your Outlook. If the other salesperson has no permission to edit your Outlook items, the change will only be saved in Microsoft Navision. In this case, you must run the Synchronize with Outlook batch job in order to synchronize these changes with Microsoft Navision.

- When another salesperson creates, modifies, or deletes tasks or appointments in your Outlook, these changes are synchronized with Microsoft Navision. If your Microsoft Navision client is not running, these changes will only be saved in Outlook. In this case, you must run the Synchronize with Outlook batch job in order to synchronize these changes with Microsoft Navision.

If, during synchronization setup, you have chosen to receive notifications when other salespeople modify your records in Microsoft Navision, you will be notified about these changes by e-mail.

Viewing Outlook Items from Microsoft Navision and Microsoft Navision Records from Outlook

Viewing Outlook Contacts from Navision

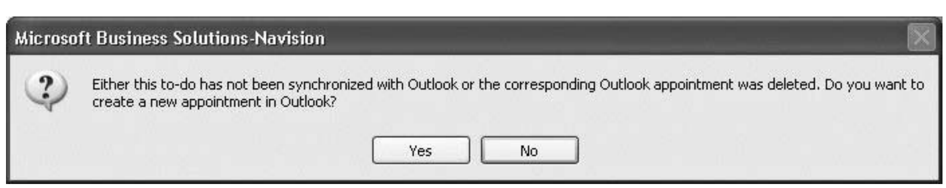
From Microsoft Navision, you can view Outlook contacts synchronized with Microsoft Navision contacts. You can do this from the Contact Card or Contact List windows. From this window, you can look up the synchronized contacts that are assigned to you as well as those that belong to other salespeople within your company, if you have been given the necessary Outlook permissions.

To view an Outlook contact that is assigned to you, do the following:

1. Click SALES & MARKETING→SALES→CONTACTS. The Contact Card window appears.
2. Press F5 to open the Contact List window. From this list, select a contact that is assigned to you.
3. Click FUNCTIONS→SHOW OUTLOOK ITEM. The Outlook Contact card window appears.

You can follow the same procedure to view an Outlook contact corresponding to a Microsoft Navision contact assigned to another salesperson, provided it has already been synchronized with your Outlook.

If the contact has not been synchronized with your Outlook, or it was synchronized with your Outlook and the corresponding Outlook item was deleted in the process, the following message appears:



Click **Yes** if you want the program to synchronize this contact with Outlook and display the corresponding Outlook Contact card.

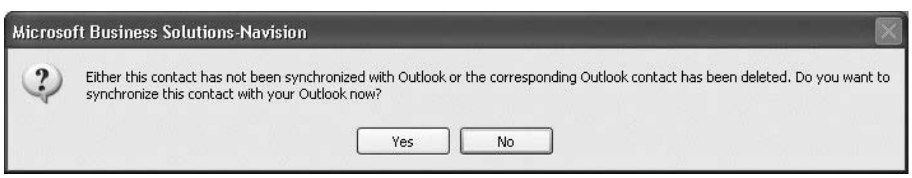
To view another salesperson's contact that has not been synchronized with your Outlook, do the following:

1. Click SALES & MARKETING→SALES→CONTACTS. The Contact Card window appears.
2. Press F5 to open the Contact List window, and select from the list a contact that is assigned to another salesperson and has not yet been synchronized with your Outlook.
3. Click FUNCTIONS→SHOW OUTLOOK ITEM. If you have permission to access this Salesperson Outlook contacts folder, the following message appears:

4. Select one of the options and click **OK**.

If you select the first option, **Show contact in PS's Outlook**, the program will retrieve the contact from Outlook that is assigned to this salesperson and display the corresponding Outlook Contact card.

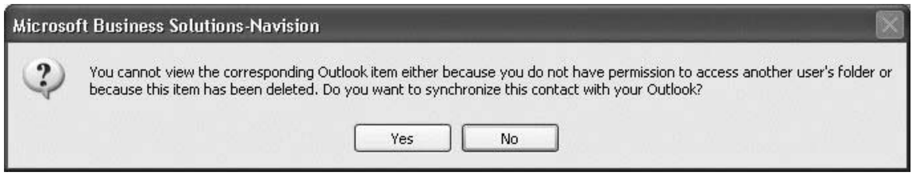
If the contact has not been synchronized with the Outlook salesperson it is assigned to, the following message appears:



Click **Yes** if you want the program to create this contact in your Outlook and display the corresponding Outlook Contact card.

If you select the second option, **Create a contact in my Outlook**, the program will create this contact in your Outlook and display the corresponding Outlook Contact card.

