123 Sync for ACT! and Outlook/Exchange

Designed for ACT! 2007 and Beyond

Printed Manual

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123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! With Outlook

by 123Sync.com Inc.

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Special thanks to our customers for their input and support in testing and encouraging us to go forward with this project.

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Foreword

I want to securely access my ACT! data from everywhere,
including phones, Tablets, Web, and more...

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123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

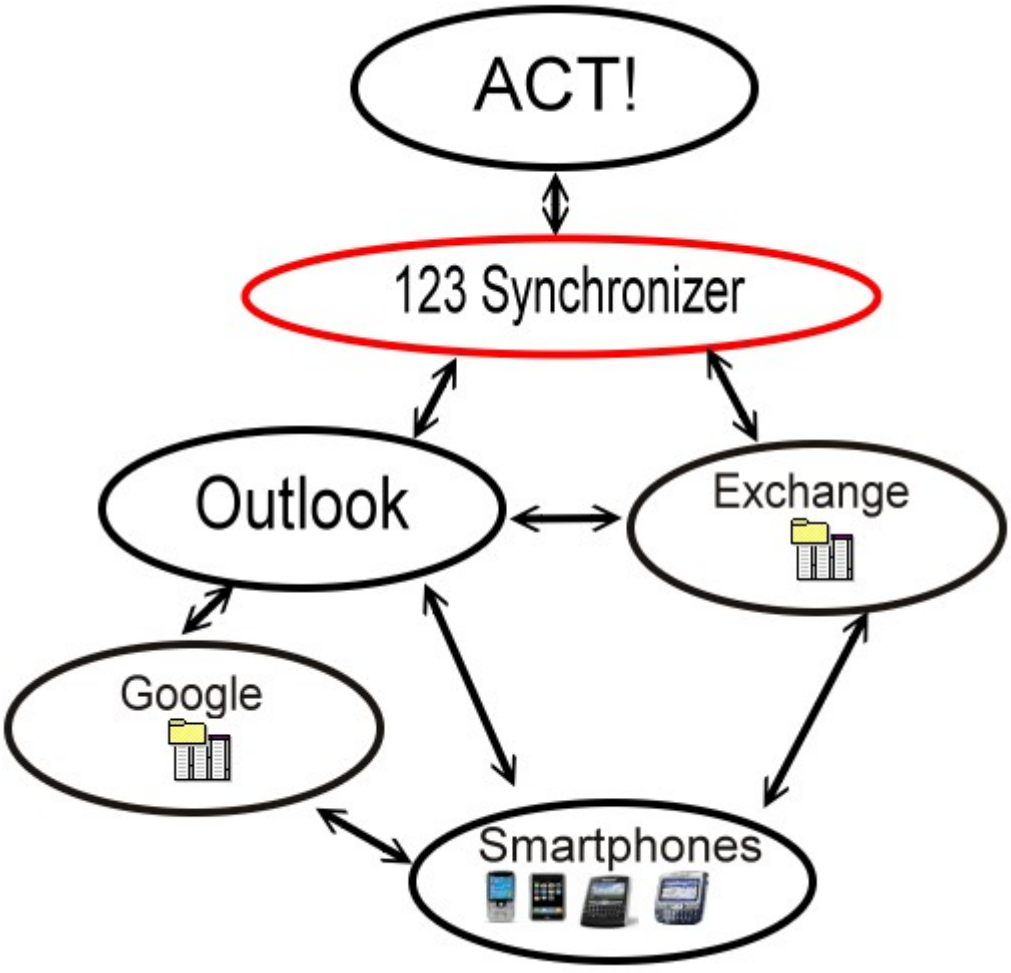
Part I

1 Welcome

123 Sync for Act! and Outlook/Exchange

The Ultimate Act! <-> Outlook/Exchange Synchronization!

Never has such a complete and powerful tool been available to maintain your Act! data in Outlook/Exchange.



Compatible with Act! 2007 through 2014 and ALL versions of Outlook (32-bit) and Exchange.

The purpose of 123 Sync for Act! and Outlook/Exchange is to provide users with a tool to quickly

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convert, synchronize, update, and transfer an Act! Contact database into multiple individual or shared Outlook/Exchange Folders. Enhanced filtering system and options allow you to slice which segments of the Act! database that you want to bring over to Outlook/Exchange.

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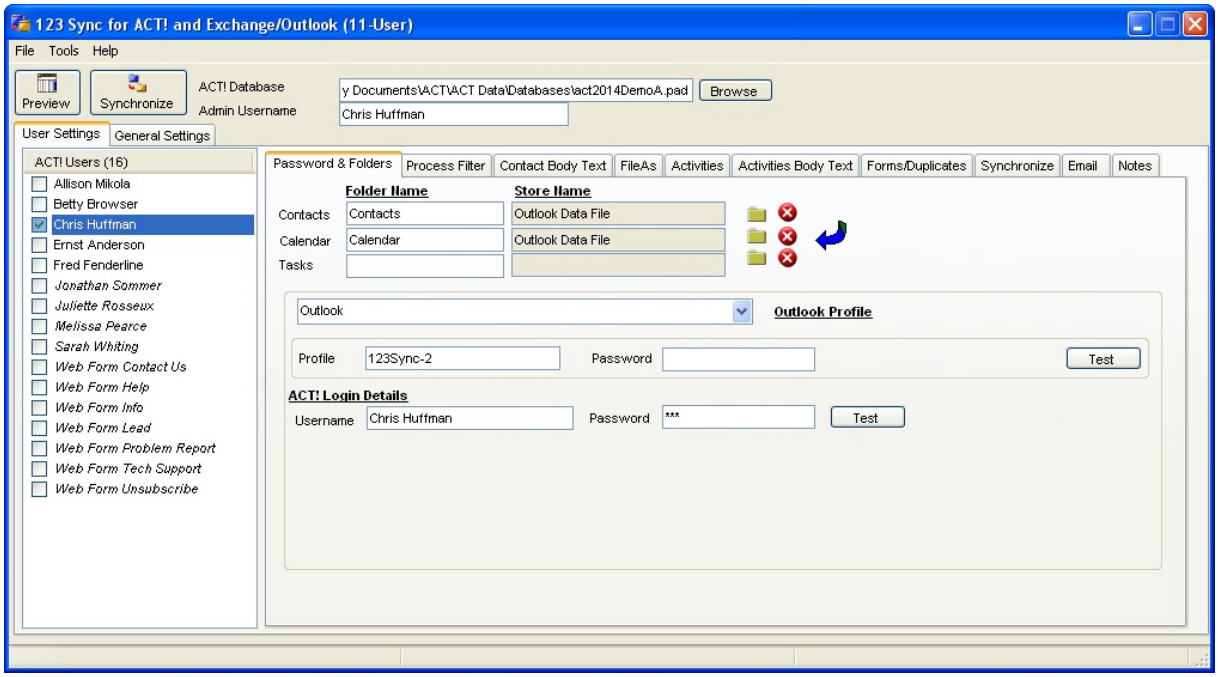
123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

Part II

2 Introduction



The purpose of 123 Sync for Act! and Outlook/Exchange is to provide users with a tool to quickly convert, synchronize, update, and transfer multi-user Act! Contact database into multiple individual or shared Outlook/Exchange Folders. Enhanced filtering system and options allow you to slice your Act! database to bring over to Outlook/Exchange. In addition, 123 Sync provides users with the capability to synchronize all incoming/outgoing email.

2.1 Why Use 123 Sync

123 Sync for Act! and Outlook/Exchange is designed for users that have an active Act! database and want to transfer/synchronize data from the Act! database to the Outlook/Exchange folders with modifications that make the data in Outlook/Exchange more accessible and relevant. In addition, Outlook/Exchange folder sharing and intelligent multi-user management makes this product the leading solution to share your Act! Data with Outlook/Exchange.

Major Features

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Ease of Use	Install, and you are ready to go. Merge and folder flexibility allows you to keep your Act! Contacts updated with your Outlook/Exchange.
Single and Multi-User Support	123 Synchronizer - 2014 Edition supports Act! in Single or Multi-User configurations and properly converts the activities relating to all the users enabled to be converted.
Exchange Support	You can run 123 Sync on an Exchange server with CDO/Mapi installed or via a client with CDO/Mapi installed. No requirement for Outlook/Exchange to be installed as long as CDO/Mapi is configured to access the exchange server.
Custom Users Support	Add any number of custom users to 123 Sync Server Configuration. Each user can have its own database with individual preferences.
Act! Versions Supported	Act! 2007 and later editions, including Act! Standard, Premium, Act! for WEB, Act! for Financials and Act! for Real Estate.
Outlook Versions Supported	All versions above Outlook 2000 SR1.
Field Conversion Capabilities	All the fields in Act! can be converted, whether they are standard fields or user defined fields. In addition, fields that are mapped to Outlook/Exchange Custom forms are also converted.
Field Remapping Capabilities	All fields in Act! can be remapped to Outlook/Exchange fields, whether these fields exist in Outlook/Exchange or not. The field remapping is maintained if you exit 123 Sync for Act! and Outlook/Exchange.
Act! Items Supported	The following Act! Items are converted to Outlook/Exchange equivalents: • Contacts - All Act! Contacts and fields are converted/synchronized. • Todo's - Act! Todo's are converted into Outlook/Exchange Tasks with the same time-reccurring properties. • Calls - Act! Calls are converted into equivalent Outlook/Exchange Calendar. • Meetings - Act! meetings are converted into Outlook/Exchange Calendar. • History/Notes - All Act! history are converted into the Contact body text or into the Activities related to the contact.
Synchronization	The following items have two-way synchronization capabilities i.e. items can be updated either in Outlook/Exchange or in Act! and the data will be synchronized both ways, including item addition and removal: • Contacts, Todo's, Calls, Meetings
Attachments	Act! attachments links are transferred into the contact and activities body text
Extensive Filtering Capabilities	You can choose to convert All, Group, Calendar, Private Only and many other options.
Group Conversion	You can select contacts belonging to an Act! group and convert only the group.
State-of-the-art duplicate checking	When you first want to convert your Act! database into an existing Outlook/Exchange contact folder, we check for corresponding contacts according to the following criteria: • If it exists on our index database and if it has been transferred to Outlook/Exchange. • Email Address. • First and Last Name and City • Company Name and City • and many more pattern matching mechanisms to reduce duplicates.
	Outlook/Exchange Item Move Capability With our system, you can convert locally and then move the items (contacts, calendar and tasks) into another Outlook/Exchange folder with no resulting

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2.2 Help on 123 Sync

You can obtain help for 123 Sync for Act! and Outlook/Exchange in the following ways:

- **The help file shipped with the product**. The help file provided with 123 Sync for Act! and Outlook/Exchange is the most recent help file when this version was created. We provide an online version of this help file which may be more up-to-date than the shipped version.
- **The online help file**. This is the most updated version of the help file. When additions and changes are made to the help file, they are always posted on the online help file. To access the online help, go to the Help menu on the software.
- **Printed Version of this Help File**. A printer-friendly version of the manual may be obtained via the Help Section on 123 Sync for Act! and Outlook/Exchange toolbar.
- **Email Support**. You can obtain free email support from 123Sync.com. Make sure that you explain your problem/question with as much detail as possible. Use the support form on our web 123Sync.com to contact us.
- **Personalized, one-on-one support**. 123Sync.com will provide personalized, one-on-one support to paying customers. Support is provided on an hourly basis. If you are interested on one-on-one support, you can purchase it from 123Sync.com. A support professional will call you (US Only). If you are based outside the U.S., schedule a time to call so that we can make sure the best support person is available to receive your call.
- **Suggestions**. 123Sync.com is driven to provide software solutions that will satisfy our customers. Your input is important to us and we want you to contact us if you have any suggestions on added features or even improvements we can make to our products in order to make them better.

2.3 How to Buy 123 Sync

123 Sync for Act! and Outlook/Exchange is distributed worldwide by a variety of resellers and distributors.

To Purchase
Click on the Registration->Purchase menu option of 123 Sync for Act! and Outlook/Exchange and you will be taken to the purchase page for the product.

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123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

Part III

3 Installation

Installation of 123 Sync for Act! and Outlook/Exchange is straightforward. The following is needed

- You'll need approximately 60mb of hard disk space if you do not have the .Net framework installed.
- You need .Net Framework 2.0 and the latest .Net framework required by Act! installed
- Act! 2007 or later. Works with Act! Standard, Premium, for Financials, for Real Estate and for WEB.
- Administrator Privilege for whichever version of Windows you are running.
- Where UAC is used, enable UAC so that we can run properly.

To install, simply execute the 123 Sync for Act! and Outlook/Exchange executable and follow the directions to install the program.

Once installed, 123 Sync for Act! and Outlook/Exchange is accessed via the Start->Programs->123 Sync for Act! and Outlook/Exchange Menu.

Sub-topics

123 Sync for Act! and Outlook/Exchange Compatibility
Lists the system with which 123 Sync for Act! and Outlook/Exchange is compatible with.

License Registration
Instructions on the procedures on registering 123 Sync for Act! and Outlook/Exchange

End-User License Agreement

Uninstall

3.1 Compatibility Chart

123 Sync for Act! and Outlook/Exchange is an Addon Product for Act!. Hence, it requires the user to have Act! installed on the machine.

Act! Compatibility

123 Sync for Act! and Outlook/Exchange is compatible with the following versions of Act!:
Act! 2007 and above.
Act! Standard and Premium
Act! for Financials and Act! for Real Estate
Act! For WEB

How to find out what version/build of Act! you are running
To find out what version of Act! you are running, do the following:

1. Click on Help->About Act! on the Act! Contact Screen
2. Check the Build Number on the right hand corner of the About Screen.

Outlook Compatibility
123 Sync for Act! and Outlook/Exchange is compatible with all 32-bit version of Outlook 2000 SP1 and higher, including 2010. We also support Outlook connected to Exchange Server folders, either through a local network or through a hosted Exchange system.

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Operating System Compatibility

123 Sync for Act! and Outlook/Exchange is compatible with the ALL Windows operating systems after windows 2000, including all server windows installations.

Exchange Compatibility

We use Mapi/CDO libraries to communicate with Exchange. Hence, before you use our software, install and setup Mapi/CDO form Microsoft and then we work great. We support Exchange in Server Mode (install on Exchange) as well as in Client Mode connecting either through Outlook or through Mapi.

123 Sync for Act! and Outlook/Exchange is compatible with the ALL Native Exchange versions.

Hosted Exchange Compatibility

123 Sync is compatible with ALL hosted Exchange servers.

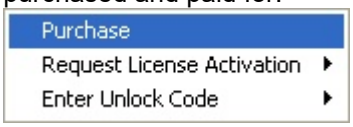
Office 365

123 Sync for Act! and Outlook/Exchange is compatible with the ALL Office 365 installations. You must, however, install Outlook 2010 or 2013 to connect to Office 365 without password prompt.

3.2 Registration

Purchasing 123 Sync for Act! and Outlook/Exchange

To purchase 123 Sync for Act! and Outlook/Exchange, click on the Buy/Purchase Button and it will take you to the web site for purchase. When the product is purchased, you receive a license code (some of our partners also call it a Serial Number), indicating that your product has been purchased and paid for.



123 Sync for Act! and Outlook/Exchange Registration

To Register

When you purchase 123 Sync for Act! and Outlook/Exchange, you are provided with a License Number. This number is your proof that you have purchased the product. To activate your product so that it works unencumbered, you need to provide 123Sync.com with your details and the license number from the machine where 123 Sync is installed. Click on the Registration->Request License Activation->Activate #-User License where # is the number of users license you purchase of 123 Sync.

To Activate

After you Register your product with the license number, you receive, via email, a combination of 3 numbers:

Serial Number: 39074-8690-2603-1605
License Number: 58213-0309-4767-3921
Unlock Key:
CTPWMnPIoX+khJBzKG5K55DqjrhzGQEUIeZp+VkLR7OW9LnCCe9Pb3zWxHNZef83

You enter these numbers into the Registration->Enter Unlock Code->#-User License where # is the number of user license you are trying to activate.

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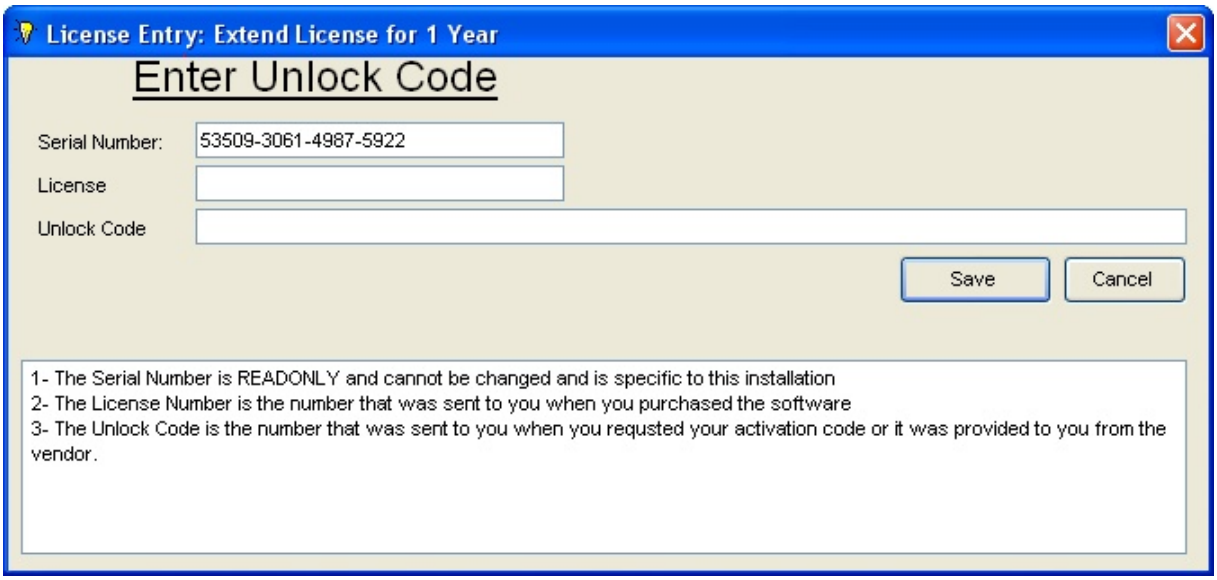

After you enter Save, you will get a License Code Accepted message. Restart 123 Sync and you are ready to go.

123 Sync for Act! and Outlook/Exchange Registration Problems

If you encounter any problems registering 123 Sync, contact support at http://www.123sync.com

3.3 End-User License Agreement

123 Sync for Act! and Outlook/Exchange

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123 Sync is a time licensed product, namely, you purchase a license and you can use the product until the license expires. Licenses can be purchased for 3 or 12 months usage. During this period, the customer has the right to:

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- Use 123 Sync as specified by the license agreement
- Receive unlimited upgrades for 123 Sync, including improvements, etc..
- Receive discounted paid support when purchased via the 123 Sync web site.

The purpose of a time licensed product is for the customer to have the latest (and best) revisions of 123 Sync while 123Sync.com keeps improving on the product.

3.5 Uninstall

To uninstall 123 Sync for Act! and Outlook/Exchange, do the following:

- Click on Start->Settings->Control Panel
- Execute Add/Remove Programs from the Control Panel
- Select 123 Sync for Act! and Outlook/Exchange from the listed programs
- Click Remove and 123 Sync for Act! and Outlook/Exchange will be removed from your system.

A Few Things

- Installing and Uninstalling will **NOT** reset the evaluation period for 123 Sync for Act! and Outlook/Exchange
- Uninstalling 123 Sync for Act! and Outlook/Exchange will not reset the conversion counter
- Uninstalling 123 Sync will not remove your license.

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123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

Part IV

4 Video Tutorials

123 Sync Offers a vast variety of video tutorials on 123 Sync. These tutorial can be accessed via our online page at:
http://123sync.com/123-sync-server-video-tutorials.html

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123 Sync For ACT! and Outlook/Exchange

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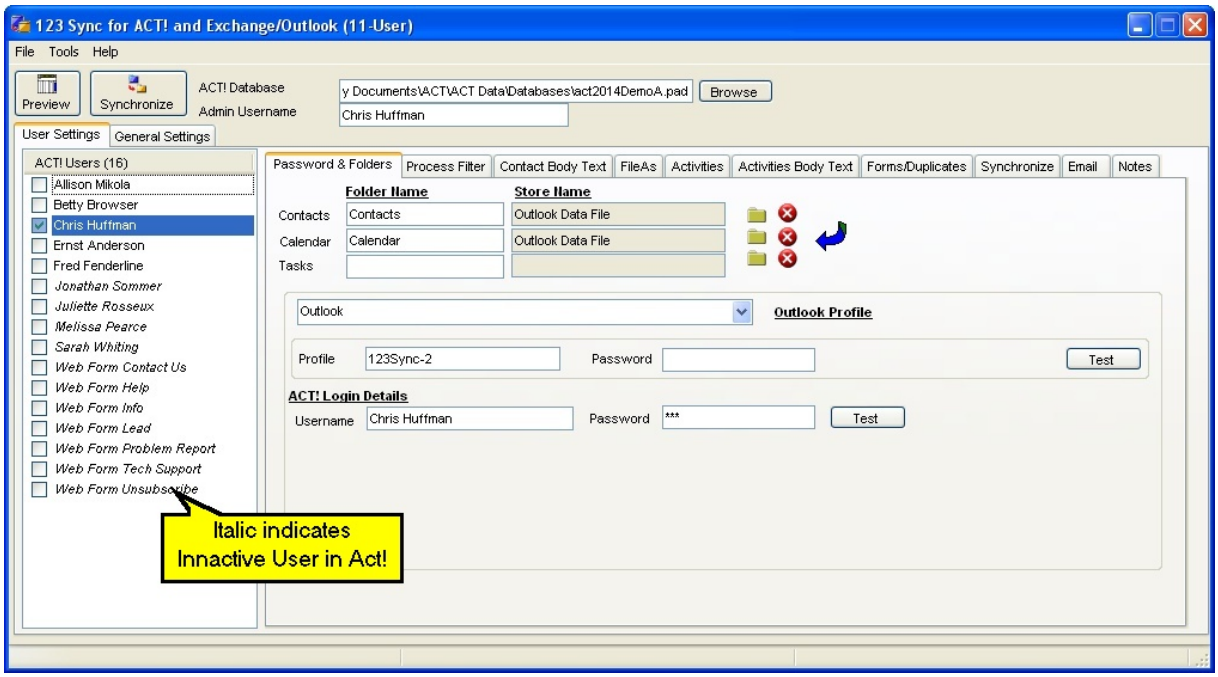
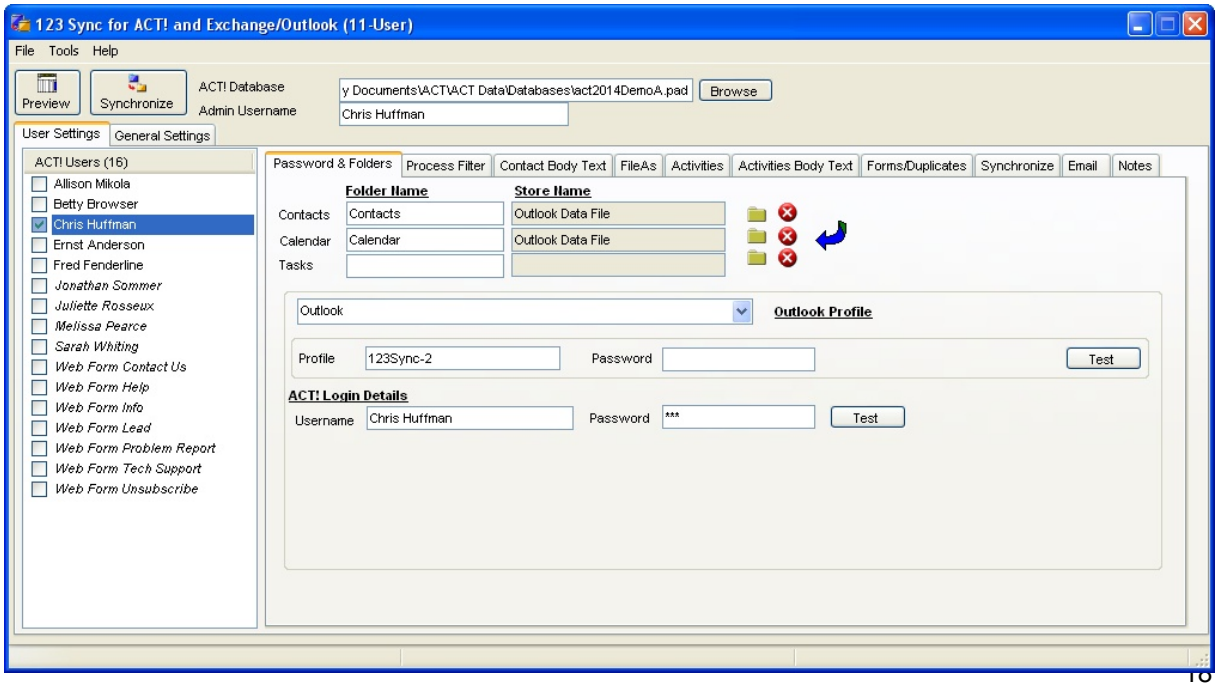
Part V

5 Main Interface



5.1 User Settings

Each user has an individual set of settings so that you can configure each user to individual, specific folders.



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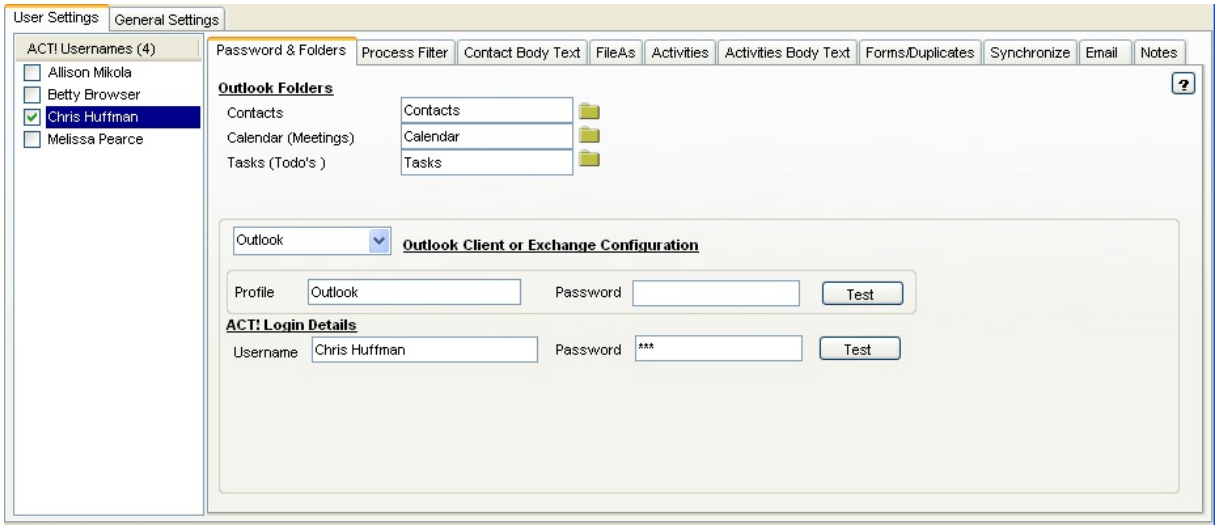
5.1.1 Passwords And Folders

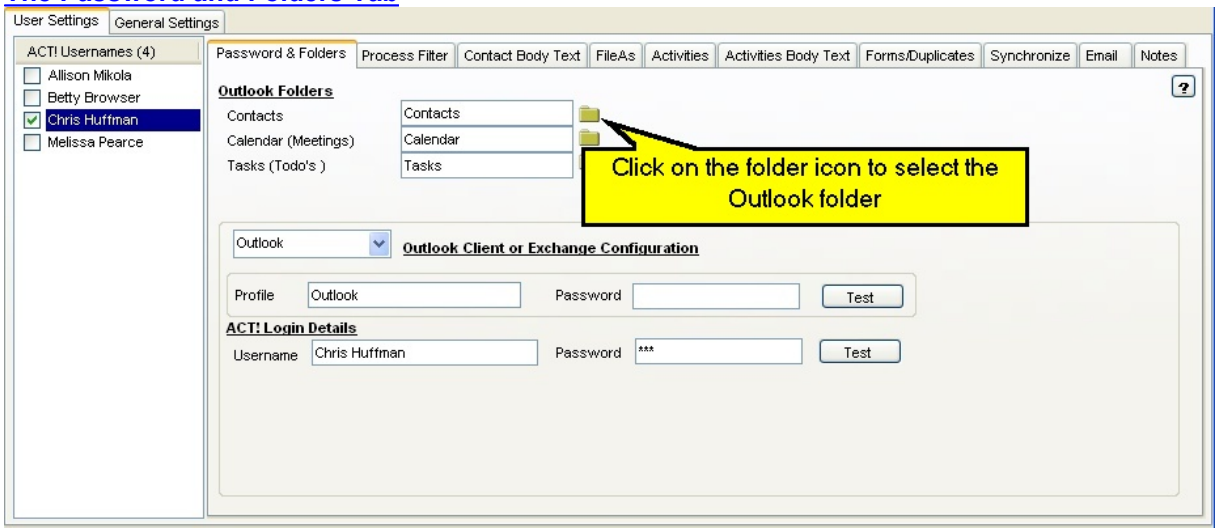
Each user has an individual set of settings so that you can configure each user to individual, specific folders.



Act! Username List

Once the Act! database has been opened, all the users defined on the database are listed. Each username has it's own set of User Settings. To enable an Act! user to be converted, you must check mark the user. Users not check marked are ignored for conversion purposes.

The Password and Folders Tab



In the Outlook/Exchange Folders Tab, the destination folders where 123 Sync for Act! and Outlook/Exchange deposits the data are defined.

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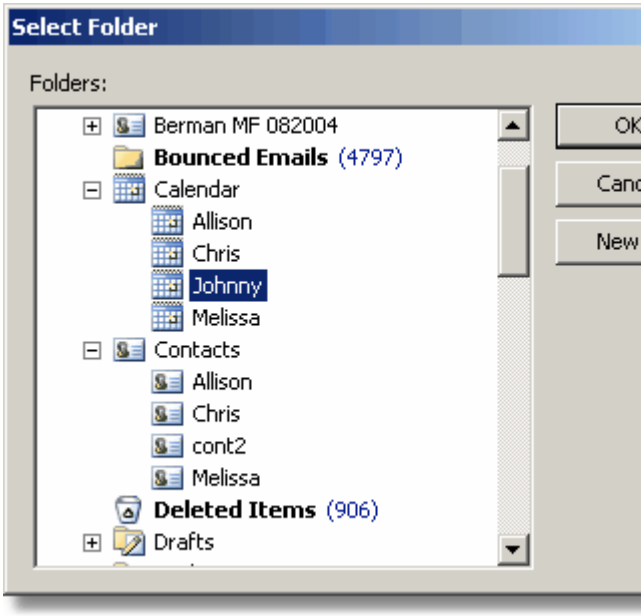
With 123 Sync for Act! and Outlook/Exchange you must which Outlook/Exchange folder you want to deposit By clicking on the folder button, the Outlook/Exchange folder selection form pops up which then allows you to enter the destination folder(s) for your conversion.



Make sure that the folder selected matches the type that has been requested i.e. Contact Folder should be of type Contact Folder; Appointments folder should be the same as a Calendar folder, etc..

These folders do not have to reside on your local machine. If your current version of Outlook/Exchange can find the folders, 123 Synchronizer can find them as well.

Calls and Appointments are deposited into the Outlook/Exchange Calendar folder while Todo's are deposited to the Tasks folder in Outlook/Exchange.

Outlook and Exchange Configurations

Outlook

This is the simplest of all configurations and should be used when connecting to an Outlook client. In this case, you need to have an instance of Outlook installed. Outlook 2003, 20007, 2010 and 2013 are all supported.

Office 365

You need to have Outlook 2010 or 2013 installed on the machine if you want to use this feature. Currently, direct Mapi configuration of this feature is not available. The reason this option is provided is to allow users to sync directly with the supported configurations without any configuration required in Outlook. We only use Outlook 2010 SP2 or Outlook 2013 as the transport to connect.

This option supports the direct connection using three login parameters: SMTP Email Address, Username and Password.

SMTP Email Address: This is the email address of the individual on the Exchange server.
Username: This is the username to login to the server. In many cases, this is the same as the email address.
Password: The password for the Username.

Office 365: When accessing an Office 365 mailbox, the SMTP Email address and the Username are the same.
Exchange with Autodiscover: This option is for Hosted Exchange servers with Autodiscover enabled.
Supported Hosted Exchange: We support many Exchange Hosted configurations. Unfortunately, there is a plethora of Hosted login processes and we only support a few.

