Commence® Application Suite RM Version 2.1

MICROSOFT OFFICE® INTEGRATION GUIDE

Commence Technical Support

(732) 660-8818, 9AM to 6PM ET, Monday-Friday except holidays.

Sales Information

(877) COMMENCE

Sales (from Outside the United States)

(732) 660-0990

Contents

Chapter 1: Introduction

Word Mail Merge Features

Sending Letters Perform mail merges using built-in macros for Word 97 and later versions. The resulting merged document can be printed, faxed, or emailed to one or more contacts. Office 2000 users can also preview and update merged documents before printing.

Logging Letters Letters can be logged automatically from Commence or from Word. The actual merged document can be stored with the log item for future reference. Optionally the merged document can be discarded after the merge to keep the log size to a minimum in Commence.

Adding Templates Commence makes it easier than ever to create letter templates and merge with Commence data. Images from the Commence database can be embedded into the merged document. Shared letter templates can be personalized with your name, signature, and other information about you. New menu commands are installed to the Word toolbar to make it faster and easier to create document templates. This feature is only available with Office 2000 and later versions.

Outlook Integration Features

Logging Outlook E-Mail E-mail integration with Outlook has been streamlined to simplify the storing of email messages to a Commence database, to improve the display of stored email messages, and to provide a means for capturing and managing attachments within Commence. Users can store and view their Outlook E-mail in Commence. Supported features include:

- One-button logging of email messages into the Commence database
- Stores original message in rich-text or HTML format along with attachments
- Works with incoming and outgoing email

Synchronizing with Outlook This feature enables Commence users to share Contacts, Tasks, and Calendar information with Outlook users. The synchronization feature provides the ability to share information between a Commence database and Microsoft Outlook® 98, Outlook 2000 or later versions. Information is shared by two-way synchronization between Commence and

Outlook using the **Tools -> Outlook Sync** menu command. This synchronization copies information added or modified in Commence into Outlook, and then copies information from Outlook and adds or modifies the items in Commence.

Scheduling Meetings in Outlook

The **Tools -> Schedule Meeting** command in Commence can be linked directly with Outlook. This allows users to schedule meetings using the group scheduling feature in Outlook.

Using the Commence Address Book

In some cases, it may be preferable to simply access email addresses in Commence without actually synchronizing all your Commence data to Outlook. Configuring the Microsoft Outlook Address Book preference creates an external Commence Address Book that can be used from within Outlook.

Requirements

Commence has been designed to work with the more advanced capabilities offered in Microsoft Outlook 98, Outlook 2000 and later versions. Outlook Express and previous versions of Outlook do not include these capabilities and are not supported.

In addition, the E-mail logging feature requires that the Collaboration Data Objects (CDO) library be installed. CDO is a component included with Outlook 98 and later, but it is not installed by default. Use **Control Panel -> Add/Remove Programs** to update your installation of Microsoft Office. Choose to "Add or Remove Features" for Microsoft Outlook for Windows. Select Collaboration Data Objects from the list of features then select "Run from My Computer". This will install the necessary libraries needed to work with Commence.

Outlook must be installed on the same PC as Commence RM. To determine if Outlook was setup properly, start Outlook and select the **Help -> About Microsoft Outlook** menu command. Outlook should be setup using either of the following options:

- Corporate or Workgroup: provides full MAPI compliance

- Internet Mail Only: provides services to connect to an Internet Service Provider (ISP).

Chapter 2: Word Mail Merge

Sending Letters

Letter to one or more recipients

To create a letter:

1 Open a view containing the contact(s) who should receive the letter.

2 Select the item for whom you want to create a letter by clicking on it once.

3 Select **Tools -> Send Letter** or select the ⊞ button on the tool bar. The *Send Letter* Dialog Box is displayed.

Note: When this command is launched from a detail form, only a single contact is merged.

Figure 2-1: Send Letter dialog for Microsoft Word Merge

4 By default, a single letter will be sent to the **Selected Item** in your view. To perform a mail merge for all contacts in the view, choose **All Items** from the **Send Letter To:** list at the top of the dialog.

5 Highlight the letter template you wish to use. Formatted letter templates will be shown as type DOC. Letter templates of the type TXT are text letter templates. Graphics and other formatting are not supported in Text letter templates.

Note: Formatted letter templates created with a previous version of the Commence letter macros may also be listed. These templates may continue to be used as-is, or new templates may be created to take advantage of the latest mail merge features. If there are no .DOC templates defined for the selected category, create one by following the steps for "Adding templates from Commence" on page 4.

