

Outlook Synchronize

The FaxFinder Address Book and Outlook Contacts may be kept in Sync by using the Outlook Synchronize feature. With the first synchronization, the FaxFinder creates a relationship between entries in the FaxFinder Address Book and Outlook Contacts. After the initial synchronization step, Select the **Outlook Synchronizer** item in the **Device Status** tab. Right Click **Synchronize with Outlook** will merge changes to the corresponding Phone Book Entry in Outlook and the FaxFinder Address Book. First time synchronization is straight forward, if there is no duplicate information between the Phone Books. If there is information in both phone books you want to keep, there are extra steps for the first synchronization.

Phone Book Synchronization creates a relationship between an Outlook Entry, a FaxFinder Address Book Entry, as well as an entry with the values from the last synchronization. Each time a sync is performed, the results are saved in the FaxFinder database. Then on subsequent syncs these THREE records are compared for differences.

Field Mapping

FaxFinder Address Book	Outlook Contact
Name	Full Name
Organization	Company Name
Home Number	Home Telephone Number
Work Number	Business Telephone Number
Fax Number	Business Fax Number
Address	Business Street Address
City	Business City
State/Province	Business State
Postal Code	Business Postal Code

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Enable Outlook Synchronization

1. Select the **Options** sub-menu of the **File** menu.
2. Select the **Advanced** tab.
3. Select **Enable Outlook Sync**.
4. Click the **Browse** button to select an Outlook contacts folder you wish to keep in sync with the FaxFinder Client.
5. Click OK. The next time the FaxFinder Client Starts, the Outlook synchronization status will be listed in the Device Status tab. See the [First Time Sync](#) Example.

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Outlook Synchronization (After the Initial synchronization)

1. Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.
2. Any new entries in the FaxFinder Address book will be copied to Outlook, and any new Outlook entries will be copied to the FaxFinder Address Book.
3. If there are changes to an existing entry, changes will be copied into both entries (i.e. they will be synchronized).
4. If any fields have changed in both entries a conflict resolution dialog will appear to allow you to pick which of the changes to use.

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First Time Sync (with no valuable information in the FaxFinder Address Book)

1. Delete the entries of the FaxFinder Address Book.
2. Proceed to [First Time Sync \(Empty FaxFinder Address Book\)](#)

First Time Sync (Empty FaxFinder Address Book)

1. Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.

The Outlook Contact information will be copied into the FaxFinder Address Book. A relationship will be created between the corresponding entries for future synchronizations.

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First Time Sync (No FaxFinder Address Book entries are in Outlook)

1. Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.

The FaxFinder Address Book Entries will be copied into Outlook Contacts. Any existing Outlook Contacts will be copied

into the FaxFinder Address Book. A relationship will be created between the corresponding entries for future synchronizations.

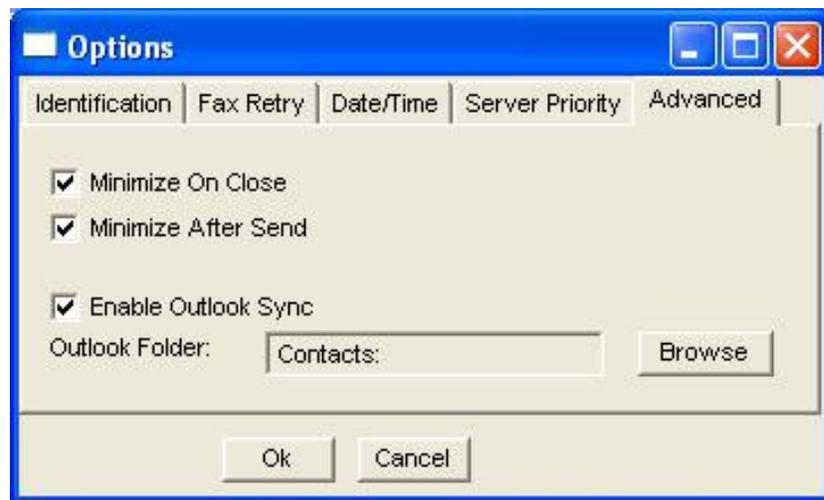
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First Time Sync (Some information is required from both Outlook and the FaxFinder Address Book)