Test to see if your current hosted configuration is supported: If after entering all the relevant data and you still receive an Username/Password prompt when a login is attempted, that indicates that your configuration is not supported.
What to do if your Hosted Configuration is not supported under our mechanism:

- Setup Outlook to access the Hosted server and use the Outlook direct mechanism as the login-free transport.
- Setup the Exchange Mapi environment

Exchange (Mapi)

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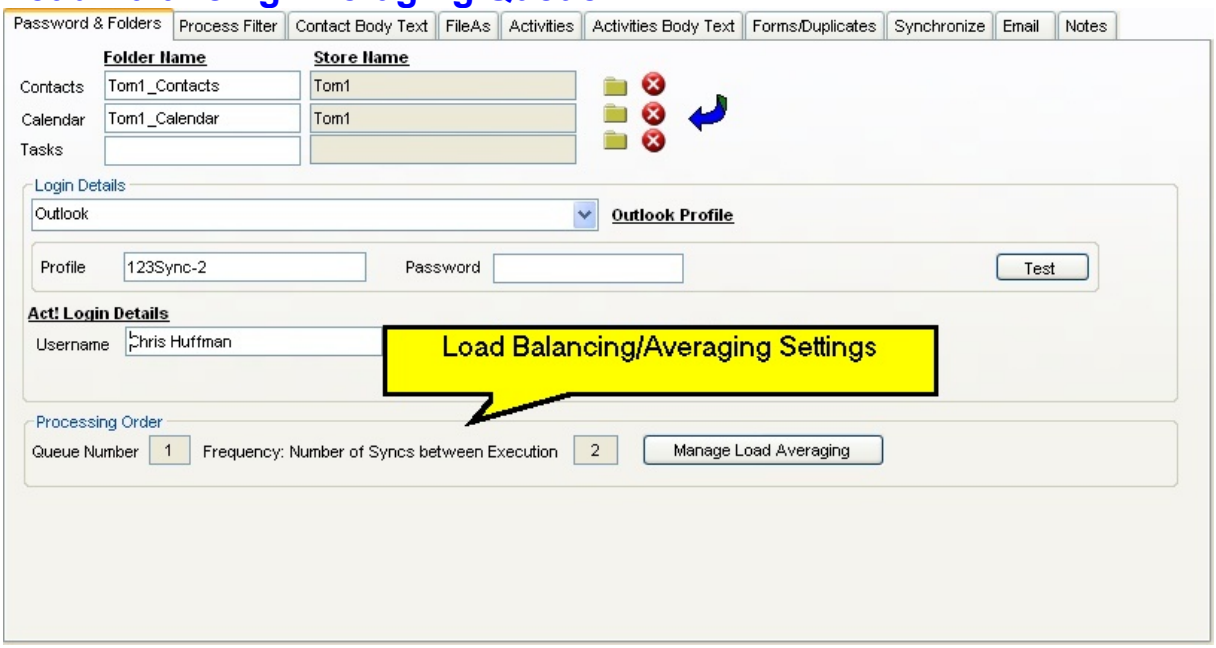
The Exchange configuration connects directly to Exchange via Mapi/CDO (you need to install Mapi/CDO from Microsoft) without the need of Outlook. This is the most flexible configuration. In order to login to the Exchange server, 123 Sync uses the credentials stored on the local machine. These credentials could be as simple as the login username/password or as complex as a setup using the credential manager. It is suggested that you go through our Exchange setup video tutorials for more information. The hosted exchange protocol has been upgraded and is only supported by Outlook 2010SP2 or Outlook 2013. So if you are going to be connecting to an extenal Hosted Exchange, install Outlook 2010 SP2 or later Or Outlook 2013. The CDO/Mapi transport does not support hosted exchange.

Hosted Exchange

123 Sync supports hosted Exchange mailboxes. All you need is the SMTP address, Username and Password and you'll be able to access the Exchange mailbox. The hosted exchange protocol has been upgraded and is only supported by Outlook 2010SP2 or Outlook 2013. So if you are going to be connecting to an extenal Hosted Exchange, install Outlook 2010 SP2 or later Or Outlook 2013. The CDO/Mapi transport does not support the latest version hosted Exchange.

Load Balancing/Averaging Queue



With Build 17.3, 123 Sync introduced Load Averaging i.e. you can schedule when each user is processed in the synchronization queue. There are many benefits that this process provides:

- You can choose which synchronization happen first and frequent.
- You can "postpone" not so important synchronization. For example, a group schedule mashup to synchronize only every 15 syncs.
- You can move high priority syncs to the top of the queue.
- You can specify how often a user is synchronized.
- You can spread out database intensive synchronization into different cycles of the daily scheduler.
- All in all, you can control when and how often a user gets synchronized.

Load Averaging Interface

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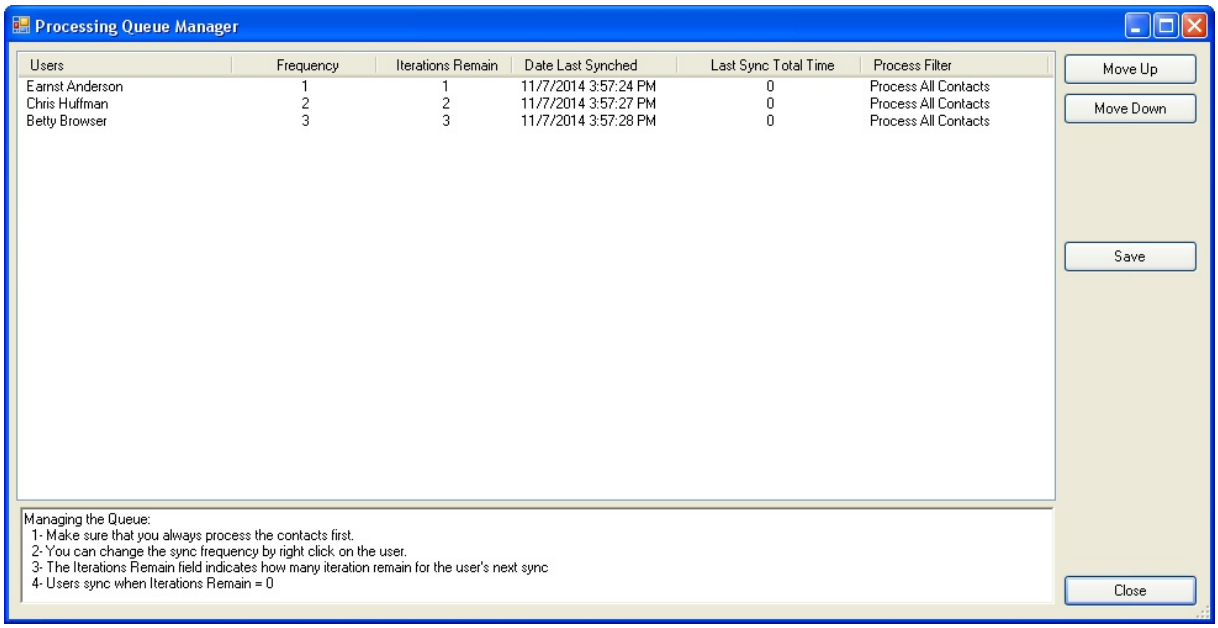

The load averaging interface displays the list of the users as they will be processed by 123 Sync. You can:

- Move the user up or down in the processing queue.
- Change the frequency which the user is processed. Right click on the user and a popup is displayed to change the frequency.
- Change the Iterations Remain value. This value indicates how many iterations of 123 Sync occur before the user is processed. A zero value indicates that the user will be processed when 123 Sync is run next.
- When an the iteration counter is zero, the user is processed and the iterations counter is set to the value of the Frequency. Every time 123 Sync executes, the iterations counter is reduced by 1. When it reaches 0, the user is processed and the iterations counter is set to the frequency.

5.1.1.1 How to clear a Folder Link

In some cases you may want to clear a link to an Outlook/Exchange folder.
For example, below, we want to clear Mellisa Pearce's link to Allison's Contact Folder.

To clear the link,

1. Click on the folder selection
2. Select the Cancel button
3. Select Yes to clear the Outlook/Exchange entry from the User Settings.

One thing: Only when the last user has cleared the folder link will the relevant Index maintained by the software be cleared. This means, for example, if you have 3 users pointing to the same Outlook/Exchange folder, clearing one will not reset the item index for that folder. Only when the last user is disconnected, is the index reset.

Visual Description on how to clear the Outlook/Exchange Folder Link

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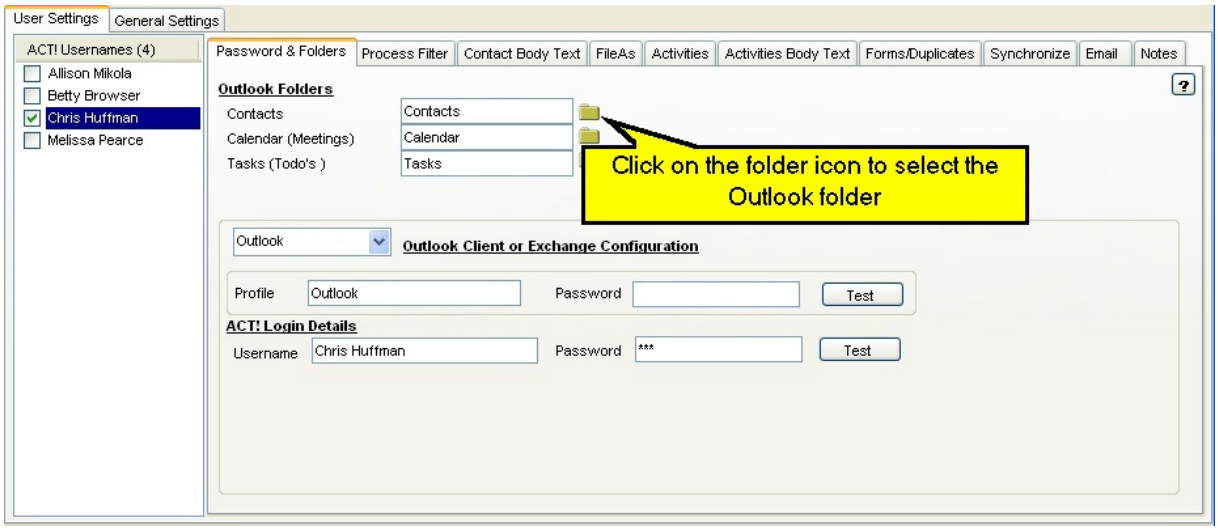

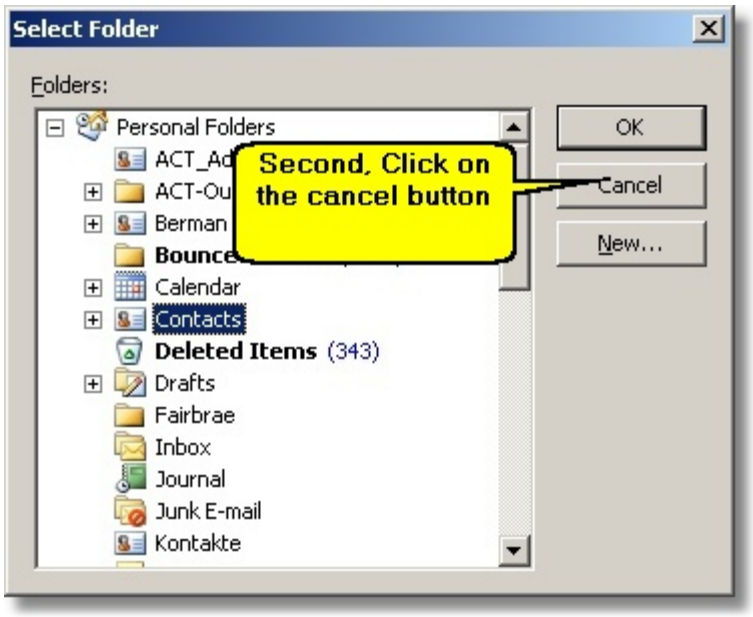

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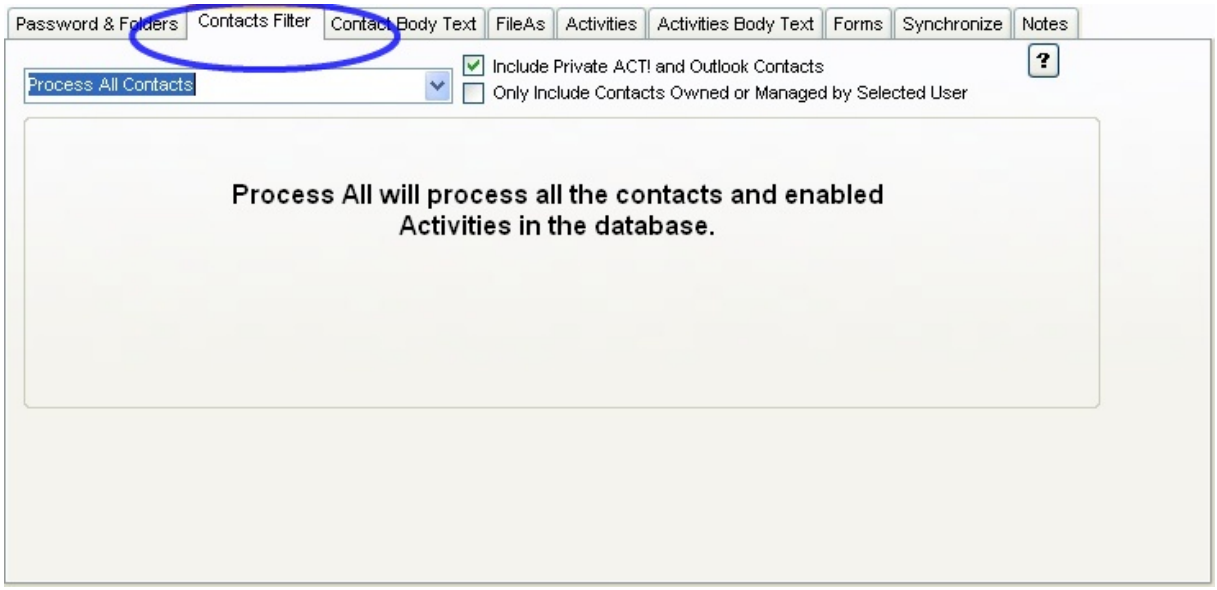
5.1.2 Contacts Filters



Act! Contact Filter Tab

Each user has the following filtering options to synchronize contacts:

1. **Process All Contacts**: All the contacts are synchronized, including any activities related to those contacts
2. **Process Only Contacts With Calendar**: Only contacts that have calendar items (calls, meetings or todo's) that are not cleared are selected for processing.
3. **Process Group**: Convert only a selected group and/or subgroups.
   - Groups with Activities Option: you may choose to sync a group and ALL the activities on your calendar
   - Specific Group: you may choose to restrict group sync to only a particular group.
4. **Process Only Meetings/Todos/Calls**: Synchronize only the Act! activities. No contacts are synchronized.
5. **Private Calendar Sync**. Synchronize only the Calendar in Act! marked Private to the folder in Outlook. A couple of things:
   - Act! Calendar items are created in Outlook with the Private Flag set.
   - Outlook Calendar Items, when added to Act!, the Private Flag is set.
6. **Integrate Emails Only**. Only the email integration piece runs when this option is selected.
7. **Calendar Mashup**. In Calendar Mashup, you perform a 1-way sync of all users (enabled only on the Cal Mashup list) to a single Outlook folder. Great to list all users with different colors on a single calendar folder.

Sync Options

Include Private Act! Contacts. When this option is set, private contacts are included in the conversion. If unset, no contacts flagged as private are converted to the Outlook/Exchange Folder.
Match Act! Record Manager Field for Contacts and Activities. Each Act! Contact and Activity has a Record Manager Field. When set, only records that have a record manager ID equal to the Act! User being converted are brought over.

Contact Filters Descriptions

Process All Contacts

In Process All Contacts, all the Act!/Outlook contacts and their respective activities are selected for synchronization.

HInt: To exclude activities from being included in the synchronization, go to the Activities Tab and disable the Calls, Meetings and Todo's from being converted or considered for

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synchronization

Process Only Contacts With Calendar
Only contacts that have a calendar item associated with them are considered for synchronization.

Process Groups
This option allows you to process Static and Dynamic groups between Act! and Outlook. There are two powerful options on Process Groups:

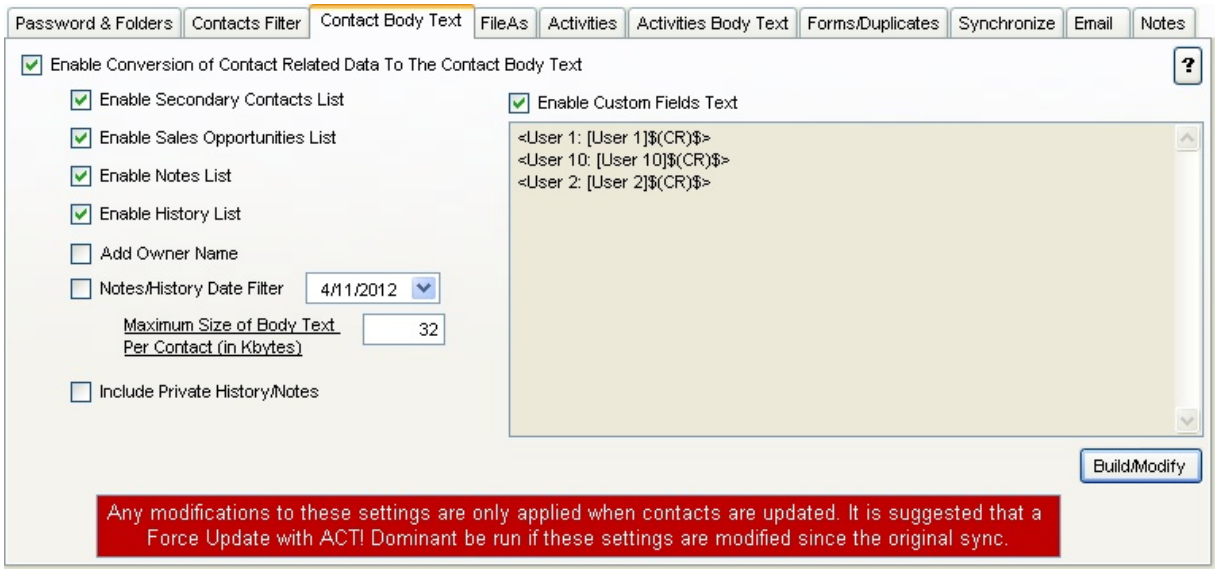
- ***Add Activities Related Contacts if not in Group***. This option syncs the selected contact group PLUS any contacts that have an activity associated with them. When enabled, it is the same as synchronizing Contacts with Calendar AND Groups on the same pass.
- ***Sync Primary Group Name to Categories and Vice-Versa***. This option restricts contacts from Act! to Outlook/Exchange in two ways:
  - One, only the group name gets inserted into the Categories field in Outlook
  - Only contacts that have the group name in the categories field in Outlook/Exchange are included. All other contacts are ignored.

5.1.3 Contact Body Text

This option controls which parts of the Act! data related to a contact are transferred to the Contact Body Text in Outlook/Exchange.
Each user is provided with a set of options to include/exclude data from the contact body text.

Special Options for History/Notes Generation:

- **Add Owner Name**. When enabled, a text is inserted that identifies who entered the history entry in Act!.
- **Notes/History Date Filter**. This option inserts a date marker that filters out any history/notes items that have been created before the selected date i.e. that are older than the selected date.
- **Maximum Size of Body Text per Contact**. This option states the maximum amount of data to put in the Contact Body Text.
- **Include Private History/Notes**: When enabled, history and notes that are Private in Act! are included in the sync. By default, only public items are included (starting with V15.2 of 123 Sync)



 This option controls which parts of the Act! data related to a contact are transferred to the Contact

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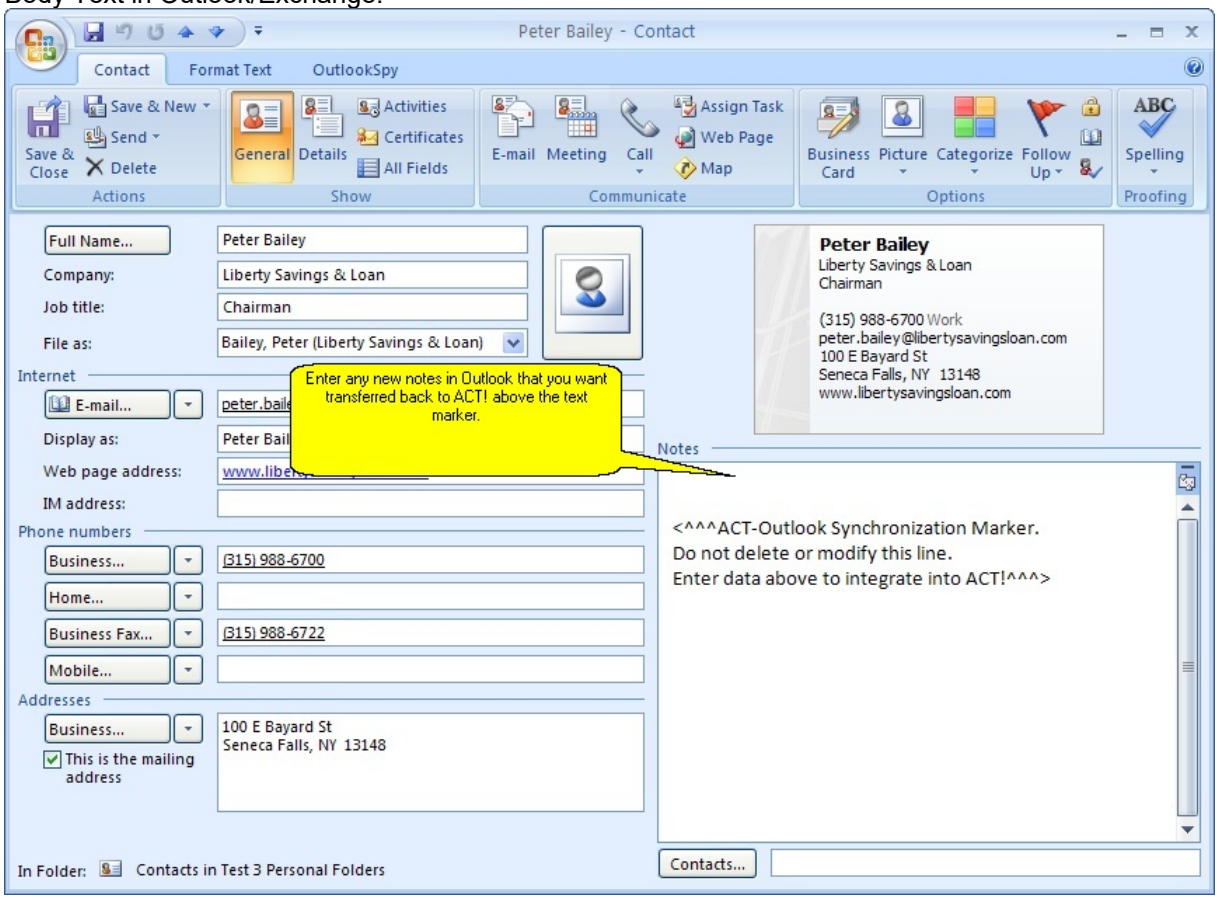
Body Text in Outlook/Exchange.



123 Sync offers a magnificent choice of data that you can put in the Outlook/Exchange Body Text.

Remember the data is 1-way from Act! to Outlook/Exchange and any modifications to this data in Outlook/Exchange is ignored by the synchronization software.

A typical contact body text listing could look like on a sample from the ***Act! Demo Database***:

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Contact Name	Enabled Contact Body Text option	Result
Chris Huffman	***Secondary Contacts*** This lists the secondary contacts into the body text. The contact details are merged together and listed.	*** Secondary Contacts *** Kacie Hare Title: Payroll Supervisor CH Gourmet Gifts BPhone: (212) 555-1773 13 East 54th St. New York, NY 10034 Harold Wesley Title: VP Operations BPhone: (212) 555-1892
Louis Hill	***Sales Opportunities*** Sales opportunities are taken and listed in a readable way in the contact body text. All sales opportunities are listed for the contact.	*** Sales Opportunities *** Opp Name: St Paul Probability: 65 Est Close Date: 2009/02/26 Actual Close Date: 9999/12/31 Company: Great Northern Coffee... Contct Name James Hill... Prod Name: TechONE System Prod Total: $12,000.00 Gross Mrgn: $7,000.00 Status: Open Stage: Negotiation Reason: Manager Name: Chris Huffman Details:
Chris Huffman	***Notes List*** The notes list are all the notes associated to that contact (the notes listed in the Notes section in Act!). Here we add the Date, Owner, the contact of the note and the note details.	*** NOTES *** ***Date:4/26/2008 9:37:00 AM ***Owner: Chris Huffman What You Should Know About This Demo Database Click the attachment icon (the icon with the paperclip) to see how the ACT11Demo database can be used to help

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Contact Fields List

You can create a customized contacts fields list with text, headers, and Act! values that you want to see on the body text of the contact.
The syntax is as follows:

<User 1: [User 1](CR)>

- The parenthesis < > indicate the beginning and the end of the instantiation of the User 1 field. If User 1 field has a value, then everything within the < > is inserted into the body text, including the carriage return (next line) i.e. **(CR)** . Otherwise this line is ignored.
- **[User 1]** Indicates the name of the field. We use [] as the delimiters of the field name.
- **User 1:** is the text put when there is a value for User 1.

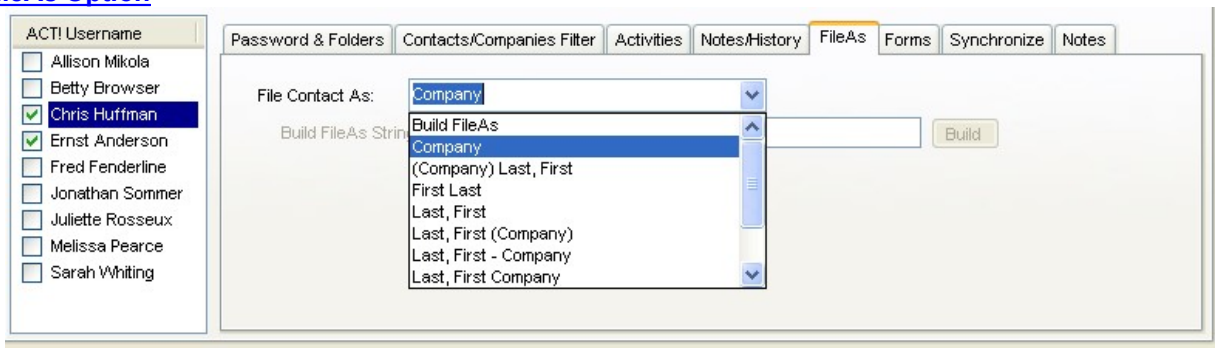
So for example if User 1 field had the value of 123Sync, then the field would look like:
User1: 123Sync

If User 1 has no value or an empty value, then nothing is created for the field.

- Any text outside the parenthesis <> is always created.

5.1.4 FileAs

FileAs Option



The FileAs option indicates how you want the contact's FileAs field to be brought over to Outlook/Exchange. Apart from quite a few standard FileAs options, a new Build FileAs option is now available where you can build a string from the fields in the contact. This string can be anything from the variables in Outlook/Exchange. Here's a look at the build interface:

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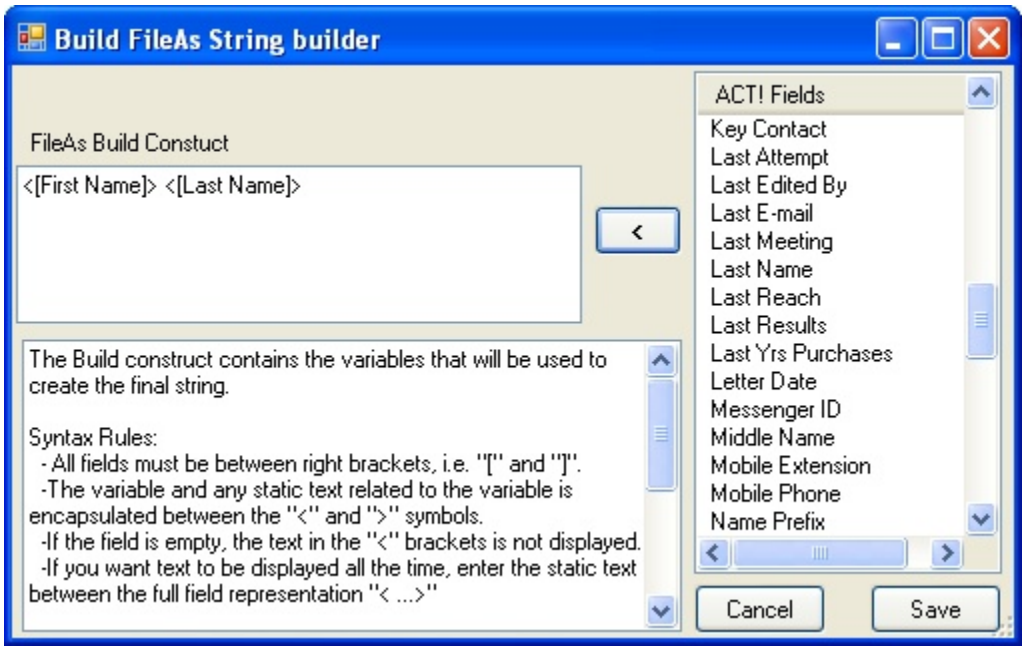

Syntax rules of the Build FileAs string:
- All fields must be between right brackets, i.e. "[" and "]".
-The variable and any static text related to the variable is encapsulated between the "<" and ">" symbols.
-If the field is empty, the text in the "<" brackets is not displayed.
-If you want text to be displayed all the time, enter the static text between the full field representation "< ...>"

Examples:
<[Firstname]> <, [Lastname]>
This will generate First, Last. However, if Lastname is empty, the comma ',' will not be displayed

<[Firstname]>, <[Lastname]>
This will generate First, Last. If Lastname is empty, you will get First, with a comma

5.1.5 Activities

[Activity Options]

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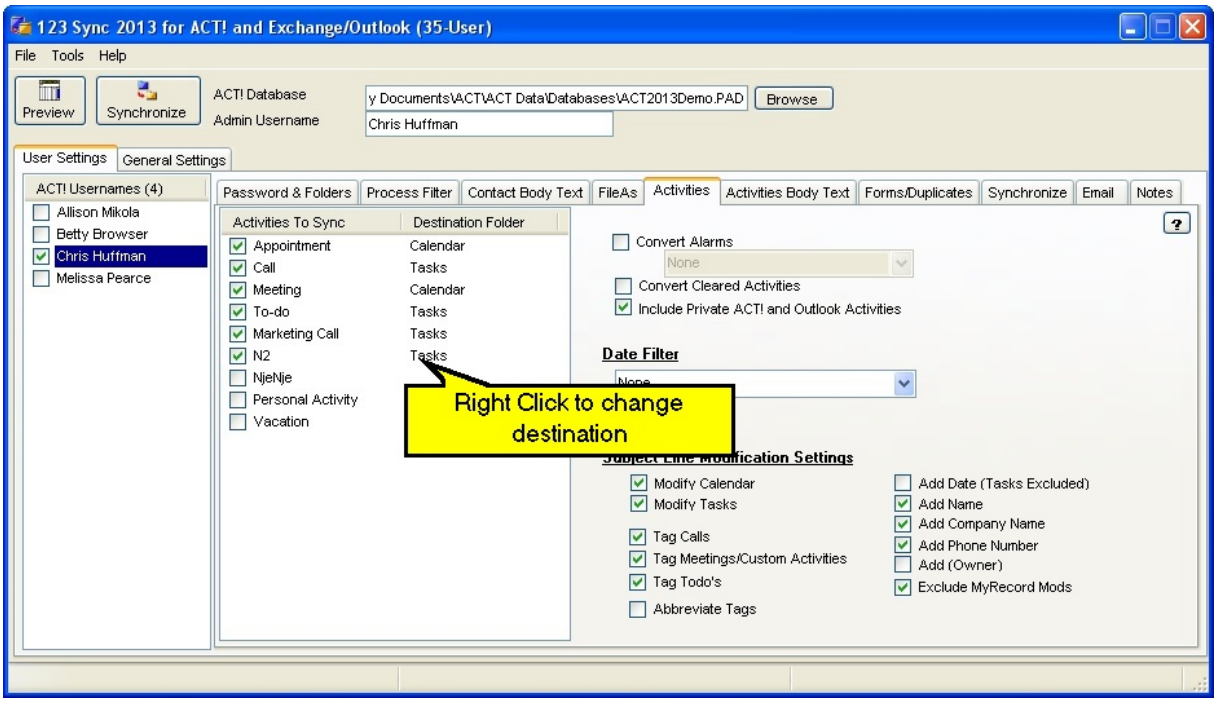

The Activities Options control which activities are converted and how they are modified in Outlook/Exchange.

Activities To Sync

This is a new feature introduced with 123 Sync, V15.0.5
It allows the user to enable/disable which activities are synched.

Adding Activities from Outlook to Act!

By default, all activities that are added from Outlook to Act! are of the type "Meeting". However, if you want to typeset your activity from Outlook, you can simply add the type to the subject line followed by a ':'. For example,
to create a call in Act!, you would add the "Call:" to the beginning of the subject line of the call: "Call: Contact Tom to resolve integration of 123 Sync with 60 User database" or "Marketing Call: Contact corporate re. creating demand." which will create an activity of type "Marketing Call" in Act!.

There are a couple of settings you need active to make this work:

- Tags: You need to have the activity tagging enabled.
- Disable the "Abbreviate Tags" option
- If you try to create an activity that is not enabled, 123 Sync will default to the "Meeting" type.

Clearing Activities via the subject line

One of the great features of 123 Sync is that you can clear an activity remotely by simply entering a "***cleared keyword***" to the subject line.

What is a Cleared Keyword?