If you have chosen to view a contact that has been synchronized with another salesperson's Outlook and then deleted, or if you do not have permission to access this salesperson's corresponding contacts folder, the following message appears:



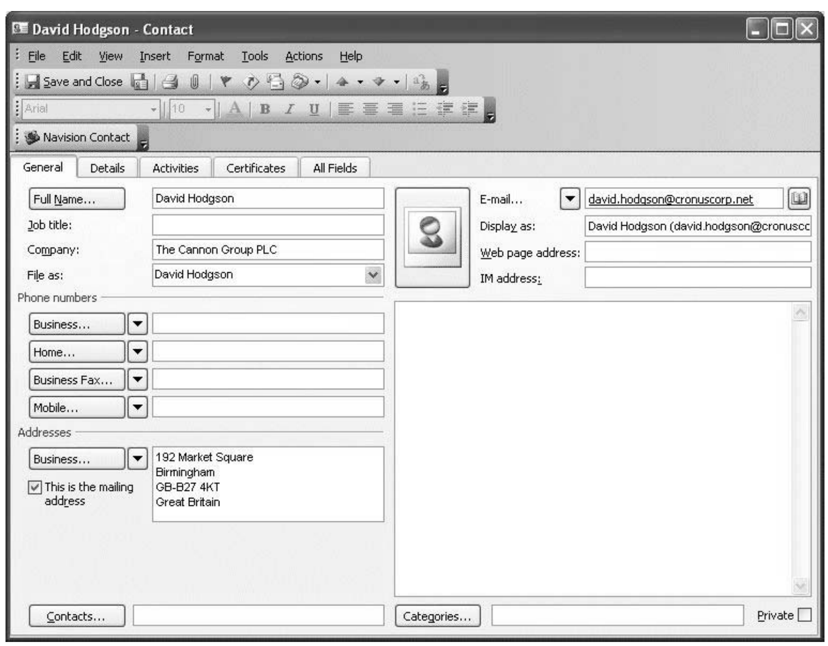
Click **Yes** if you want the program to create this contact in your Outlook and display the corresponding Outlook Contact card.

Viewing Microsoft Navision Contacts from Outlook

Using the Microsoft Navision toolbar, you can view Microsoft Navision contacts synchronized with Outlook contacts from Outlook. If the Microsoft Navision toolbar is not installed, you can install it using Add/Remove Programs in the Control Panel in Windows.

To view a Microsoft Navision contact, do the following:

1. In the Contacts folder, select a contact. The Contact Card window appears.
2. If the contact has been synchronized with Microsoft Navision, you will see the Microsoft Navision Contact toolbar button.



If the contact has not been synchronized, the Microsoft Navision Contact toolbar will be disabled.

Click the **Microsoft Navision Contact** button on the Microsoft Navision toolbar to open the corresponding Microsoft Navision contact card.

3. The Microsoft Navision Contact Card window appears. If the Microsoft Navision application has not yet been started, it will be opened automatically. You may have to enter your login name and password.

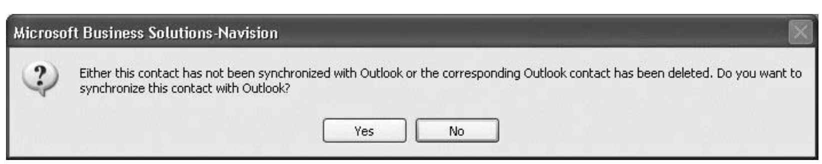
If a Microsoft Navision contact has been synchronized with Outlook and then deleted in Microsoft Navision, the program will display a message informing you that the corresponding Microsoft Navision item does not exist. After you click **OK**, the Microsoft Navision Contact Card window appears, displaying the first contact in the contact list.

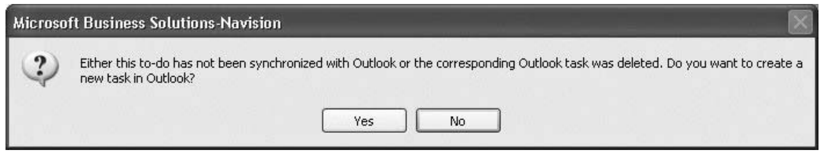
Viewing Outlook Calendar Items and Tasks from Navision

From Microsoft Navision, you can view Outlook calendar items and tasks that correspond to Microsoft Navision to-dos. You can do so from the To-do Card or To-do List window.