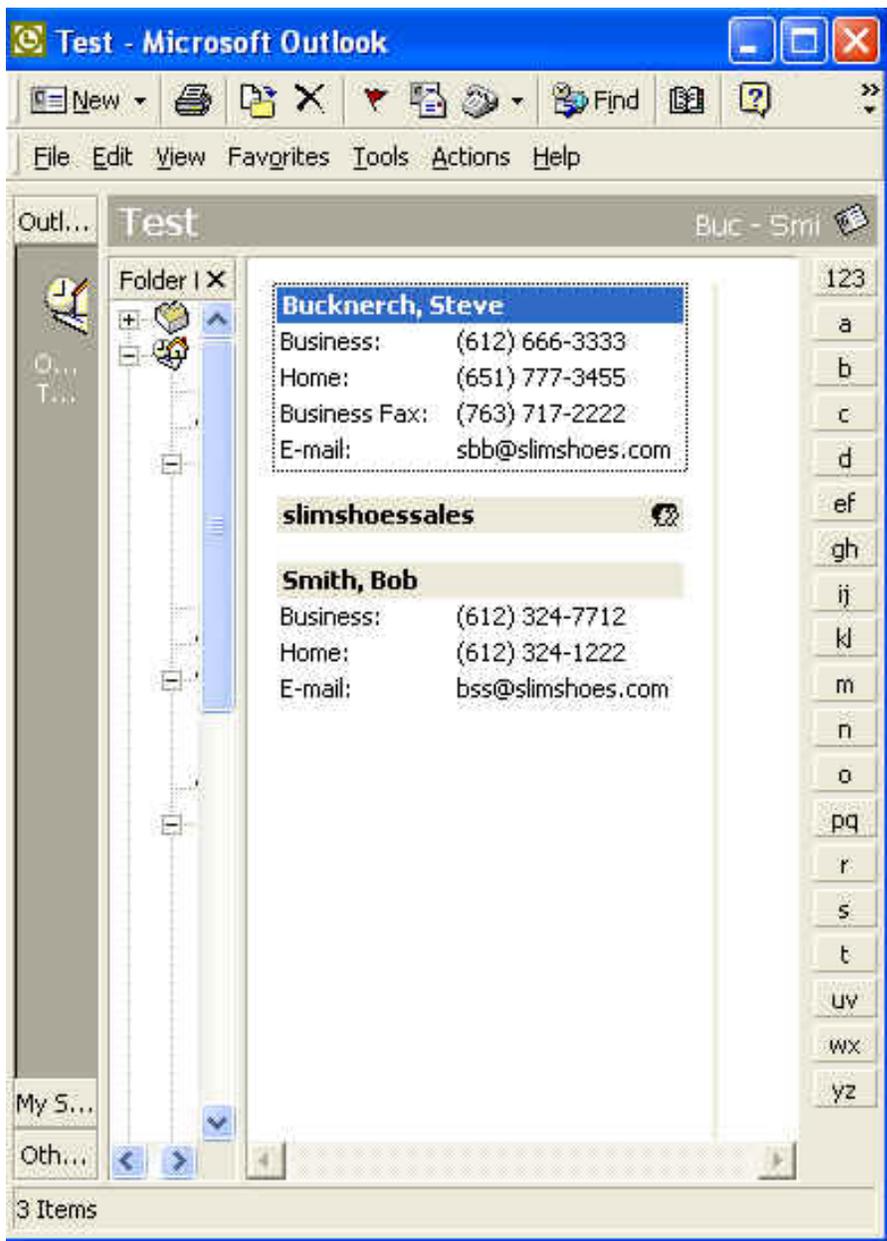
1. Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.
2. All existing FaxFinder Address Book entries will be copied to Outlook, and all existing Outlook Entries will be copied to the FaxFinder Address Book. A relationship will be created between the corresponding entries for future synchronizations.
3. In either the Outlook Contacts, or in the FaxFinder Address Book, merge changes into any duplicate entries and delete the duplicate.
4. Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.
5. Changes from the Edited entry will be copied to both phone books. Deleted Contacts will be removed from both phone books.
6. From this point forward, a relationship will be created between the entries in the FaxFinder Address Book and Outlook Contacts. All further changes will be merged into both phone books.

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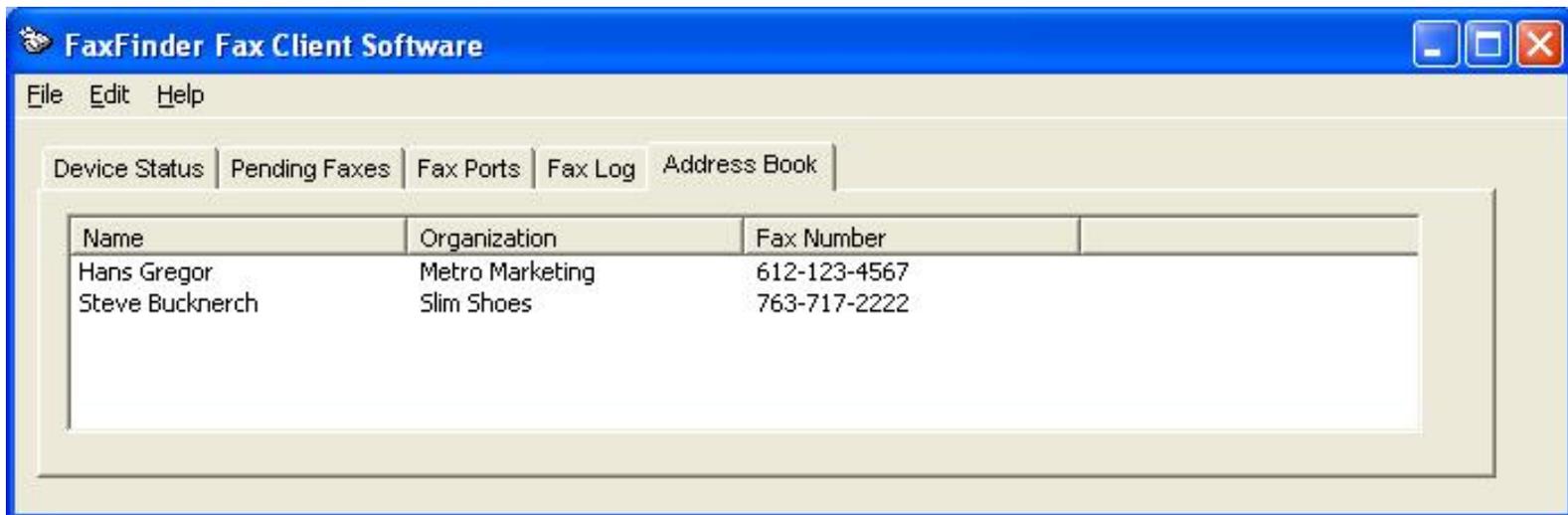
First Time Sync Example



Enable Outlook Sync. With the Browse button, select an Outlook Contacts folder to synchronize with the FaxFinder Address Book.



There are 3 entries in the Outlook Phone Book, Steve Bucknerch, Bob Smith, and a Distribution List (SlimShoesSales).

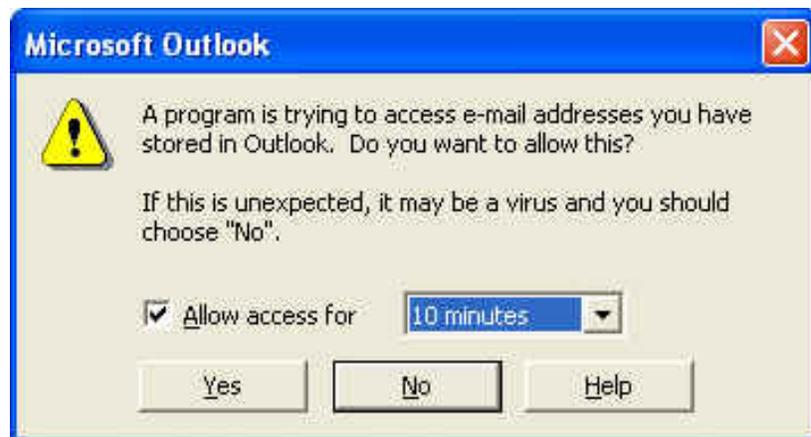


There are 2 entries in the FaxFinder Address Book. Steve Bucknerch (duplicated in Outlook), and Hans Gregor.