The cleared keyword is the keyword listed on the General Settings ->Calendar Screen:

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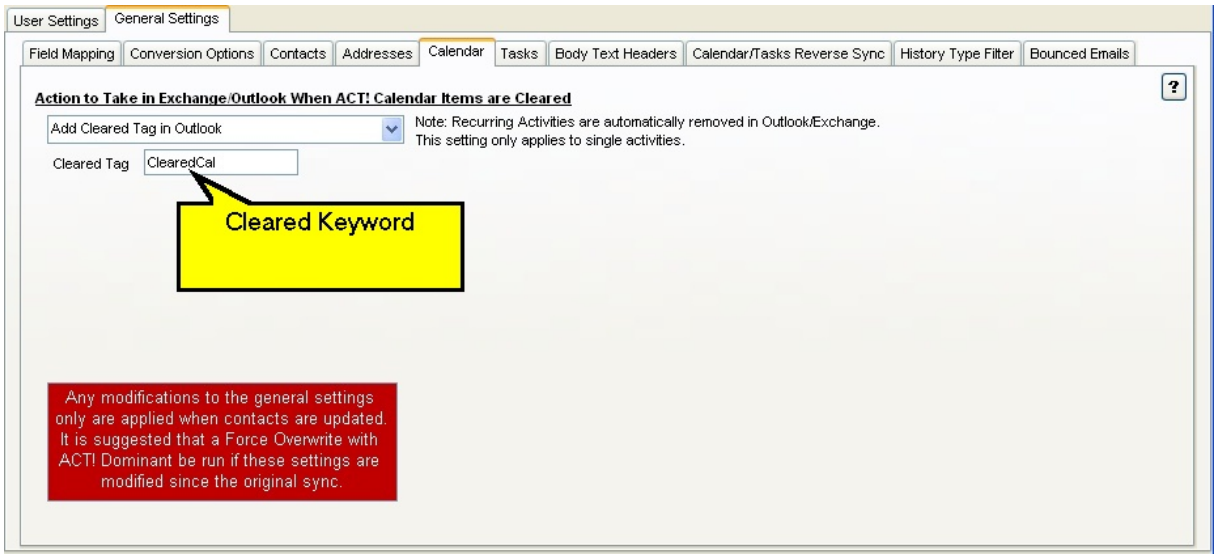

How to Clear the Act! Activity

Quite simple, simple enter the *cleared keyword* at the beginning of the subject line in parenthesis i.e. **(ClearedCal)** . When 123 Sync scans the calendar folder, it finds the (ClearedCal) tag and then marks the activity to be cleared in Act!. The tag can be changed to whatever you want.

Activities Options

Convert Alarms. This option enables the creation of Outlook/Exchange alarms for Act! alarms for todo's, calls, and meetings/appointments. Most Act! activities tend to have the alarm set but the user has disabled it via either the snooze button or by some other means. The alarm, however, still lingers and will pop-up in Outlook/Exchange as an item to be dealt with. Disabling the conversion of the alarm flag, you basically do not activate Outlook/Exchange alarms. If the database is clean and the activities well maintained, converting alarms should not be a problem. However, if you have lots of old alarms that have not been dealt with, these alarms will pop up in Outlook/Exchange with an annoying speed. Hence, we provide you with the option of converting/not converting the alarms. By default, we do not convert the alarm.

Include Private Activities. Enable/Disable the inclusion of Private Activities into the conversion.

Opportunities

When the Convert Opportunities to Tasks is set, any opportunity in Act! is converted into Outlook/Exchange Tasks.

Date Filter

When this filter is enabled, any activity (Calls, todo's, meetings, etc.) that is older that the date selected is not converted into Outlook/Exchange.

Subject Line Modification Settings.

The idea of subject line modifications of Act! activities when transferred to Outlook/Exchange is to provide users with additional contact and activity information by simply looking at the activity (meetings, calls and todo's) subject line. This is very useful when transferring data to a shared calendar or event to a PDA, since most of the important contact data is included in the activity subject line.

Activity Tags: These are tags that are added in front of the subject line: For example, the word "Call: " can be added in front of the Call activity being transferred. This word can be edited to anything you with, for example "Llamada: " if you reside in a Spanish speaking country. Although this is not so important in the Tasks folder, it is important in the Calendar since it helps users differentiate between Calls and Appointments.

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Modification Options

Modify Calendar: Enable/Disable the modification of Calendar items (Calls/Meetings).
Modify Tasks: Enable/Disable the modification of Tasks items (Todo's).

You can modify and enable/disable the tags that are in front of the subject line to whatever you want.
Tag Calls: Enable/Disable the tagging of Calls with a specific tag.
Tag Meetings: Enable/Disable the tagging of Meetings with a specific tag.
Tag Todo's: Enable/Disable the tagging of Todo's with a specific tag.

Add Date: Enable/Disable the addition of the activity date.
Add Name: Enable/Disable the addition of the Contact Name with whom the activity is scheduled with.
Add Company Name: Enable/Disable the addition of the company name.
Add Phone Number: Enable/Disable the addition of the phone number.
Add (Owner): Enable/Disable the addition of the activity owner in parenthesis. This is the name of the Act! username that is the owner of this activity. This feature is useful if you have multiple uses sharing a single calendar/task folder.

Exclude Modifications with MyRecord Info: When enabled, the logged user's details are not added to the subject line. This is useful when users have Activities assigned to themselves as reminders of what to do. Obviously one doesn't want the same name over and over on the tasks folder. Hence, this option disables the insertion of the

Color matched Example of Subject Line Modifications

Date Added	Meeting Tag	Activity Owner	Company	Contact Name	Phone number	Subject
10/4/2006 2:19:00 PM	Mtng:	(Johnnyt)	CH Gourmet	Allison Mikola,	(212) 555-6743 ::	Meet Re. Sales

5.1.6 Activities Body Text

his option controls which parts of the Act! data related to a contact are transferred to the Activities Body Text in Outlook/Exchange.
Each user is provided with a set of options to include/exclude data from the activities body text.

Special Options for History/Notes Generation:

- **Notes/History Date Filter**. This option inserts a date marker that filters out any history/notes items that have been created before the selected date i.e. that are older than the selected date.
- **Maximum Size of Body Text per Contact**. This option states the maximum amount of data to put in the Activities Body Text.
- **Include Private History/Notes**: When enabled, history and notes that are Private in Act! are included in the sync. By default, only public items are included (starting with V15.2 of 123 Sync)
- **Multi-User Meetings Settings**. When activities have more than 1 user included, the generation of the contact details can be disabled for reasons of confidentiality. By default, only the generation of the contact details is enabled in the Activities.

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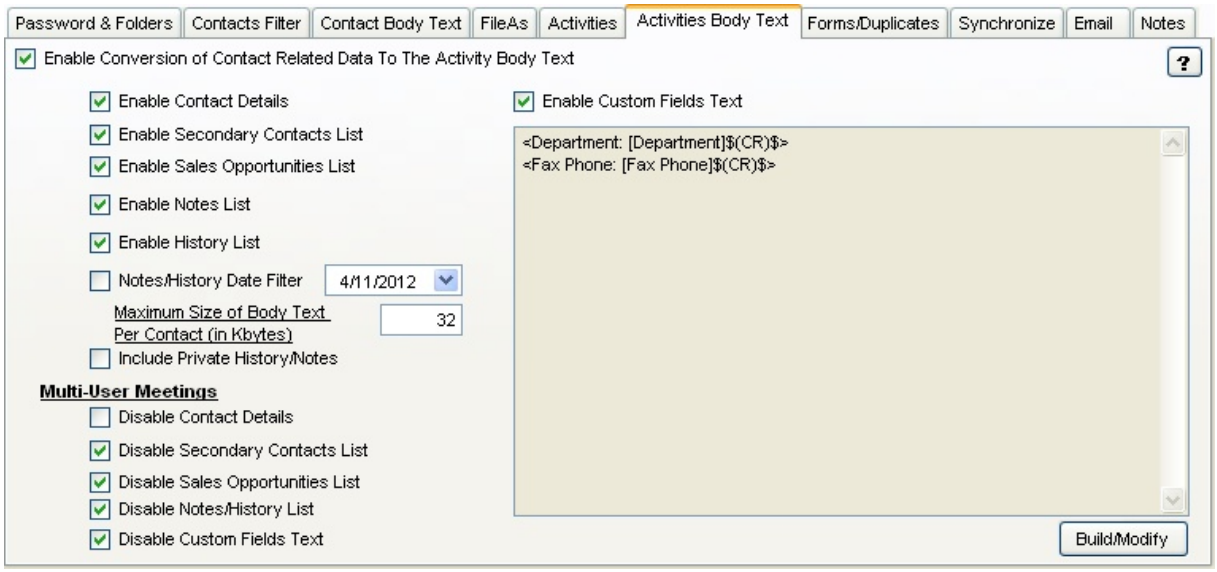
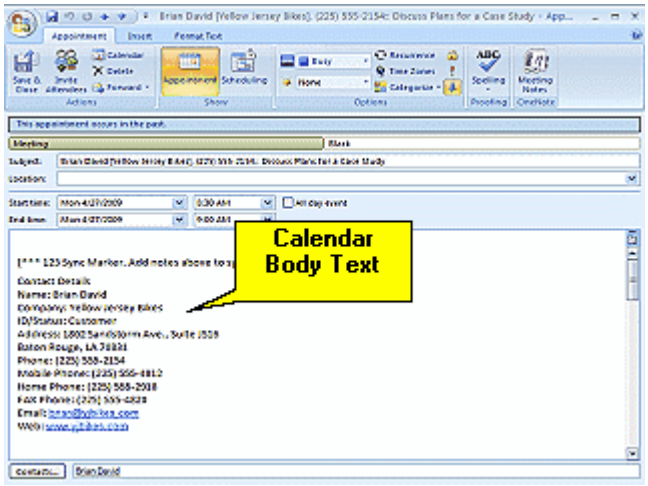


Beyond synchronizing Activities to Outlook/Exchange, 123 Sync also brings over the contact details into the Activity Body Text.



123 Sync offers a magnificent choice of data that you can put in the Calendar/Task Body Text.

Remember the data is 1-way from Act! to Outlook/Exchange and any modifications to this data in Outlook/Exchange is ignored by the synchronization software.

A typical contact body text listing could look like on a sample from the ***Act! Demo Database***:

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Contact Name	Enabled Contact Body Text option	Result
Chris Huffman	***Contact Fields List*** You can list contact fields that are not part of the field mapping. Although Outlook/Exchange allows for user defined fields, Smart Phones do not. Hence, you can list any field that you want on the contact body text for reference. These fields are enabled/disabled in the General Settings->Body Text Headers section and the selection apply to all users.	*** Contact Fields List *** [Customer ID] = [Department] = Administration [First Name] = Chris [First Purchase] = [ID/Status] = Employee [Key Contact] = False [Last Reach] = 7/25/2008 6:30:00 AM
Chris Huffman	***Secondary Contacts*** This lists the secondary contacts into the body text. The contact details are merged together and listed.	*** Secondary Contacts *** Kacie Hare Title: Payroll Supervisor CH Gourmet Gifts BPhone: (212) 555-1773 13 East 54th St. New York, NY 10034 Harold Wesley Title: VP Operations BPhone: (212) 555-1892
Louis Hill	***Sales Opportunities*** Sales opportunities are taken and listed in a readable way in the contact body text. All sales opportunities are listed for the contact.	*** Sales Opportunities *** Opp Name: St Paul Probability: 65 Est Close Date: 2009/02/26 Actual Close Date: 9999/12/31 Company: Great Northern Coffee... Contct Name James Hill... Prod Name: TechONE System Prod Total: $12,000.00 Gross Mrgn: $7,000.00 Status: Open Stage: Negotiation Reason: Manager Name: Chris Huffman Details:
Chris Huffman	***Notes List*** The notes list are all the notes associated to	*** NOTES *** ***Date:4/26/2008

Contact Fields List

You can create a customized contacts fields list with text, headers, and Act! values that you want to see on the body text of the contact.
The syntax is as follows:

<User 1: [User 1](CR)>

- The parenthesis < > indicate the beginning and the end of the instantiation of the User 1 field. If User 1 field has a value, then everything within the < > is inserted into the body text, including the carriage return (next line) i.e. **(CR)** . Otherwise this line is ignored.
- **[User 1]** Indicates the name of the field. We use [] as the delimiters of the field name.
- **User 1:** is the text put when there is a value for User 1.

So for example if User 1 field had the value of 123Sync, then the field would look like:
User1: 123Sync

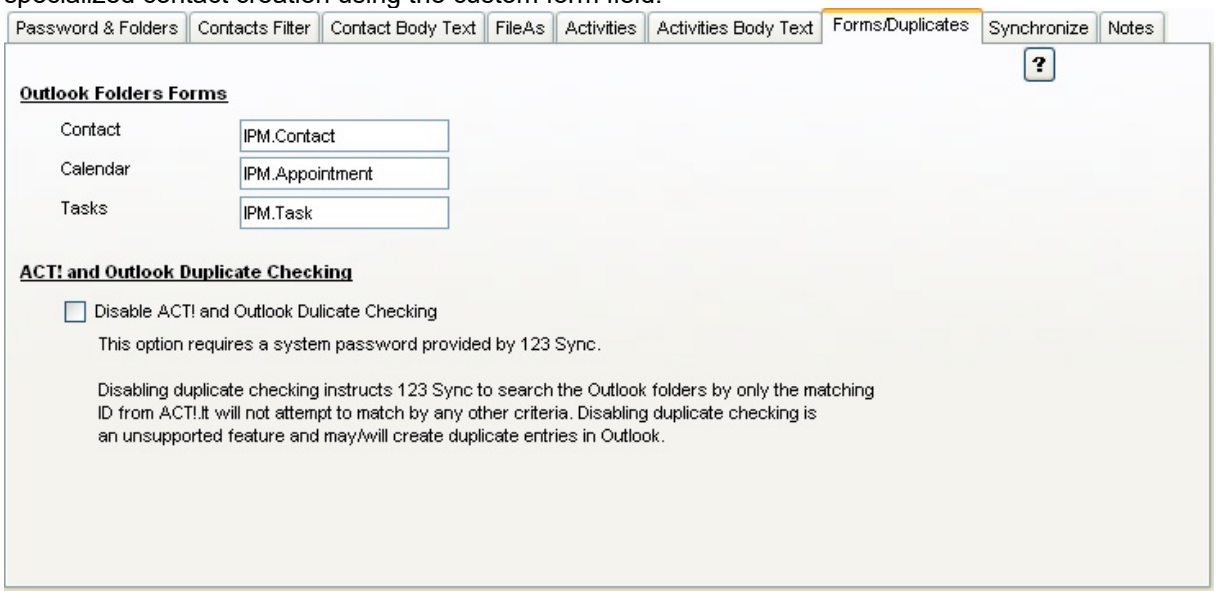
If User 1 has no value or an empty value, then nothing is created for the field.

- Any text outside the parenthesis <> is always created.

5.1.7 Forms/Duplicates

Forms

Here you can specify if you want any user defined forms to be used when converting contacts. The name of the form for a specific contact resides in the field Message Class. When we convert contacts, we modify this field to match the field on the Forms screen and we also perform specialized contact creation using the custom form field.



Disable Act! and Outlook Duplicate Checking

This option disables duplicate checking from Act! to Outlook. The password to activate this option is **1483K** . This option is for users that want to sync without having 123 Sync check for any duplicates in Outlook. THIS IS AN UNSUPPORTED FEATURE AND WILL CREATE DUPLICATES IS ANY MODIFICATIONS ARE MADE TO THE BILLINGINFORMATION FIELD IN OUTLOOK BY A THIRD PARTY SYNC PROGRAM.

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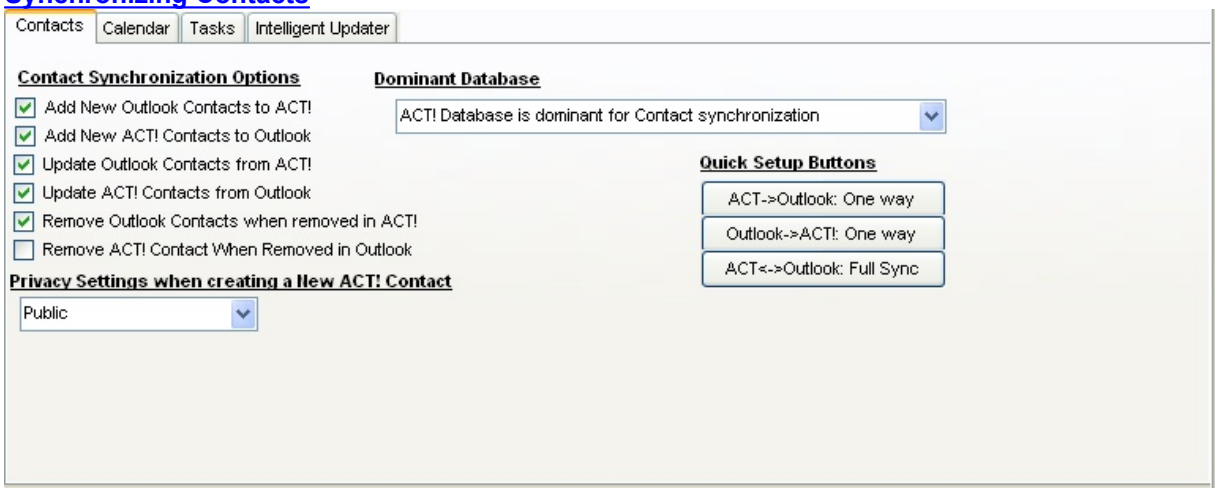
5.1.8 Synchronization Settings

123 Sync for Act! and Outlook/Exchange allows you to synchronize data from Act! to Outlook/Exchange and vice-versa, including deletions and modifications to items.

A couple of things about synchronization:

- When synchronizing, make sure that you start with the full set of contacts and stay with them i.e. If you plan to only synchronize a group, start with that group. If you want to synchronize all, start with all.
- When running interactively, the synchronization will popup a window with a list of synchronization actions to take. It is up to the user to decide whether to go ahead with these actions or not.
- Contacts, Calendar, and Tasks have individual synchronization settings, including database dominance, the database that wins when an update conflict occurs.
- Synchronization Actions:
  1. Modifications in Act! come automatically to Outlook/Exchange. Any item that is modified in Act!, is automatically brought over to Outlook/Exchange.
  2. Addition of Items in Outlook/Exchange are added to Act!
  3. Updates of Items in Outlook/Exchange are brought over to Act!
  4. Updates of Items in Act! are brought over to Outlook/Exchange
  5. Items Removed in Outlook/Exchange are also removed in Act!
  6. Items Removed in Act! are Removed in Outlook/Exchange
- Dominant Database
  The dominant database settings indicates the direction of the record update if the same record has been updated in Outlook/Exchange and Act!. For example, if Dominant Database is set to Act!, if the same record has been updated in Outlook/Exchange and Act!, the Outlook/Exchange record is overwritten by the Act! Record.

Synchronizing Contacts



Contacts are fully synched with Outlook/Exchange with updates and deletions.

Privacy Settings when creating a New Contact: These are the settings in Act! when a new contact is created.

Private
Public
Limited Access

Synchronizing Calendar

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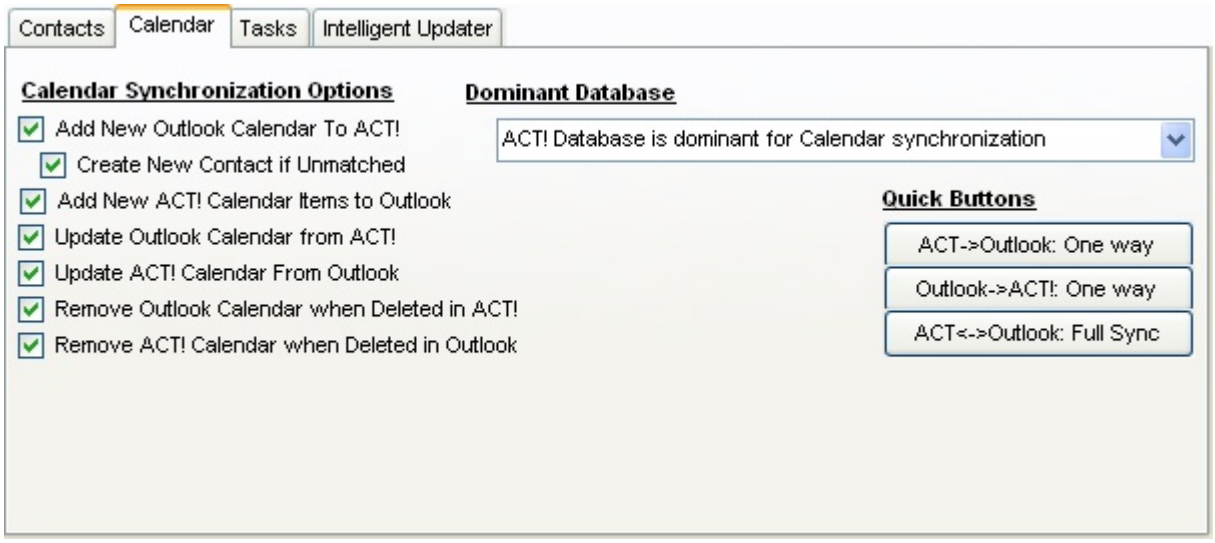
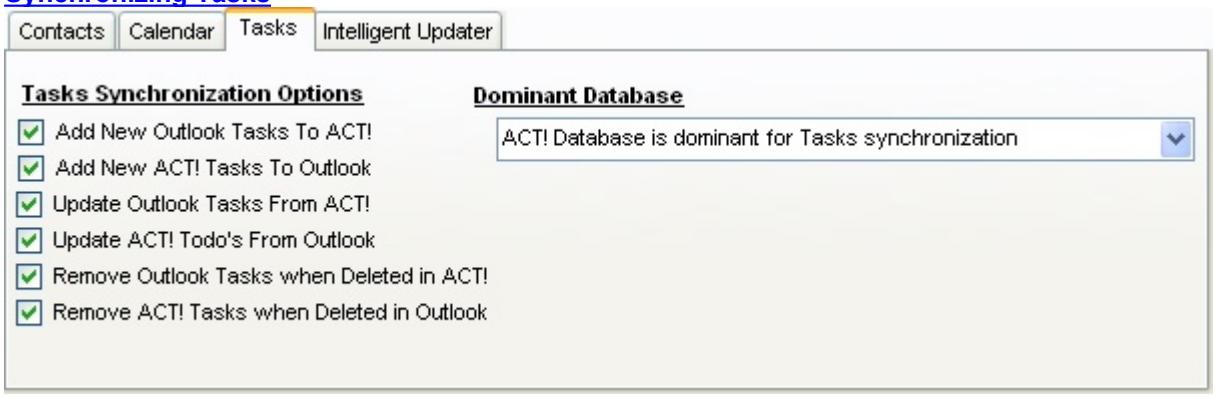


Calls and Meetings are brought over to the Outlook/Exchange Calendar. All the data is brought over from Act! over to the Outlook/Exchange Calendar, including re-occurring items. From Outlook/Exchange to Act!, re-occurring patterns are not brought over (next release). Otherwise everything else is supported, including color schemes to be brought over from Act! to Outlook/Exchange.

If the "Create New Contacts if Unmatched" option is set, a new contact is created if a scheduled calendar item from Outlook does not find a corresponding contact.

Synchronizing Tasks



Todo's and Opportunities are synched to the Tasks folder. All the data from the todo's is fully supported to transfer from Act! to Outlook/Exchange, including re-occurring activities. However, re-occurring patterns may be only modified in Act! and are not transferred over from Outlook/Exchange (Next release). Also, Opportunities that are converted into Outlook/Exchange tasks only support modifications in Act!. Only deletions in Act! and Outlook/Exchange are synched both ways.

Intelligent Updater

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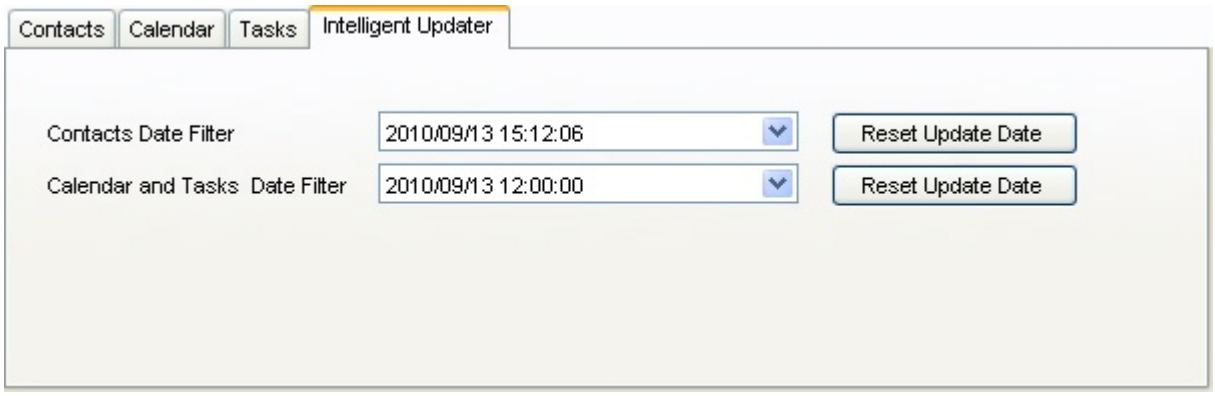

The intelligent updater dates are our filters that indicate when the last sync was done. These dates are used to filter out new vs. old items that have already been synched.

Synchronization Action Screen

After you run the synchronization (by pressing the Process button), a screen is displayed that indicates the actions that will take to synchronize all the selected folders. From this screen you can do the following:

- Remove any Synchronization actions you don't want to do. Simply select the item and press the Del button and the action is then removed.
- Synchronize All the Data.
- Cancel the synchronization altogether.

Note that any synchronization action that is not done will come up in the next synchronization screen until it is done.

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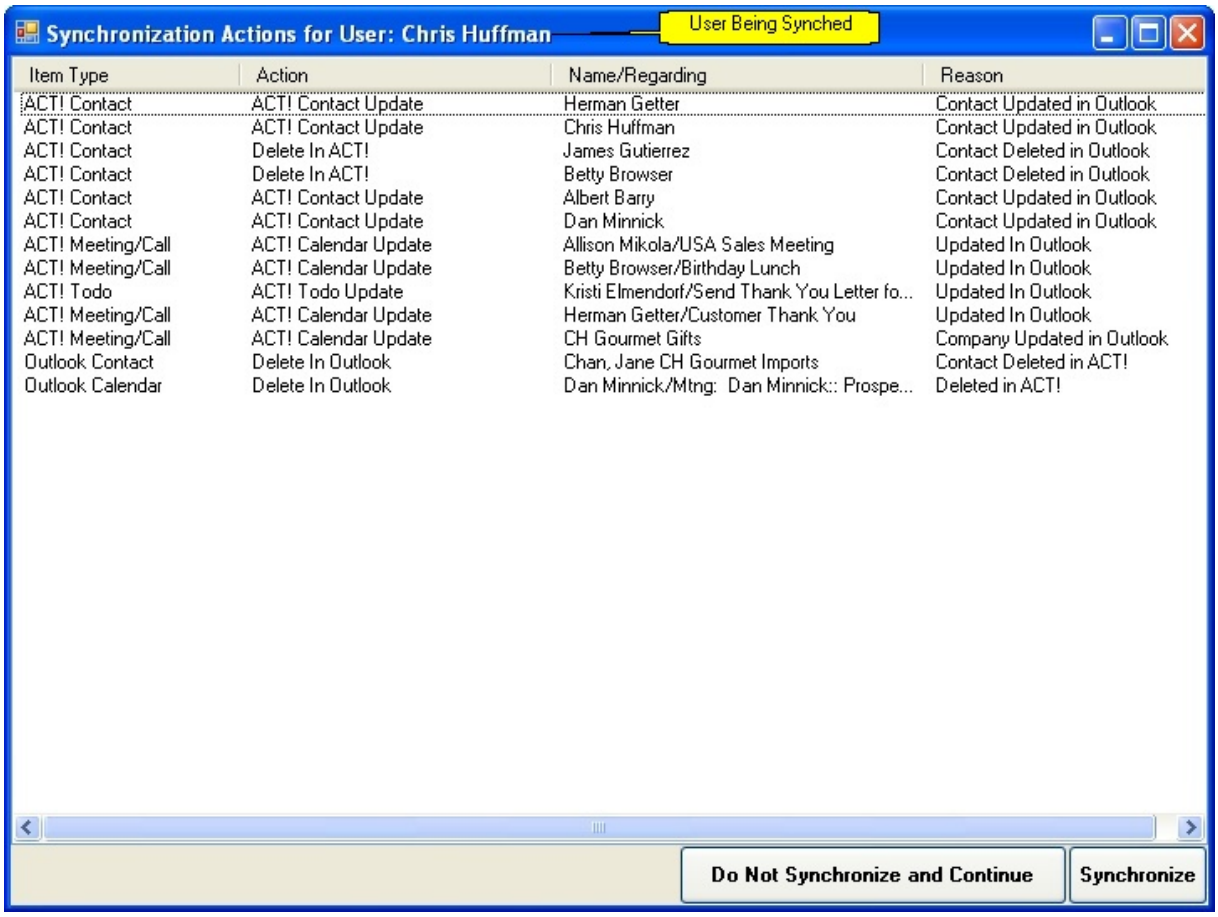

5.1.9 Email

The Email Tab contains two primary sections:

- The Email Address Mappings. These are the fields 123 Sync uses to search for email address and/or subject line IDs setup by the user
- Email Integration Settings: This tab contains all the settings related to 123 Sync integration of Emails with Act!.

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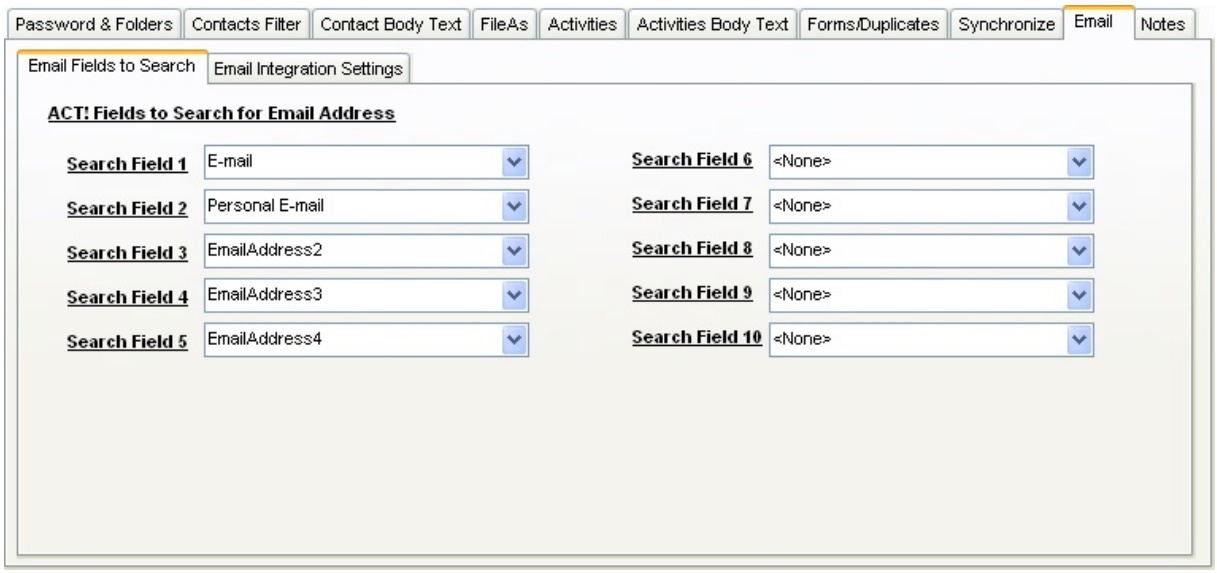
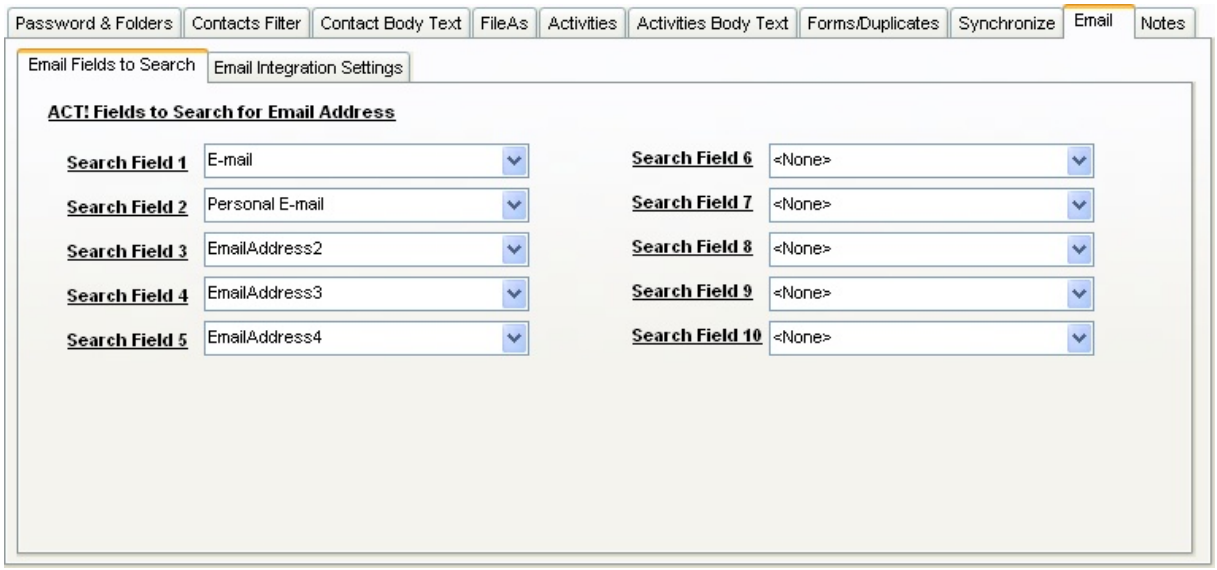


'

5.1.9.1 Email Fields To Search



These are the fields 123 Sync uses to search for Email addresses or ID's retrieved from the Email Subject line. Make sure you set the fields starting at 1 and ending up at 10.