To view an Outlook calendar item or task that corresponds to a Microsoft Navision to-do assigned to you, do the following:

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. On your salesperson card, click SALESPERSON→TO-DOS.
3. In the To-do List window, choose a to-do and click FUNCTIONS→SHOW OUTLOOK ITEM. If the to-do has been synchronized with Outlook and the corresponding Outlook item has not been deleted, the program will display the corresponding Outlook item card.
4. If this to-do is open and has not been synchronized with Outlook, or the respective Outlook item was deleted, the program will display a message asking you whether you want to synchronize this to-do with Outlook. Depending on whether the to-do is of the Meeting type or Blank or Phone Call type, one of the following messages will be displayed:





Click **Yes** if you want the program to synchronize this to-do with Outlook and display the corresponding Outlook item card.

5 If the to-do is closed and has not been synchronized with Outlook and/or has been canceled, then a message will be displayed informing you that this to-do has been closed and asking you whether you want to reopen this to-do and synchronize it with Outlook.

Click **Yes** if you want the program to synchronize this to-do with Outlook and display the corresponding Outlook item card.

You can also view Outlook calendar items and tasks that belong to other salespeople within your company.

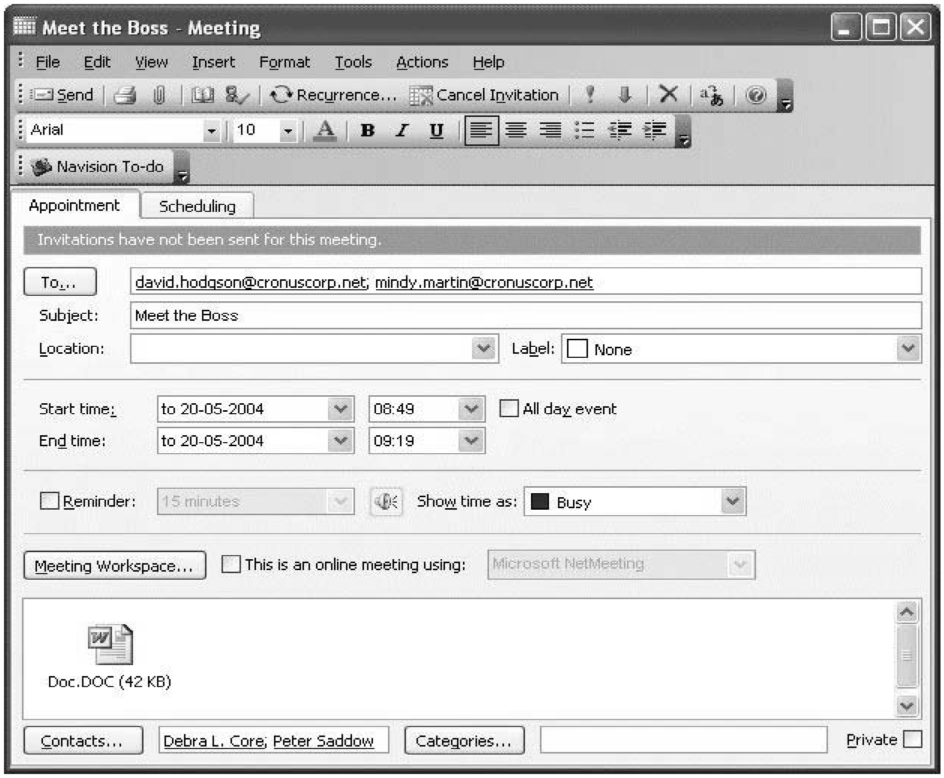
To view an Outlook calendar item that is assigned to another salesperson, do the following:

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. On the salesperson card, select the salesperson whose Outlook calendar item you want to see, and then click SALESPERSON→TO-DOS.
3. In the To-do List window, select a to-do and click FUNCTIONS→SHOW OUTLOOK ITEM. The corresponding Outlook item card appears.

To view an Outlook item corresponding to a to-do assigned to another salesperson, you must have permission to access this salesperson's Outlook folder. If you do not have such permission, or if the corresponding Outlook item has been deleted from this salesperson's Outlook, or if this item has not been synchronized with Outlook at all, a message will appear. This message informs you that you cannot view this Outlook item.

Viewing Microsoft Navision To-dos from Outlook

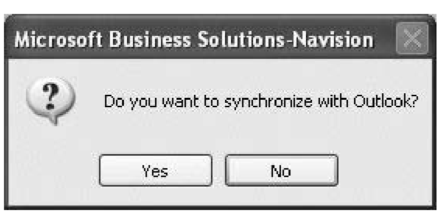
From Outlook, you can view Microsoft Navision to-dos synchronized with Outlook calendar items and tasks. To do so, follow the same procedure as for viewing Microsoft Navision contacts from Outlook.