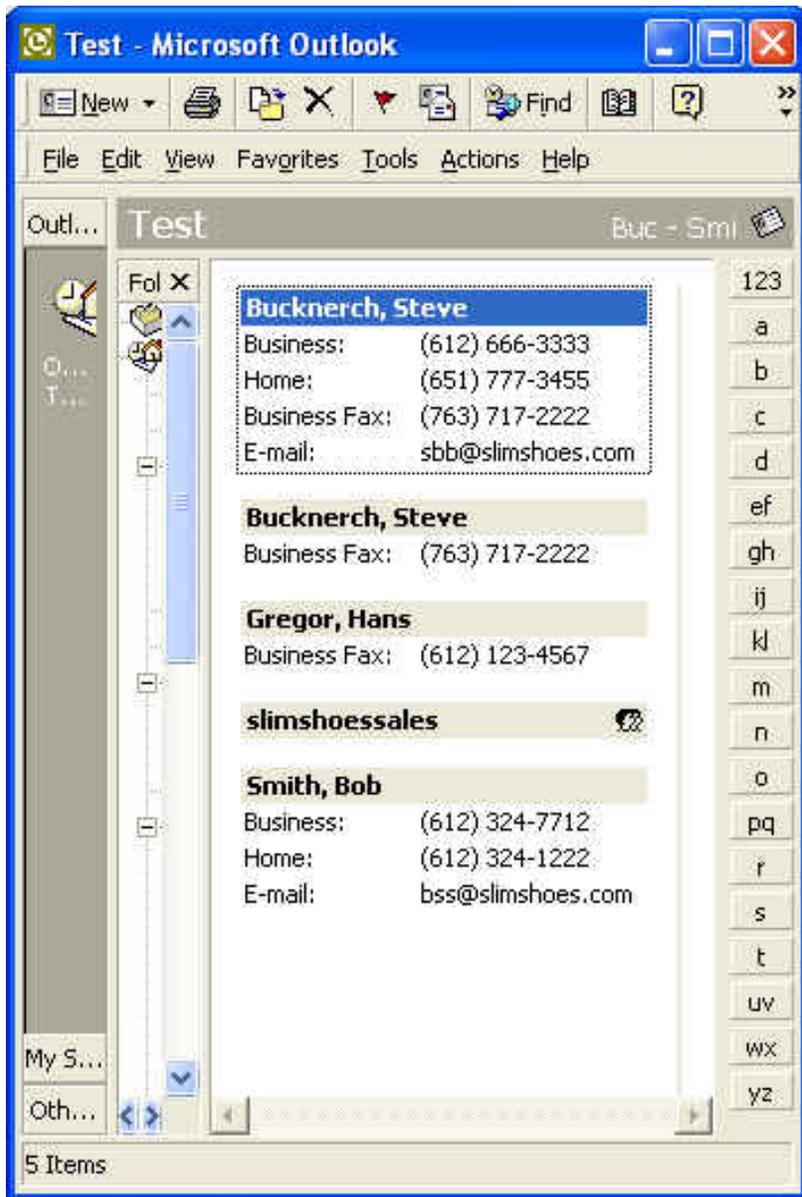


Select Outlook Synchronize.

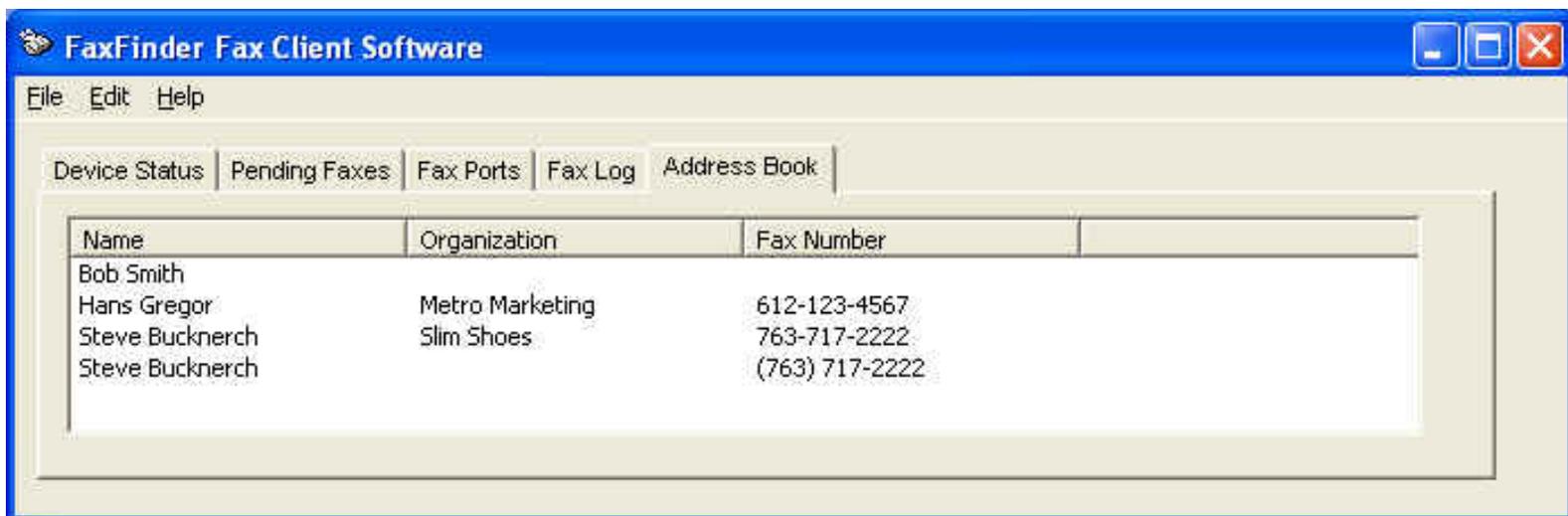
Since a relationship between entries has not yet been created, All Outlook entries are copied to the FaxFinder Address Book, as well as all FaxFinder Entries copied to the Outlook Phone Book.