6 When the letter is logged, the date and time the letter was sent is automatically recorded and saved with the contact record(s) to whom the letter was sent. You may also wish to attach a copy of the finished letter with your log. This option is recommended if you have made any significant modifications to the letter. It also allows you to quickly view the content of any document that has been logged. Check the box to **Include merged document with log item** to attach a copy of the letter in your log history. **Custom Document Filename** lets you specify a custom path and filename to store the merged document instead of using the auto-generated filename.

7 Select **Merge**. Pressing the Merge button runs the merge process and sends the finished documents to the selected destination.

8 If **Preview** is turned on, the merged document will open in Word. This enables you to update the letter before completing the merge. When sending a letter to multiple contacts, your changes will be applied to the merged document for all contacts.

9 Press **Continue with Merge** to complete the letter and send it to the destination you selected (printer, fax, or email). Press Cancel to discard the letter.

Printing Labels

For more than one contact

To print labels for all contacts in your Commence view:

1 Open a view containing the contacts for which labels will be generated. This view does not need to be formatted for labels.

2 Select **Tools -> Send Letter** or select the ⊡ button on the tool bar. The *Send Letter* Dialog Box is displayed.

3 By default, a single label will be created for the **Selected Item** in your view. To print labels for all contacts in the view, choose **All Items** from the **Send Letter To:** list at the top of the dialog.

4 Highlight the label template you wish to use.

5 Confirm the destination (e.g. Printer) and choose whether or not you wish to preview the labels before completing the merge.

6 Select **Merge**. Pressing the Merge button runs the merge process and sends the finished labels to the selected destination.

7 If you chose to preview, the completed labels will be displayed in Word. You may edit the finished labels if necessary before printing.

Adding templates from Commence

Commence comes with a variety of pre-defined letter templates that allow you to quickly and easily create letters to your Contacts. The merged document can then be viewed in Word, printed, faxed, or sent via e-mail. The mail merge process is typically configured and launched using the standard Commence menu commands.

To add a new template using Commence:

1 From the Commence menu bar, select **Tools -> Customize -> Database -> Letter Template**. Any pre-defined templates for the active category will be listed under Letter Templates, and sorted by Type.

2 Press **Add Formatted...**. The *Add Formatted Letter Template* dialog appears.
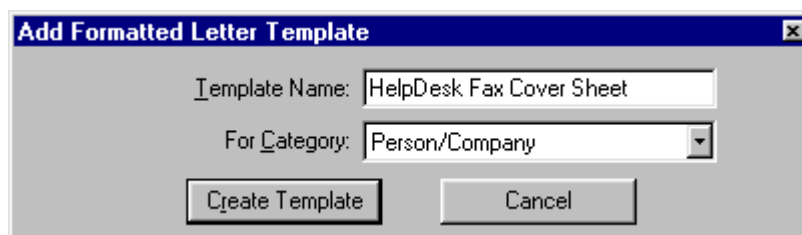
Figure 2-2: Adding a letter template using Commence

3 Enter a brief description of the template in the **Template Name** box. The description could include information such as how it will be used, or simply which type of contact will receive the letter. (e.g. HelpDesk Fax Cover Sheet)

4 Using the **For Category:** drop-down list, select the Commence category that will be used as your data source. This category should typically contain the names and addresses of your contacts, however templates may be created for any category.

5 The *Select Template Type* dialog appears.
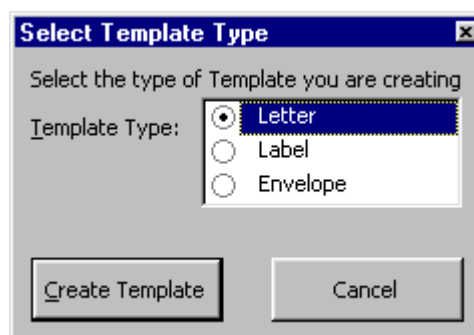
Figure 2-3: Select the type of template

6 A Commence template can be used to generate letters, labels, or envelopes. Each of these template types is designed differently so a different template must be added for each type as needed. Choose the type of document that best suits your needs. If more than one type is needed, repeat the steps above to add another formatted template, then select a different template type.

7 Press **Create Template** to continue with the template creation process.

8 The next step is to select the fields to be used in the template. These field codes can be inserted throughout the body of the template. These codes will be replaced with data from the Commence item(s) once the document is merged. Proceed with "Inserting Commence Fields" on page 11.

9 When you are finished designing your template, save the document. See "Saving Commence templates" on page 13.

Adding templates from Word

Mail merge templates can also be managed directly from within Word. The following commands are available from the Microsoft Word menu bar.

