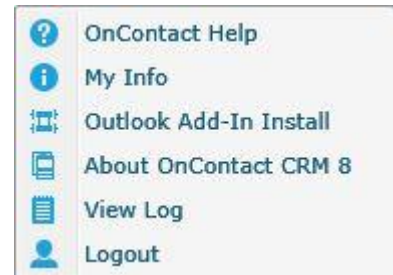


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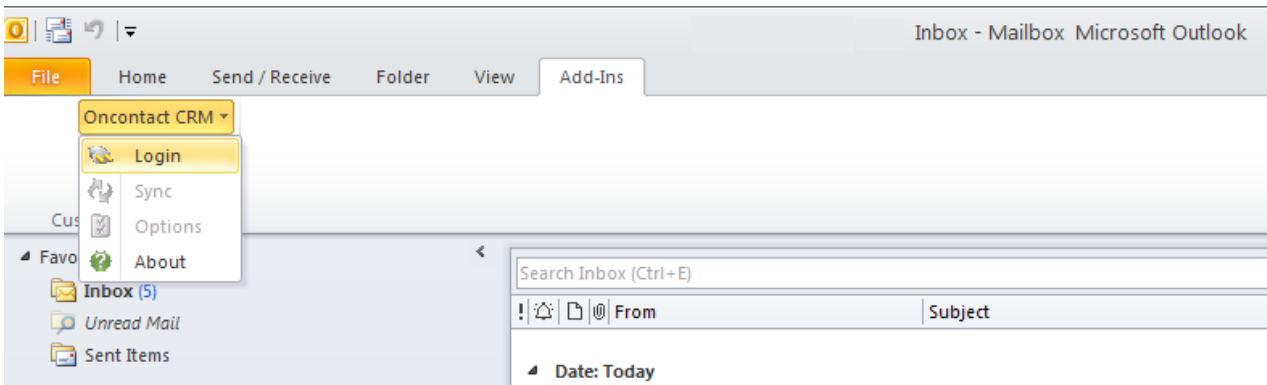
Outlook Add-In Installation and Setup

1. Close the Outlook application.
2. In the OnContact CRM application, click the Options button in the upper-right corner, and select Outlook Add-In Install.
3. Click the link for OnContact Outlook Add-In to download and save the file.
4. Double-click the saved file to run it.
5. Check the box to accept the terms of the License agreement and press Install to continue.



Note: The Add-In requires Microsoft .net framework which is installed during the installation process if not present on the target system.

6. Start the Outlook application.
7. In Outlook, select the Login option from the OnContact CRM menu found in the Add-Ins tab.



8. Enter your User Name, Password, and Profile.
9. Click the orange **Advanced** hyperlink on the Login page to verify the connection information.

The **Connect to Web Server** option should be selected. The **Server Address** field should contain the same address you use to connect to OnContact with the browser, minus the **/oncontact.aspx** (see example here).

If OnContact is hosting your CRM (i.e. Cloud), use the following URL:

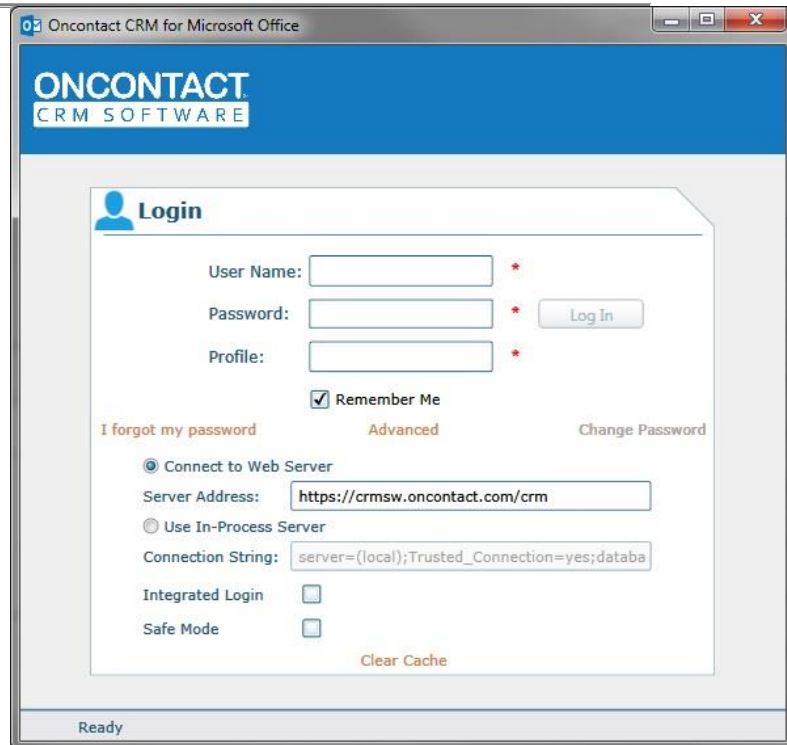
<https://crmsw.oncontact.com/crm>

If you are hosting your own CRM (i.e. on-premise), contact your CRM administrator for the correct URL.

Hint: It will most likely be the same URL used to log into the main CRM application, minus the /oncontact.aspx

For example, if your regular CRM URL is something like this,
<https://mycompany.oncontact.com/oncontact.aspx>, you should use this URL for the Outlook add-in:
<https://mycompany.oncontact.com/>

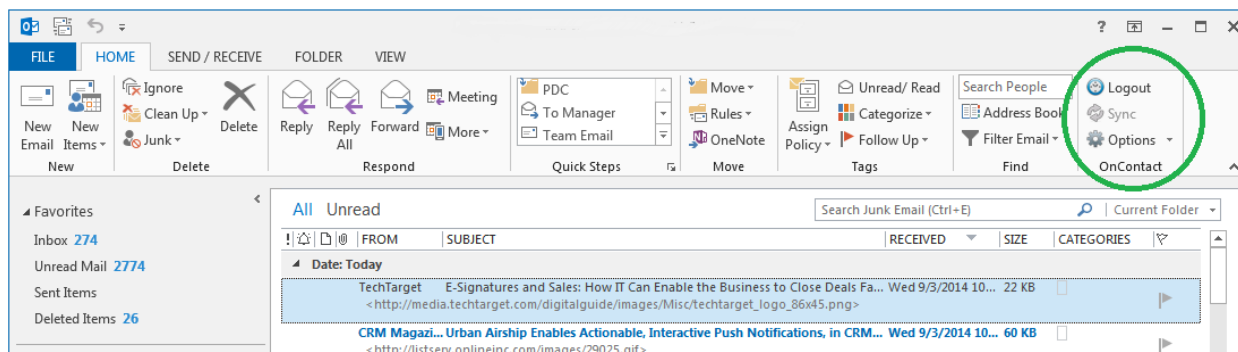
10. Check the box to remember this connection information for the future.
11. Click the Log In button.



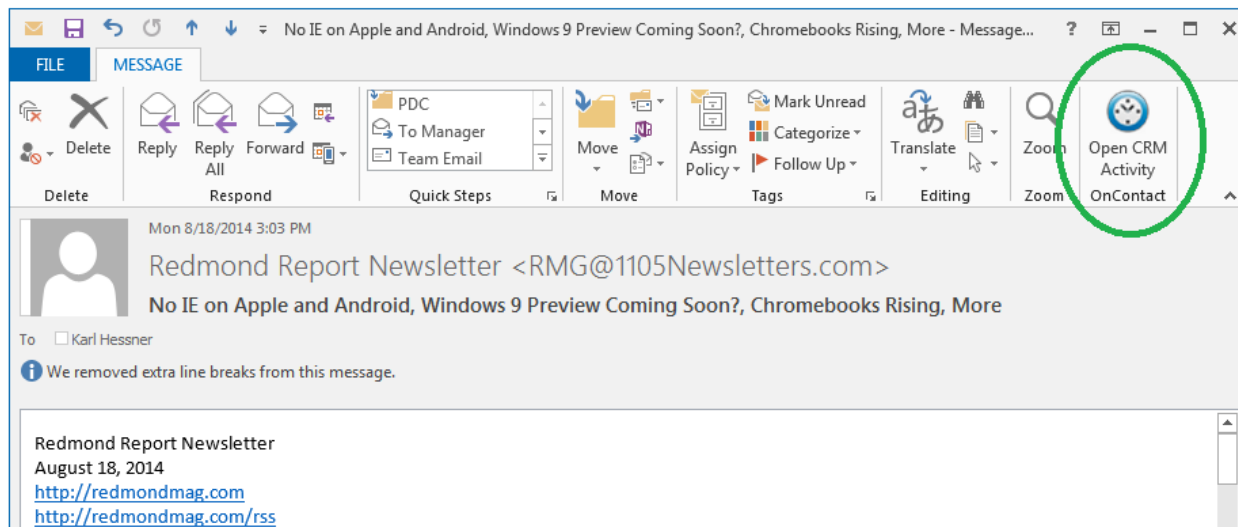
OnContact Add-In Menus

OnContact menus have been moved to the main ribbon of all Outlook forms.