If this Message appears, you must allow access to the FaxFinder to read the Outlook Contacts.



The FaxFinder Address Book was copied into Outlook creating two new entries Hans Gregor, and Steve Bucknerch (a duplicate of the FaxFinder Address Book Entry).



The Outlook Contacts were copied into the FaxFinder Address Book. Creating two new entries Bob Smith, and Steve Bucknerch (a duplicate of the Outlook Entry).

Contact - Steve Bucknerch

Name: Steve Bucknerch

Organization: Slim Shoes

Home Number:

Work Number:

Fax Number: 763-717-2222

Address:

City:

State/Province: Postal Code:

OK Cancel

This is the FaxFinder Address Book Entry for Steve Bucknerch

Steve Bucknerch - Contact

File Edit View Insert Format Tools Actions Help

Save and Close Print Attach

General Details Activities Certificates All Fields

Full Name... Steve Bucknerch

Job title: President

Company:

File as: Bucknerch, Steve

Address... Business

Business (612) 666-3333

Home (651) 777-3455

Business Fax (763) 717-2222

Mobile:

E-mail sbb@slimshoes.com

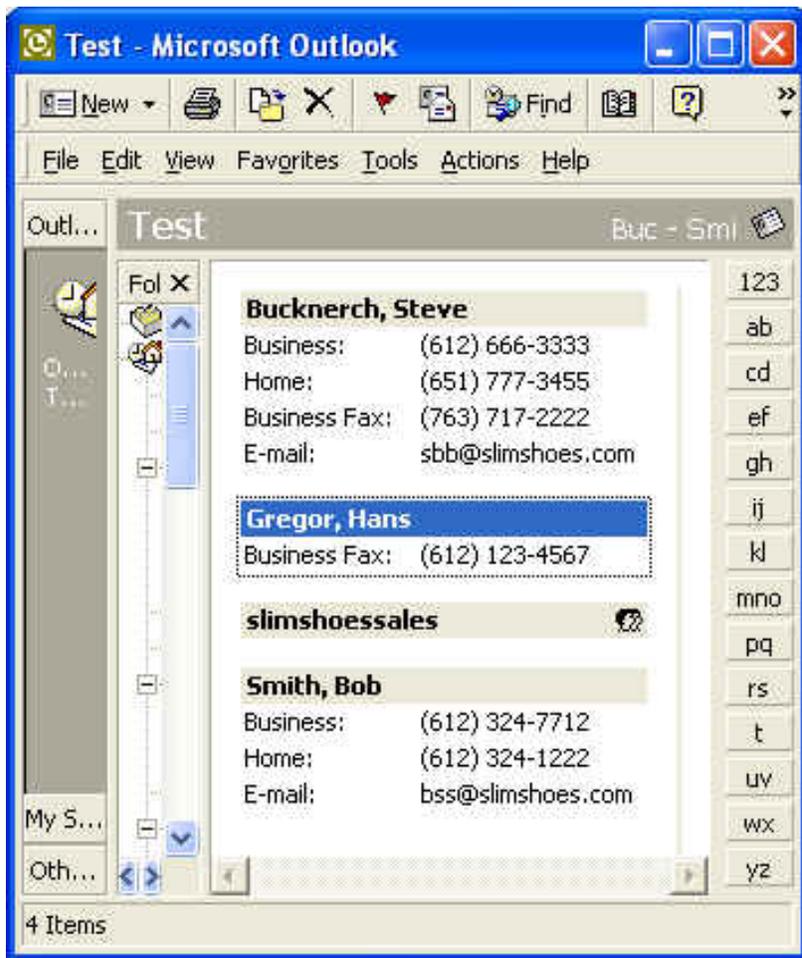
Web page address:

This is the mailing address

Contacts... Categories... Private

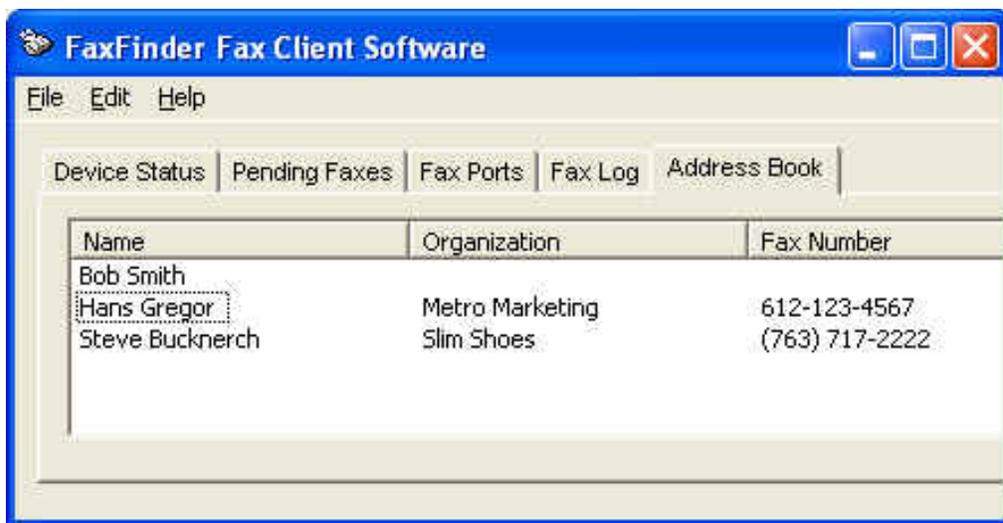
Edit the Outlook Entry with any differing information that was in the FaxFinder Entry.

Delete the duplicate.



The Outlook Contacts now contain all the desired information from the FaxFinder Address Book, and all duplicates deleted.

Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab, and do the synchronization a second time.



The duplicate entry deleted from Outlook is also deleted from the FaxFinder Address Book. At this point the Outlook Contacts are in sync with the FaxFinder Address Book. A relationship has been created between the Outlook and FaxFinder Contacts. All subsequent Syncs will update information in both records.