Table 2-4: Microsoft Word menu commands

Microsoft menu command	Description
File->Save Commence Template	Saves the Commence template and related data source information
Commence->Save Commence Template	Same functionality as above
Commence->Add Letter Template	Shortcut to add a letter template from Word.
Commence->Add Label Template	Shortcut to add a label template from Word.
Commence->Add Envelope Template	Shortcut to add an envelope template from Word
Commence->Insert Commence Field	Lets you specify where to merge Commence item data with the document
Commence->Insert Commence View	Embed a view into the merged document
Commence->Commence Preferences	Configure a default fax and email field from a selected category to be used when faxing or emailing the merged document
Commence->Log and Link to Commence	Creates a log item in Commence for the active document in Word

Adding Letter Templates

To add a new letter template using Microsoft Word:

1 From the Word menu bar, select **Commence -> Add Letter Template**. The *Add Commence Letter Template* dialog appears.
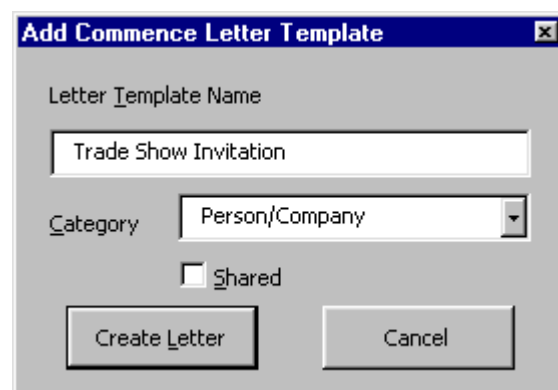
Figure 2-5: Adding a Commence Letter Template from Word

2 Enter a brief description of the template in the **Letter Template Name** box. The description could include information such as how it will be used, or simply which type of contact will receive the letter. (e.g. Trade Show Invitation)

3 Using the **Category** drop-down list, select the Commence category that will be used as your data source. This category should contain the names and addresses of your contacts.

4 If this template will be used by more than one client in the workgroup, turn on the **Shared** checkbox. Note that you must have been granted Author permissions by the Commence Admin-

istrator to add shared templates. Or you may leave the Shared box unchecked to add a local template. Shared templates can be personalized for each client who uses it. See "Inserting My personal information" on page 12 for more information.

5 Press **Create Letter** to continue with the letter template creation process. Otherwise click Cancel to close the template and discard your changes.

6 The next step is to select the fields to be used in the letter. The *Get Commence Fields* toolbar contains a list of fields and connections for the Commence category you selected. See "Inserting Commence Fields" on page 11 for more information about using this toolbar.

7 When you are finished designing your template, save the document. See "Saving Commence templates" on page 13.

Adding Label Templates

To add a new label template using Microsoft Word:

1 From the Word menu bar, select **Commence -> Add Label Template**. The *Add Commence Label Template* dialog appears.
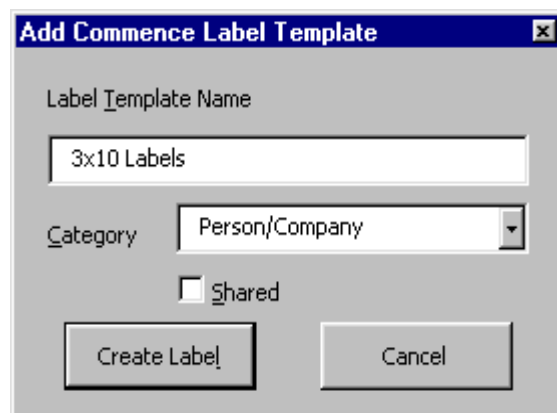
Figure 2-6: Adding a Commence Label Template from Word

2 Enter a brief description of the template in the **Label Template Name** box. The description could include information such as how it will be used, or simply what size label will be produced using the template. (e.g. 3x10 Labels).

3 Using the **Category** drop-down list, select the Commence category that will be used as your data source. This category should contain the names and addresses of your contacts.

4 If this template will be used by more than one client in the workgroup, turn on the **Shared** checkbox.

5 Press **Create Label** to continue with the label template creation process. The *Select Fields for Label Template* dialog will appear. Clicking Cancel will close the template and discard your template.

Figure 2-7: Selecting name and address fields for a label template

The next step is to select the fields to be used in the label. The *Select Fields for Label Template* dialog contains a list of fields and connections for the Commence category you selected.

6 Using your mouse, click on each field that contains data to be used on the label. Keyboard users can scroll through the list of fields using the up and down arrows on the keyboard, and use the spacebar to select a field. A checkmark will appear next to all fields that have been selected.