Synchronization of Batch Jobs

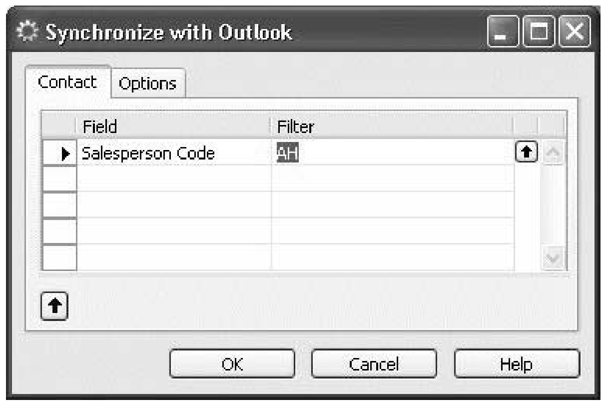
Synchronize with Outlook

You can use the Synchronize with Outlook batch job to both import and export data simultaneously. The system suggests starting this batch job when you start Microsoft Navision.



You may also skip the synchronization or start up the batch job to run manually later. To start synchronizing now, follow this procedure:

1. Click SALES & MARKETING→SALES→SALESPERSON and find your salesperson card.
2. Click FUNCTIONS→SYNCHRONIZE WITH OUTLOOK. The Synchronize with Outlook batch job request window appears:



3. On the **Contact** tab, you may set a filter to define which Microsoft Navision contacts you want to be synchronized with Outlook. You can set additional fields for filtering by clicking the **Field** field, then clicking the **AssistButton** in this field.

NOTE*: If you select a different salesperson code in the* ***Filter*** *field, then contacts that are assigned to the selected salesperson will be synchronized with your Outlook.*

4. If you do not want the program to synchronize the to-dos belonging to the current salesperson when running the Synchronize with Outlook batch job, go to the **Options** tab, and select **Synchronize Only Contacts** check box. If you leave this field empty, the program will also synchronize the to-dos belonging to the current salesperson with Outlook.
5. If you want the program to synchronize only the to-dos that match a certain period when running the Synchronize with Outlook batch job, then on the **Options** tab, enter the dates for the period in the **Period Start** and **Period End** fields.

NOTE*: The program will use calculation formulas specified on the* ***Synchronization*** *tab of your salesperson cards to calculate the* ***Period Start*** *and* ***Period End*** *field values. You may change these values when you run the Synchronize with Outlook batch job.*

6. Click **OK** to begin synchronizing with Outlook.

We recommend that once you have started the Synchronize with Outlook batch job, you do not click **Cancel** on the progress indicator. If you click **Cancel**, the synchronization process will be stopped, and changes made by the batch job will not be rolled back. This means you will be unable to retrieve the data as it existed before you started this batch job.

You can also access the Synchronize with Outlook batch job in the following way: Click SALES & MARKETING→SALES→OUTLOOK INTEGRATION→SYNCHRONIZE WITH OUTLOOK.

If an error, warning or conflict appeared during the synchronization, the Outlook Integration Statistics window is displayed when the batch job finishes. In this window, you can see the overall number of errors, warnings, and conflicts that are currently logged in your Outlook Integration Error Log and Conflict Resolution Worksheet.

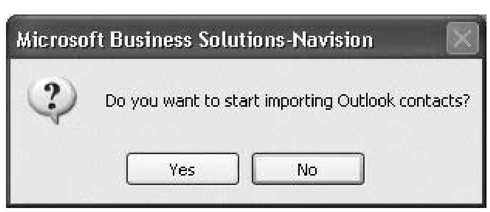
NOTE*: If you change an Attendee list of a to-do of the Meeting type when synchronization with Outlook is disabled (by adding, removing, replacing, or modifying an attendee), then the next time you run the Synchronize with Outlook batch job, the program will overwrite the meeting attendees in Microsoft Navision with the Outlook recipients and related contacts. The contents of all other fields on the Outlook appointment card, such as* ***Subject****,* ***Due Date****,* ***Start Date****, and so on, will be overwritten with the new information you have entered on the to-do card in Microsoft Navision.*

Importing Contacts from Outlook

You may want to have all the Outlook contacts stored in your Outlook Contacts folder transferred to Microsoft Navision at once. This is particularly useful if you are working with Outlook when Microsoft Navision is not running. In this case, the Outlook items will not be created in Microsoft Navision. Therefore, it is a good idea to import the items later when you open Microsoft Navision.