Merging Changes with Conflicts.

Bob Smith - Contact

File Edit View Insert Format Tools Actions Help

Save and Close

General Details Activities Certificates All Fields

Full Name... Bob Smith

Job title:

Company: Slim Shoes

File as: Smith, Bob

Business: (612) 324-7712

Home: (612) 324-1222

Business Fax:

Mobile:

Address... Business

E-mail: bss@slimshoes.com

Web page address:

This is the mailing address

Contacts... Categories... Private

This is the Outlook entry for Bob Smith. The Company name has been added to the entry since the last sync.

FaxFinder Fax Client Software

File Edit Help

Device Status Pending Faxes Fax Ports Fax Log Address Book

Name	Organization	Fax Number
Bob Smith	Sales	
Hans Gregor	Metro Marketing	612-123-4567
Steve Bucknerch	Slim Shoes	(763) 717-2222

In the FaxFinder Address Book entry, the Organization field (which is merged from Outlook Company) has been set to **Sales**.

Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.



Because the same field has changed in both Outlook and the FaxFinder Address Book since the last sync, a Resolve Conflict Dialog is displayed to allow you to decide how to resolve the conflict. The Contact is Bob Smith. The field value at the last sync was **blank**. The Local (FaxFinder Address Book) value is "**sales**" and the Remote (Outlook value) is "**Slim Shoes**". Note that the resolution is "**[not resolved]**"

Select Use Previous to use the value of the last sync (empty field).

Select Use Local to resolve with the value of the Local field ("sales")

Select Use Remote to resolve using "Slim Shoes".

Select Use Edit Field to enter a new value for the field.

Select Show Local Contact to display the entire FaxFinder Address Book entry.

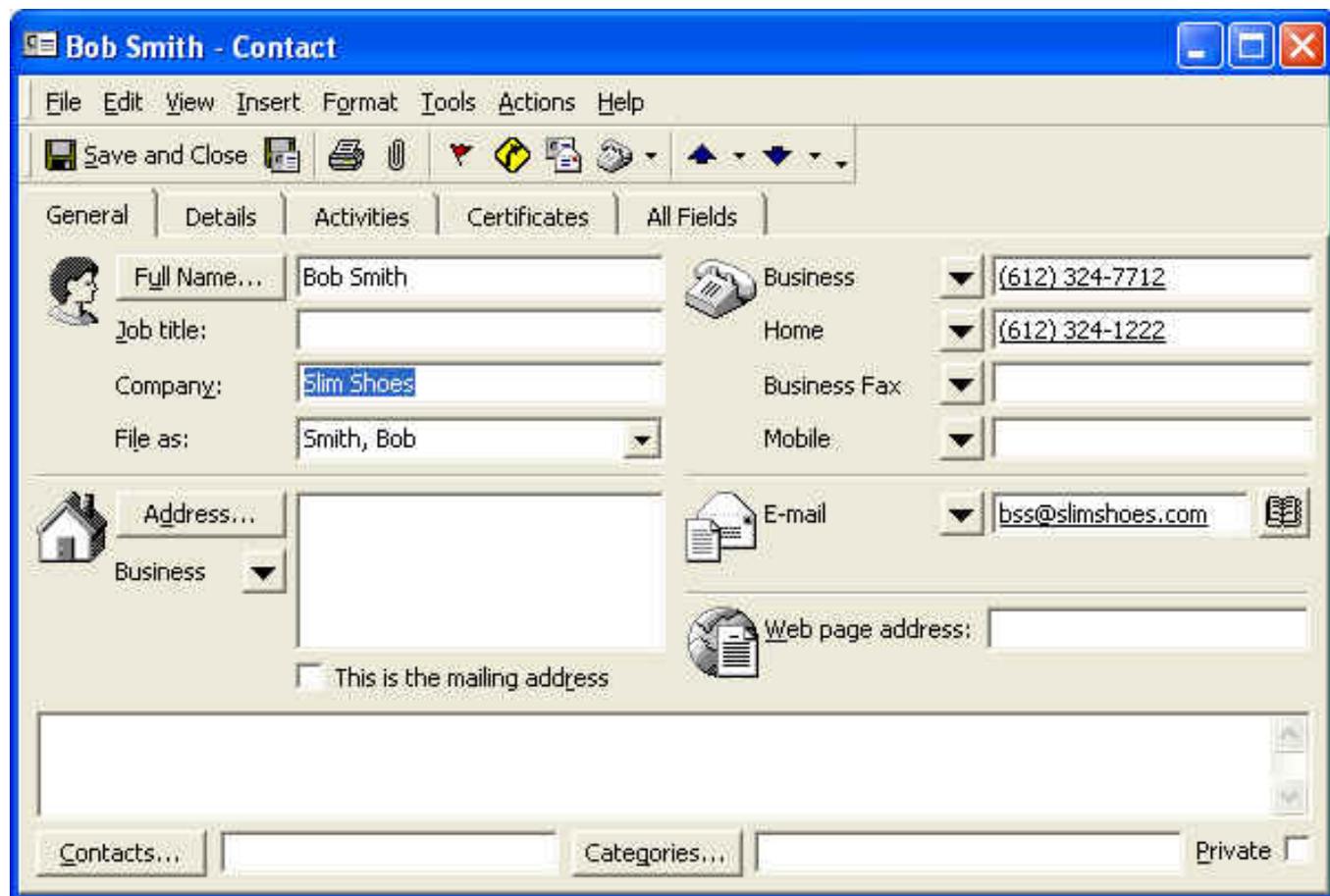


Use Remote was selected. The resolution and the Edit Value box has changed to the remote value "Slim Shoes."

Select Finished to Continue the Sync.



The Address Book Entry for Bob Smith has been changed. The Organization is now set to "Slim Shoes".