7 Press **Create Template** to continue with the label template creation process.

The Merge Helper will guide you through the next steps. This will assist you in making the following decisions:

• What label size will you be using? You may choose from Avery and other popular label products already configured in Word.

• How will the data appear on the label? This includes arranging the fields appropriately on each line so that they create an address block.

8 Choose the product number that corresponds to the correct label size. For this example, choose '5160 - Address' which will create 30 labels to a page. If the size you need is not listed, press F1 for more information about creating your own custom labels in Word. When you are finished, press **OK**.
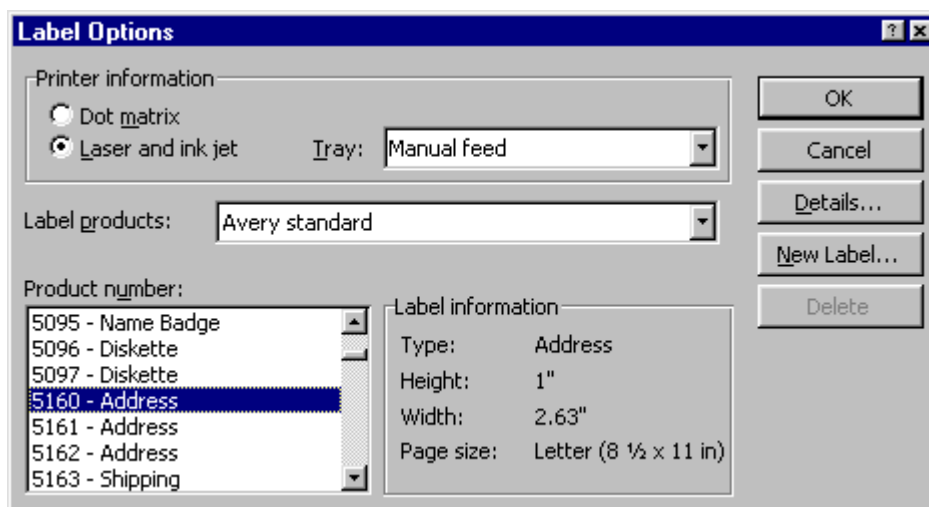
Figure 2-8: Choosing label options

9 Press **Insert Merge Field** and select the fields for your label.
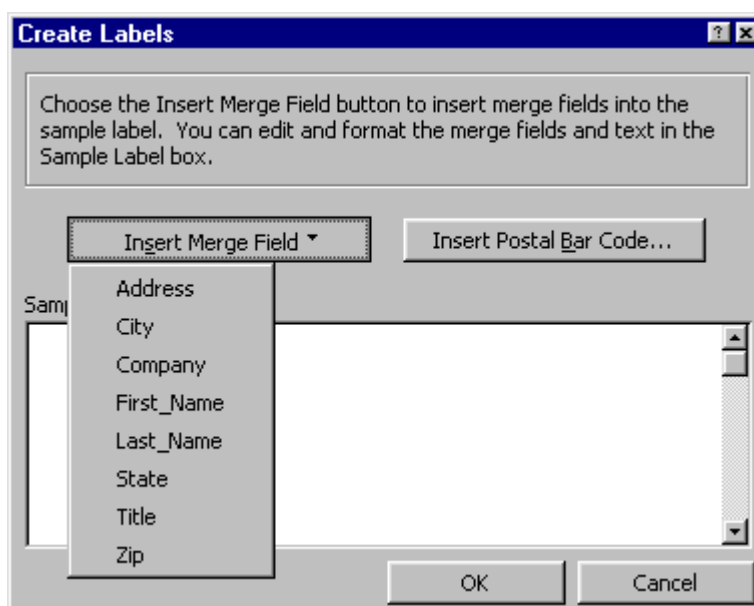
10 Design your label by positioning your inserted fields on the label as needed. You may add spaces and other punctuation, plus arrange fields on separate lines as needed.

Figure 2-9: Sample label

11 If required, you may place a barcode on your label by pressing Insert Postal Bar Code. You will be prompted to select which fields contain the address and zip code information. Use the drop-down list to select the appropriate fields from Commence.
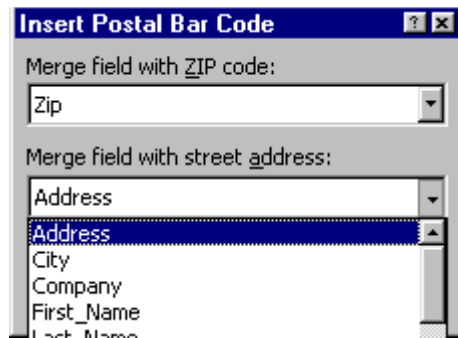
Figure 2-10: Inserting a bar code on the label

12 When you are finished designing the label, press **OK**.

13 You may close the *Mail Merge Helper* by pressing **Close**. It is not necessary to get a data source or merge the data at this point.