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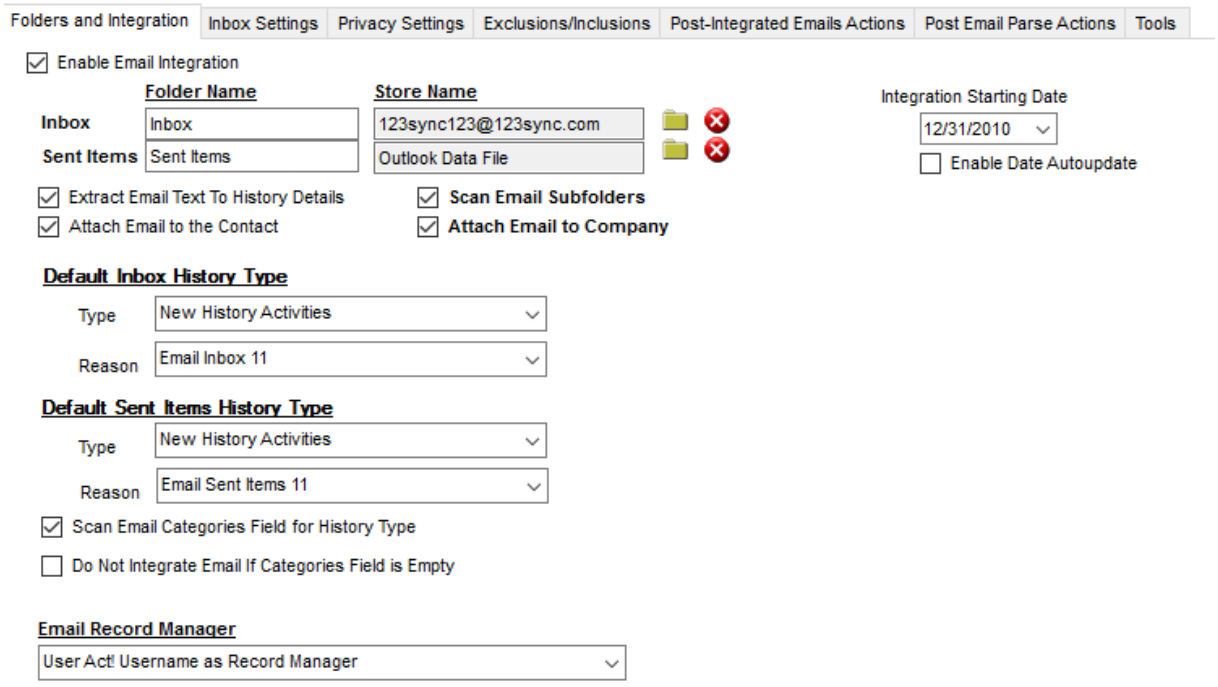
5.1.9.2 Email Integration



The Folders and Integration options for email is where the Inbox and the Sent items folder are set for the user. In addition, you can set the default History Types to use when integrating email. 123 Sync uses the Integration Starting Date and the base date for integration of Emails with Act!.

If you have contacts that you do not want email integrated with, enable the "Exclude Integration with Contacts with this field set" and set a value on a field when you do not want emails to be integrated. In the example above, all contacts with the value "DNI" in the User 1 field are ignored when integrating Emails.

Options

- *Integration Starting Date*. This field determines when integration of emails should start. If the SendOn date on the email is earlier than the date specified, it is then integrated, otherwise it is ignored. That prevents old emails from being integrated.
  Auto-Update of Email Integration Date Enabled. When this option is enabled, the integration date is set every time a sync is run and an email integration succeeds. This speeds up email integration since the date keeps moving up and only more recent emails are integrated.
- *Extract Email Text to History Details*.
- *Scan Subfolders*: enable or disable to the scanning of subfolder in Outlook/Exchange
- *Attach Email To the Contact*: enable/disable attaching the email to the history item in Act!.
- *Attach Email to Company*: enable/disable attaching the email to the history item for the Company linked to the contact. So there is a history of the company emails as well.
- *Default Inbox History Type*. This option indicates what history type to use when integrating the inbox.
- *Default Sent Items History Type*. This option indicates the default history type when integrating the Sent Items email
- *Scan Email Category Field for History Type*. When enabled, 123 Sync scans the Categories field for a history type to use.
- *Do Not Integrate Email if Categories Field is Empty*. When enabled, only emails with a value in the categories field is integrated.

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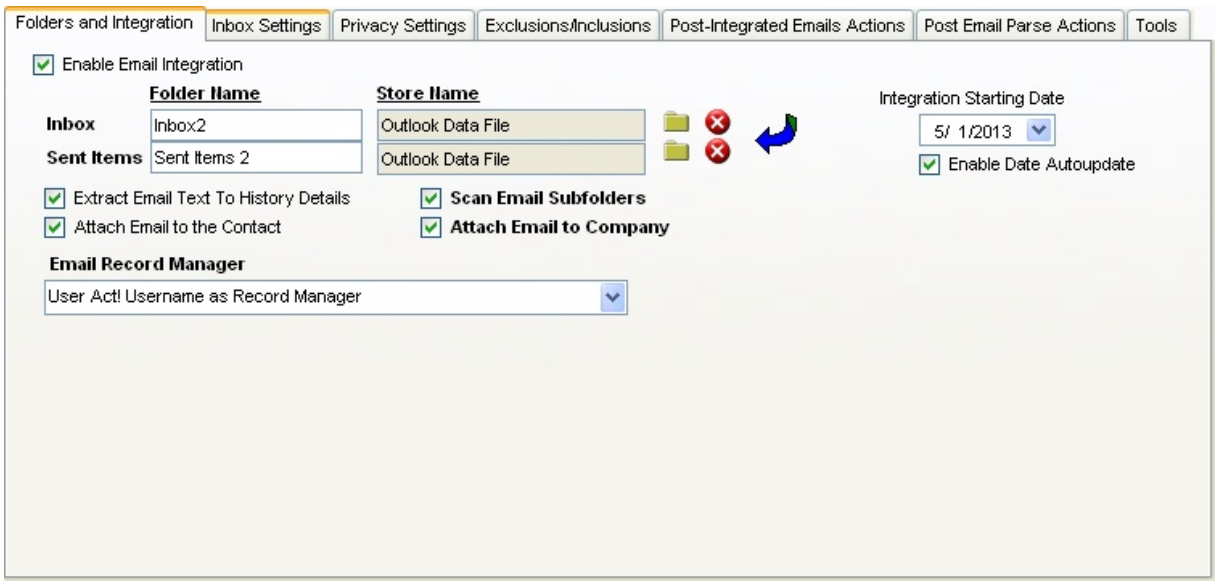
- *Record Manager Settings*: This indicates what record manager will show for the history item in Act!.
  - Use Act! Username as Record Manager
  - Use Act! Login as Record Manager
  - Use Another User as Record Manager

.

5.1.9.2.1 Folders and Integration



Here you can set the Inbox and the Sent items folder for the user. 123 Sync uses the Integration Starting Date and the base date for integration of Emails with Act!.

If you have contacts that you do not want email integrated with, enable the "Exclude Integration with Contacts with this field set" and set a value on a field when you do not want emails to be integrated. In the example above, all contacts with the value "DNI" in the User 1 field are ignored when integrating Emails.

Options

- ***Integration Starting Date***. This field determines when integration of emails should start. If the SendOn date on the email is earlier than the date specified, it is then integrated, otherwise it is ignored. That prevents old emails from being integrated.
  Auto-Update of Email Integration Date Enabled. When this option is enabled, the integration date is set every time a sync is run and an email integration succeeds. This speeds up email integration since the date keeps moving up and only more recent emails are integrated.
- ***Extract Email Text to History Details***. When enabled, once an email is integrated, the text of the email is extracted and put into the details section of the history item.
- ***Attach Email to the Contact***. This enables/disables the attaching of emails to contacts. Remember, you must either extract the email or attach it.
- ***Attach Email to the Company***. enable/disable attaching the email to the history item for the Company linked to the contact. So there is a history of the company emails as well.
- ***Scan Subfolders***: enable or disable to the scanning of subfolder in Outlook/Exchange
- ***Attach Email To the Contact***: enable/disable attaching the email to the history item in Act!.
- ***Record Manager Settings***: This indicates what record manager will show for the history item in Act!.
  - Use Act! Username as Record Manager
  - Use Act! Login as Record Manager

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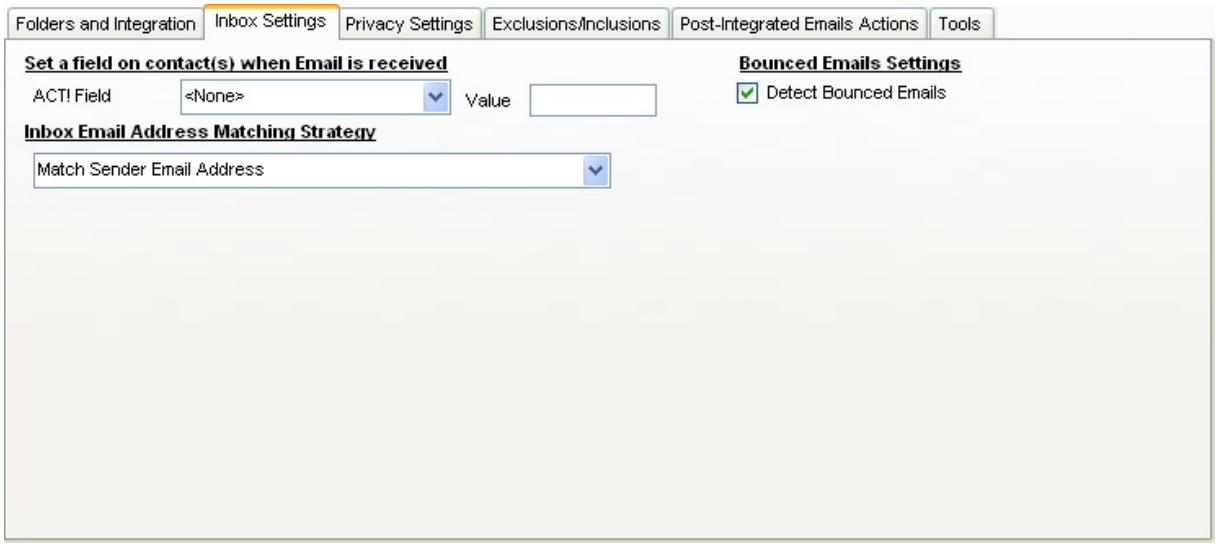
- Use Another User as Record Manager

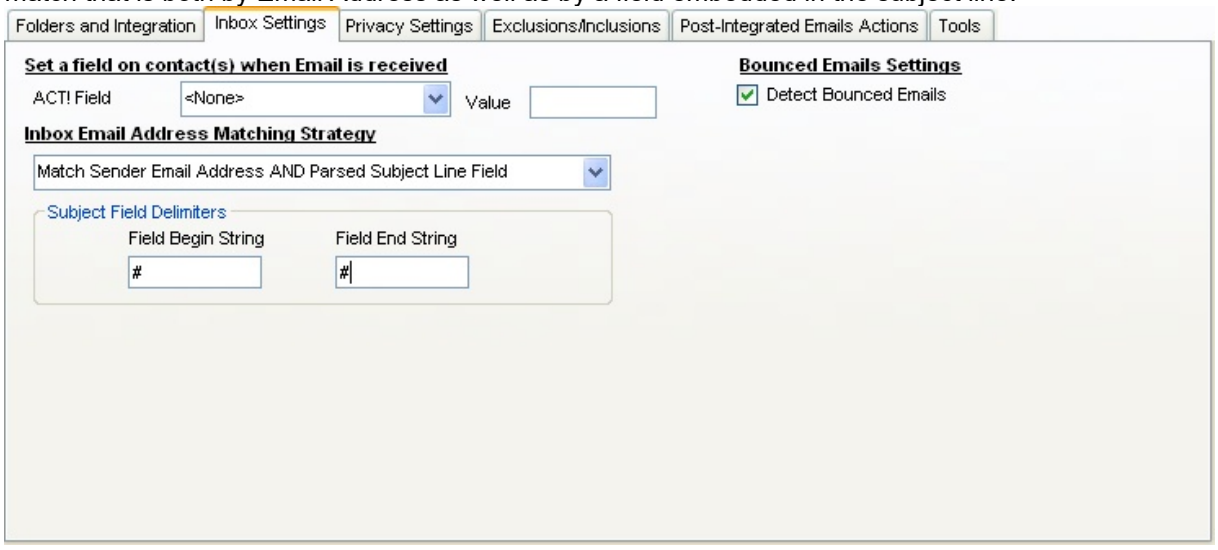
5.1.9.2.2 Inbox Settings



The Inbox Settings determines how 123 Sync searches the emails:

Email Address Matching Strategy. This option determines where 123 Sync retrieves the search data from the email. There are two strategies that can be used:

- ***Match Sender Email Address***: When selected, only the sender's email address is used to search the Act! database for the corresponding contact.
- ***Match Sender Email Address AND Parsed Subject Field***. In addition to the senders email address, you can setup 123 Sync to search the Email's Subject line for a particular string delimited by two characters. In the case above, if you have **{#789040898#}** in the subject line, it will add **789040898** to the search procedure. You can setup multiple fields in the Email Fields to Search where 123 Sync then searches these fields for the matching case number. So you get a match that is both by Email Address as well as by a field embedded in the subject line.



- **Parse Body Text**. With this feature, instead of 123 Sync scanning the email address and/or items on the subject line, it does the following:
  1. It matches the Email Subject Line to the defined subject line in 123 Sync.
  2. It searches for labels to parse in the email and matches them to fields in Act!.
  3. If a corresponding contact is not found, it is added to Act!. If a contact is found, you have

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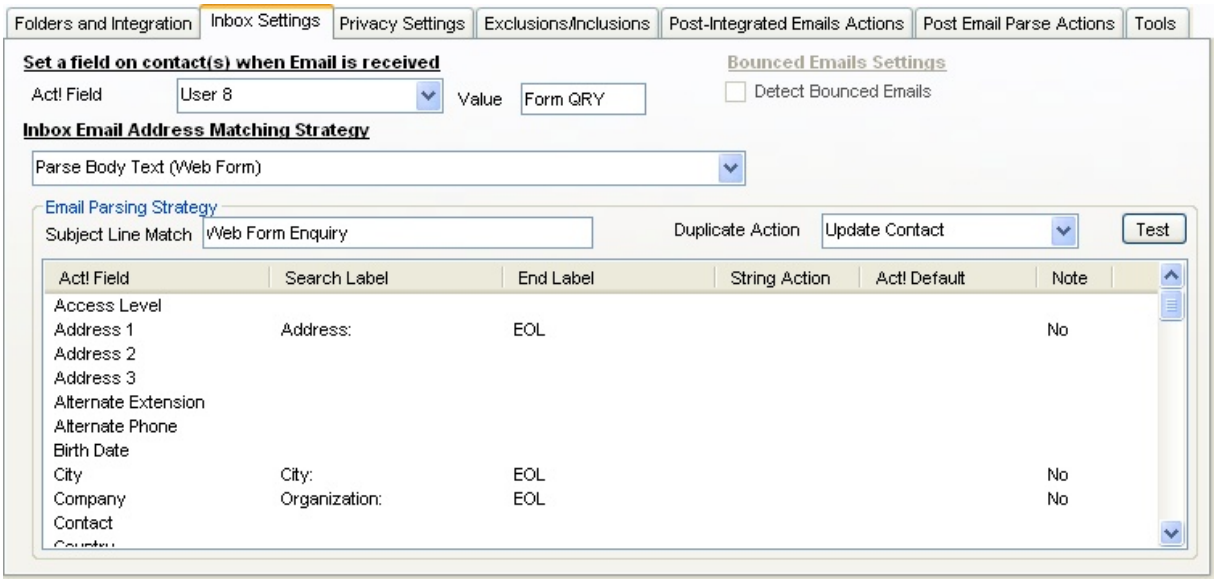
the choice to update, do nothing or just attach the email to the contact.

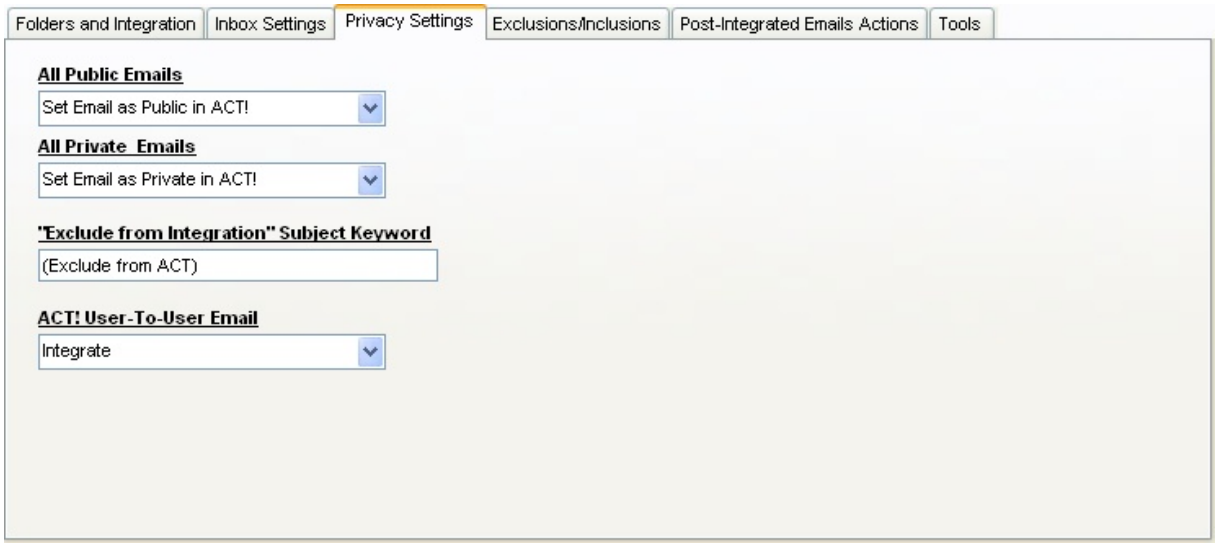
4. **Usage of Body Text Parsing**: You can import data from web submissions while integrating emails into Act!
5. **Note:** go through our video tutorials on how to setup the email parsing mechanisms.
6. **Note 2:** Right click on the field to setup the parameters.



Set a fields on contact(s) when Email is received: Here you can set a field for a contact when an email is received for the contact.

Bounced Email Settings. When enabled, all emails in the Inbox are searched for Bounced Emails responses and then matched to the contact in Act!. See the Bounced Emails settings for more information on Bounced Emails detection on Email Integration.

5.1.9.2.3 Privacy Settings



Privacy settings are settings that are applied to email integration for users i.e. whether the history entry for an email is public or private.

All Public Emails. If an email is Public, this setting determines whether the email should be made

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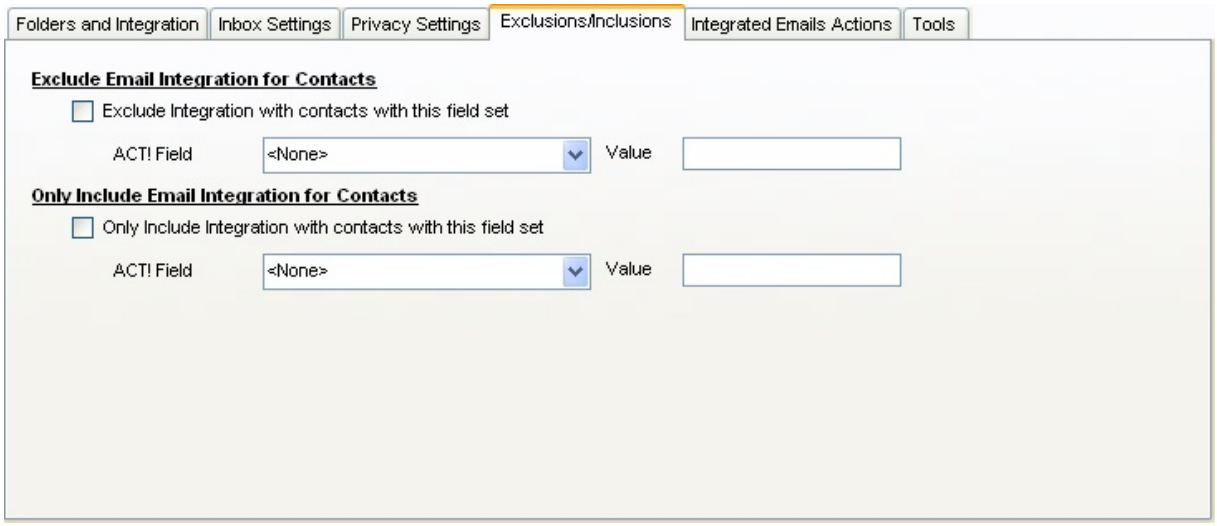
public for this user or private.
All Private Emails. If an email is Private, this setting determines whether the email should be made Public, Private or just ignored from integration.
Exclude From Integration Keyword. Here you can create a keyword that instructions 123 Sync to ignore the email from integration.
Act! User-to-User Email. On many installations, users do not like to have internal user-to-user emails integrated into Act!. Here you can disable the integration.

5.1.9.2.4 Exclusions/Inclusions



- **Exclusion and Inclusion Options**
  - ***Exclude Integration with contacts with this field set***. If you have contacts that you do not want email integrated with, enable the "Exclude Integration with Contacts with this field set" and set a value on a field when you do not want emails to be integrated. In the example above, all contacts with the value "DNI" in the User 1 field are ignored when integrating Emails
  - ***Only Include Email Integration for Contacts***. This additional option allows users to only integrate emails if the field matches. So if the email does not get rejected by the Exclusion, you can setup an inclusion comparison that restricts email inclusion by contact.

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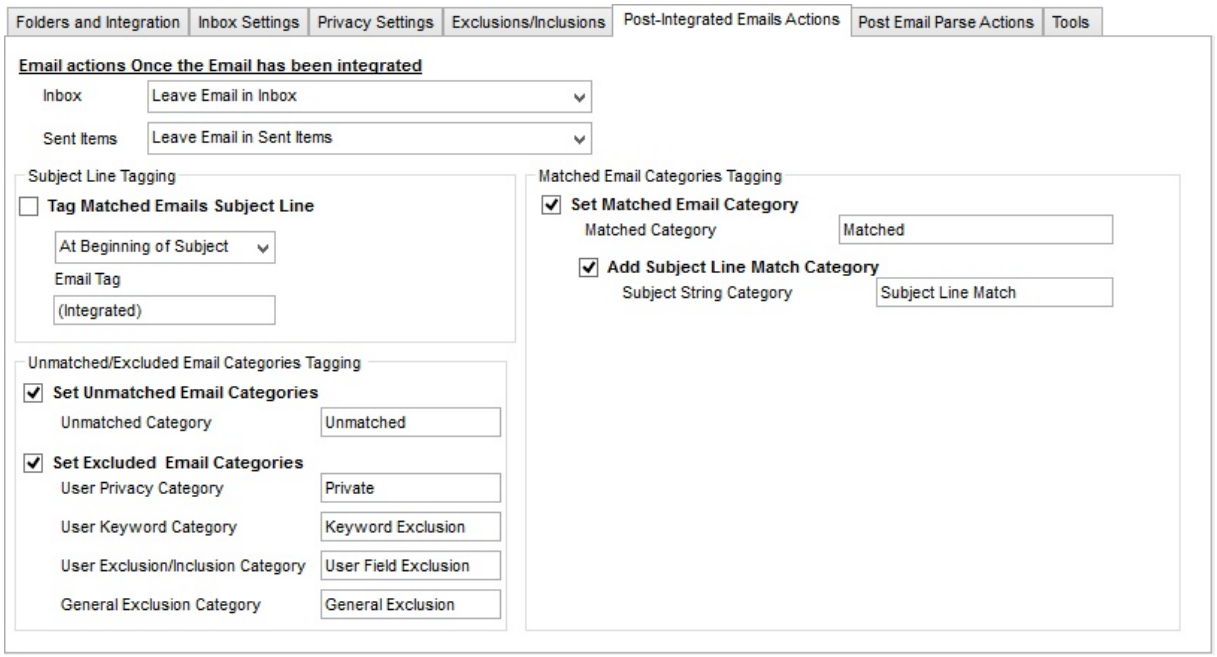
5.1.9.2.5 Post Integrated Email Actions



There are the actions 123 Sync takes once the email is integrated into Act!.

Email Tagging

There are two methodologies supported by 123 Sync:

- Subject Line tagging adds a string to the subject line of the email.
- Categories Tagging. Here, data is deposited into the Categories field in the email which can then be analyzed by the user. Categories tagging can be used in various stages of the email integration:
  - When the email is matched to an Act! Contact
    - ***Add Attach by Subject String Match*** option: When enabled, an additional category is added to the email if the matching included matching by a string on the subject line.
  - When the email is not matched (unmatched) to the Act! contact
  - When the email is excluded from integration due to general or user restrictions.
    - Unmatched Category: set when the email is not matched to an act contact
    - User Privacy Category: set when the email is excluded due to the privacy settings.
    - User Keyword Category: set when the email is excluded due to an exclusion keyword on the subject line (set in the Privacy Settings Tab).
    - User Exclusion/Inclusion Category: set when the email is excluded due to a field exclusion set in the Exclusions/Inclusions Tab.
    - General Exclusion Category: set when the email is excluded due to a rule setup in the General Settings->Email->Inbox Exclusions or Sent Items Exclusions

  Note: When using Categories Tagging, change the default of Set Quick Click in Outlook to be No Categories, otherwise every time you click on the categories field, it will clear.

Common questions about Email Categories Tagging

- Will 123 Sync overwrite the categories field on the emails that already exist? The answer is yes. Once the email is categorized, the categories field is updated with that information.
- Can a user run 123 Sync Email Categories Tagging at the same time as another Email categories management? 123 Sync will overwrite the categories field with its own information. Hence, it is not advisable to run two programs that access and manipulate the same field.
- Can one setup 123 Sync to NOT modify the Email Categories when it integrates? Yes, the categories tagging can be enabled/disabled on the Email Integration for each user that is setup.

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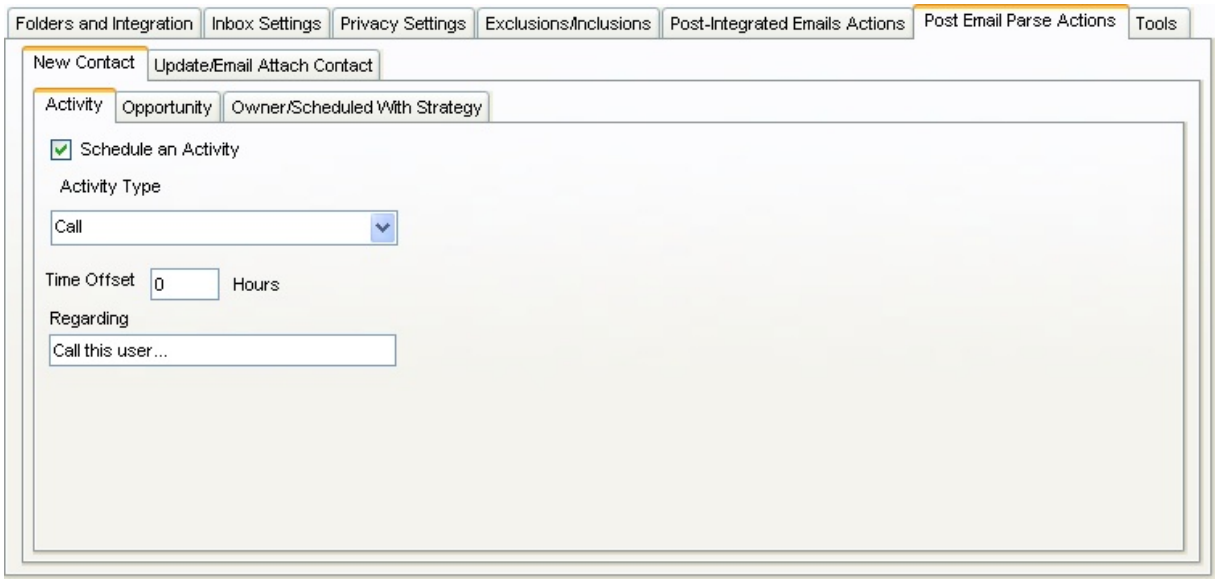
5.1.9.2.6 Post Email Parsed Actions



The Post Email Parsed Actions settings is only active for Web Form parsing. It allows you to schedule items to specific users in Act! after an email has been processed using the Parse Body Text (Web Form) option in the Inbox Settings. It instructs 123 Sync to execute a few actions after a form is received and a contact is either created or updated

New Contact Post Email Parsed Actions

- ***Activity***: Schedule an Act! Activity with the Contact and the Act! user as selected by the Owner/Scheduled WIth Strategy.
- ***Opportunity***: Schedule an Act! Opportunity with the Contact and the Act! user as selected by the Owner/Scheduled WIth Strategy.
- ***Owner/Scheduled With Strategy***. This setting defines with whom the action is scheduled with according to a set of programmable parameters
  - **Email Record Manager**: Assign the newly created Contact to the Email Record Manager setting on the Inbox Settings.
  - **Round Robin**. This assigns the record manager/scheduled with to an Act! user listed on the round robin list.

  - **By Contact Field Value**. Record Ownership and Scheduled With parameters are determined by a set of rules.

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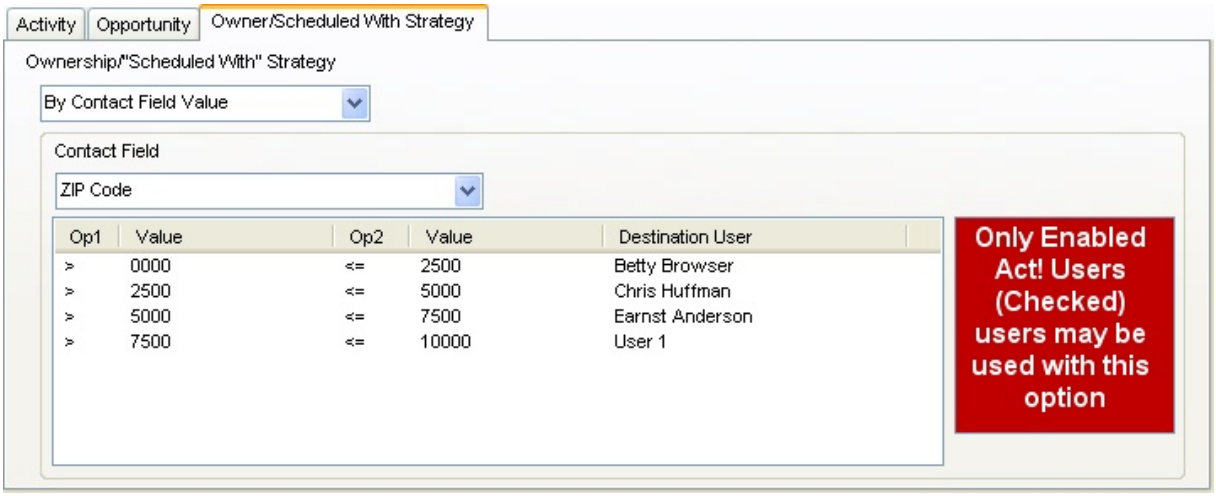
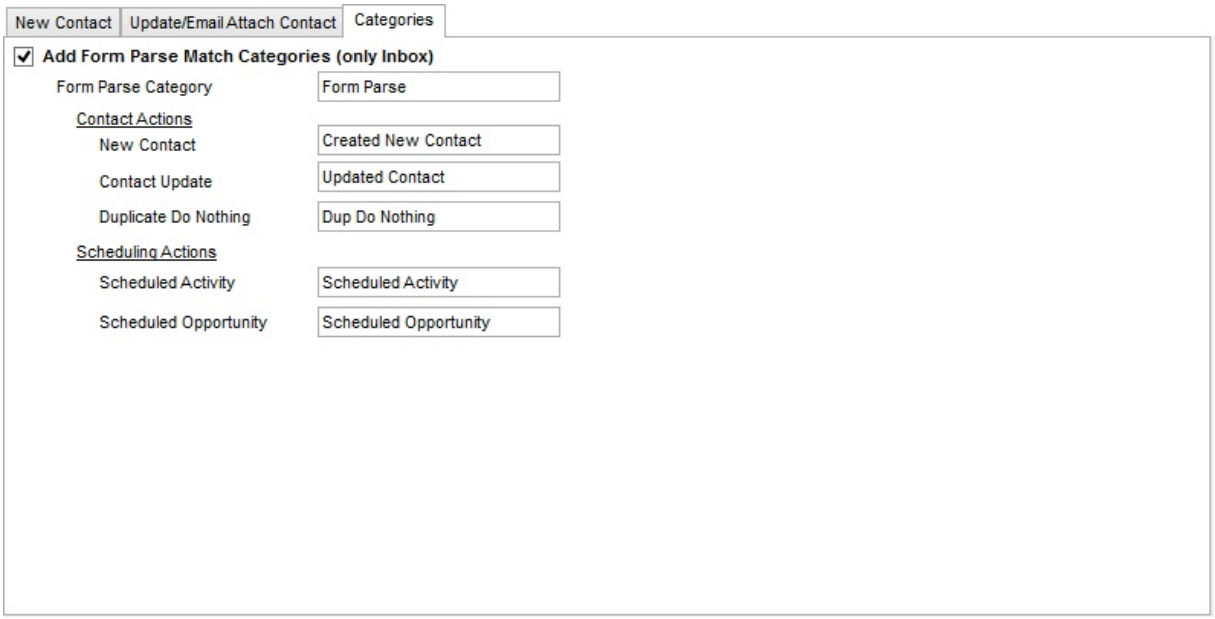


It is highly recommended that you go through the online video tutorials to learn how to setup these options.

Update Contact

When a contact is updated, you have the option to schedule an activity with the contact's Record Manager.