To import contacts from Outlook, do the following:

1. Click SALES & MARKETING→SALES→OUTLOOK INTEGRATION→IMPORT FROM OUTLOOK.
2. Confirm the subsequent message.

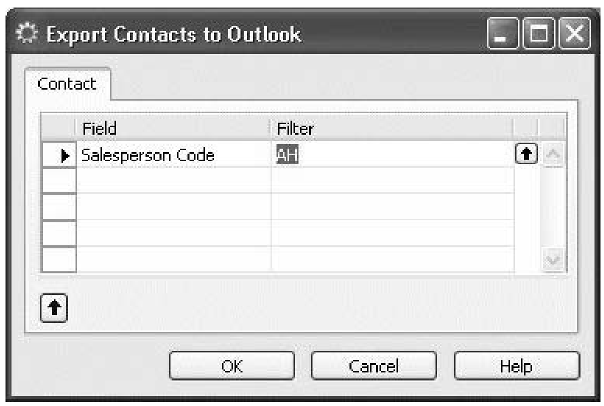


Exporting Contacts to Outlook

If you want to have Microsoft Navision contacts available in your Outlook Contacts folder, you can run the Export Contacts to Outlook batch job. As with importing Outlook contacts, this will be most useful if you are working with Microsoft Navision while Outlook is not running, and you want the changes to be synchronized with Outlook later when you open Microsoft Navision.

To export contacts from Microsoft Navision to Outlook, follow this procedure:

1. Click SALES & MARKETING→SALES→OUTLOOK INTEGRATION→EXPORT TO OUTLOOK.
2. The Export Contacts to Outlook batch job request window appears. Your Salesperson Code will be selected as the default filter for exporting contacts.



3. You can set a filter to define which Microsoft Navision contacts you want to export to Outlook contacts. You can set additional fields by clicking the **Field**, clicking the **AssistButton** to the right of the appropriate field, and selecting from the list.

   If you select a different salesperson code in the **Filter** field, then contacts that are assigned to the selected salesperson will be synchronized with your Outlook.
4. Click **OK** to start exporting contacts to Outlook.

Importing and Exporting To-dos

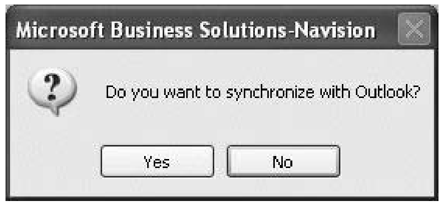
As an alternative to synchronizing all your data between Microsoft Navision and Outlook, you can choose to import only tasks and appointments from Outlook to Microsoft Navision or to export only to-dos from Microsoft Navision to Outlook.

By choosing one of these two processes, you can set filters on your synchronization to specify which data you want to be synchronized.

Importing Tasks and Calendar Items from Outlook

To import Outlook tasks and calendar items into Microsoft Navision, follow this procedure:

1. Click SALES & MARKETING→SALES→OUTLOOK INTEGRATION→IMPORT FROM OUTLOOK→TO-DOS.
2. Confirm the subsequent message.

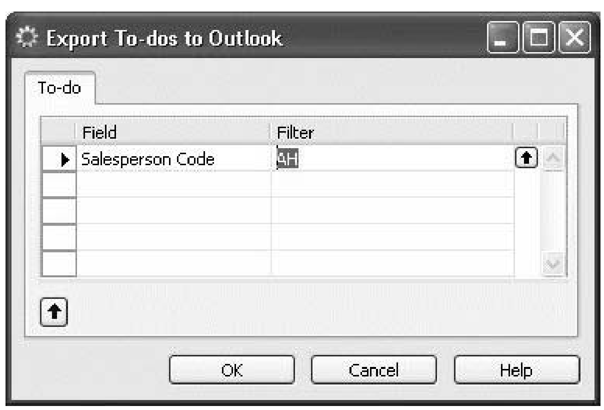


Outlook tasks that have already been closed are not transferred to Microsoft Navision.

Exporting To-dos to Outlook

To export your to-dos to Outlook, do the following:

1. Click SALES & MARKETING→SALES→OUTLOOK INTEGRATION→EXPORT TO OUTLOOK.
2. The Export To-dos to Outlook batch job request window appears:



3. Set a filter to define which Microsoft Navision to-dos you want to be synchronized with Outlook tasks and calendar items. You can set additional fields by clicking the **Field**, and then clicking the **AssistButton** to the right of the field.

4. Click **OK** to start exporting to-dos to Outlook.

***NOTE**: Only to-dos belonging to you will be exported to Outlook. This is true regardless of whether you change the salesperson code in the **Filter** field or leave it empty.*

Conflict Resolution and Error Handling

When synchronizing Microsoft Navision records and Outlook items, the program compares certain fields. If you change the value in any of these fields, the program automatically synchronizes the two documents and updates the information in them. This occurs while both Microsoft Navision and Outlook are running. However, in the following situations the program cannot determine which data has priority, since it was changed in both applications. As a result, a conflict appears.