14 The finished template will be named PIM*.doc. Save your template in Word by selecting **File -> Save Commence Template** or **Commence -> Save Commence Template**.

Caution: The Save Commence Template command must be used to save your template before it can be used in Commence. See "Saving Commence templates" on page 13 for more details.

This template can now be used to print labels from Commence.

Adding Envelope Templates

To add a new envelope template using Microsoft Word:

**1** From the Word menu bar, select **Commence -> Add Envelope Template**. The *Add Commence Envelope Template* dialog appears.
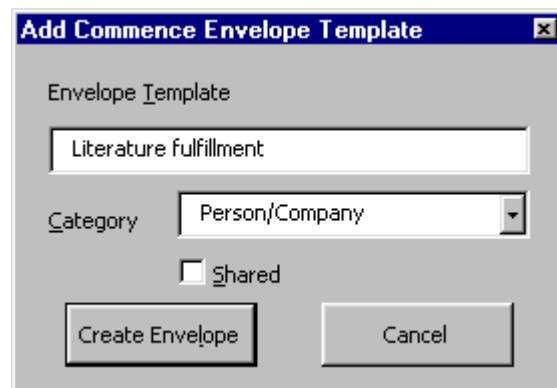
Figure 2-11: Adding a Commence Envelope Template from Word

2 Enter a brief description of the template in the **Envelope Template** box. The description could include information such as how it will be used, or simply what size envelope will be produced using the template. (e.g. Literature fulfillment)

3 Using the **Category** drop-down list, select the Commence category that will be used as your data source. This category should contain the names and addresses of your contacts.

4 If this template will be used by more than one client in the workgroup, turn on the **Shared** checkbox.

5 Press **Create Envelope** to continue with the envelope template creation process. The *Select*

Fields for Envelope Template dialog will appear. Clicking Cancel will close the template and discard your template.
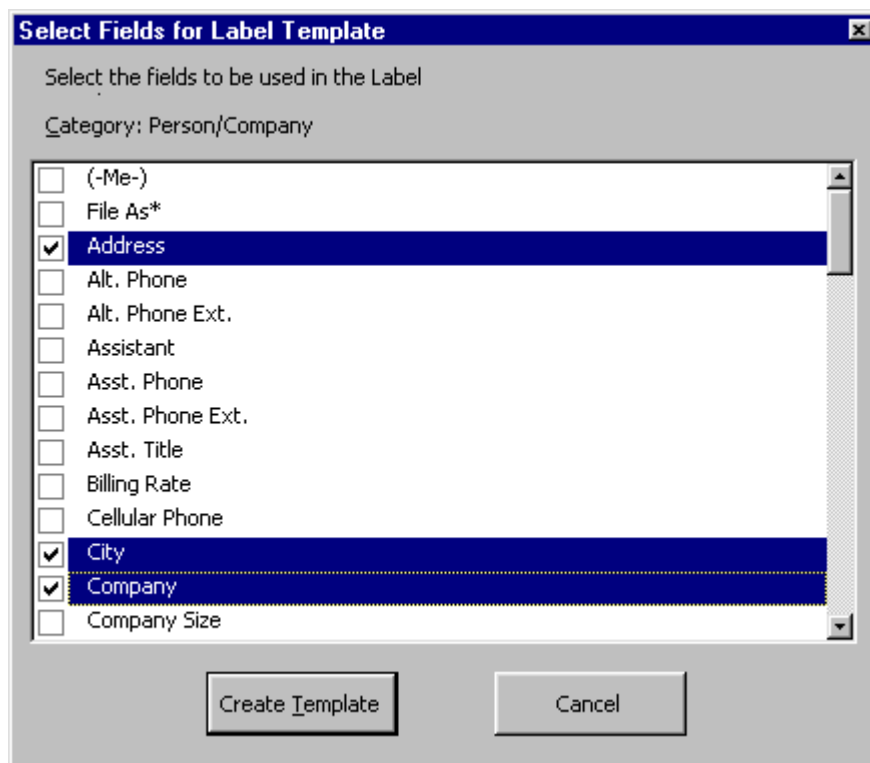
The next step is to select the fields to be used in the envelope. The *Select Fields for Envelope Template* dialog contains a list of fields and connections for the Commence category you selected.