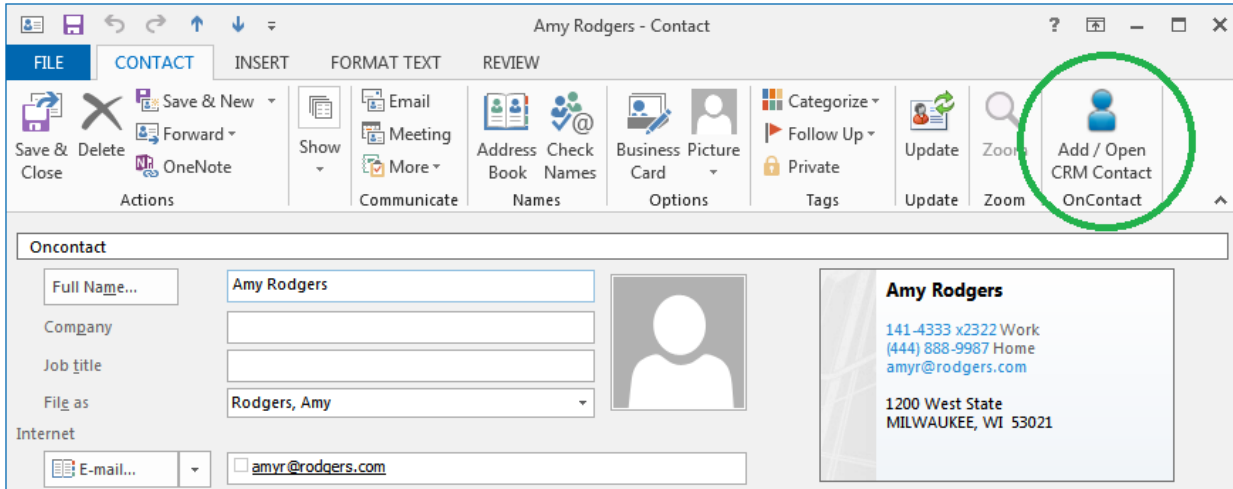
The Home ribbon on the Inbox contains options to log in to the OnContact Add-In and initiate synchronization.



The OnContact section of the Mail, Appointment, and Task Item ribbons includes the Open CRM Activity option.



Similarly, the Contact item ribbon also contains the Open CRM Contact option.

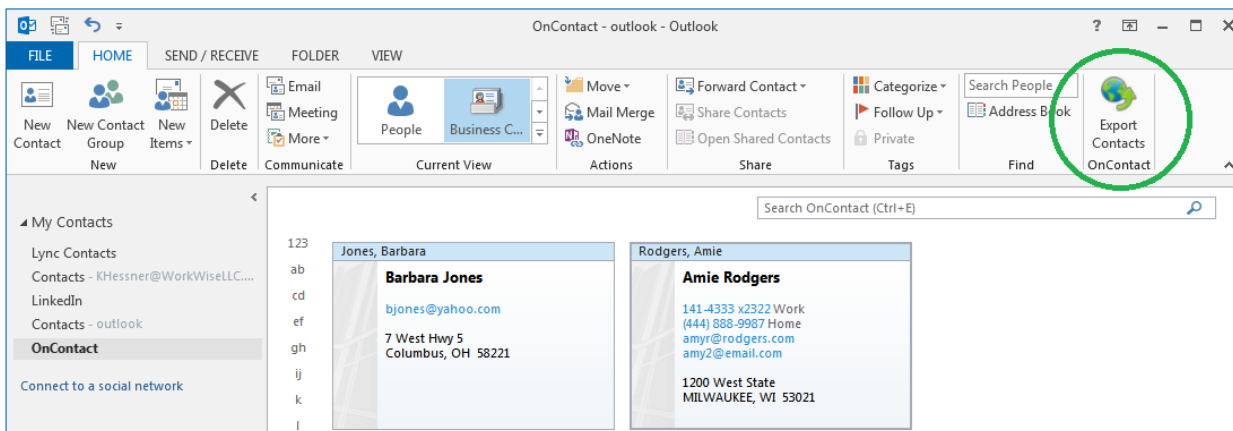


OnContact Add-In Login

The OnContact Login window is now displayed when you open Outlook, making it easier to start the application. This change also ensures that your applications stay synchronized and keep information current on both ends.