A conflict appears when changes were made to the same item in both applications at a time when data could not be synchronized between applications. This may happen either because Microsoft Navision was not running, Outlook was not accessible, or Synchronization with Outlook was disabled. Therefore, a conflict will be logged in the Conflict Resolution Worksheet.

To resolve the conflicts that took place during synchronization:

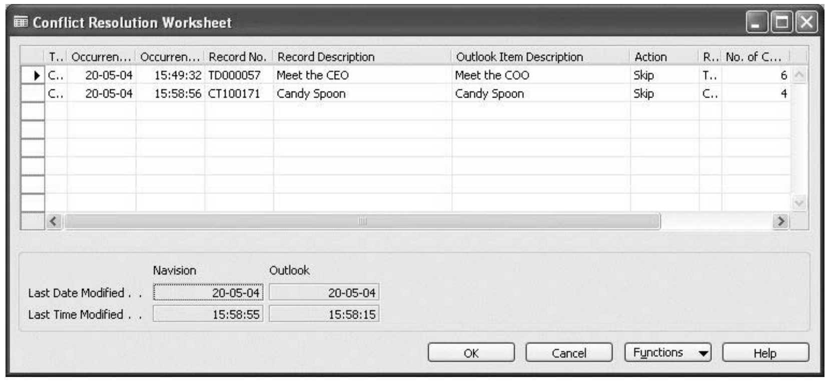
1. In the Outlook Integration Statistics window, click the **AssistButton** in the **No. of Errors and Warnings** field. The Outlook Integration Error Log is displayed, containing the list of errors and warnings.
2. In the Outlook Integration Statistics window, click the **AssistButton** in the **No. of Conflicts** field. The Conflict Resolution Worksheet is displayed, allowing you to resolve the conflicts that appeared during synchronization.

   You can also access the Outlook Integration Error Log and the Conflict Resolution Worksheet and resolve the conflicts that appeared during synchronization from the Functions menu on the Salesperson/Purchaser Card.

To resolve Outlook integration conflicts, follow this procedure:

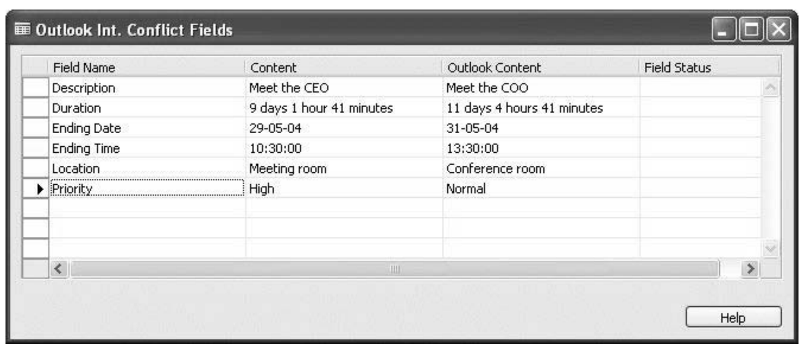
1. Click SALES & MARKETING→SALES→SALESPEOPLE, and find your salesperson card.

2. Click FUNCTIONS→CONFLICT RESOLUTION WORKSHEET. The Conflict Resolution Worksheet window appears:

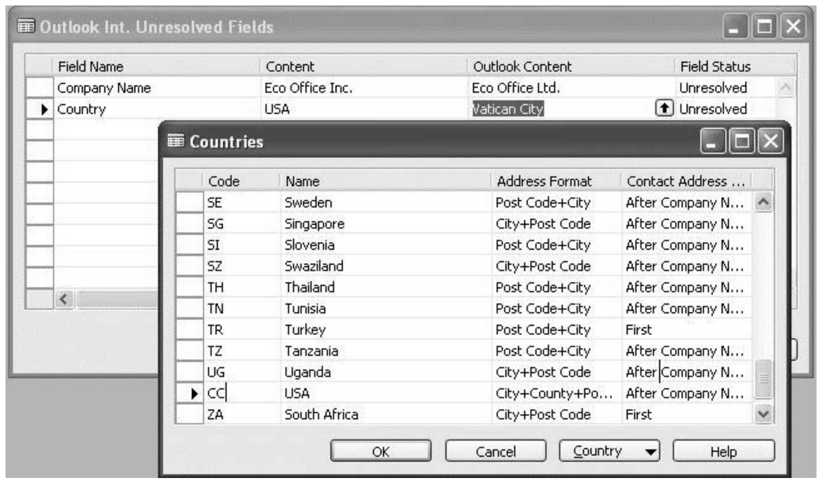


3 Select the conflict you want to resolve. You can look up the date and time on which the Microsoft Navision record or Outlook item was modified in the **Last Date Modified** and **Last Time Modified** fields.