6 Using your mouse, click on each field that contains data to be used on the envelope. Keyboard users can scroll through the list of fields using the up and down arrows on the keyboard, and use the spacebar to select a field. A checkmark will appear next to all fields that have been selected.

7 Press **Create Template** to continue with the envelope template creation process.

8 Information from Commence can be positioned anywhere on your envelope. The next step allows you to arrange the fields you selected on the envelope template. Proceed with "Inserting Commence Fields" on page 11.

9 When you are finished designing your template, save the document. See "Saving Commence templates" on page 13.

Inserting Commence Fields

When designing the body of your template, there may be areas that require data from Commence to be merged into the document. This is accomplished by inserting fields from Commence into the template. The supported field types are discussed below.

Inserting fields

Some examples of how fields can be used include:

• the salutation in a letter template (e.g. Dear John,)

• your closing signature in a letter template (your name, title, phone, extension)

• the address block (a contact's full name, company name, and address)

1 If the Get Commence fields toolbar is not already displayed in Word, select **Commence -> Insert Commence Field** from Microsoft Word's menu. The floating toolbar will appear.
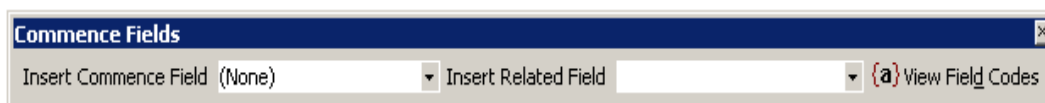
Figure 2-12: Floating toolbar

2 This toolbar can be docked at the top of the window along with all the other Word toolbars. Docking the toolbar gives you the fastest access and convenience if you plan to create many new templates.
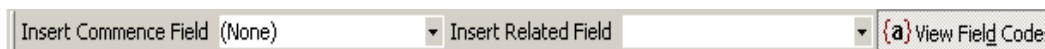
Figure 2-13: Docked toolbar

3 Select a field from the **Insert Commence Field** drop-down list.

4 To move the field to another position in the template, be sure to select the entire field code, including brackets, before dragging and dropping it.

Note: Formatting your field code will apply the formatting to the resulting data in the merged document. Be sure to select the field code in its entirety, including the brackets. Then apply the style or formatting to the selection.

Inserting images

Images are photos, electronic signatures, or other graphics stored in image fields in the Commence database. Image fields are immediately visible in the detail form when the Commence item is opened. These types of images can be inserted and positioned in your template in the same way that fields are inserted. See "Inserting fields" on page 11.

Note: You may have other graphic files stored in data file fields in the Commence database. Data file fields point to external files on your local and/or shared drives. The path to these files is visible when the Commence item is opened but the content of the data file is not viewable directly within Commence; the external application must be launched in order to view these files. These data file fields are not supported in the mail merge templates. Only direct image fields can be inserted into your template.

Inserting connected fields
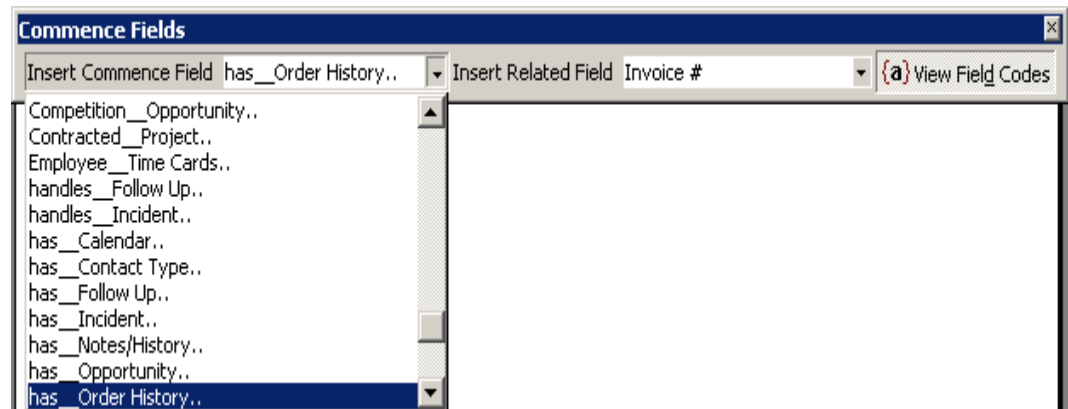
Figure 2-14: Selecting a connection field

In the above example, the merge field code for the Invoice # is shown below.

{ DDEAUTO Commence MergeItem "[GetConnectedItemField(,,\"has\",\"Order History\",\"Invoice #\")]" * CHARFORMAT }

This field code would resolve to a value of "134708" (the actual invoice #) when the letter is sent.