Categories Tagging

With Categories Tagging, you can add Categoty tags to the email bing parsed in Outlook/Exchange and that will indicate what actions 123 Sync took when the email was parsed and integrated to Act!.

Note: If the email already exists in Act! (which means it has already been parsed), the category is not modified.

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5.1.9.2.7 Tools

Here, you can list the emails and forcefully integrate them into Act!. No checking or filtering is applied here.

5.1.10 Notes

User Notes
This area is reserved for miscellaneous notes that are pertinent to the user.

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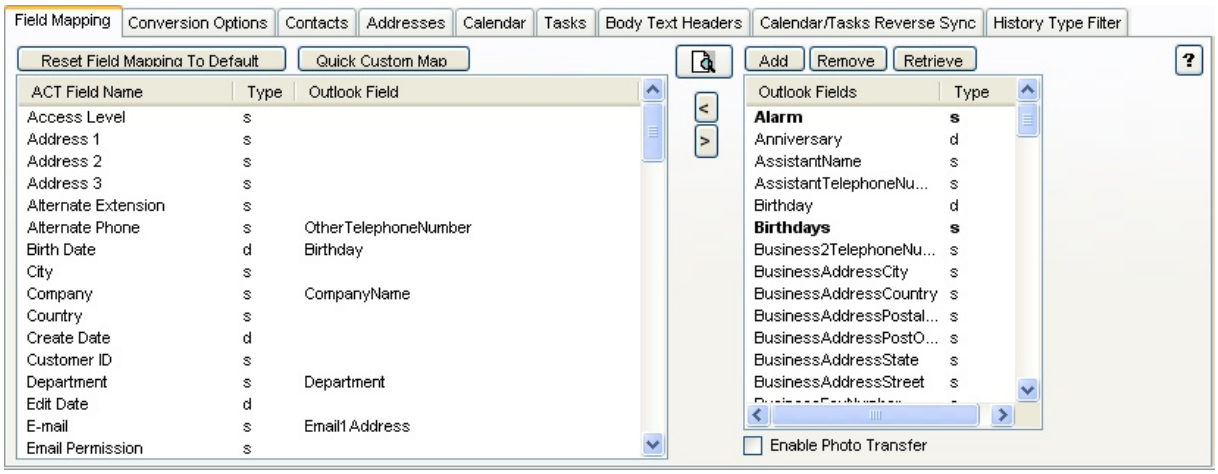
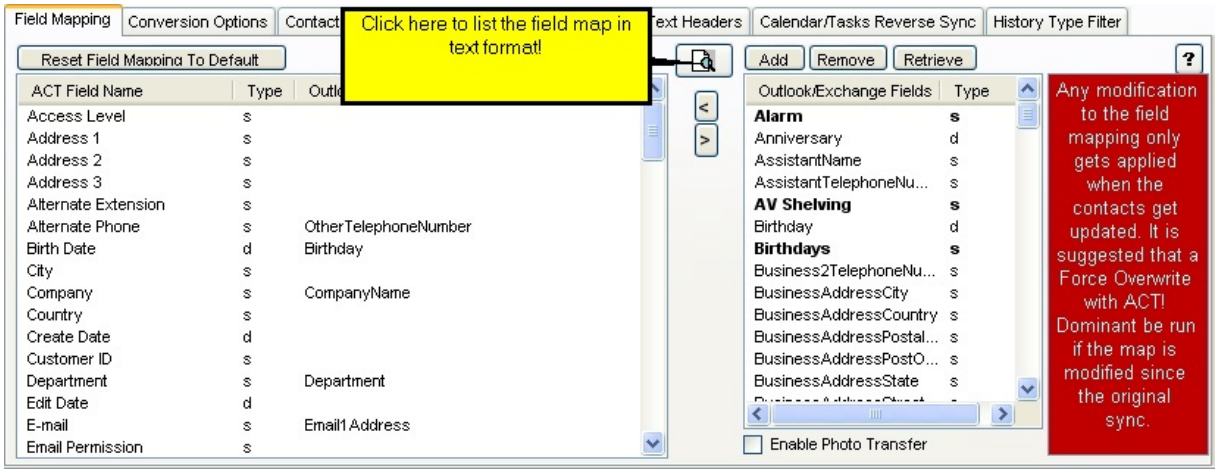
5.2 General Settings



The general settings are used for ALL conversions and apply to ALL users.

5.2.1 Field Mapping



Field Mapping

The field mapping option allows Act! fields to be matched to their Outlook/Exchange equivalent. A preliminary set of default matches is provided with the software. However, You can either match other Act! fields to their "standard" Outlook/Exchange fields or you can create your own Outlook/Exchange custom field (please refer to the section on Adding Outlook/Exchange Custom Fields for more information on this feature).

View our video tutorial on field mapping. Click here.

To map an Outlook/Exchange field to an Act! field

1. Select the Act! field you want to map to.

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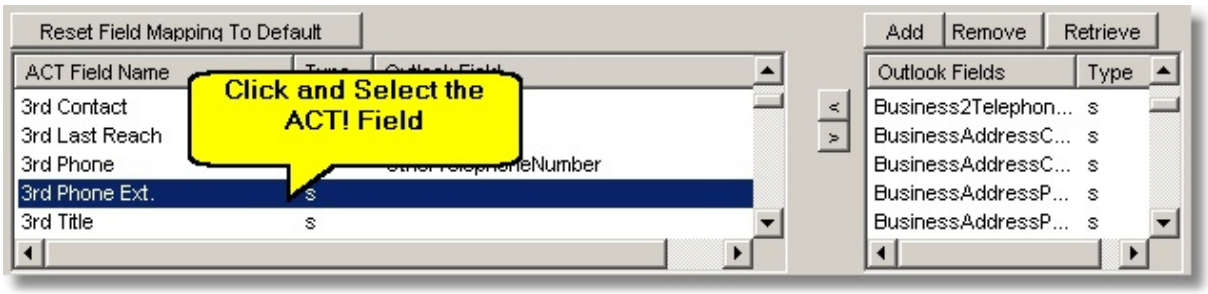
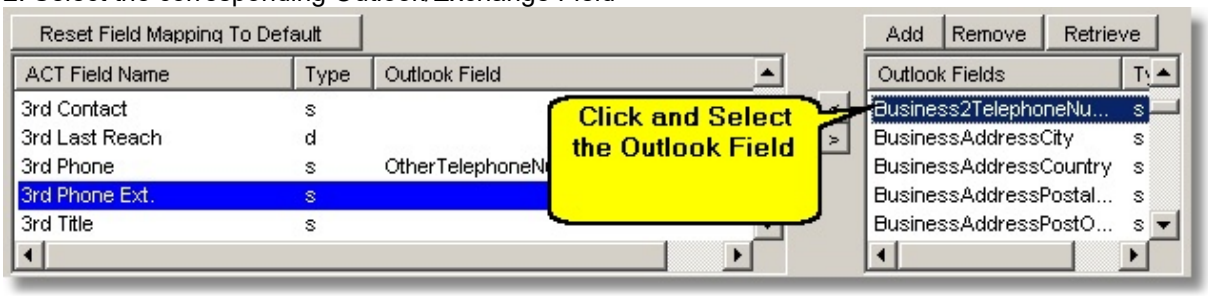
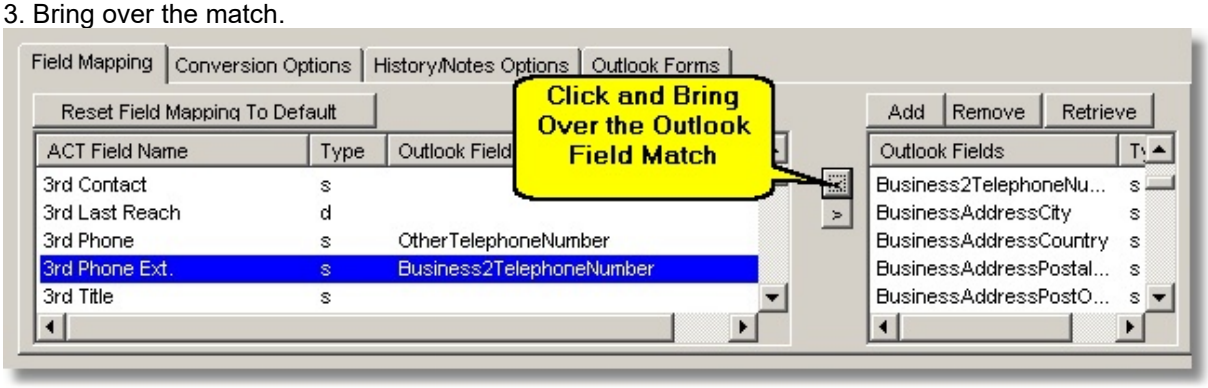


2. Select the corresponding Outlook/Exchange Field



3. Bring over the match.



5.2.1.1 Adding Outlook/Exchange User Defined Fields

Setting up the Outlook/Exchange User Defined Fields
All Outlook/Exchange User Defined Fields are displayed in Bold in the User defined field list.
123 Sync for Act! and Outlook/Exchange allows the user to create corresponding Outlook/Exchange User defined fields for Act! records.

- **Add Outlook/Exchange User Defined Field**: add a user defined field to Outlook/Exchange by simply typing in the input box. Duplicate fields will be ignored. Also, all fields are considered to be of type string.

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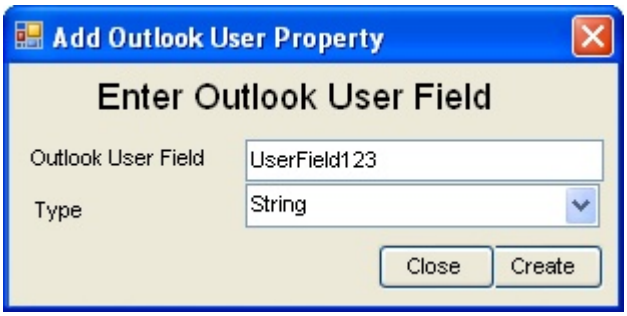
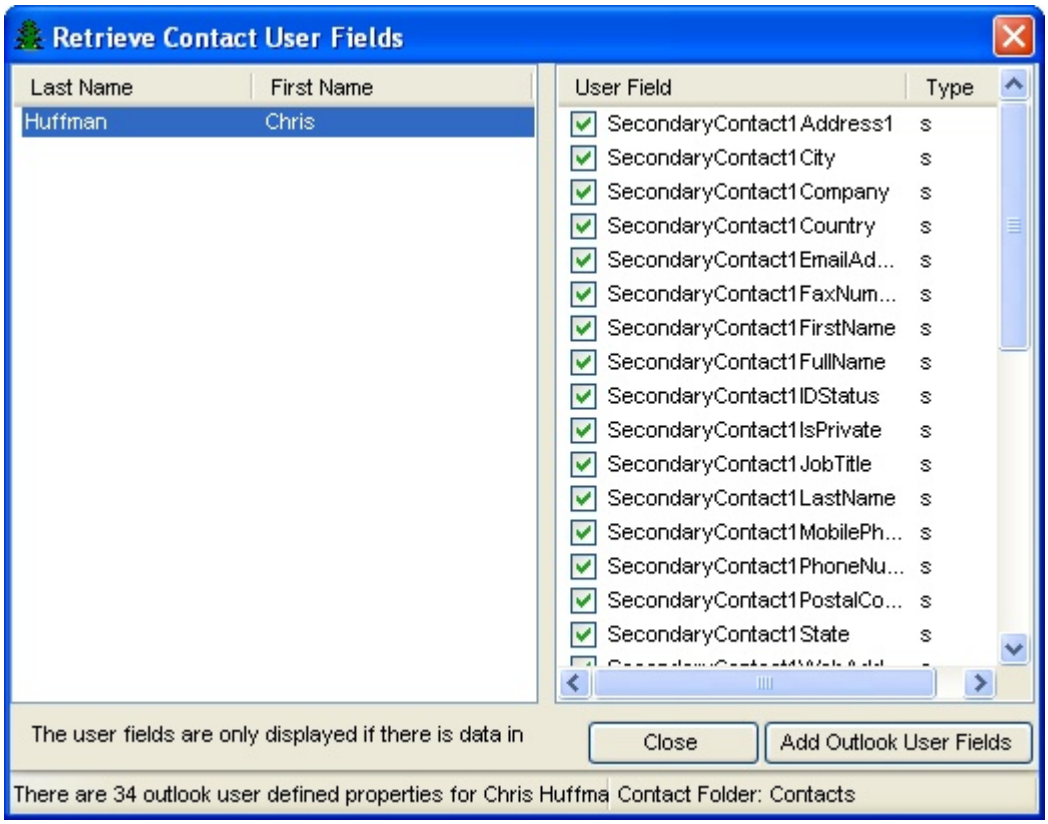


- **Remove Outlook/Exchange User Defined Field**: remove the selected Outlook/Exchange user defined property from the list of defined fields. You can only remove user defined fields.
- **Retrieve User Properties from Existing Contacts**. If you already have Outlook/Exchange contacts that have the user defined fields that you want, you can search Outlook/Exchange for these fields using this option. This option creates a screen that displays all the contacts in the Outlook/Exchange Contact Database and when you click on the contact, it will display the user fields defined for that contact.



By clicking on the contact, this screen displays the user defined fields found for the contact.
Note: if the user defined field has an empty value, Outlook/Exchange does not see it as a user defined field and it will not appear in the list!
To add these user fields to the list of user fields that you want to create, select the Add Outlook/Exchange User Fields button.

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5.2.1.2 Outlook/Exchange Standard Fields

Name	Description
Anniversary	Specifies the date of the contact's anniversary
AssistantName	The name of the contact's assistant
AssistantTelephoneNumber	The telephone number for the contact's assistant
BillingInformation	Contains a free-form string that can be used to hold the billing information associated with the item.
Birthday	The date of the contact's birthday
Body	A free-form string containing the body of the item.
Business2TelephoneNumber	The second business telephone number for the contact
BusinessAddress	The entire unparsed business address for the contact
BusinessAddressCity	The city part of the contact's business address
BusinessAddressCountry	The country part of the contact's business address
BusinessAddressPostalCode	The postal code part of the contact's business address
BusinessAddressPostOfficeBox	The Post Office Box of the contact's business address
BusinessAddressState	The state code for the contact's business address
BusinessAddressStreet	The street information for the contact's business address
BusinessFaxNumber	The contact's business fax number
BusinessHomePage	The URL of the home web page of the business
BusinessTelephoneNumber	The contact's business telephone number
CallbackTelephoneNumber	The telephone number at which the contact may be called back
CarTelephoneNumber	The contact's car telephone number
Categories	Specifies the categories that are assigned to the item.
Children	The names of the contact's children
Companies	A free form string containing the company names associated with the item
CompanyMainTelephoneNumber	The main telephone number for the contact's company
CompanyName	The name of the company that the contact works for
ComputerNetworkName	The name of the contact's computer network

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Email1AddressType	The address type ("SMTP") of the contact's first email address
Email2Address	The contact's second email address
Email2AddressType	The address type ("SMTP") of the contact's second email address
Email3Address	The contact's third email address
Email3AddressType	The address type ("SMTP") of the contact's third email address
FileAs	The keyword for the contact
FirstName	The contact's first name
FTPSite	The contact's FTP site entry
FullName	The contact's whole name
Gender	The gender of the contact
GovernmentIDNumber	The government ID number for the contact
Hobby	The contact's hobby
Home2TelephoneNumber	The second home telephone number for the contact
HomeAddress	The entire unparsed home address of the contact
HomeAddressCity	The city part of the home address
HomeAddressCountry	The country part of the home address
HomeAddressPostalCode	The postal code part of the home address
HomeAddressPostOfficeBox	The Post Office Box of the home address
HomeAddressState	The state code for the home address
HomeAddressStreet	The street information for the home address
HomeFaxNumber	The contact's home fax number
HomeTelephoneNumber	The home telephone number of the contact
Importance	Specifies the importance of the contact (0=low, 1=medium, 2=high)
Initials	The initials of the contact
InternetFreeBusyAddress	The URL for the contact's free/busy information
ISDNNumber	The contact's ISDN number
JobTitle	The contact's job title
Journal	Specifies whether all the transactions are to be entered into the journal
Language	The language for the contact
LastName	Specifies the contact's last name

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MailingAddress	The entire unparsed mailing address of the contact
MailingAddressCity	The city part of the mailing address
MailingAddressCountry	The country part of the mailing address
MailingAddressPostalCode	The postal code part of the mailing address
MailingAddressPostOfficeBox	The Post Office Box of the mailing address
MailingAddressState	The state code for the mailing address
MailingAddressStreet	The street information for the mailing address
ManagerName	The name of the manager of the contact
MiddleName	The middle name of the contact
Mileage	Mileage record for the contact
MobileTelephoneNumber	The contact mobile phone number
NetMeetingAlias	The contact's ID or alias for Net Meetings
NetMeetingServer	The name of the server to host the Net Meeting
NickName	The contact's nickname
OfficeLocation	The office location information for the contact
OrganizationalIDNumber	The organizational ID number for the contact
OtherAddress	The entire, unparsed for of another address for the contact
OtherAddressCity	The city part of the other address
OtherAddressCountry	The country part of the other address
OtherAddressPostalCode	The postal code part of the other address
OtherAddressPostOfficeBox	The Post Office Box part of the other address
OtherAddressState	The state code for the other address
OtherAddressStreet	The street information for the other address
OtherFaxNumber	Another Fax Number for the contact
OtherTelephoneNumber	Another Telephone Number for the contact.
PagerNumber	The contact's pager number
PersonalHomePage	The URL for the contact's personal home page
PrimaryTelephoneNumber	The primary phone number for the contact
Profession	The profession for the contact
RadioTelephoneNumber	The radio telephone number of the contact

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ReferredBy	The name of the person that referred this contact to you.
Sensitivity	Specifies the level of sensitivity for the contact (0=normal, 1=personal, 2=private, 3=confidential)
Spouse	The name of the contact's spouse
Subject	Contains the subject of the item
Suffix	The contact's suffix
TelexNumber	The contact's telex number
Title	The contact's Title
TTYTDDTelephoneNumber	The TTY/TDD telephone number for the contact
User1	The first MS Schedule+ user for the contact
User2	The second MS Schedule+ user for the contact
User3	The third MS Schedule+ user for the contact
User4	The fourth MS Schedule+ user for the contact
UserCertificate	The authentication certificate for the contact
WebPage	The URL for the contact's web page
YomiCompanyName	The Japanese phonetic rendering of the company name
YomiFirstName	The Japanese phonetic rendering of the contact's first name
YomiLastName	The Japanese phonetic rendering of the contact's last name

5.2.1.3 Outlook/Exchange and ACT! Fields

All Outlook/Exchange Fields that are write/read are available to be overwritten. Fields that are Read-Only in Outlook/Exchange cannot be overwritten by 123 Sync for Act! and Outlook/Exchange. The fields below cannot be overwritten by the conversion.

Fields that cannot be overwritten in Outlook/Exchange

Actions Application Class CompanyLastFirstNoSpace CompanyLastFirstSpaceOnly ConversationIndex ConversationTopic CreationTime	FormDescription FullNameAndCompany GetInspector LastFirstAndSuffix LastFirstNoSpace LastFirstNoSpaceCompany LastFirstSpaceOnly	LastFirstSpaceOnlyCompany LastModificationTime LastNameAndFirstName Links OutlookInternalVersion OutlookVersion Parent Saved Session Size

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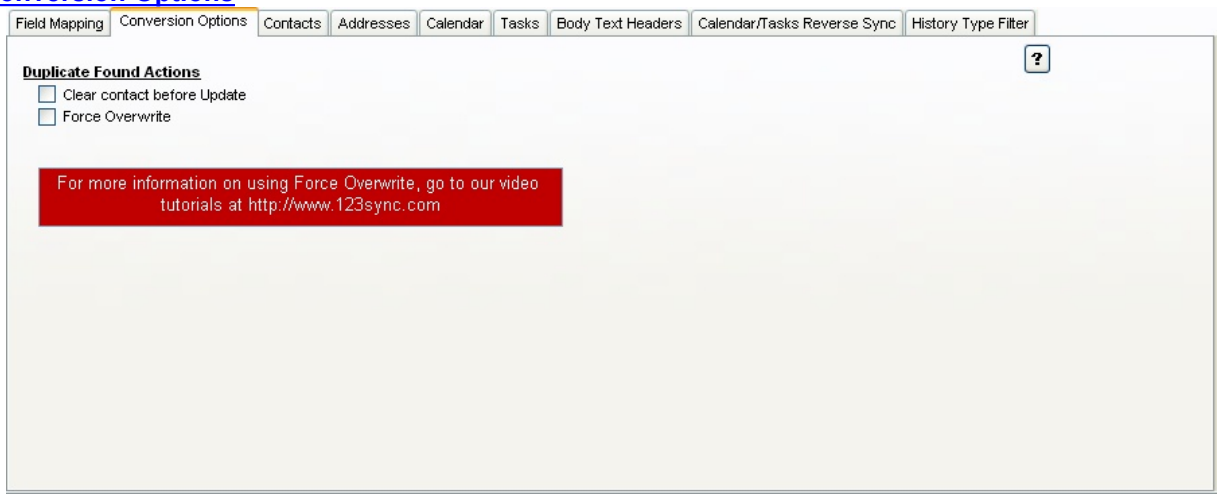
5.2.2 Conversion Options

Conversion Options

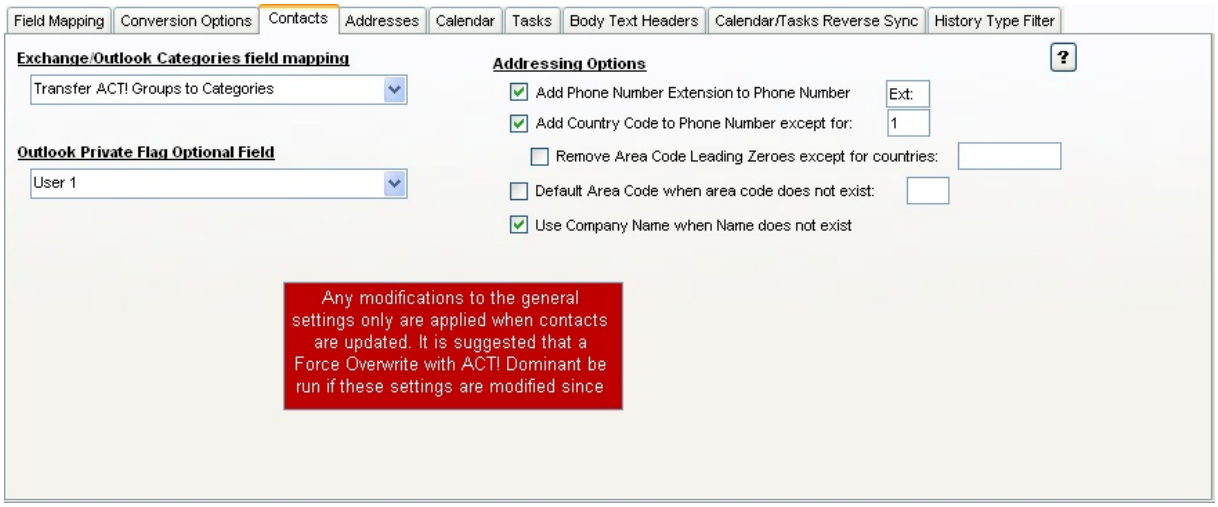


Duplicate Found Actions

Clear Contact Before Update. When this flag is set, all the data in the contact is cleared *before* adding the information to the Outlook/Exchange Contact.

Force Overwrite of Contacts. When set, all the contacts are forcefully overwritten without regard to update dates of the contacts in Act!.

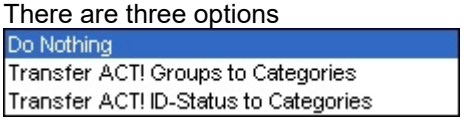
5.2.3 Contacts



ACT Fields To Outlook/Exchange Contact Categories

Outlook/Exchange Categories Conversion Options

There are three options



Do Nothing - No processing is done re. Outlook/Exchange Categories

Transfer Act! Groups to Categories - Act! Groups are listed and converted into

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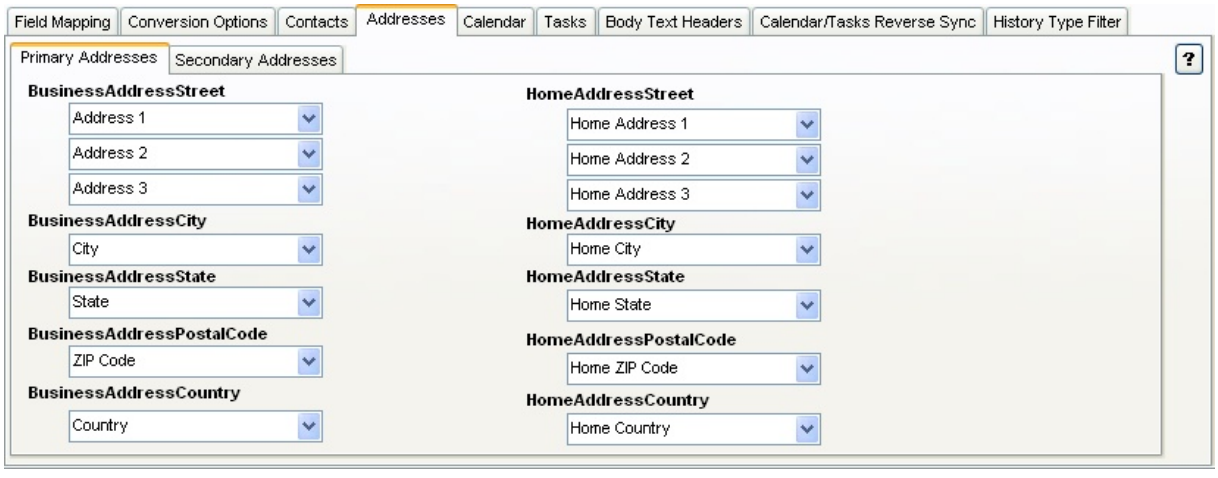
Outlook/Exchange Categories. Subgroups are linked via a full stop ".". For example, Group.Subgroup.
Transfer Act! ID-Status to Categories - Act! ID/Status is put into the Outlook/Exchange Categories Field.

Outlook Private Flag Optional Field
When enabled, 123 Sync will scan the selected field for the word **Private** . If that word exists in the field, the contact in Act! is rendered Private.

- Add phone number extension to Phone number. When set, this option adds the phone number extension to the end of the phone number. For example, Outlook/Exchange only provides 1 field to add a phone number to. Hence, this feature will take the standard phone fields with extensions and put merge them to make one field in Outlook/Exchange.
- Add Phone # Country Code. By default, the country code is not added to the Outlook/Exchange phone number. However, if you so wish, enable this option and the country code in the format of +CC (like +44) is added to each Outlook/Exchange phone number that has a country code.
  Ignore Country Code: If a number exists in this box, country codes that match that number are not brought over to Outlook/Exchange. This is usefully since most of the time you want to only bring over "foreign" country codes but not your own.
- Remove Area Code Leading Zeroes except for countries. This option (implemented at the request of our European customers) when enabled, removes any leading zeroes in the area code before converting them to Outlook/Exchange. If you have any area code that you do not want the zeroes to be removed, add the country code into the text box and separate each country code by a "," comma. From what we understand, this option is useful with Cell Phones since it enables the phone number to be called directly from the phone.
- Default Area Code when Area Code does not exist. Enabling this option and entering the number in the box instructs the software to add this area code to phone numbers that do not have an area code (also, feature implemented at the request of our friends in Europe).
- Use Company Name when Name does not exist. Outlook/Exchange requires a contact name in order for the links to function properly. This option instructs 123 Sync for Act! and Outlook/Exchange to replace the company name in the name field of FileAs so that the contact get's saved properly and links to the contact work well. If this option is not set, the user will be queried for every instance of this problem.

5.2.4 Addresses



The Addresses tab is where the Act! Addresses are mapped to Outlook/Exchange. By default, Act! only has Business and Home addresses.

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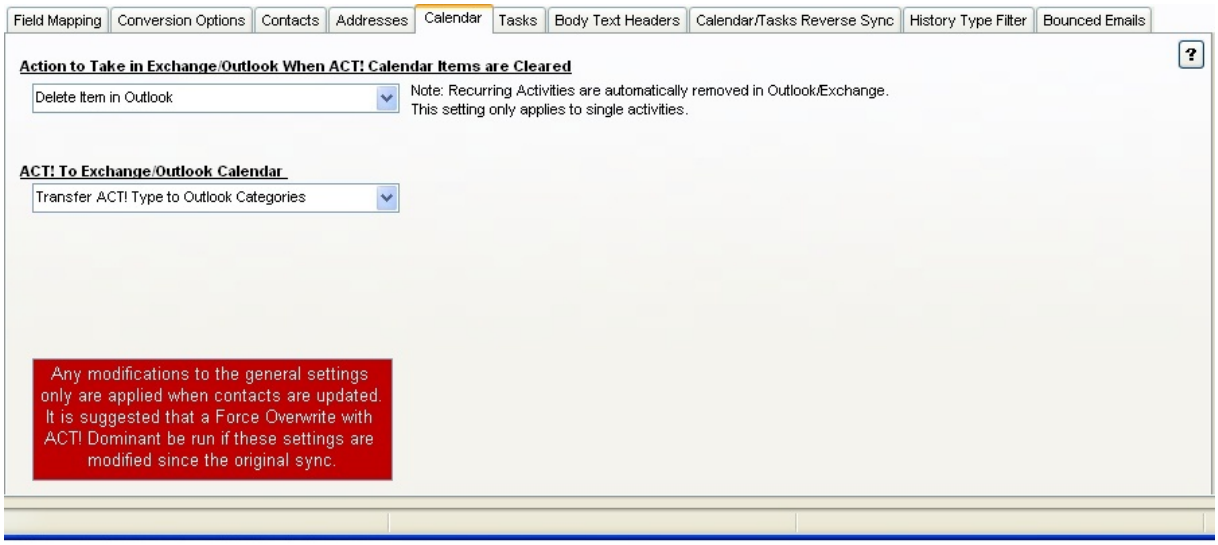
However, Outlook/Exchange provides 2 additional addresses, namely, Mailing Address and Other address. Here you can map these Act! addresses
to the Outlook/Exchange equivalent. By default, there addresses are already mapped and should only be modified if you modify the address storage in Act!. Otherwise the mapping should suffice. Refer to the video tutorials for an online explanation on how to change and remap these addresses.

5.2.5 Calendar



Action to Take in Outlook/Exchange when Act! Calendar Items are Cleared

- ***Delete Item in Outlook/Exchange*** - When a calendar item is cleared in Act!, it is then deleted from Outlook/Exchange
- ***Add Cleared Tag in Outlook/Exchange*** - This will only add the cleared tag to the Outlook/Exchange calendar subject line i.e. (Cleared) :: Appointment

NOTE: Activity "Clear" Tagging is not supported for Recurring Events. If the recurring event in Act! is cleared/erased, it will be erased on Outlook.

Act! To Exchange/Outlook Calendar

- **Transfer Act! Type to Outlook Categories**. When selected, the Act! Type is deposited in the Outlook Calendar Categories field. This enables users to match custom Act! Activities to Outlook Categories in the Categories list. There are a couple of sync mechanisms not currently supported (due to bugs in Act! and in Outlook):
  - In Act!. You cannot change the Category on an item in Outlook that has already been synched. That will not be reflected in Act!. Only when you create new items in Act! from Outlook, will the correct activity type be matched. Updating from Outlook->Act! does not currently work.
  - In Outlook. If you change the activity type in Act!, the Outlook Category will change. However, the color scheme does not (Outlook bug).