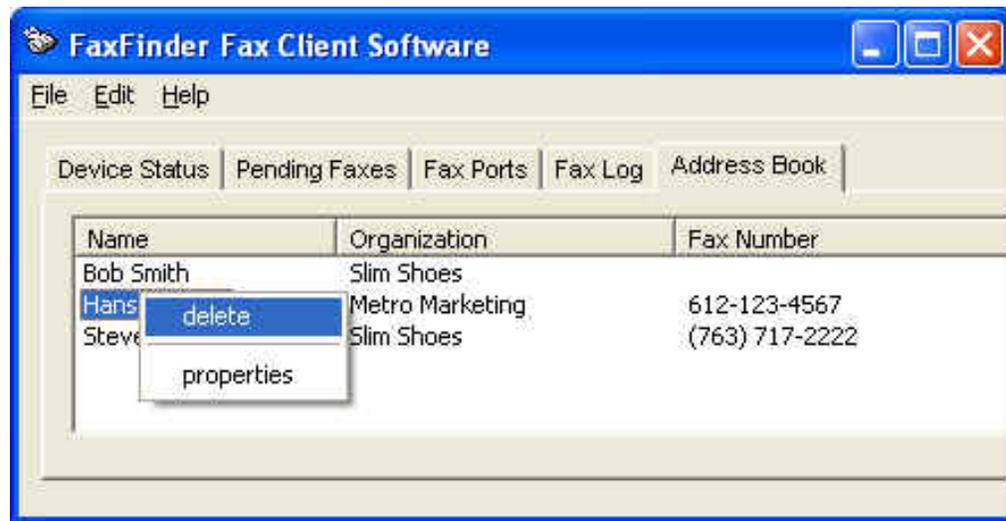


The Outlook Contact and FaxFinder Address Book are now in sync.

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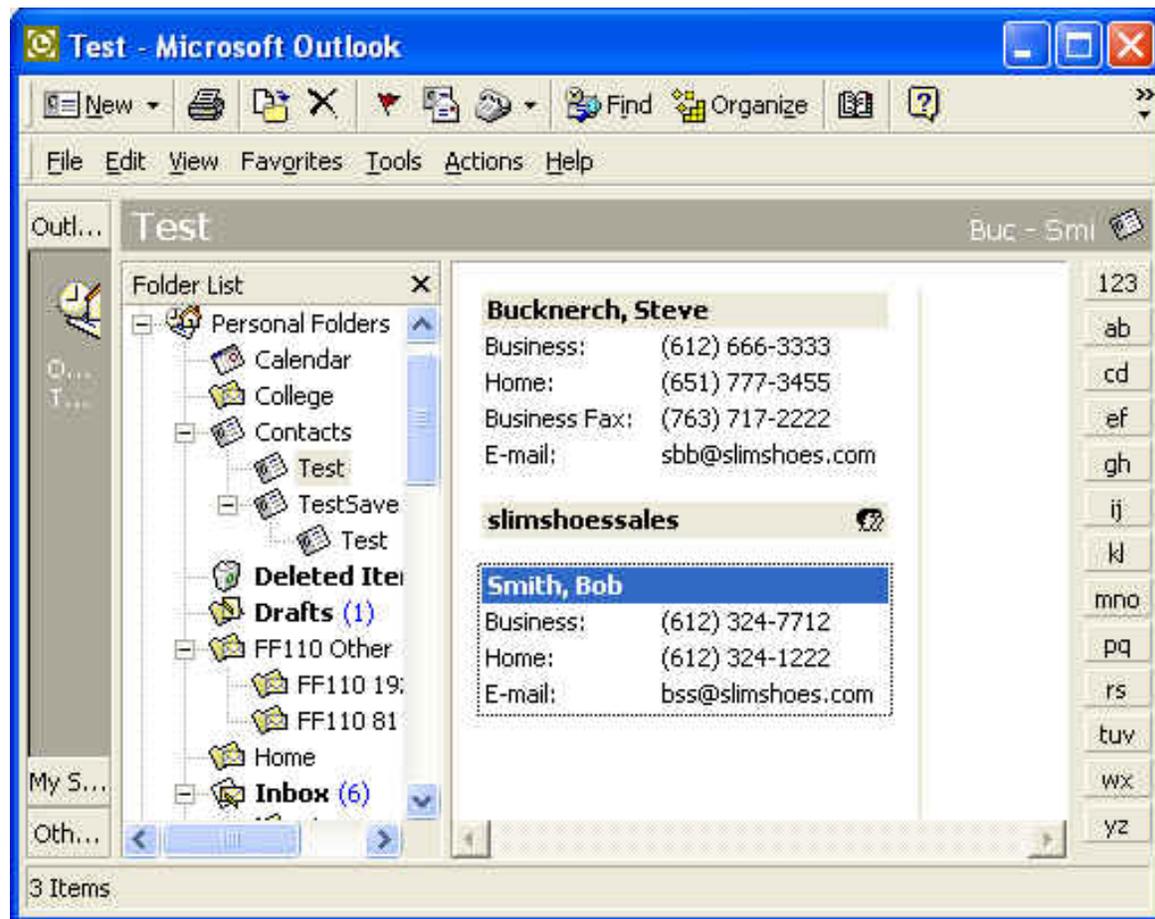
Example of an edited entry deleted in an Address Book.

If an entry is deleted from one address book, at the next sync, it will also be deleted from the other book.



Later the Contact Hans Gregor was deleted from the FaxFinder Address Book.

Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.



When the sync is finished, the entry is also deleted from the Outlook Contacts.

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We went to the Deleted Items to recover the Hans Gregor Entry. Drag it into the Contacts Folder to restore it.

Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.



The Contact has now been restored and synced in the FaxFinder Address book as well as Outlook.

Contact - Hans Gregor [X]

Name:

Organization:

Home Number:

Work Number:

Fax Number:

Address:

City:

State/Province: Postal Code:

OK Cancel

The home phone number has been updated in the FaxFinder Address Book.