If there is more than one connected item, each item will be displayed on a new line. For best results, the fields should be arranged in table format. This will ensure that the merged data lines up properly.

Inserting My personal information

The (-Me-) item can be used to personalize the signature portion of your letter template. Some examples of fields you can insert include your name, title, phone, signature, and corporate logo. This feature is ideal for shared letter templates used by multiple Commence users. Shared templates can contain both general information that pertains to everyone, as well as personal information about the one sending the letter.
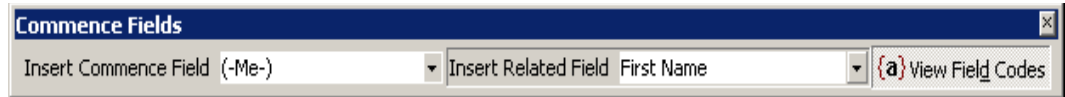
Figure 2-15: Selecting fields from the (-Me-) item

For example:

{DDEAUTO Commence MergeItem "[GetMeField(\"First Name\")]" * CHARFORMAT } { DDEAUTO Commence MergeItem "[GetMeField(\"Last Name\")]" * CHARFORMAT }

resolves to: Alice Bayerd

✎ Tip Your personal information is stored in the item you have designated as the (-Me-) item. To set the (-Me-) item in Commence, select **Edit -> Preferences -> Personal Info**.

Inserting a view

If the *Commence Views* toolbar is not already displayed in Word, select **Commence -> Insert Commence View** from Microsoft Word's menu.
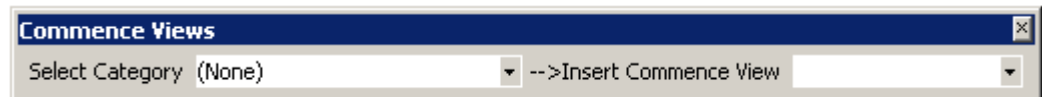
Figure 2-16: Inserting a view

For example:

{ MACROBUTTON CommenceView ["Order History by Customer"] }

resolves to:

Invoice #	Order Date	Product Description	Part Number	Qty	Purchase Order #	Shipped via	Ship Date	RMA#
134708	12/30/99	Construction grade cabling w/E7 connector	WE-203	100	GH-788921	Other	01/05/00	22987
134709	01/04/00	DR Trimmer/Mower	XE-203	2	GH-788921	DHL	01/12/00	22987

Figure 2-17: Sample view inserted into merge document

Saving Commence templates

The standard File -> Save command in Word will save a draft of your document but does not save the necessary data source information necessary for Commence templates to merge properly. Commence templates should always be saved using the **Save Commence Template** command.

To save your customized template in Word:

1 From Word, select **File -> Save Commence Template** or **Commence -> Save Commence Template**.

2 Commence uses the filename (PIM*.DOC) to locate the template during a mail merge.

The template can now be used to send letters to one or more contacts within Commence. See "Sending Letters" on page 3. All letter templates are stored in the "\tmplts" subdirectory of your current database.

Formatted Letter preferences

These preferences determine which word processor is used for formatted letters.

Application

To integrate Commence with Microsoft Office 2000/XP, select the **Edit -> Preferences -> Letters** command in Commence and confirm that your Formatted Letters Application is set to "**Microsoft Word Merge**".

Note: *The Formatted Letters Application should be set to "Microsoft Word 97" for Office 97 users. Not all mail merge features are available with Office 97.*