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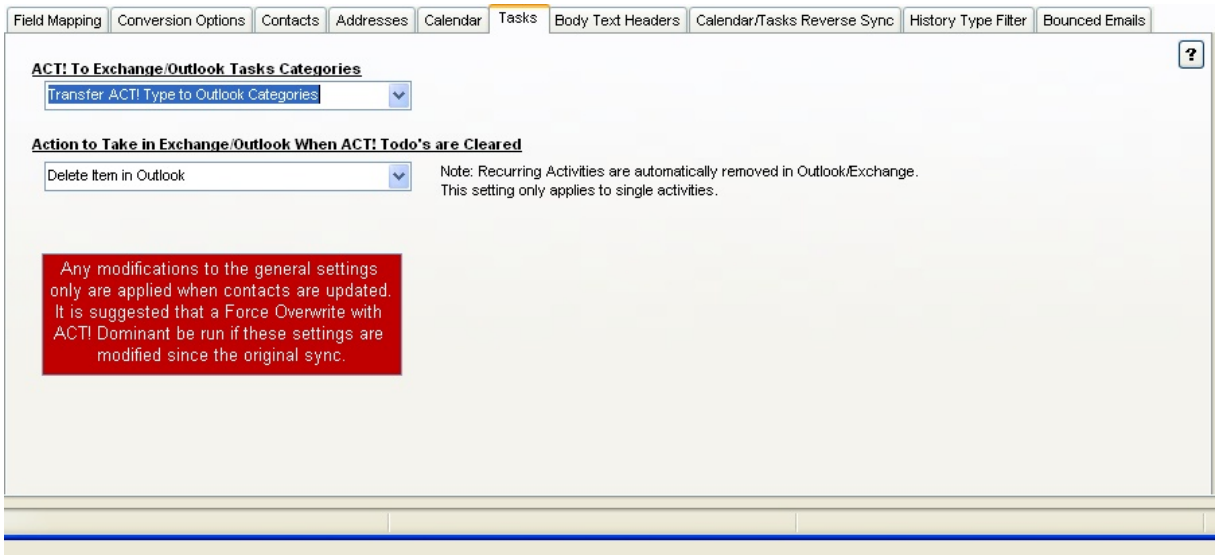
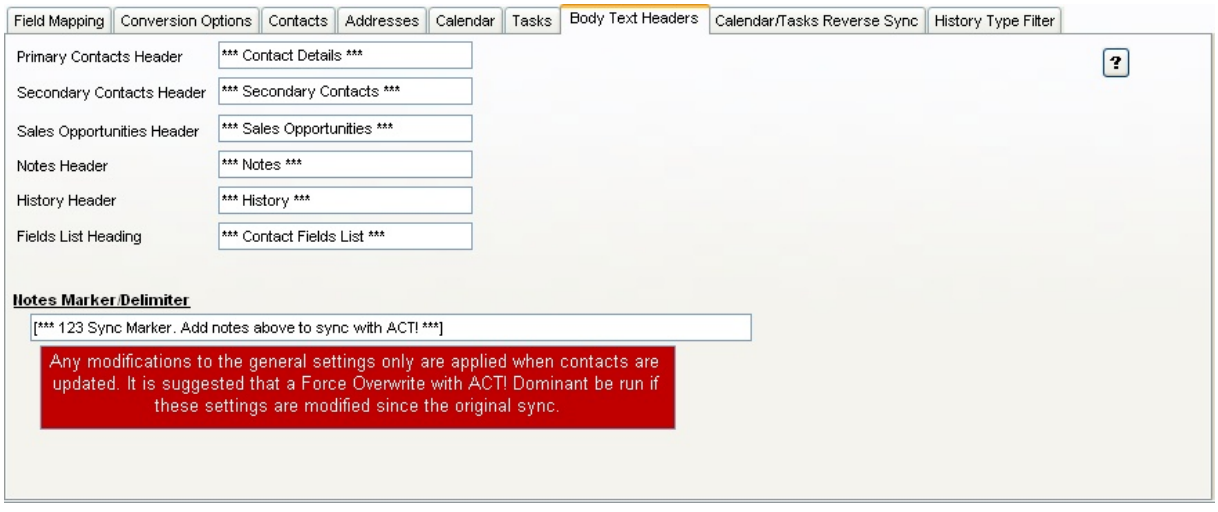
5.2.6 Tasks



Act! To Exchange/Outlook Tasks Categories

- **Transfer Act! Type to Outlook Categories**. When selected, the Act! Type is deposited in the Outlook Task Categories field. This enables users to match custom Act! Activities to Outlook Categories in the Categories list. There are a couple of sync mechanisms not currently supported (due to bugs in Act! and in Outlook):
  - In Act!. You cannot change the Category on an item in Outlook that has already been synched. That will not be reflected in Act!. Only when you create new items in Act! from Outlook, will the correct activity type be matched.(Act! Bug). Updating from Outlook->Act! does not currently work.
  - In Outlook. If you change the activity type in Act!, the Outlook Category will change. However, the color scheme does not (Outlook bug). We'll find a way on our next release to enable this.

5.2.7 Body Text Headers



Body Text Headers

These are the headers that appear when you convert into the body text area. They are made editable so that they can be edited to different languages.

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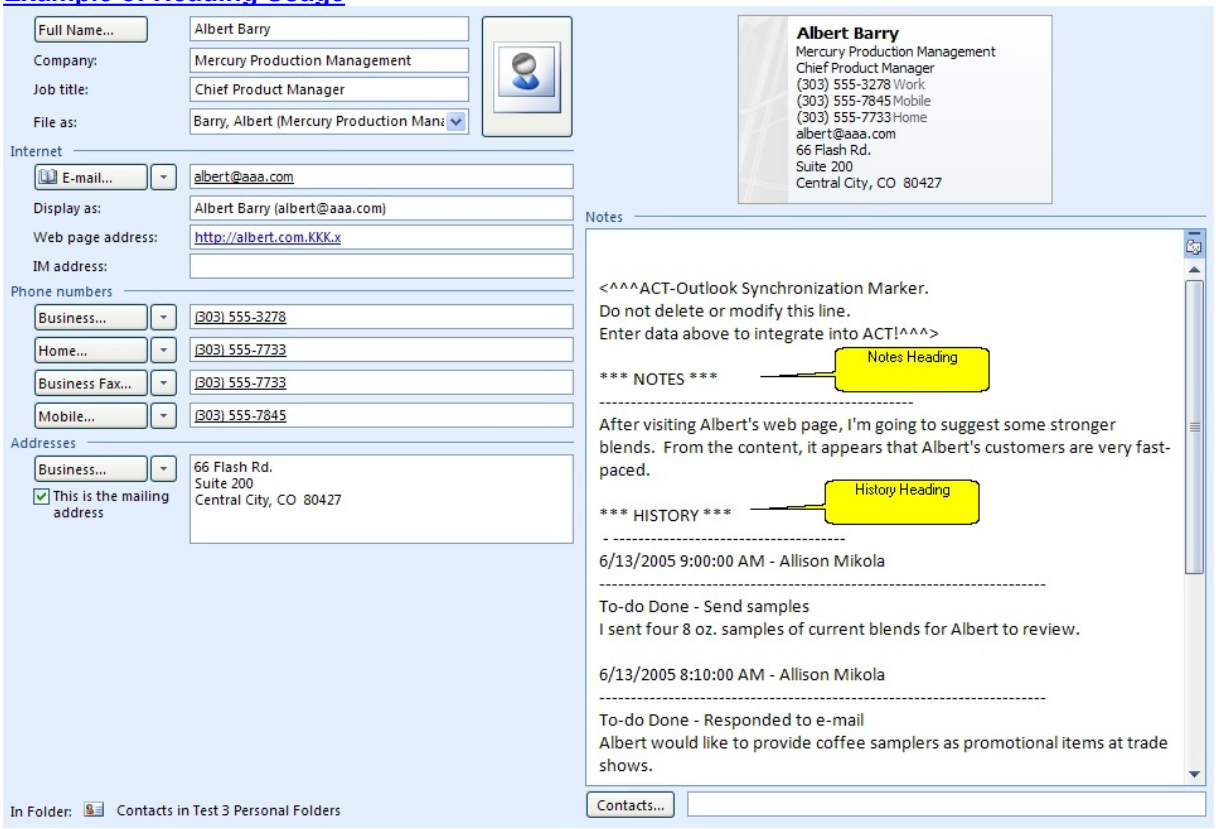
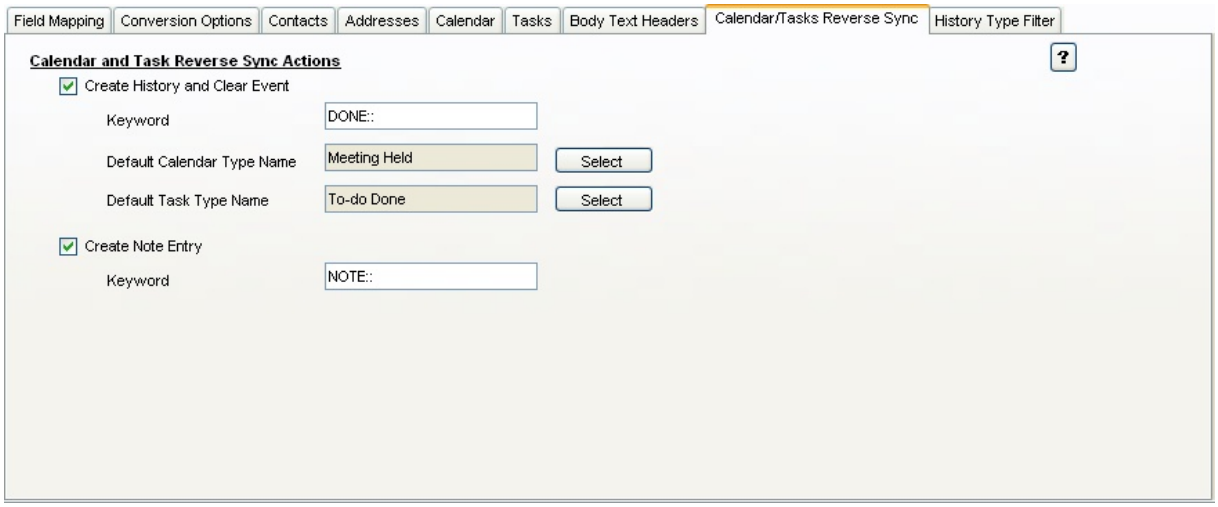
Notes Marker/Delimiter

This text delimiter is added to the beginning of the body text and any text that is entered above the marker, it is transferred as a note (in the case of contacts) or as the Activity Details when text is added to calendar/tasks.

Example of Heading Usage



5.2.8 Calendar/Tasks Reverse Sync



This general settings tab allows users to edit/change the keywords 123 Sync uses to perform reverse synchronization actions from Calendar and Tasks items:

- ***Create History and Clear Event***. Here you can enter the keyword at the beginning of a

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calendar/task in Outlook/Exchange and 123 Sync clears the item in Act! and creates a history of it. To enter the text of the history regarding field, enter the note in parenthesis i.e. DONE::[This is the regarding for this calendar item]

- ***Create Note Entry***. In this option, you get to create a note in Act! from a calendar item. For example, if you enter the word NOTE::[This is an activity note], a note gets created in Act! for the contact with the regarding field "This is an activity note".

5.2.9 History Type Filter

The History Types list is a list of all the history types in Act!. This list is used to determine whether a particular history type should be added to the generation of the history for the Body Text in Outlook/Exchange. By default all history types are enabled. However, you can limit which types are brought over and unclutter the history listing in the Body Text.

5.2.10 Email

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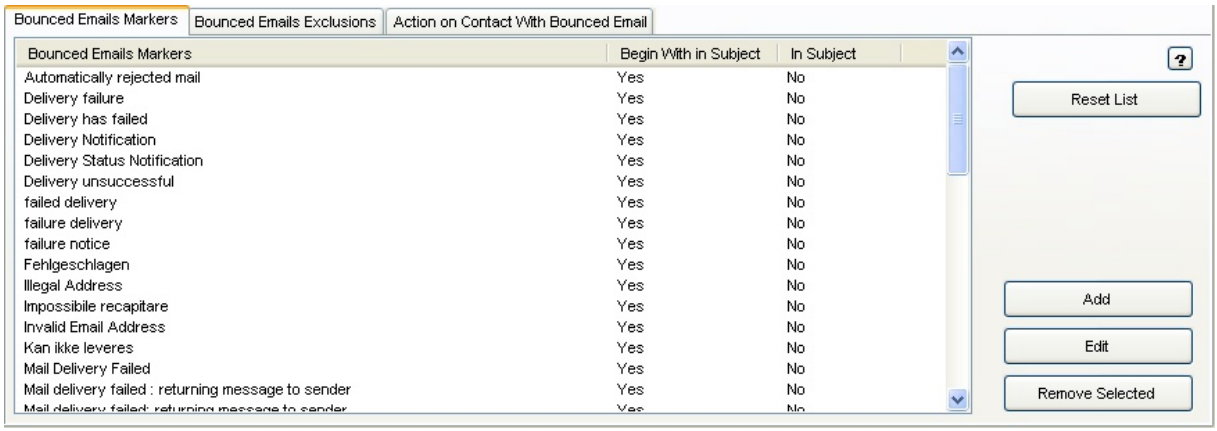
5.2.10.1 Bounced Emails Detective



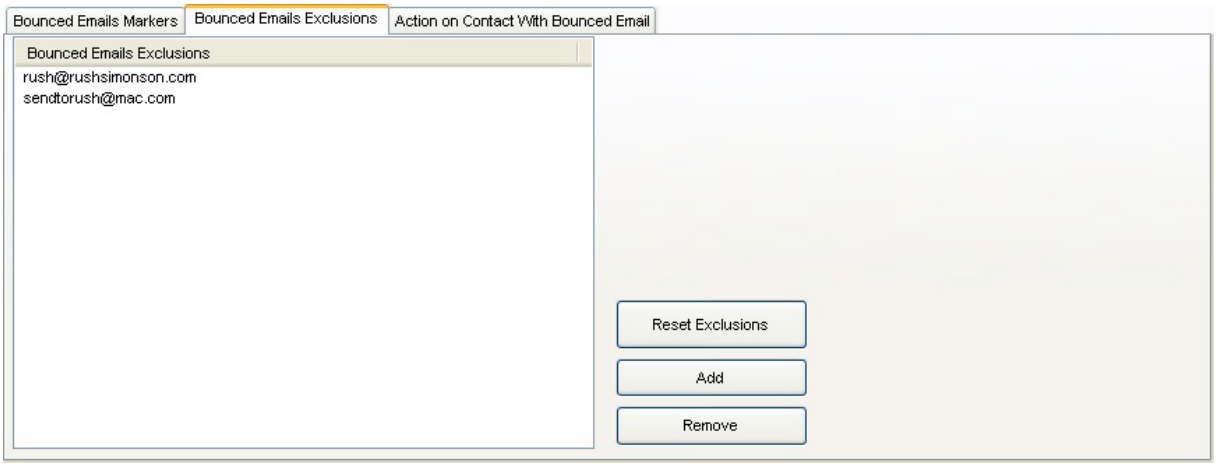
The bounced emails identifiers are indicators for 123 Sync to search the subject line on an email in the Inbox for a Bounced Emails. There are two strategies that can be used:

1. Simple match the beginning of the Subject line to the bounced email ID (Begin with in Subject)
2. To match the identifier to anywhere in the Subject line (in Subject)

Bounced Emails Exclusions

The exclusions are the email addresses you want 123 Sync to ignore when scanning the bounced emails. These addresses should be:

- All email addresses used by Act! users in the database (set by default)
- Any email address used by your marketing dept (or mass mail dept). These have to be entered manually
- In general, any email address you want 123 Sync to ignore as a bounced email address.



Action on Contact With Bounced Email

Here you can setup 123 Sync to set a particular field in the Act! Contact to a value that you can later search.

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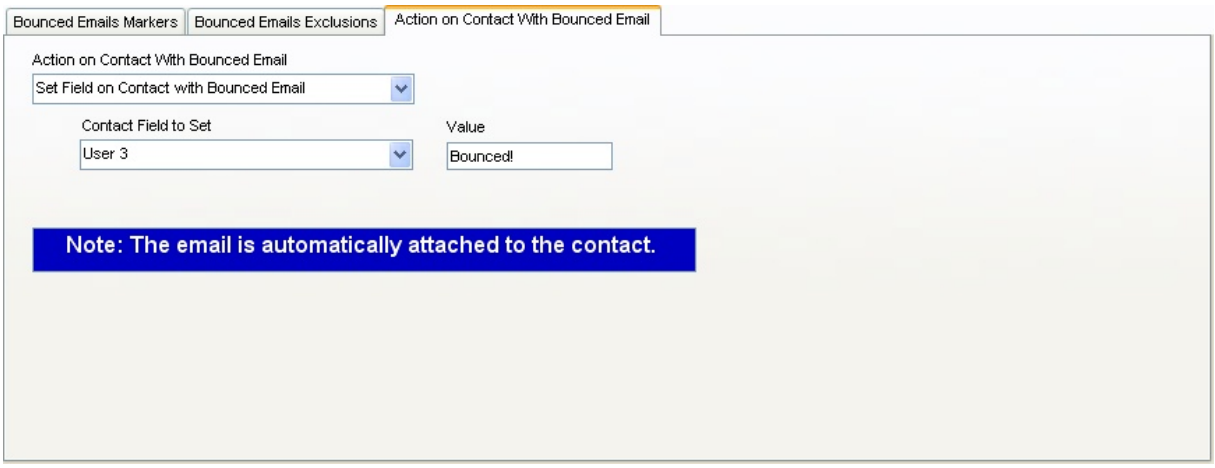
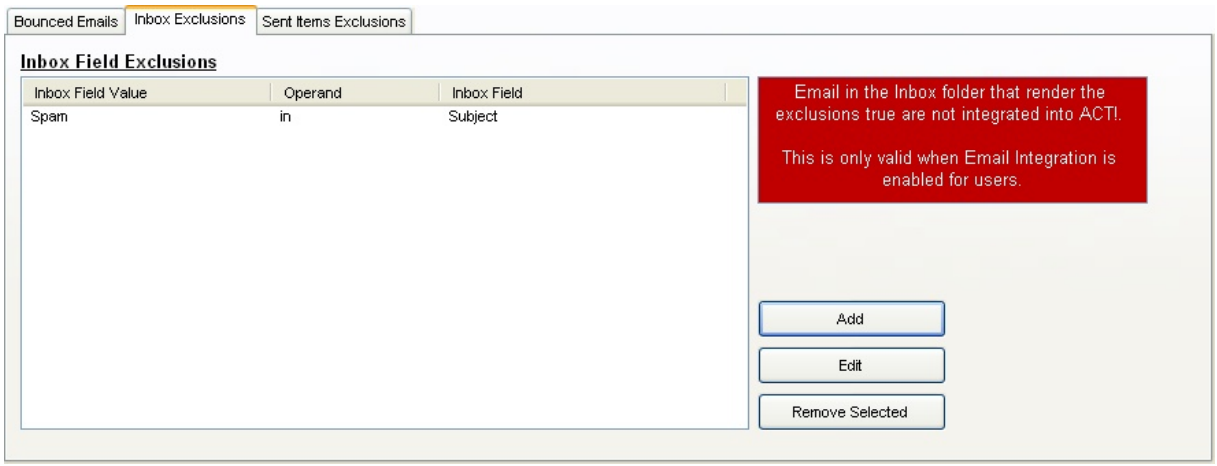
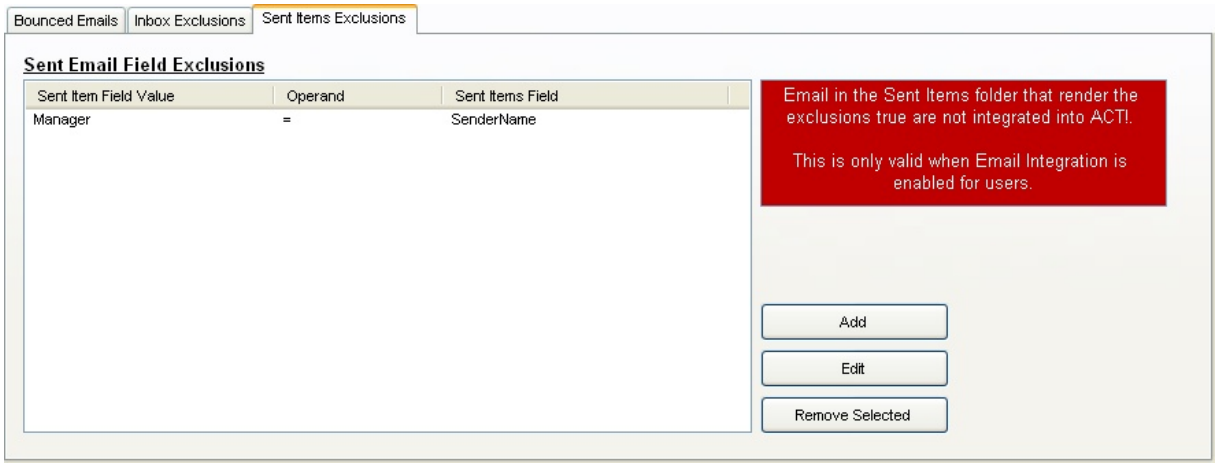


5.2.10.2 Inbox Exclusions



The Email Exclusions setup allows users to add general rules that apply to everyone receiving and integrating emails.

5.2.10.3 Sent Items Exclusions



The Sent Items Exclusions allows users to setup generic rules that apply to all users on what emails

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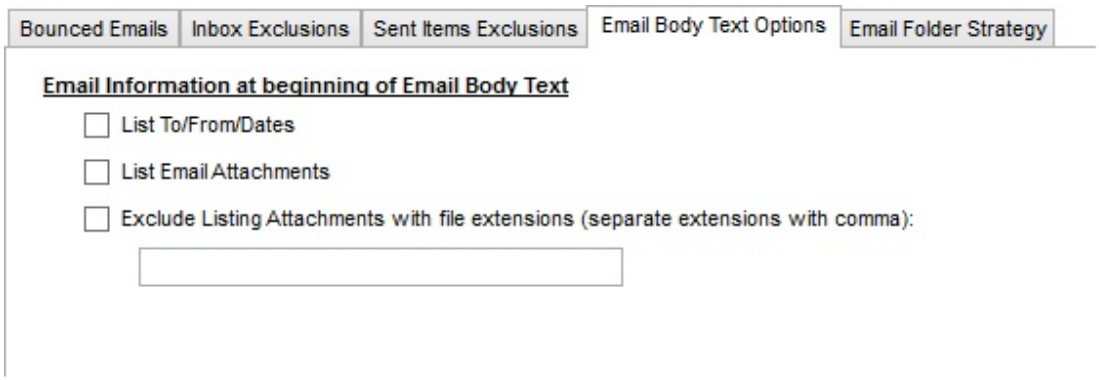
should be integrated into Act!.

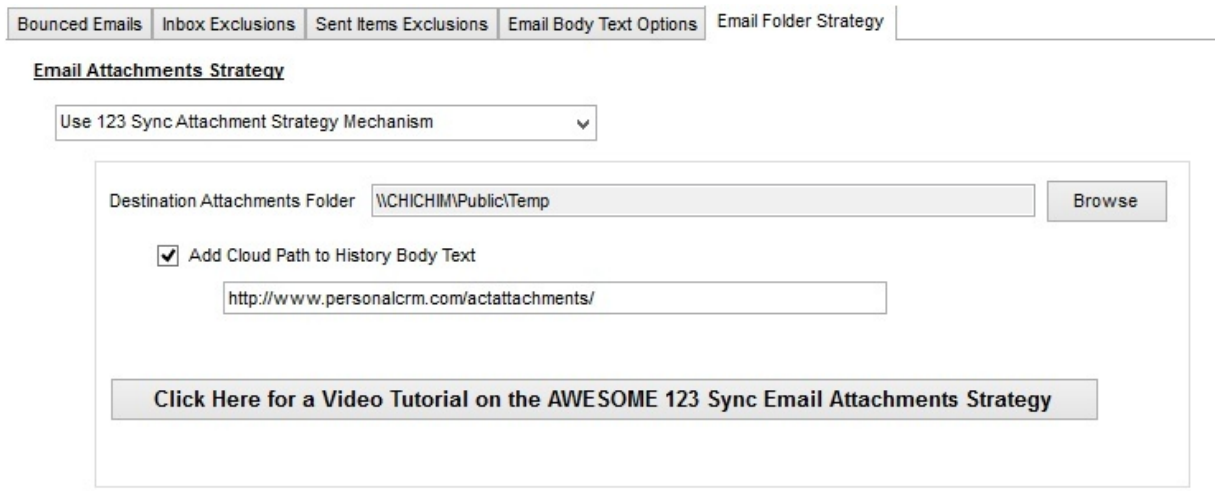
5.2.10.4 Email Body Text Options



These options enable the addition of informatioin at the beginning of the email body text in Act!:

- List To/From Dates. The sent and received dates of the email is listed.
- LIst Email Attachments: Any attachment included in the email.
- Exclude Listing Attachments: a list of attachment extensions, separated by a comma, that should not be listed.

5.2.10.5 Email Folder Strategy



The Email Folder Strategy allows the user to setup a hiearchical mechanism to store the email in Act!. Instead of adding email attachments directly to Act's Attachment folder, 123 Sync adds shortcuts that point to the destination where the email is saved. In addition, if the email is stored on a cloud server, you can opt to add a cloud link at the beginning of the body text of the email.

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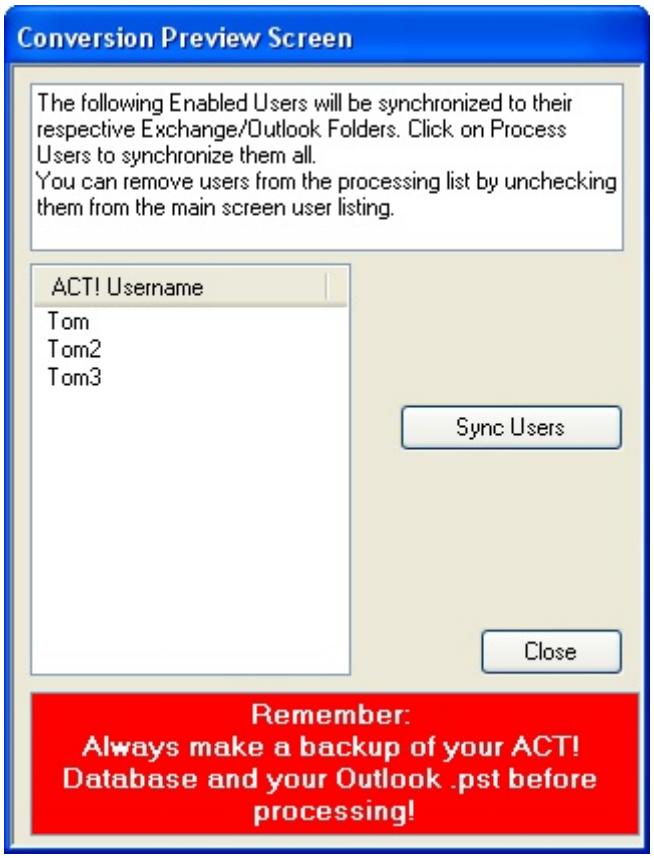
5.3 Synchronization Preview



The contact preview screen allows you to see what enabled (users that have been checked on the main screen) users you are going to convert.

Auto Sync Option.
When you sync from Act! to Outlook/Exchange, 123 Sync displays a set of actions that it will take and you need to press the synchronize button in order for these actions to occur. Enabling the Auto Sync is the same as pressing the sync button and you do not get the request for synchronization as shown below:

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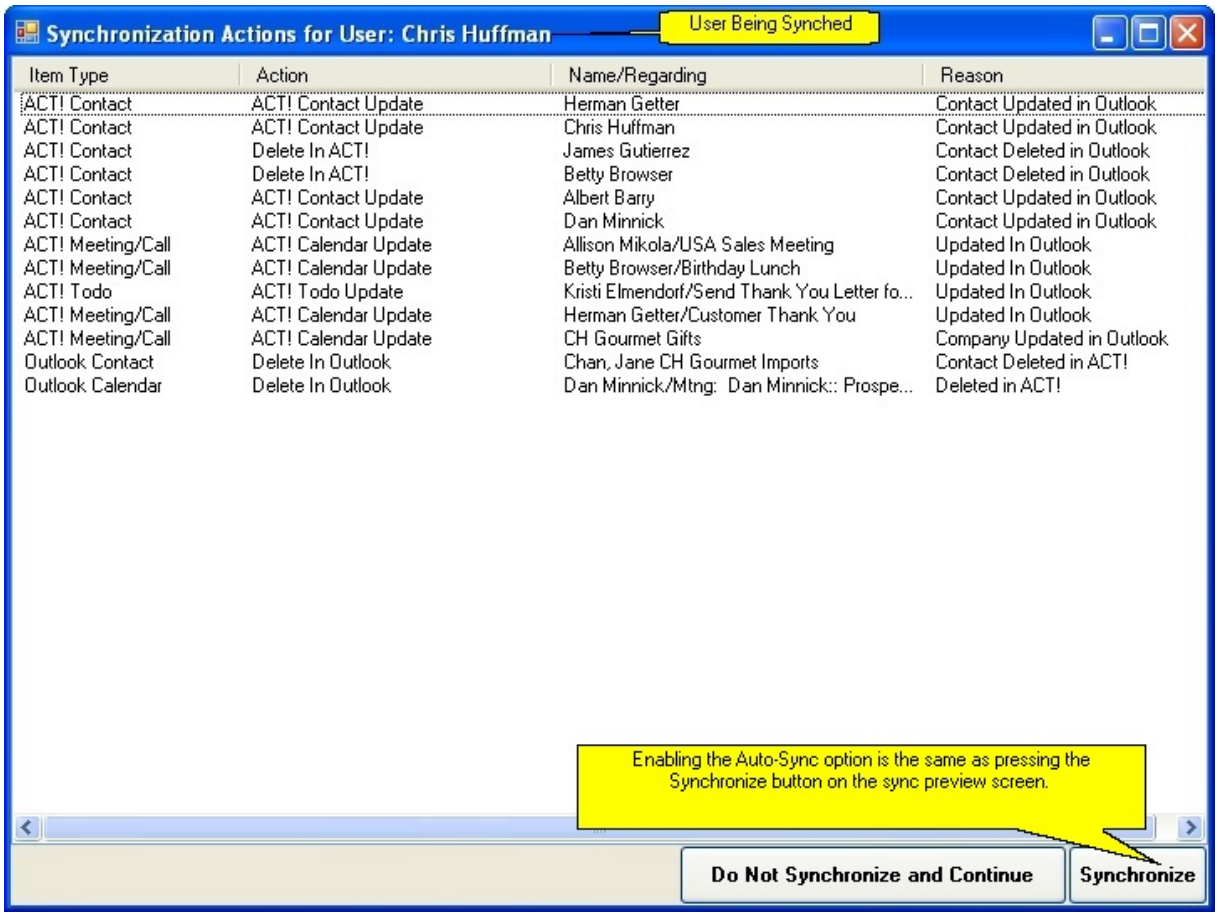

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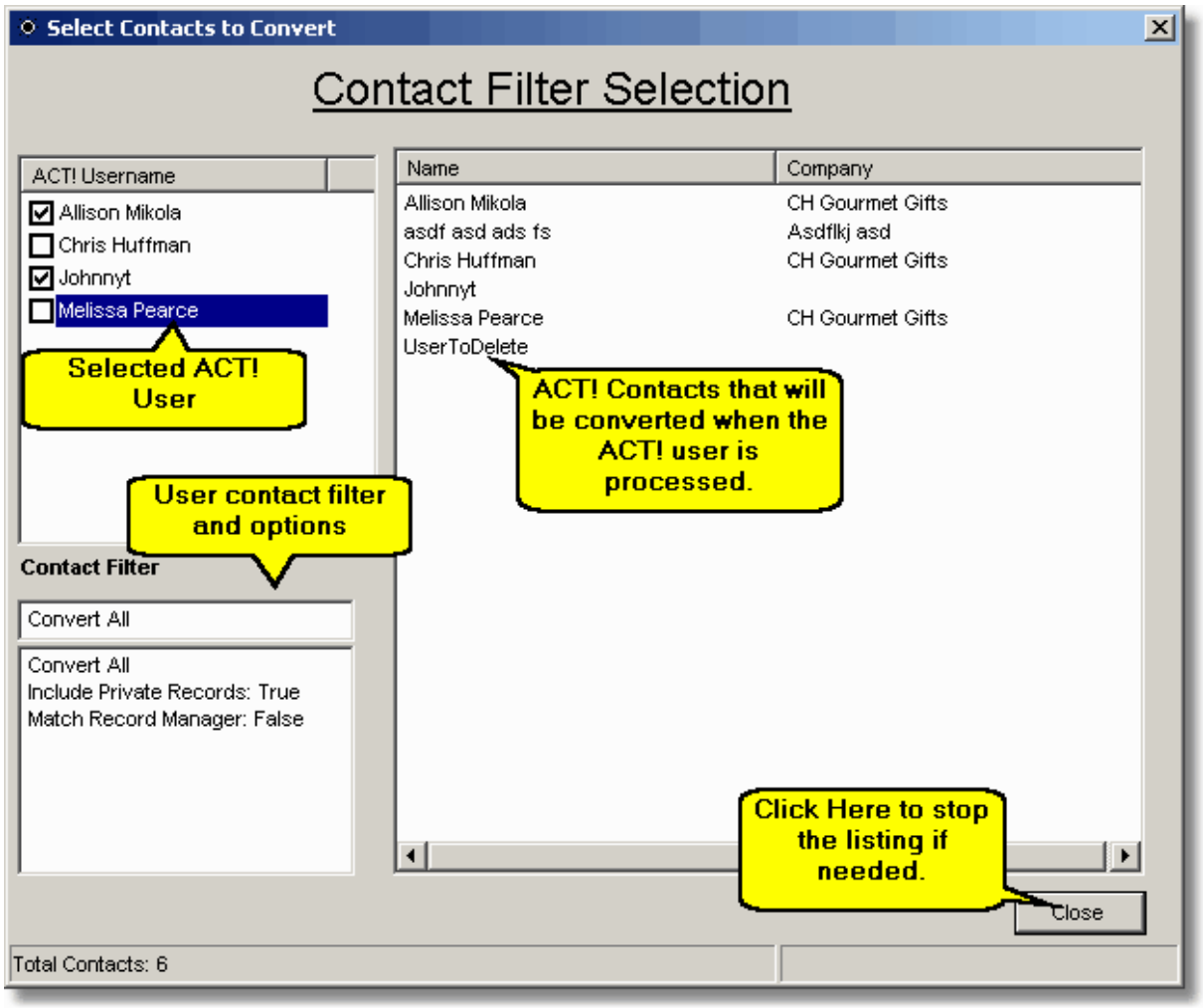
5.4 Contact Selection Viewing

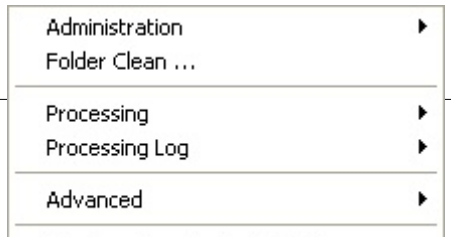


The contact selection viewing form comes up when you press the View button on the main screen. It's objective is to provide a listing of the contacts that will be selected for conversion once the Process Users button in the preview screen is pressed.

Dealing with Large Databases
The objective of the Contact Selection Viewing is to provide users with a list of the contacts that will be converted for a particular user. If you have Convert All enabled, all the contacts will be listed on the database. However, if you have over 20000 contacts in the database, the listing will take awhile. You can press on the Stop button to stop the listing and still see the front end of the contact list.