Hans Gregor - Contact [Min] [Max] [X]

File Edit View Insert Format Tools Actions Help

Save and Close [Icons]

General | Details | Activities | Certificates | All Fields

 Full Name...
 Business

Job title:
 Home

Company:
 Business Fax

File as:
 Mobile

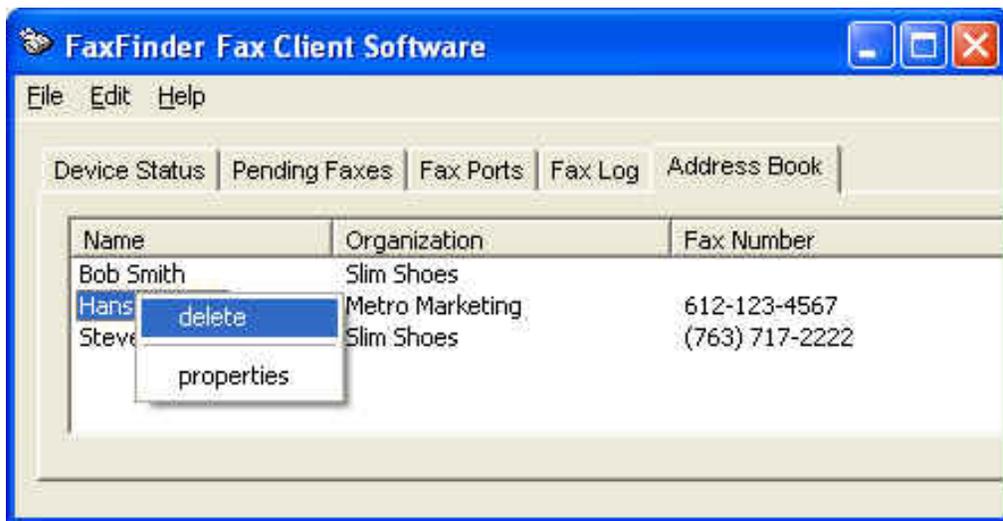
 Address...
 E-mail

Business
 Web page address:

This is the mailing address

Contacts... Categories... Private

The home phone number has also been updated in the Outlook Entry.

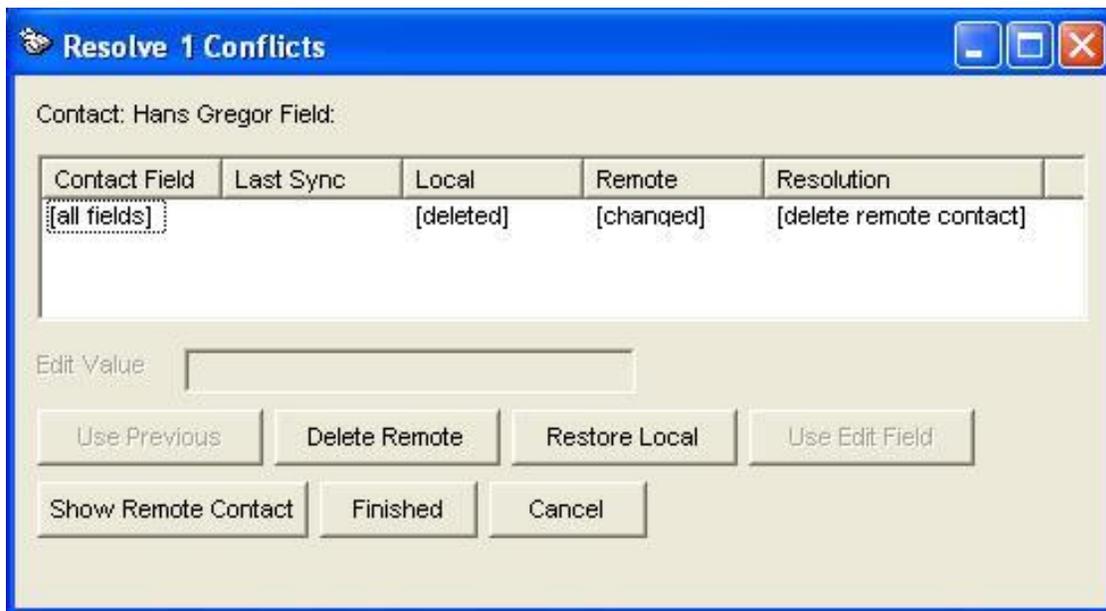


Delete the entry from one of the Phone books. Since the records conflict, when a Sync is attempted, the conflict must be resolved, even though one record was deleted.

Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.