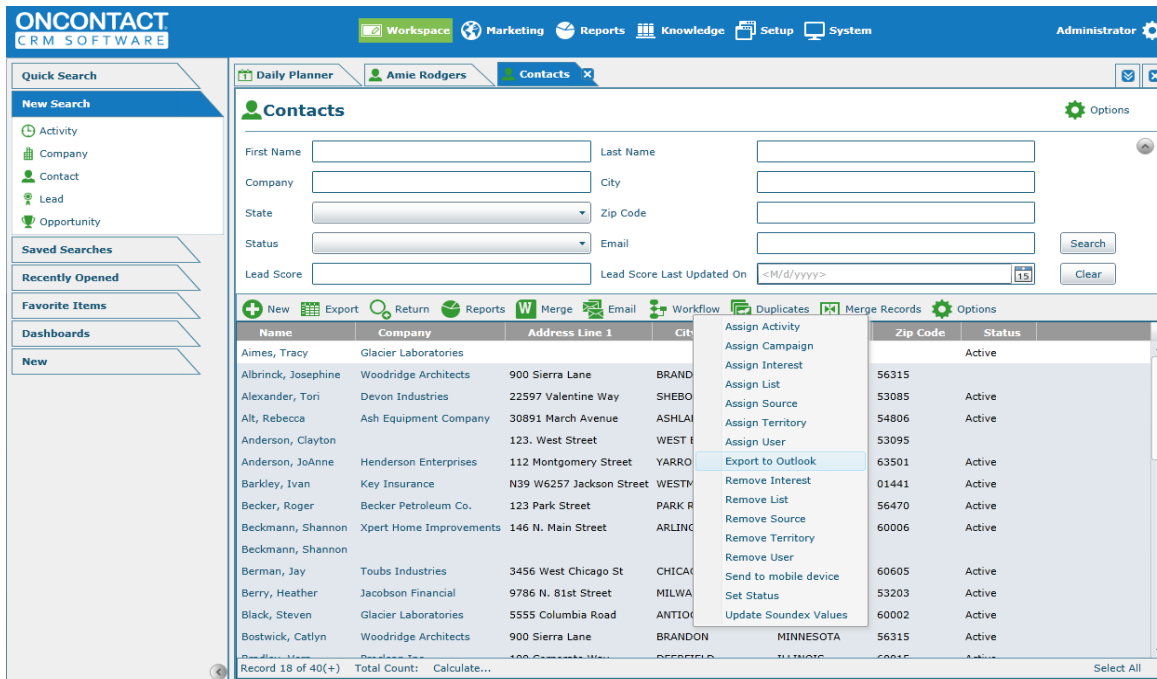
Mass Export of Contacts from Outlook to OnContact

You can select multiple Outlook contacts exported them to OnContact. This process skips records that were previously exported to avoid creating duplicates.



Mass Export of Contacts from OnContact to Outlook

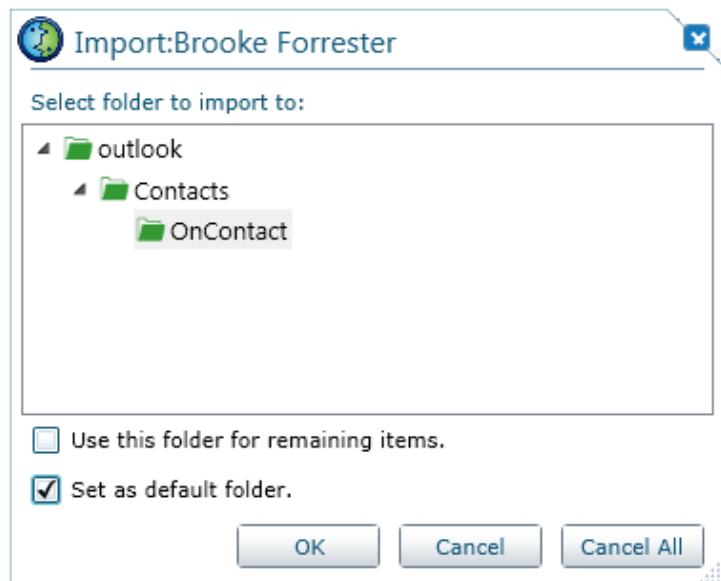
You can also export multiple Contacts from OnContact to Outlook. This is done from the Contact List pages with a new Workflow option. Select each contact you wish to be exported, and select *Export to Outlook* under the *Workflow* tab.