Contact List with no contact name and company name
In many Act! databases, there are a lot of empty records and these records will display at the beginning of the list. Scroll down the list and you'll see the real contact records.

5.5 Tools Menu



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5.5.1 Administration

Change Administration Login

This from is used to change the administration login details. Remember, whatever username you change the login to be, that username has to have privilege to access the details required by the software. It is recommended that you use a login profile with administration privileges.

Add User Licenses

This option allows you to add user licenses to your current set of users.

Interface Password

Select this option if you want to set a password on the 123 Synchronizer interface. When set, non-authorized users are not able to change the 123 Sync settings.

Copy Selected User Settings

This options allows a user to copy a users's settings to all the users. It copies everything except user-specific folder settings.

5.5.2 Folder Clean

Warning: Folder Clean is a very powerful application and all actions are NON-REVERSIBLE. Make a backup of your Outlook/Exchange data BEFORE you use this tool!

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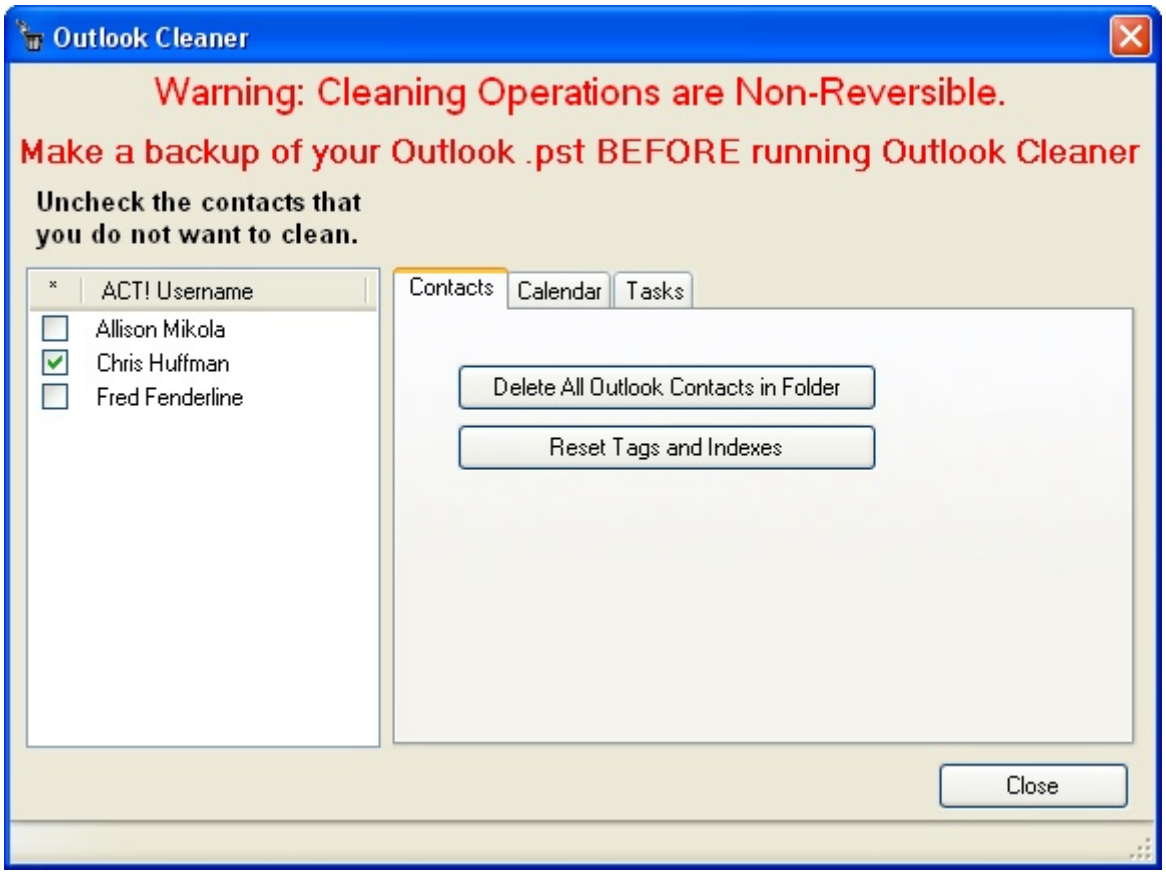
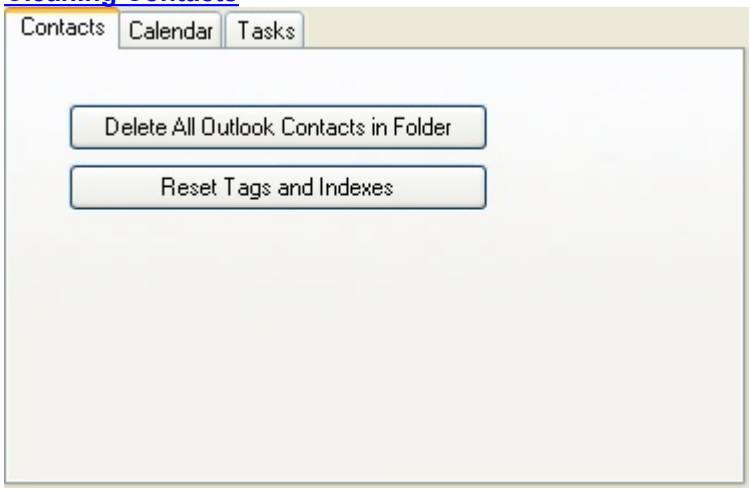


The Folder Clean option in the Tools Menu enables the user to "clean" i.e. **DELETE** items from the folders in Outlook/Exchange.
This tool was added to the software after extensive testing and experience with truly mismanaged Outlook/Exchange folders.
The actions takes apply to each user that is checked on the list.

Reset Tags and Indexes. This option clears all the tags and indexes created by 123 Sync. It is like starting fresh on the synchronization.

Cleaning Contacts



Delete All Outlook Contacts in Folder: Pressing this button will delete ALL the Outlook/Exchange

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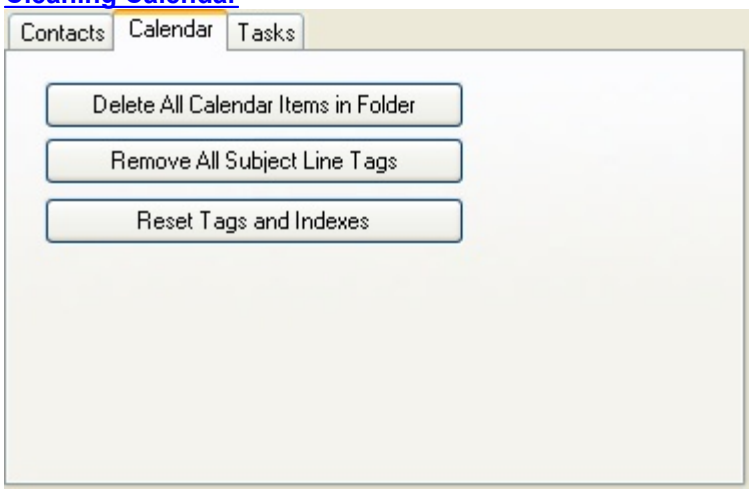
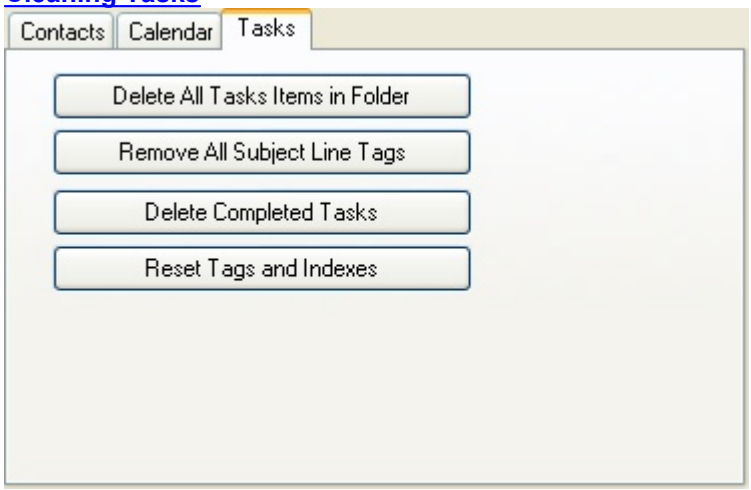
contacts for the enabled/checked Act! users.
Reset Tags and Indexes: Clear all the 123 Sync tags and indexes. It is like starting with a fresh Outlook/Exchange.

Cleaning Calendar



Delete All Calendar Items in Folder: This button will delete all the Outlook/Exchange calendar items for the enabled/checked Act! Users.
Remove All Subject Line Tags:This button removes the subject line modifications from the calendar items in Outlook/Exchange for the enabled/checked Act! Users. The modifications are entered when the software is run to synchronize calendar items.
Reset Tags and Indexes: Clear all the 123 Sync tags and indexes. It is like starting with a fresh Outlook/Exchange.

Cleaning Tasks



Delete All Tasks Items in Folder: This button will delete all the Outlook/Exchange Tasks items for the enabled/checked Act! Users.
Remove All Subject Line Tags:This button removes the subject line modifications from the tasks items in Outlook/Exchange for the enabled/checked Act! Users. The modifications are entered when the software is run to synchronize tasks items.
Delete Completed Tasks: When pressed, this option deletes all the completed tasks in Outlook/Exchange.
Reset Tags and Indexes: Clear all the 123 Sync tags and indexes. It is like starting with a fresh Outlook/Exchange.

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5.5.3 Processing

This is a Server Only Option.

When the Process All Users is clicked, it is the same as clicking the Synchronize button on 123 Sync 2011.

Process Selected User: If you click on an enabled user on the left panel, you can synchronize only that user by selecting the Process Selected User.

5.5.4 Processing Log

The text that is displayed on the status bar is all also listed on the Processing Log. Hence, if you encounter a problem, the error is then displayed in this log. You can either open it or clear the log. The processing log file resides in the installation folder with the name pcrmlog.txt.

5.5.5 Advanced

The advanced tools are provided to users/administrators that have in-depth knowledge of 123 Sync and that are comfortable with the operation of Outlook and Act!.

Always make a backup when using these tools!

The advanced setting change regularly so you may not see some of the new settings on this screen.

Tools

When this tool is run, you receive a screen with the items in Outlook
to be deleted and you have the option to go ahead and remove them or to just cancel the operation. It is recommended that you run these tools when you already have done a synchronization.

- **Change Act! Version**. This options allows you to change the Act! version that 123 Sync accesses. Changing it to an incorrect version will result on 123 Sync failing to work.
- **List Items**. These screens allow you to view relevant items in Outlook or Exchange without the need of Outlook. It is a quick way to see where you are synchronizing.
- **Remove Notes from Database**. This options allows you to remove Act! notes according to a filtering criteria..

Advanced Settings

By default, all the default settings should suffice. However, in some circumstances regarding configuration and environment, you may need to set these settings.

- **Transfer User Defined Fields**. Enabled by default, any Act! field mapped to an Outlook user defined field, is transferred. This encompasses the creation of a user defined field in Outlook for the Act! field. In some Exchange configuration, this may not be possible since creation of user defined fields is sometimes reserved only to the owner of the folder. Hence, you will see errors when 123 Sync tries to create those fields in Outlook. Disabling this feature stops the errors and also stops the transfer of Act! fields to Outlook User Define Properties.

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- **Use Banner Setting**. When enabled, if an activity is a full-day activity, 123 Sync sets the activity to a full day banner. There are side effects to this: the activity time is modified to a full day format and it will be changed when synched back to Act!. The activity is still for the whole day, but in Outlook format.
- **Folder Reset Detection Settings**. When enabled, the folder reset detection enables a force update if the number of items deleted in Outlook/Exchange is larger than say 80% When large number of deletions are present, 123 Sync does not delete the items from Act! but forces these items to be written back to Outlook/Exchange. This situations usually happen when a Smartphone is reset and/or the user simply deletes the data in Outlook by mistake. It comes enabled by default and the threshold level is 50%.
- **Update Recurring Events from Outlook/Exchange to Act!**. This enables reverse update of recurring events from Outlook to Act!. By default it is not enabled due to reports of a bug in Act! creating duplicate activities when updated.
- **View and Set Country Code..**. This option allows you to reset the default country code used by 123 Sync.
- **Time Offsets**. If your Act! or Exchange server is at a different time zone, set the offset here. If you do not set the correct time offsets, 123 Sync will not pick up updates and modifications. By default, it is set to 0 (zero). If 123 Sync is not picking up updates due to time discrepancies, change the Time offsets to -12 and it should resolve the problem.
- **Timed Force Overwrite**. This enables a force overwrite after a number of executions of 123 Sync. By default, it is set to 20.
  In many instances, Act! will have 3rd party applications as well as internal, mass field modifications, that do not change the modification dates of the Act! items. On these occasions, 123 Sync will not pick up the latest changes and a Force Overwrite is a good way to update all the data from Act! to Outlook/Exchange. The timed overwrite is an automated mechanism to allow that to happen.

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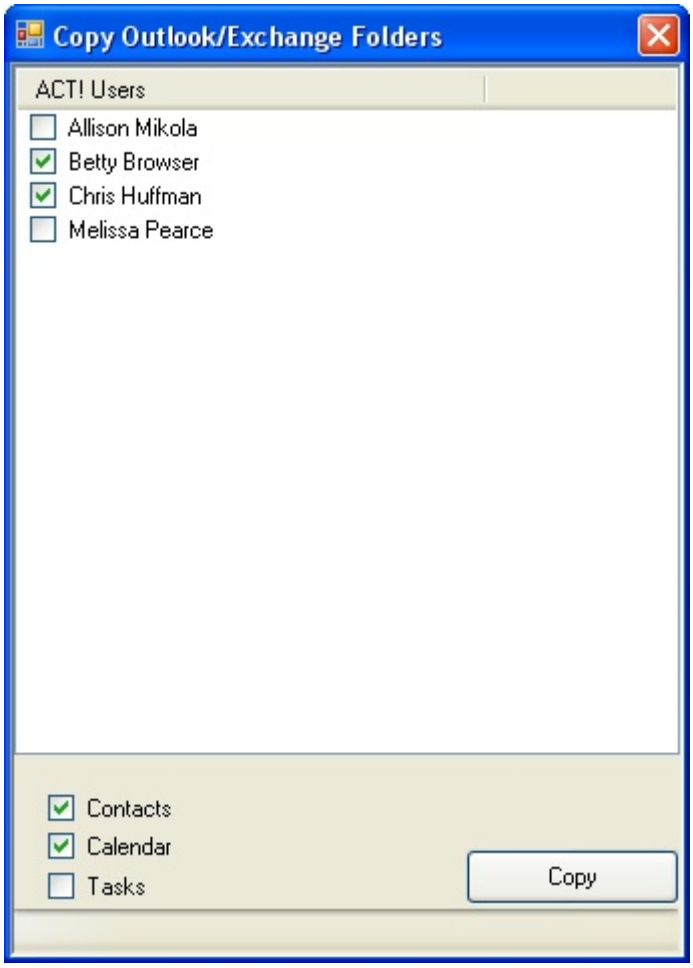
5.5.5.1 Copy Outlook/Exchange Folders



This tool allows you to copy the Outlook/Exchange contents that exist on each user's Contacts, Calendar and Tasks folder. The contents are copied to a folder named 123SyncFolderCopy and each item folder is named according to date and the number of times it is copied on the same day. See picture below:

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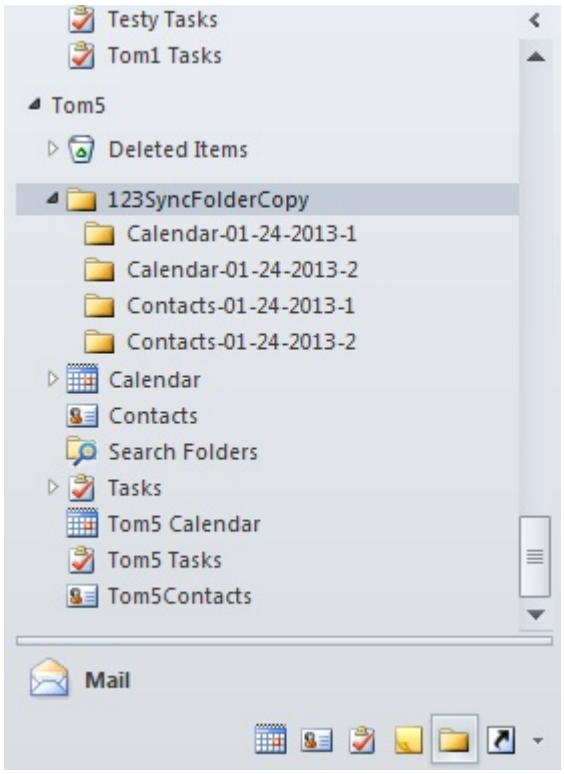

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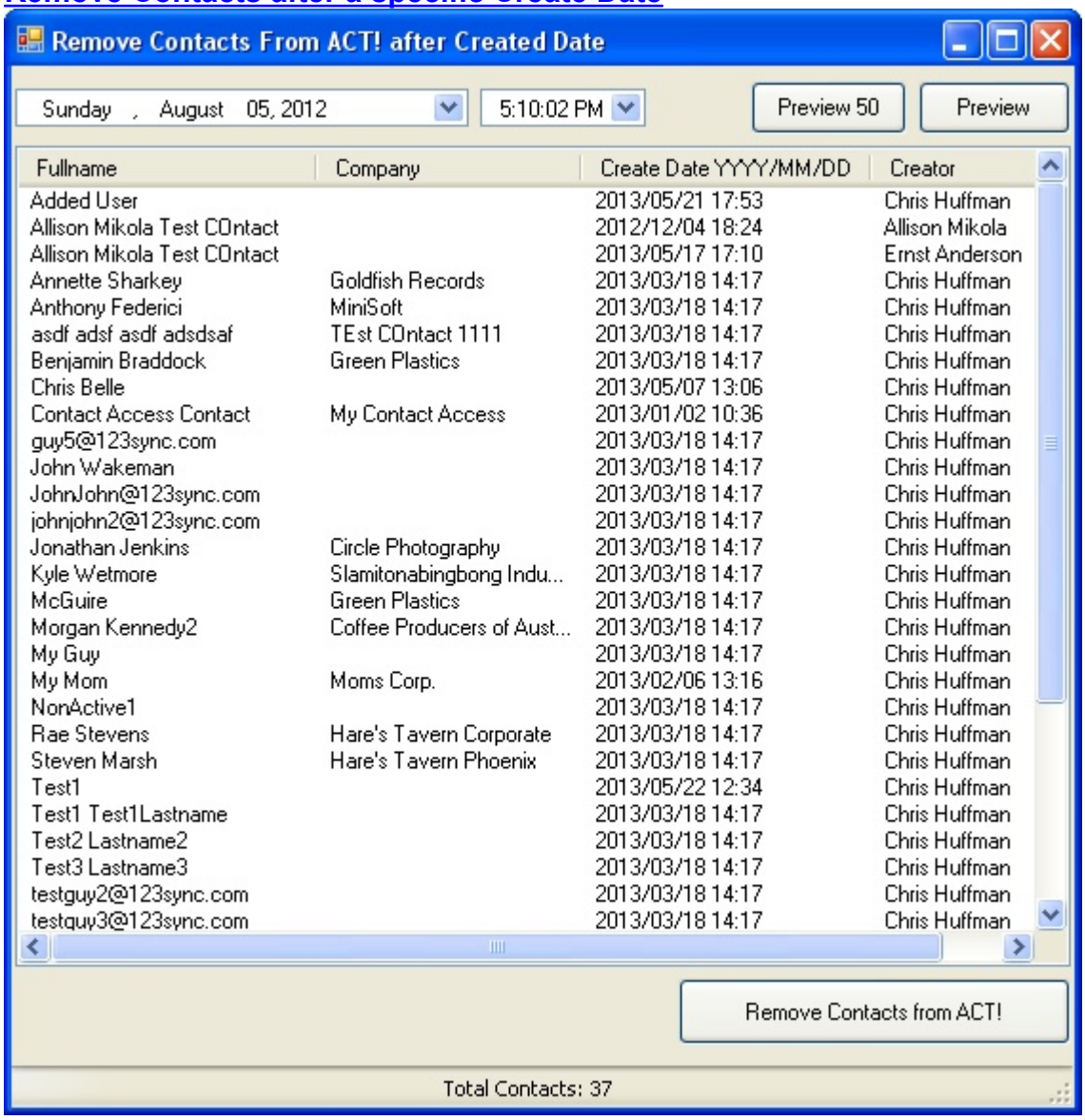
5.5.5.2 ACT! Tools

Remove Contacts after a specific Create Date



This tool allows users to remove any Act! contact created after a specific date. This tool is designed when 123 Sync syncs with Outlook and there are other sync programs installed (like Act! Sync and so on...) and they create a plethora of duplicate/triplicate contacts in Act!. All the creation of the contacts is done usually after a particular time so there we offer the tool to remove these items from Act!. MAKE A BACKUP OF Act! BEFORE USING IT!

Activity Listing

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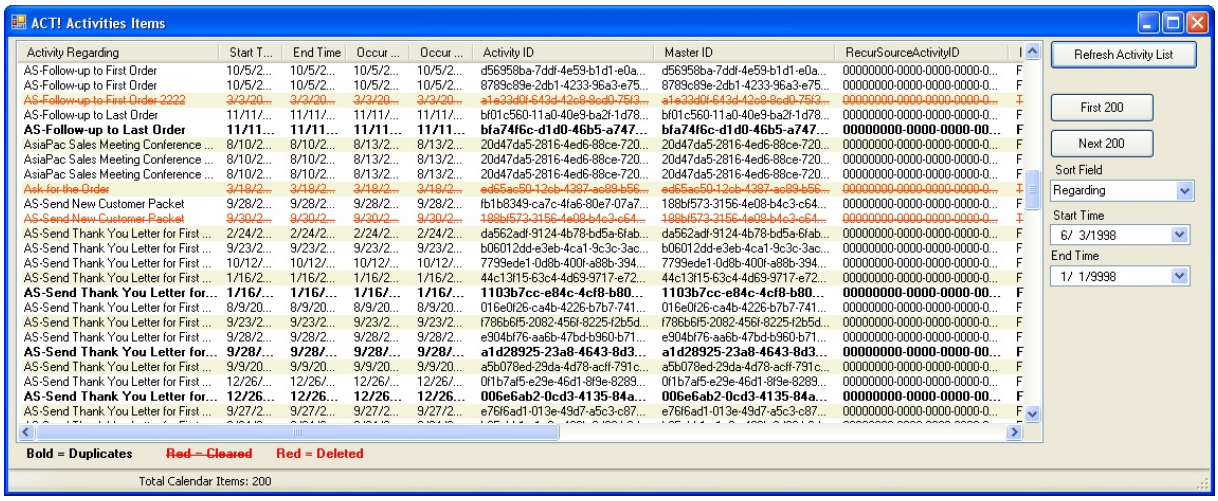
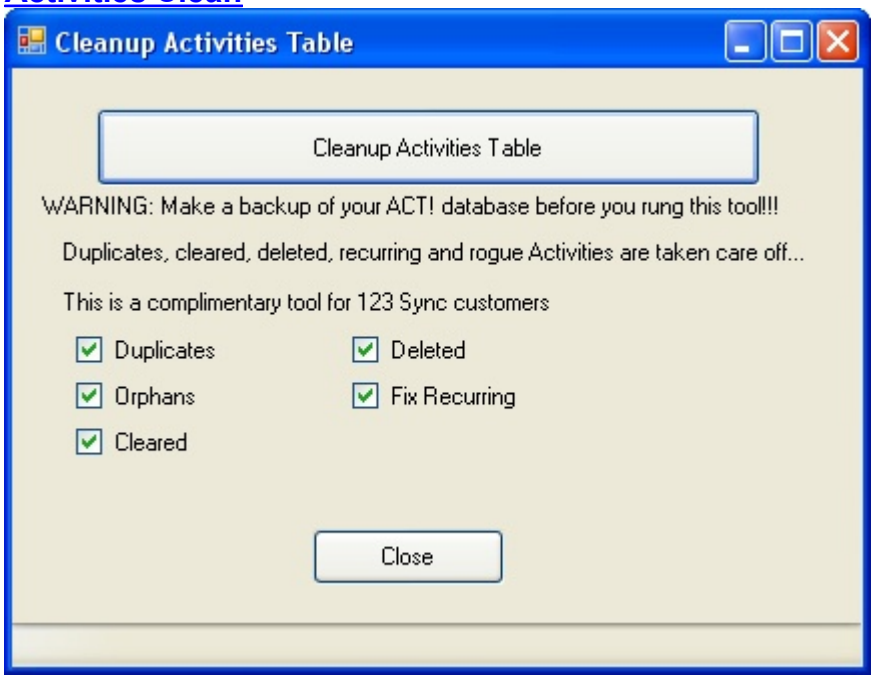


This great tool does a raw listing of the Act! Activities Table and identifies **Duplicates, Cleared and Deleted** activities that exist on the Act! database. We designed this tool to give a visual introspective of corrupt and duplicated Activities database. 95% of Act! Databases that have synchronized with other platforms come to us with a plethora of duplicates and so on. Here we provide the tool to see what's there.

Activities Clean



This fabulous tool removes all duplicates, deletes all cleared activities, deletes all orphan activities AND fixes any corrupt recurring events it encounters in the Activities Database. We created this tool so that our users can "fix" their Activities database with the click of the button. 99% of customers that come to us have used other sync products and usually 30-60% of their activities database is duplicated/corrupt. Again, make a backup before usingg.

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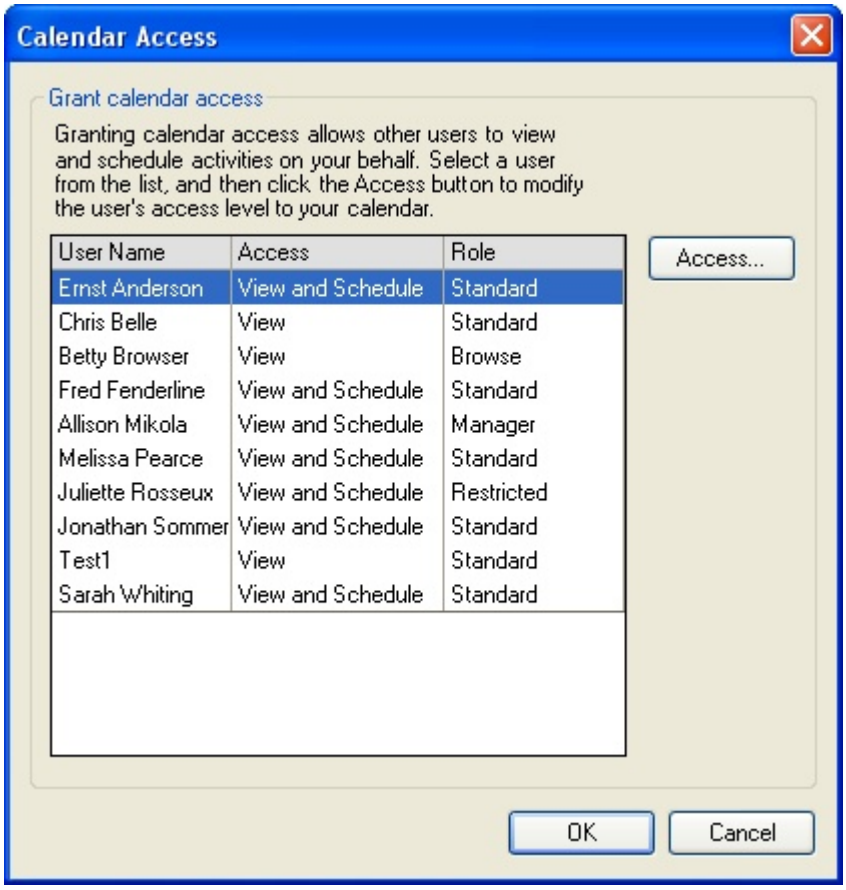
123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

Part VI

6 ACT! Settings

If you are running 123 Sync as a server and you are synchronizing multiple users, you must grant "View and Schedule" permission on the Grant Calendar Access to other users that you are scheduling with. If you do not grant access, you may get duplicate calendar items on your calendar.



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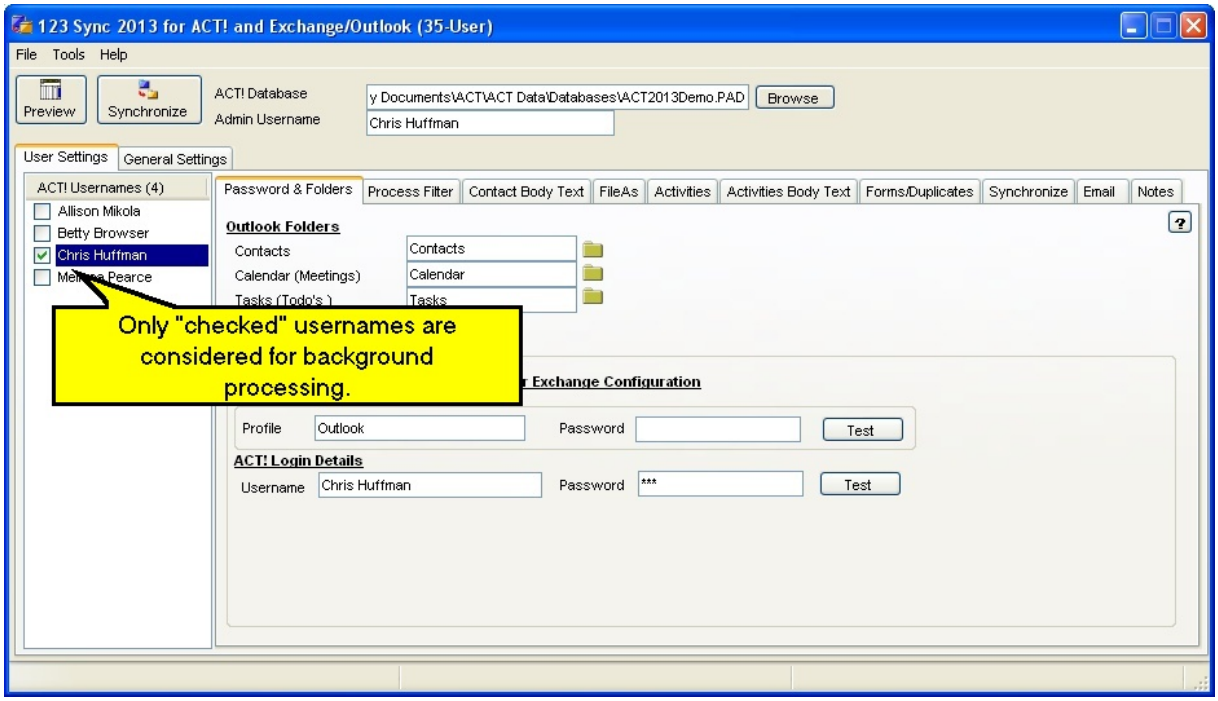
123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

Part VII

7 Background Processing

Before you run 123 Sync for Act! and Outlook/Exchange in the background, we recommend that you run in the foreground and make sure that all the settings are the way you want the software to run. Running in the background is like clicking on the Process button and answering yes to all the prompts.



123 Sync Background Processing Options

123 Sync provide numerous ways of running in the background. But before describing any background processing, it is useful to understand what runs in the background.

The 123 Sync Engine Executable

The file that does the synchronization between Act! and Exchange/Outlook is called ***123-sync-svr*** This file is called according to the Act! version it supports. Hence, 123-sync-svr-**X**.exe is the name of the executable and **X** is the version of Act! that it supports. Hence, for Act! V13.1, the executable is named 123syncsvr-13.1.exe . Once the sync is over, this executable stops and exits. A couple of things when calling the 123 Sync Engine:

- Always make the default directory the directory where 123 Sync has been installed i.e. C:\Program Files\123-sync- if you installed 123 Sync there.
- The 123 Sync Engine can be executed by browsing to the folder and just double-clicking on the executable
- There are two supported modes for the 123 Sync Engine:
  1. Interactive. That is the same as executing from the 123 Sync Interface and you get the status screen showing the sync as it happens.If you want the 123 Sync to run interactively, simply pass it the -i parameter.
  2. Background: By default, it will run in the background with no interaction with the user.
- Only one instance of 123 Sync Engine is allowed to run at one time.

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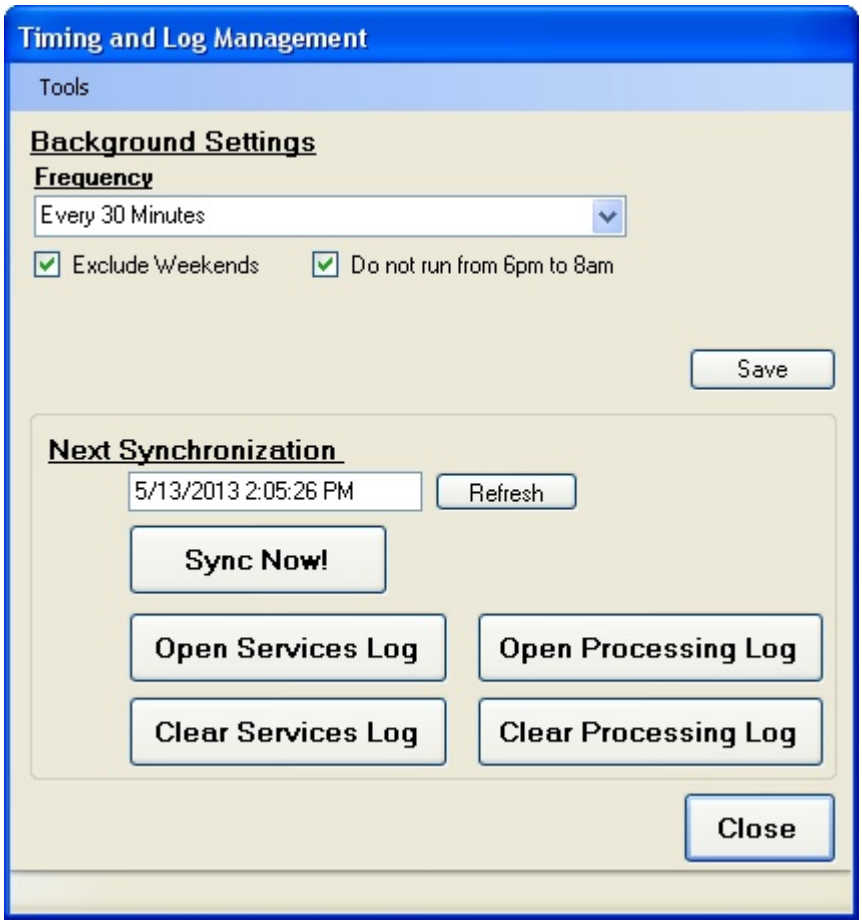
7.1 Timing and Log Management



This screen enables the user to modify the execute timing of 123 Sync and to manage the log files that have been created by 123 Sync.
When the log files are opened, they are refreshed every 15 seconds.