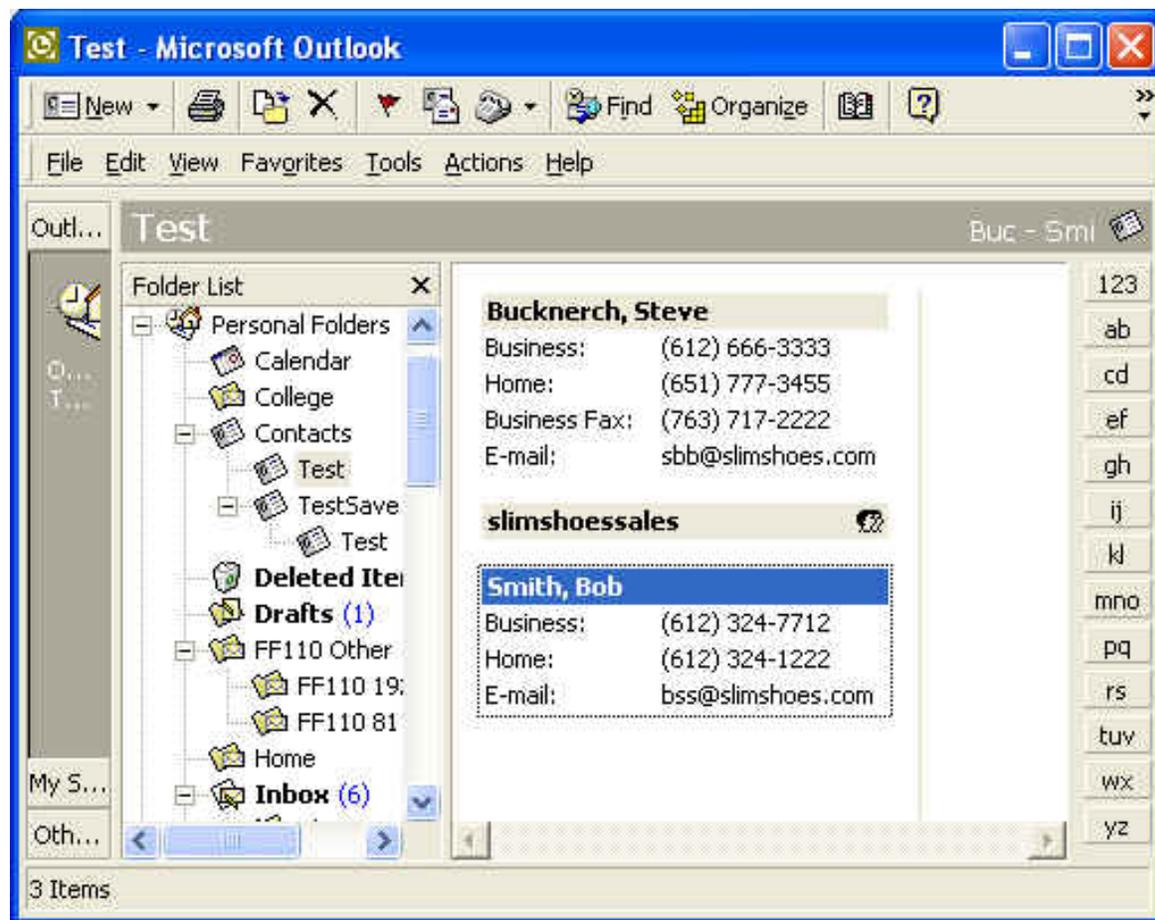


Because 1 record was deleted, AND there were edited fields in both records since the last sync, a record conflict is generated. Not that Contact Field shows **[all fields]**.



Select **Restore Local** to copy the current Outlook entry in place of the deleted FaxFinder Address Book entry. In this case, select **Delete Remote** to remove the entry from Outlook (as well as the FaxFinder Address Book).

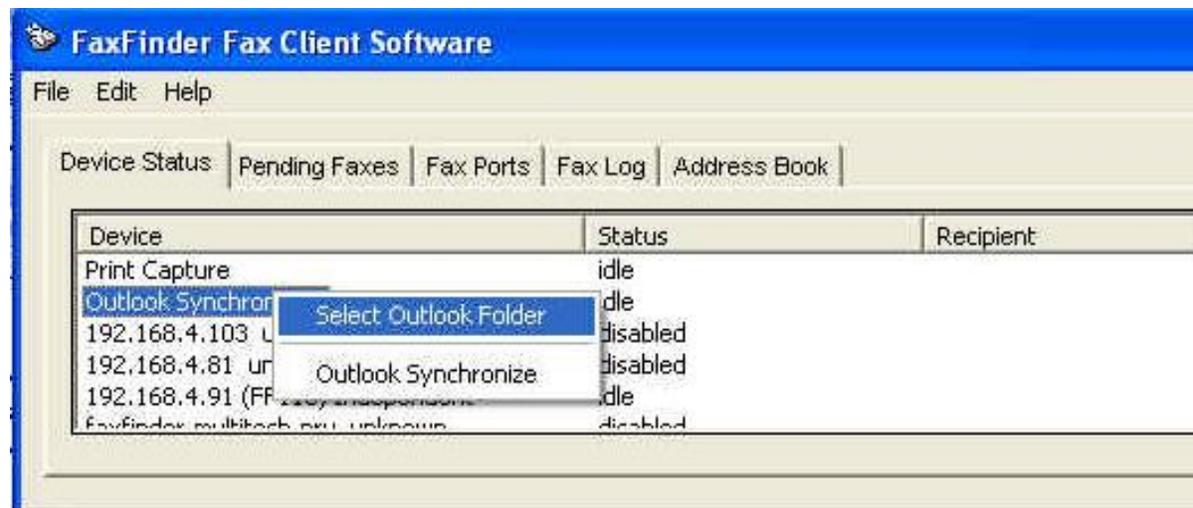
Right Click and select **Synchronize with Outlook** on the **Outlook Synchronizer** item in the **Device Status** tab.



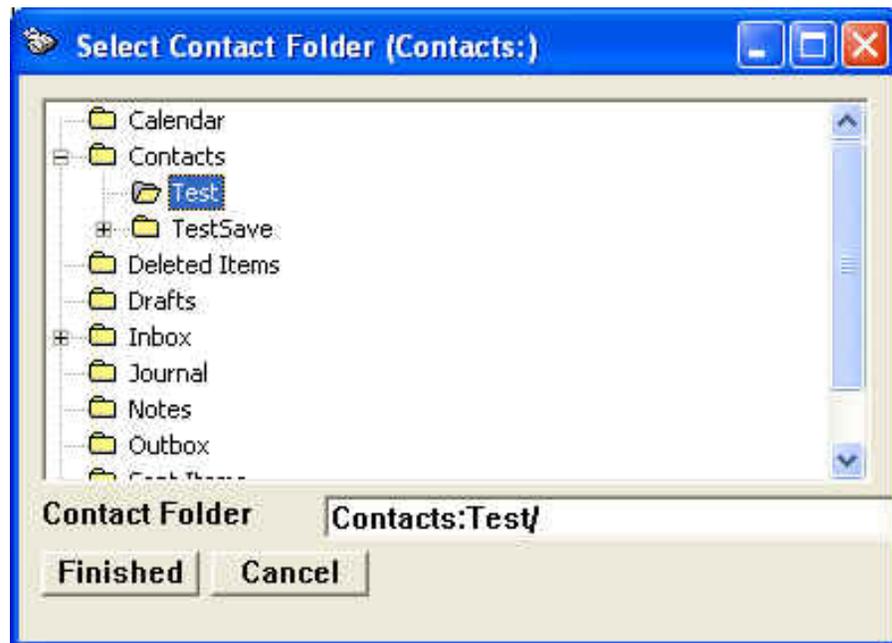
After Synchronization the entry for Hans Gregor has been removed from the Outlook Contacts.

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Selecting the Outlook Folder you wish to keep in Sync with the FaxFinder



Right Click and select **Select Outlook Folder** on the **Outlook Synchronizer** item in the **Device Status** tab.



Select the Outlook Folder to keep in Sync with the FaxFinder Address Book. Note that the default Folder is Contacts:

Select the Contact folder you wish to keep in Sync with the FaxFinder, and click Finished.

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