4 You can view the names and contents of the conflicting fields (the fields that do not match) by clicking FUNCTIONS→SHOW CONFLICTING FIELDS (or clicking the **AssistButton** in the **No. of Conflicting Fields** field). The Outlook Int. Conflict Fields window appears.



5. You can view the names and contents of the unresolved fields (the fields containing values that were not found among the values registered in Microsoft Navision, such as **Company Name** or **Country**) by clicking FUNCTIONS→SHOW UNRESOLVED FIELDS or by clicking the **AssistButton** in the **No. of Unresolved Fields** field. The Outlook Int. Unresolved Fields window appears.



If you click the **AssistButton** in the **Outlook Content** field for a line containing the **Company Name** or **Country**, which could not be resolved in Microsoft Navision, you will be able to choose the correct value from the list of registered companies and countries. If there are other entries logged in the Conflict Resolution Worksheet with the same **Company Name** or **Country** problem, a confirmation message will be displayed asking if you would like to resolve them in the same way. If you click **Yes**, all similar field conflicts will be resolved. Close the Outlook Int. Unresolved Fields window to return to the Conflict Resolution Worksheet.

6. Choose what you want to do with the conflict by clicking the **AssistButton** to the right of the **Action** field. Then select from the list: Skip, Delete, Replace Microsoft Navision Record, or Replace Outlook Item. If you want to replace the Microsoft Navision record, make sure that all unresolved fields were resolved. You can look up the Microsoft Navision record that caused the conflict by clicking on the **AssistButton** in the **Record No.** field.

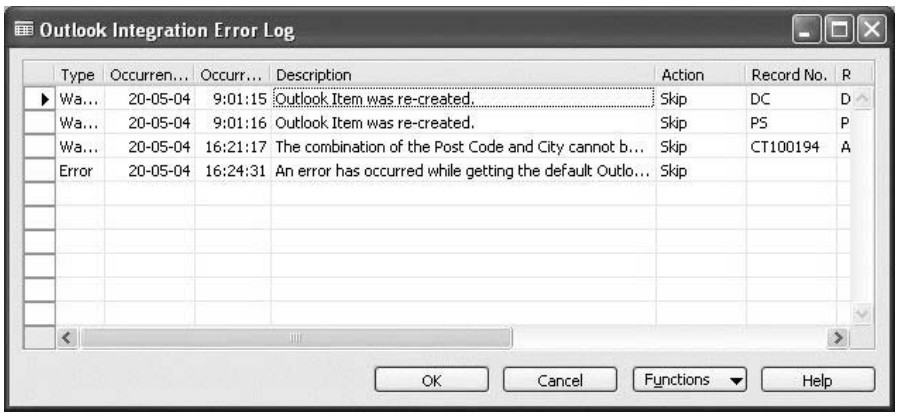
7. Click **OK**. The program will perform the action you have selected in the **Action** field. If you resolved the **Outlook** fields in Step 5, the selected values will be applied to the Outlook item.

You can also access the Conflict Resolution Worksheet by going to SALES & MARKETING→SALES→OUTLOOK INTEGRATION→LOGS→CONFLICT RESOLUTION WORKSHEET.

The program will report an error when something interrupts the Outlook synchronization process, such as a failure to connect to Outlook.

You can view Outlook integration errors in the Outlook Integration Error Log window by clicking SALES & MARKETING→SALES→SALESPEOPLE, finding your Salesperson Card, and clicking FUNCTIONS→OUTLOOK INT. ERROR LOG. You can also access the Outlook Integration Error Log by going to SALES & MARKETING→SALES→OUTLOOK INTEGRATION→LOGS→ERROR LOG. In addition, you can perform certain actions on the log errors by clicking the **AssistButton** in the **Action** field and selecting from the list: Skip or Delete. The program will perform the action you have selected after you click **OK**.

The Outlook Integration Error Log window looks like this:



When an error, warning, or conflict appears during the synchronization, the Outlook Integration Statistics window is displayed. In this window you can see the overall number of errors, warnings and conflicts that are currently logged in your Outlook Integration Error Log and Conflict Resolution Worksheet.

Test Your Skills – Setting Up Synchronization with Outlook

Scenario: You are Annette Hill, a salesperson at Cronus International Ltd. You work with both Microsoft Navision and Outlook. You are going to set up synchronization between Outlook and Navision. After setting up synchronization, you would then like to synchronize your data.

Test Your Skills – Integrating a Contact From Outlook

Scenario: You are going to create a new contact person in Outlook and want to have this contact in Microsoft Navision as well.