7.2 Installing the Background Sync Service

To install the Background Sync Service, just click on the Tools->Background Processing->Install Background Sync Service. You will be required to enter the password for the windows user account you are using.

The background Sync Service is installed with the following parameters:

- It will automatically start upon reboot.
- It will run every 30 minutes
- It will all the enabled users.

You can stop the background sync service from either 123 Sync or from the system tray.

Run ACT-Outlook Synchronization Now. Selecting this option, 123 Sync for Act! and Outlook/Exchange will run without waiting for the scheduled time to run.
Automation Settings. Selecting this option, the setup screen to set the background automation settings is opened:

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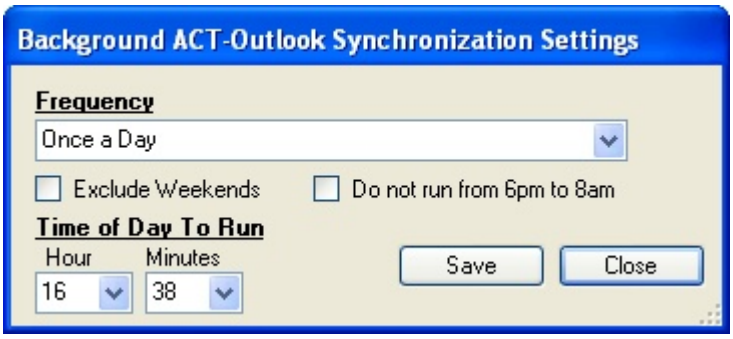

Frequency:You can schedule 123 Sync frequency using the following times:
None - Background Synchronization is disabled
Every 5 Minutes: Background synchronization occurs every 5 minutes.
Every 15 Minutes: Background synchronization occurs every 15 minutes.
Every 30 Minutes: Background synchronization occurs every 30 minutes.
Every Hour: Background synchronization occurs every Hour.
Every 2 Hours: Background synchronization occurs every 2 Hours.
Every 4 Hours: Background synchronization occurs every 4 Hours.
Once a Day: Background synchronization occurs once a day and the user then enters the Hour and Minutes when the sync is to occur..

Exclude Weekends: When enabled, synchronization does not occur during the weekends
Do not run from 6pm to 8am: When enabled, synchronization does not occur from 6pm to 8am

7.3 Using Windows Scheduler

The Windows Task Scheduler setup is simple:

- Start the Windows Task Scheduler interface in Windows:
- Set the default folder to: "C:\Program Files\123-sync-"
- Set the executable to run to: "C:\Program Files\123-sync-\123-sync-svr-**X**.exe" where X is the Act! version on the machine. It can be 13.1 all the way down th 10. Make sure that you check with the 123 Sync Installation folder for the correct executble name.
- Set the login to the login user by the 123 Sync Setup
- You are ready to run!

7.4 Processing Logs

Processing Log

123 Sync for Act! and Outlook/Exchange keeps a daily log of all the synchronization. You can open this log from the tools menu. The log provides information that is very useful whether the sync succeeded or not. It is a great debugging tool if you encounter any sync problems or if the software stops synchronizing.

Each day a new log file is created. All the log files are stored at: C:\Documents and Settings\<username>\Application Data\123-Sync-

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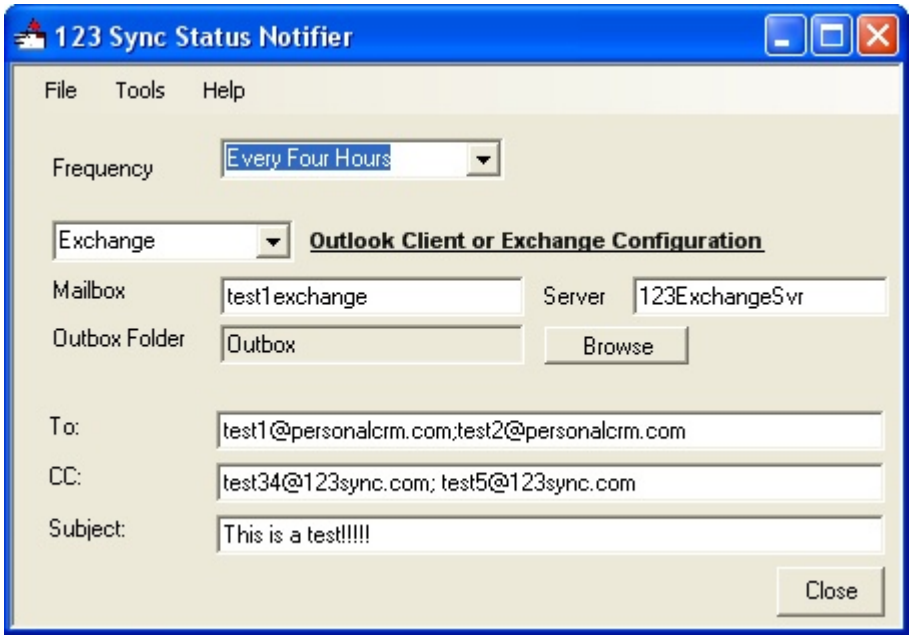
123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook

Part VIII

8 123 Sync Status Notifier



The 123 Sync Status Notifier is a small application that is called by the 123 Sync Windows Service and notifies the recipients that are setup when:

1. There is a Error in the 123 Sync. This indicates that 123 Sync has encountered an error when synchronizing. The error as well as a copy of the log file is sent.
2. There is no log file. If no log file is present, that indicates that 123 Sync is not executing.

By default, the 123 Sync Status Notifier is disabled.

Outlook Configuration Idiosyncrasies

If you are using Outlook as the transport, make sure that it is connected in non-cache mode. That will force the Exchange server to send out the email at the next sync or send/receive. However, if Outlook is setup to send messages asynchronously, the Email generated by the Status Notifier will stay in the Outbox until a send/receive is made by Outlook (which has to be opened by the admin)..

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Part IX

9 Getting Started

9.1 Getting Started Tutorial

Please view our Getting Started tutorial at http://123sync.com/123-sync-server-video-tutorials.html

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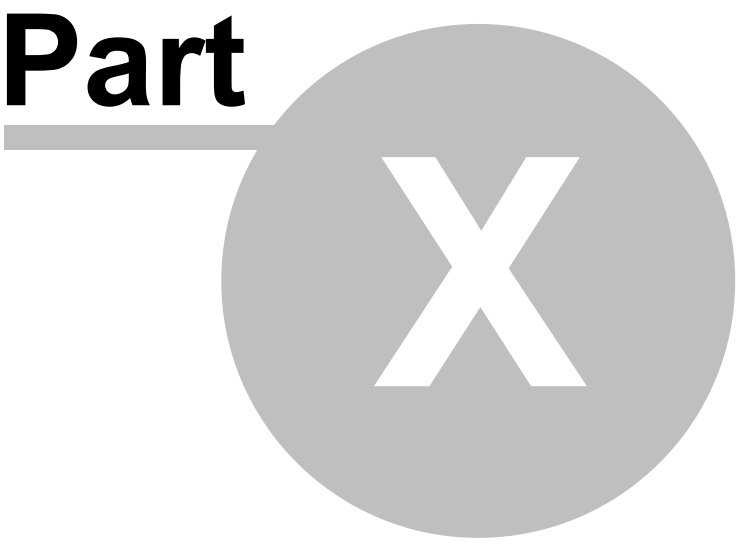
123 Sync For ACT! and Outlook/Exchange

Accurately Synchronize ACT! Databases with Exchange and Outlook



10 Synchronization Tips and Tricks

A few guidelines on how to use 123 Sync

If your items are not synchronizing, 99% of the time it is a setting. Follow these steps before contacting us:

1. Check if there are any errors on the Processing Log. These errors will explain that occurred.
2. If items are not being picked up, reset the Intelligent Updater Settings on the Synchronization settings and run it again.
3. Make sure that you have the correct sync settings set in the Synchronization Tab for the user. Click on the user and check the settings.
4. Make sure that you have selected the correct Outlook folders
5. Make sure that you are viewing the correct user's activities in Act! and matching them to Outlook
6. Contact Filters. If using contact group or calendar filters, ONLY contacts and activities associated with those contacts will sync, everything else is ignored, including the MyRecord (unless it is part of the group).

Setups and stuff

Go to our web site at http://www.123sync.com and go through the video tutorials.

Exchange

We have posted quite a few video tutorials on Exchange on our web site. Go there and view them. These tutorials keep growing with time....

10.1 Creating Activities Items

123 Sync provides a very powerful array of Activities creation options. These options are primarily driven from the subject/text/regarding line.

Creating an activity on a cloud device

When creating an activity on a cloud device, it is desired to control how the activity is created in Act!. Apart from the standard date, subject and details, it is highly desired to create activities with the following properties:

Activity Type. Namely, this is the activity type in Act!, whether is it a Meeting, Call, Conference, Dinner, etc.

- Activity Types are folder dependent. If you assign the Meetings, calls, appointments, and dinners to be synched with the Calendar in Outlook/Exchange, these activities can only be created in that folder.
- Default Activity Types: If an activity is created on a folder without a type, it defaults to Meeting for Calendar and Todo for Tasks activities.

Privacy. 123 Sync provides users with the capability to create private activities in Act!.

- To create a private activity, enter the keyword "-Private" on the subject line and the activities is then deemed private.

Association. 123 Sync scans the activity To field, the links field and recipients fields for the corresponding Act! contact. If it finds the contact, it then associates the activity to that contact. Otherwise, the activity is assigned to MyRecord.

Examples:

Dinner-Private: Have dinner with client tonight

- This activity will be deemed of type Dinner and it will be flagged Private in Act! when it is created.

Dinner: Have dinner with everyone

- This activity is assigned type Dinner. The ":" colon is the end delimiter of the activity type.

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10.2 Exchange and Office 365

123 Sync fully supports all versions of Exchange and Office 365. In addition, it may be configured to access Exchange on the server or to access Exchange via Outlook or CDO/Mapi.

Please access our video tutorials at http://123sync.com/123-sync-server-video-tutorials.html. We have a plethora of setup, configuration, and usage videos related to Exchange, Office 365 and Outlook.

10.3 Associating new Outlook-Generated Calendar items with ACT! Contacts

The biggest challenge when importing new calendar items from Outlook to Act! is to associate the item with the intended Act! contacts. 123 Sync offers 3 methodologies to associate a calendar item with an Act! Contact:

- **Contact Link**. You can link a contact to an Outlook calendar item. 123 Sync will search the links and find the correct contact. This only works if you are synching contacts and calendar.
- **The Outlook Recipient List**. Here, the Outlook calendar item has a recipient list of whom is part of the appointment. This is usually true when the appointment is Email generated (like an appointment invitation) and then it is created in Outlook with all the recipients. 123 Sync will go through the recipient list and match their email addresses to the Act! contacts. Note: every individual on the recipient list must have an email address.
- **The Location Field: Using the Contact Names**. You can enter the list of the recipients on the location field. Note, the recipients must be delimited by parenthesis. For example: (Betty Browser, Chris Huffman) . 123 Sync will scan the recipients on this field and match the Appointment to the contacts listed.
- **The Location Field: Using the Email Address**. The same way as with the contact names, you can also use email addresses to identify with whom the meeting is scheduled with. For Example, (Betty Browser, Chris@huffman.com)

10.4 Scheduling from Outlook/Smartphone

One of the great challenges when synchronizing Calendar and Tasks from Outlook to Act! is to connect the Calendar item to the correct contact in Act!.
123 Sync provides 3 ways to connect the Calendar/Task item to the correct contact in Act!:

1. The Linked Object in the Calendar Item. In Outlook, this linked object points to the Contact in Outlook
2. The Recipients objects in the Calendar Item.
3. The Contact ID that is embedded in the body text of the Calendar item.

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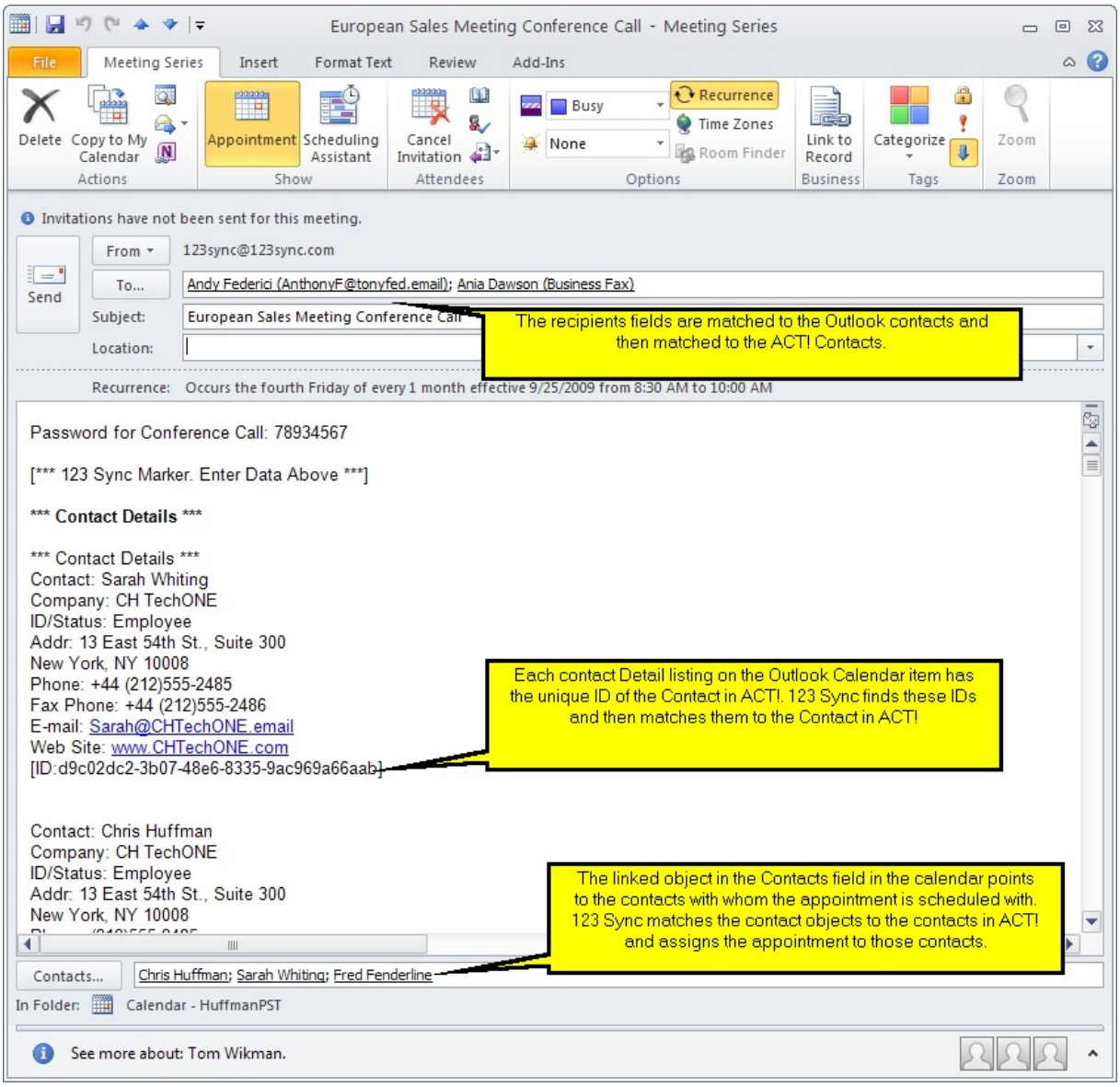

Contact ID

The Contact ID is the unique ID in Act! that matches the contact. You will find the contact ID in the contact details that are embedded into a Calendar/Tasks details.

Also, the contact ID can be exported to the contact's details if you enable "Add Contact ID Below Sync Delimiter" and then sync all the contacts from Act! to Outlook. If you have already synched and then enable this feature, you must so a new sync with the "Force Overwrite" enabled.

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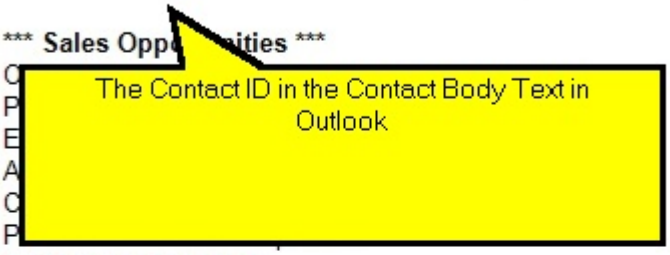
[*** 123 Sync Marker. Enter Data Above ***]

[ID:7e86a13e-ef30-49a9-80b1-91510e92f575]

*** Sales Opp[illegible]ities ***



Prod Total: $4,000.00
Gross Mrgn: $2,250.00
Status: Won
Stage: Negotiation
Reason:
Manager Name: Chris Huffman

Opp Name: Searchlight Casting-Tempe
Probability: 100
Est Close Date: 2009/07/14
Actual Close Date: 2009/07/30
Contct Name Gracie Anderson
Prod Name: TechONE System
Prod Total: $12,000.00
Gross Mrgn: $7,000.00
Status: Won
Stage: Commitment to Buy

10.5 Multi-User Scheduling

123 Sync supports Multi-User Scheduling from Outlook to Act!. You can schedule a meeting with multiple users and that is reflected in Act! on the meeting.

If you are using Multi-User Scheduling, you MUST grant Calendar Access to the other users you are scheduling with.

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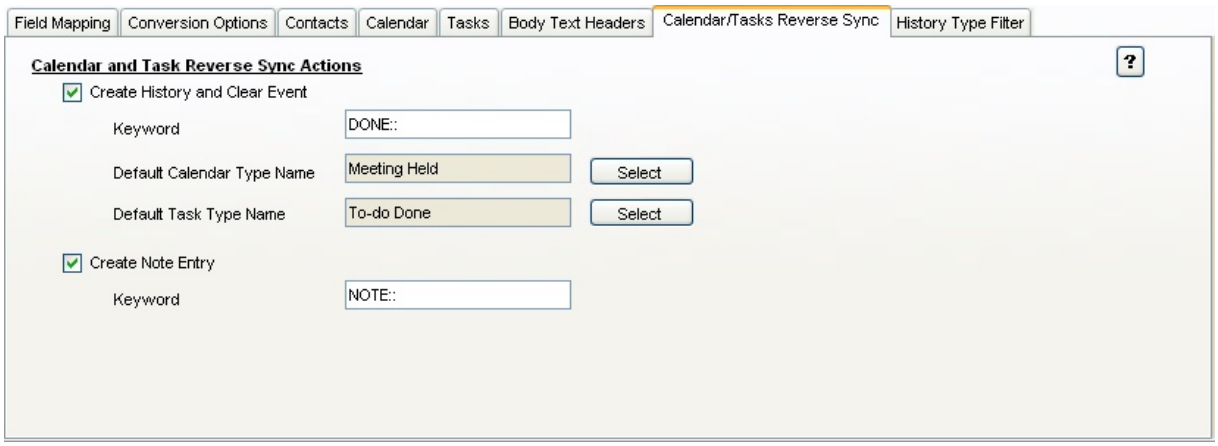
10.6 Calendar/Tasks Reverse Sync



Background to this set of features: once we started using 123 Sync and Blackberry's, we started encountering limitations on what you could do on the Blackberry's. What mostly drove us crazy was that once we had a meeting and we wanted to turn it into a history event in Act!, there was no way to do it. The only way to clear a meeting from the calendar was to actually delete it in the Blackberry and then the meeting would be erased in Act!. This caused the loss of the history (which is why we use Act!) and was basically the wrong way of using synchronization. Hence, the beginning of our ***Calendar and Task Reverse Sync Actions***.

Calendar and Task Reverse Sync Actions
These new features allow you to enter key words into the body text of a calendar and task event and then have 123 Sync take CRM actions when the data is synchronized.

Create History and Clear Event
Here you can instruct 123 Sync to create a history entry in Act!, clear the activity item in Act! and delete the item in Outlook/Exchange. Basically, what would happen if you cleared the Activity in Act!. For example, to activate this action, just type DONE:: at the beginning of the body text/notes in the calendar/task and 123 Sync will do the remainder of the action. You can also specify other actions in the DONE:: string via the use of right and left parenthesis i.e. DONE::[Meeting Not Held] . Here, a history item "Meeting Not Held" will be generated and the meeting is then deleted. If the text in the parenthesis does not match any valid Act! History type, the default is then used.

Create Note Entry
This feature allows calendar/tasks entries to create notes in the contact notes section. For example, if you type NOTE::[This is a test] , a note will be created on the contact with "This is a test" as the note part. Once the note is created, the keyword and the text is removed. This is an excellent way to reverse create note items in Act! without losing the calendar/task entry and complementing the synergy of Act! and other external devices with little or no overhead.

10.7 Calendar Repository Folder

A Calendar Repository folder is a folder where multiple Act! User Calendars are deposited. It is a place to put multiple calendars for read-only purposes. This function is only available on V15.0.6.38 of 123 Sync.

You must setup the Calendar Repository settings as explained below, otherwise results are unpredictable.

How to Push multiple User Calendars to a single Outlook folder

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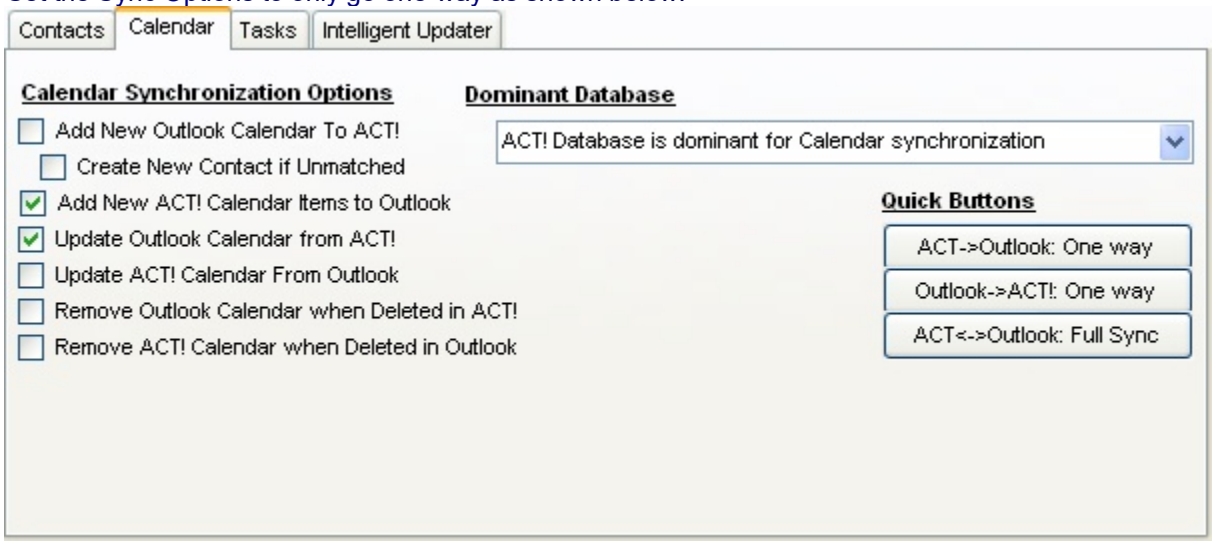
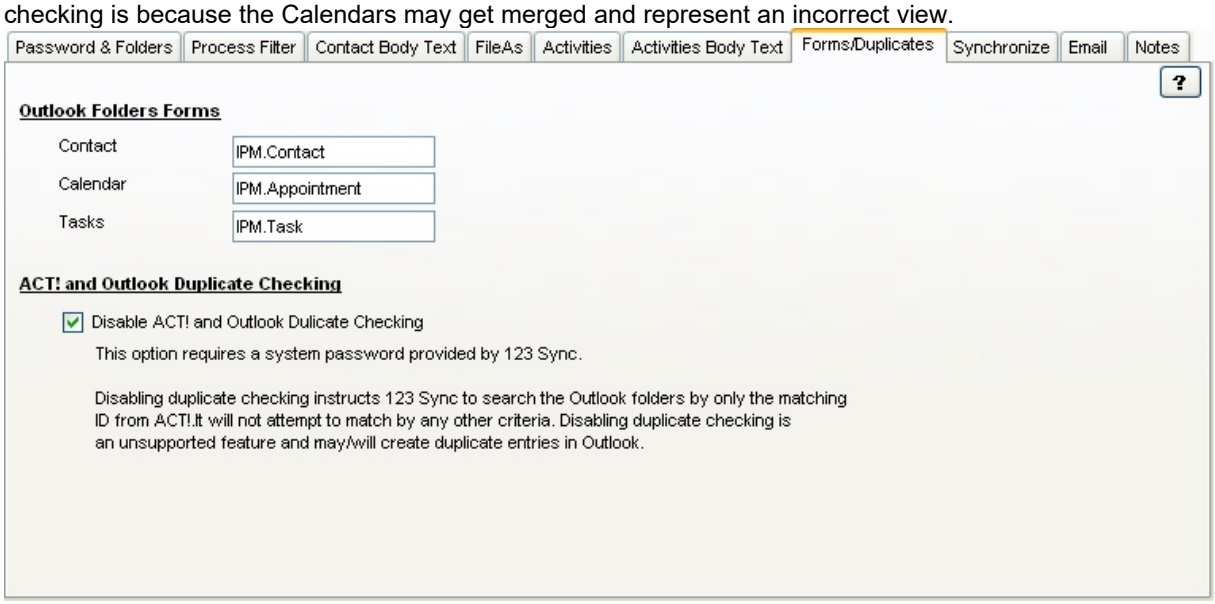
In our example, we will assume that User1, User2, and User3 want all their calendar data to go out to a shared calendar.

1. Create custom users named CustomUser1, CustomerUser2, and CustomUser3 accordingly and setup the appropriate login.
2. Set the Sync Options to only go one-way as shown below:



3. Disable duplicate checking
   The password to disable duplicate checking is: **1483K.** The reason you want to disable duplicate checking is because the Calendars may get merged and represent an incorrect view.



4. Select the Repository Folder for each Custom User

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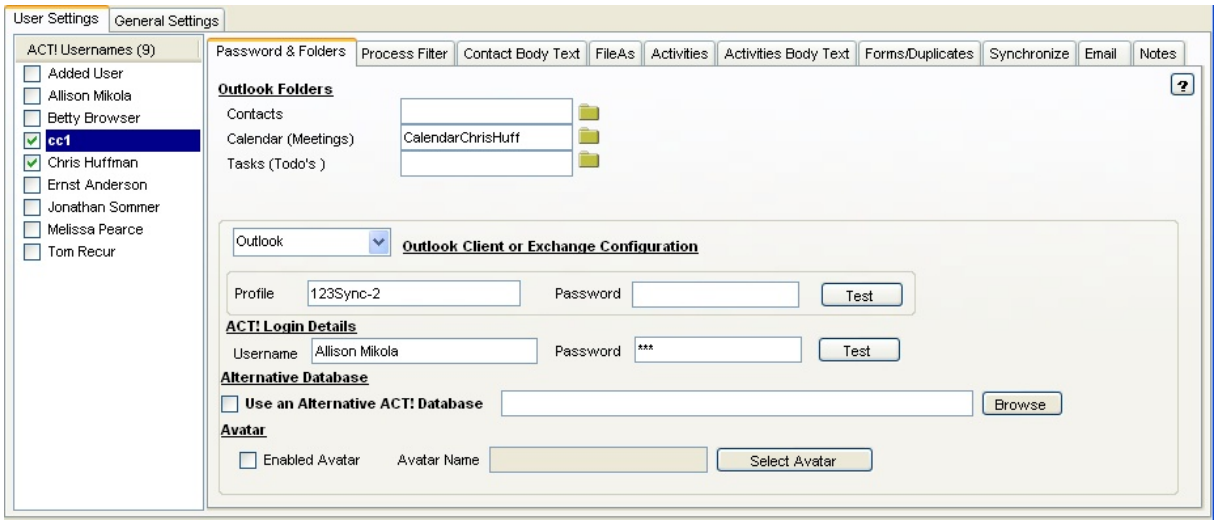

And you are done and ready to put the data into the appropriate Outlook/Exchange folderr.

10.8 Synchroning Multiple Databases on One Machine

In some cases, you want to run 123 Sync on a single machine but sync or integrate two or more Act! databases. We see that a lot with Terminal Servers and cloud servers.
123 Sync can sync multiple databases in one machine but it takes a little bit of manual setup.

The 123 Sync sync engine has a trip switch that will not allow it to run in multiple instances on a machine. The reason is that you don't want to have duplicate synchronizations running concurrently. That can happen if Act! is slow or the Exchange connection slows down, etc.. So for safety, if 123 Sync sees another sync process running, it just exits. Since you will be synchronizing two different databases on the same machine, the key is to establish the second sync as an independent sync.

This option is only available on 123 Sync V18.0.2.10 or later.

Example.
Assume DatabaseA and DatabaseB need to be synched on the same machine.
Here's the steps:

1. **Create Two Windows Accounts**: You need a Windows user accounts for each database that you want to sync. In this example we need two windows user accounts namely DatabaseA and DatabaseB.
2. **Setup DatabaseA to sync**. Login to user DatabaseA and setup 123 Sync for the user DatabaseA, including the windows service. Setup 123 Sync as you would do normally.
3. **Logout of DatabaseA**
4. **Login into DatabaseB user**.
5. **Start 123 Sync and setup Databaseb to sync without enabling the windows sync service (if you are going to use windows services).**
6. **On the 123 Sync Menu, run Tools->Advanced->Tools->Create Parallel Processing Executable**
7. **Restart 123 Sync**
8. **You can now run 123 Sync on DatabaseB**

The System Tray Background Process
If you are running the sync from the system tray, there is no need to make any further modifications.

Creating Windows Services to sync each database

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If you want to create a windows service that runs in the background, do the following:

- In 123 Sync, go to the Tools->Background Processing->123 Sync Windows Service->Register 123 Sync Service
- Consequently, go to the windows service 123 Sync just created and set the username/password. If you are logged in as DatabaseB, set the DatabaseB username and passwords.

10.9 Synchronizing One Database with Multiple Syncs

In large databases (greater than 10 users), you may want to subdivide the database into multiple sync processes. This is not advised to do on small syncs but worthwhile on an installation that has a large number of users.

This option is only available on 123 Sync V18.0.2.10 or later.

Example.
Assume you have a 50 user installation and you want to sync the database using 2 sync processes.
Here's the steps:

1. **Purchase 2 25-User licenses** since you will be activating each one of them for 25 users.
2. **Create Two Windows Accounts**: You need a Windows user accounts for each 25-User batch that you want to sync. In this example we need two windows user accounts namely Users1to25 and Users26to50.
3. **Setup Users1to25 to sync**. Login to user **Users1to25** and setup 123 Sync for the users 1 thorough 25, including the windows service. Setup 123 Sync as you would do normally.
4. **Activate the license for the 25 users**. You are now ready to sync the first batch of users
5. **Logout of Users1to25**
6. **Login into Users26to50 user**.
7. **Start 123 Sync and setup the remaining users, namely user 26 through 50.**
8. **On the 123 Sync Menu, run Tools->Advanced->Tools->Create Parallel Processing Executable**
9. **Restart 123 Sync**
10. **Activate the second 25 User License.**
11. **You can now run 123 Sync on Users26to50**

A couple of things to look for:

- Each license should be equal or larger that the number of enabled users you want to sync per process. If you want to subdivide the 50 user sync into 5 processes of 10 users each, you need 5 123 Sync licenses.
- Each Sync Username has it's own executable. The Create Parallel Processing Executable action creates a set of executables that are unique for that user.
  The windows service name is named after the executable version that you are running. To find out the name of the service specific to your username, go to Tools->Background Processing->123 Sync Windows Service->Name of Sync Service

The System Tray Background Process
If you are running the sync from the system tray, there is no need to make any further modifications.

Creating Windows Services to sync each database
If you want to create a windows service that runs in the background, do the following:

- In 123 Sync, go to the Tools->Background Processing->123 Sync Windows Service->Register 123 Sync Service
- Consequently, go to the windows service 123 Sync just created and set the username/password. If you are logged in as Users26to50, set the Users26to50 username and passwords.

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10.10 Known Problems With ACT!

Corrupt Act! Database

Removal of Users from an Act! database will corrupt your database and result in fields that cannot be transferred to Outlook/Exchange.

This is the most common issue we have with Act! when using our product. We've had users that remove any additional users from their database only to see the database become corrupt as a result. Don't do it!

In general, you'll see strange errors popup and what used to work just fine no longer works.

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