Folder Selection

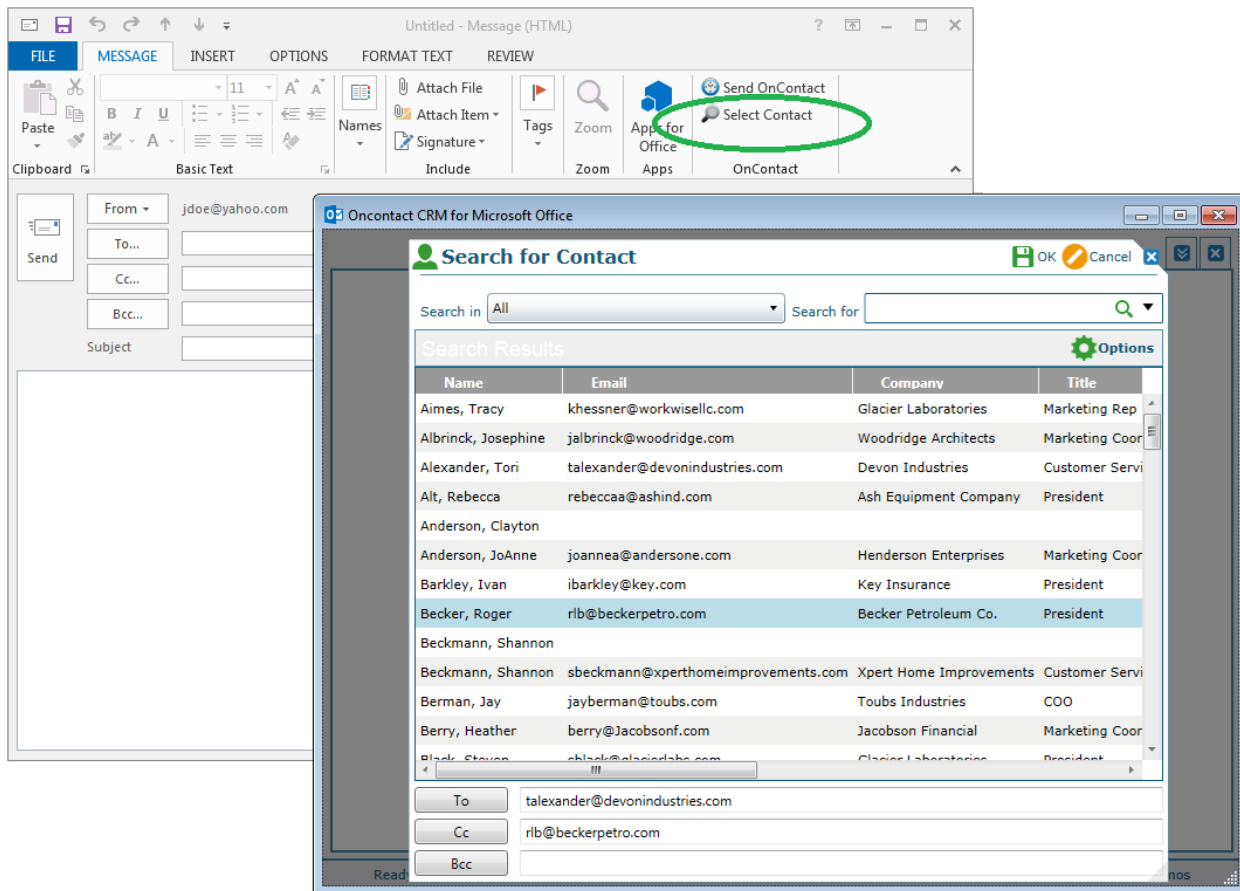
The folder selection window that is displayed when exporting items from OnContact to Outlook may now be suppressed.