Create a contact using the following information:

Name:	John Kondris
Address:	12 Henderson Street Mineral Wells, TX USA

After you have created the contact in Outlook, check that it has been created in Microsoft Navision as well.

Test Your Skills – Integrating a Contact From Navision

Scenario: You are going to create a new contact person in Microsoft Navision and want to have this contact in Outlook as well.

Create a contact using the following information:

Name:	Peter Byrne
Address:	12 5ht Ave. La Jolla, CA USA

After you have created the contact in Microsoft Navision, check that it has been created in Outlook as well.

Test Your Skills – Integrating a Contact From Navision

Scenario: You are Annette Hill, a salesperson at Cronus International Ltd. You work with both Microsoft Navision and Outlook.

You are going to create a new contact company in Microsoft Navision and want to have this contact in Outlook as well.

Create a contact using the following information:

Name:	RSyn Ltd
Address:	17 Forest Street AU-2000 Sydney, NSW Australia

After you have created the contact in Navision, check that it has been created in Outlook as well.

You want to assign contact John Kondris to this company in Microsoft Navision.

Test Your Skills – Integrating a To-do of Type Blank or Phone Call

Scenario: You are going to create a to-do of type Phone Call to schedule a telephone conversation with the manager of the technical department. Create a to-do using the following information:

Type:	Phone Call
Description:	Call Tech Dept Manager

When the to-do is created in Microsoft Navision, view the corresponding Outlook item card.

Test Your Skills – Integrating a Task

Scenario: You are going to create a task in Outlook to remind you to back up your important data.

Create a task in **Outlook and put Data Back up in the Subject** field.

When the task is created in Outlook, view the corresponding Microsoft Navision to-do.

Test Your Skills – Integrating a To-do of Type Meeting

Scenario: You are going to organize a meeting concerning the planning of the Millennium campaign. You want to create a new to-do in Microsoft Navision and to store it in Outlook as well. You want to attach a business letter to this to-do and send a meeting invitation once you have finished working with the wizard. Create a to-do using the following information:

Type:	Meeting
Description:	Millennium Campaign Planning
Duration:	1 hour
Attendees:	Debra L. Core, Peter Saddow, and Richard Lum
Template:	BUS

When the to-do is created in Microsoft Navision, view the corresponding Outlook item card.

You want to receive the responses of the meeting attendees pertaining to the meeting. You want to check the responses in Microsoft Navision.

Test Your Skills – Integrating an Outlook appointment

Scenario: You are going to organize a meeting to introduce a new CEO. You want to create a new appointment in Outlook and store it in Microsoft Navision as well.

Create an appointment using the following information:

Subject:	New CEO
Duration:	1 hour
Attendees:	Debra L. Core, Linda Martin, and Bart Duncan

View the corresponding to-do card and send meeting invitation from Microsoft Navision.

You want to receive the responses of the meeting attendees pertaining to the meeting. You want to check the responses in Microsoft Navision.

Test Your Skills – Resolving Company Field Conflicts

Scenario: You want to create a contact person in Outlook, named John Miller. You want to assign this contact to Electronics Ltd. company in Microsoft Navision, but misspell the name of the company as Electronics Lt.

Resolve the conflict that appears when the contacts are synchronized to Microsoft Navision.

Test Your Skills – Resolving Version Conflicts

Scenario: You want to synchronize a Microsoft Navision contact Andrew Dixon to Outlook. Close Microsoft Navision, and change the name of the contact in Outlook to Andrew Dikson. When this is done, start Microsoft Navision, and skip the synchronization batch job that appears on startup. Modify the contact in Microsoft Navision as well (for example, change the contact's name to Andrew Bixon).

Resolve the conflict that appears.

Test Your Skills – Synchronizing To-dos within a Specified Period

Scenario: You are going to synchronize your Microsoft Navision contacts and to-dos with the corresponding Outlook items, but you are only interested in the changes made during a two-week period. The two-week period you are interested in is the one starting one week ago (February 19, 2003) and ending one week after today's date.

1. On the **Synchronization** tab of the Salesperson/Purchaser card, set up the synchronization period starting one week ago and ending one week from today's date.
2. You realize that you need more time to prepare for the Millennium Campaign Planning meeting. You decide to postpone the meeting for more than a week, until February 28. Update the corresponding to-do.
3. Before the meeting, you decide to identify key persons for the Millennium campaign. Create a new to-do for today's date, involving contact CT000026 Lovaina Contractors.
4. If the time for which you allowed access to Outlook has expired, run the Synchronize with Outlook batch job. Then check what changes appeared in your Outlook tasks and calendar folders.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.