Selecting the *Set as default folder* option marks the folder as default for future items imported of the same type. The Select Folder window will no longer display until default folders are cleared by selecting *Forget Default Folders* in the Options menu.



OnContact Address Book

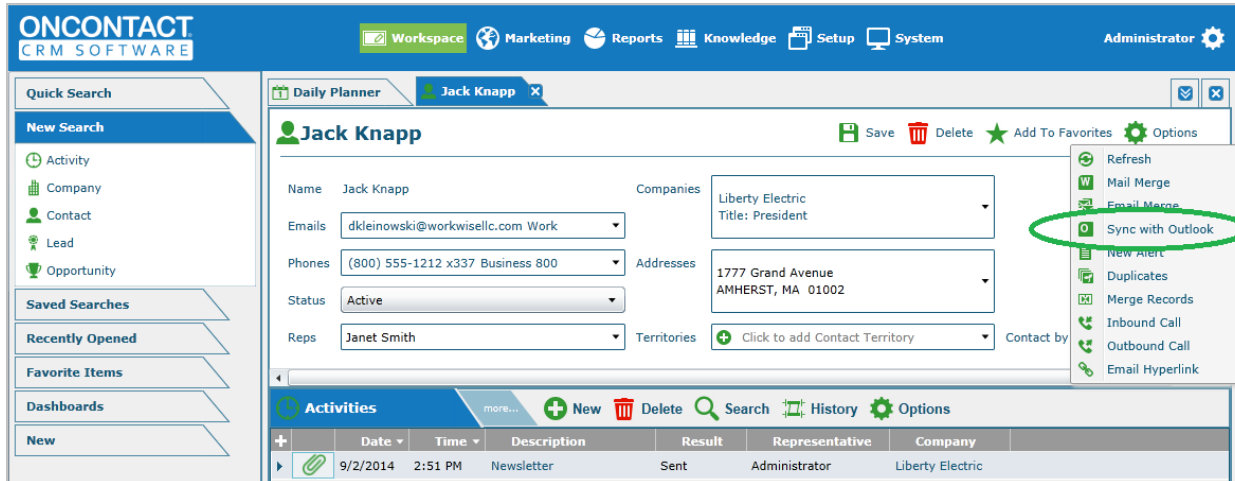
An option has been added to the New Email form to make it easier to reference email addresses from OnContact. This new option opens a Zoom window where you may search and select contacts for the To, CC, and BCC fields.



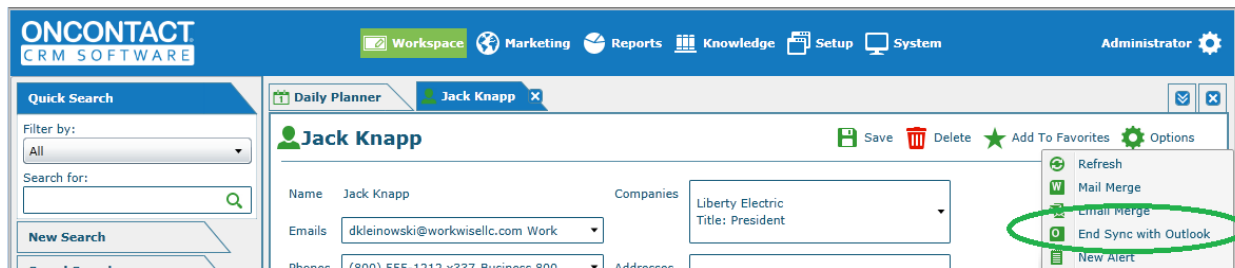
Automatic Synchronization

OnContact 8.1 supports automatic bi-directional syncing of items between OnContact and Outlook.

Contacts and activities in OnContact are designated to be synced using the *Sync with Outlook* selection in the Options menu of both the Contact and Activity windows.



Once an item is marked, it is automatically synced with Outlook every time changes are made. There is no longer a need to re-export an item after editing. To end the automatic syncing of an item, reselect the option which now reads *End Sync with Outlook*.



In the Outlook application, you can now indicate folders you wish to automatically synchronize with OnContact. You may sync Appointment, Contact, and Task folders. Any item with a category of OnContact in these folders is automatically processed. There is no need to re-export items from Outlook to OnContact after changes are made.

When the Outlook Add-in synchronization runs, changes made to tagged items in either application are processed. In the cases where changes were made to linked items in both applications, the changes made last are applied.