Templates created in Commence will be stored in Word's native DOC file format and may contain whatever formatting features Word provides, in addition to the Field Codes used in Commence templates. The same setting used to perform a mail merge with Microsoft Word is also capable of sending e-mails and faxes.
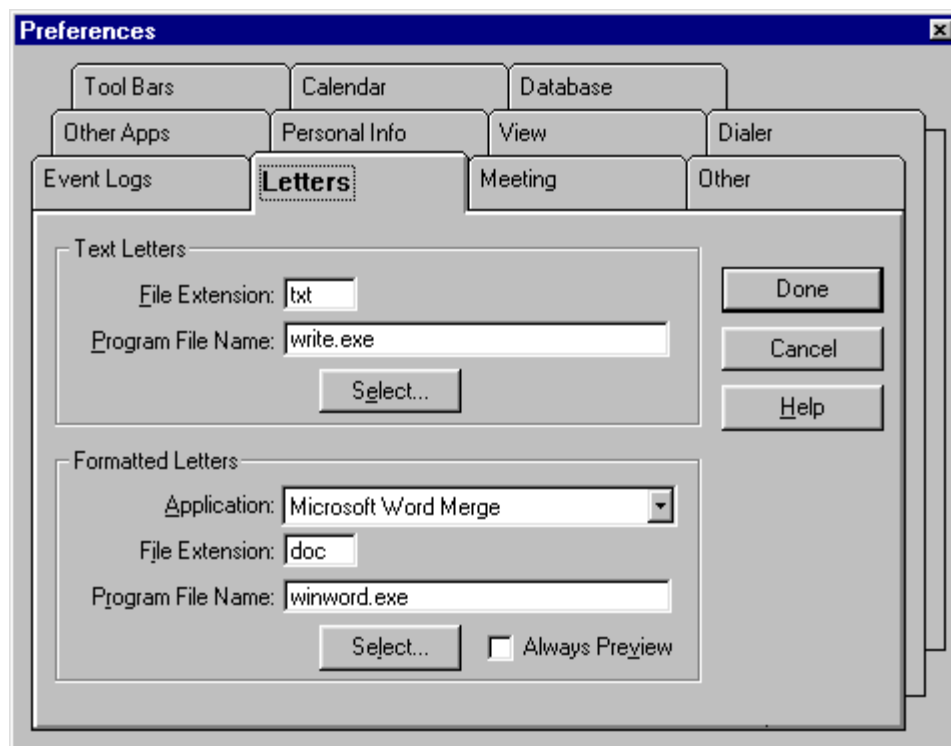
Figure 2-18: Commence letter preferences dialog

Program File Name

Verify that the **Program File Name** is set to the full path where the Microsoft Word program file (winword.exe) can be found. You can also use the Select button to browse your PC to find the program executable.

Always Preview

When creating letters using Microsoft Word Merge, you have the option of previewing the document before it is delivered to your fax, printer, or email outbox. The **Always Preview** option can be turned on if your preference is to always preview documents before sending. This setting will be used as the default, but you will still have the option of changing your preference at the time of each mail merge.

Fax and E-mail preferences

Setting a default field for fax and e-mail

There is a preference in Word that can be configured to simplify the steps for a mail merge. This assumes all your contact information is stored in a single Commence category (such as Person/Company). For your convenience, you can specify in advance which fields are used to store the fax number and email address in that category.

To set a default fax field and/or email field in Word:

1 From Word, select **Commence -> Commence Preferences**. The *Commence Preferences* dialog will appear.
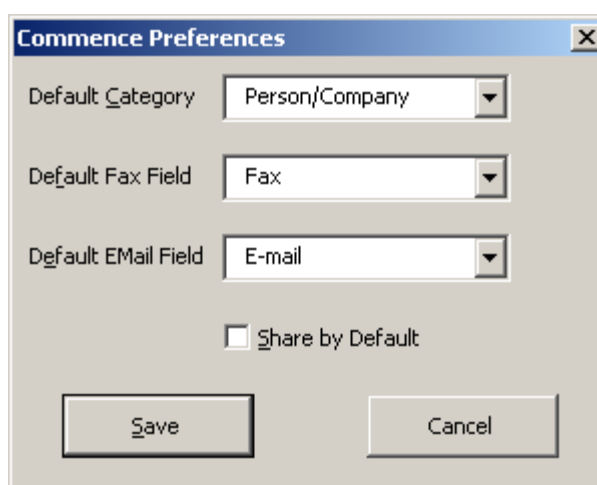
Figure 2-19: Setting a default fax and/or e-mail field

2 In the **Default Category** drop-down list, select the Commence category where contacts are stored. It is assumed that most of your templates will use this category as the data source.

3 In the **Default Fax Field** box, select the field name where the contact's Fax number is stored.

4 In the **Default EMail Field** box, select the field name where the contact's E-mail Address is stored.

Otherwise, you may leave these preferences blank and you will be prompted for this information each time you specify a destination of fax or e-mail during a mail merge.

Logging letters

Logging creates an item in Commence that is connected to the recipient(s) and contains information about the letter. Information that can be tracked includes the date and time the letter was sent, any other notes you may want to add, and even a copy of the letter itself.

The letter, also known as a merged document in Microsoft Word, is saved in a file on disk. The file name is recorded in the *data file field* in the log item. The current date is entered in the *date* field of the log item. The log item by default is given the same name as the Template that was used to create the letter, but you may enter a custom log item name if you prefer.

After the letter has been logged and saved, you can look at the finished letter by pressing the **View** button in the data file field. This launches Microsoft Word and opens the merged document.

Log preferences

Select the **Edit -> Preferences -> Event Log** command in Commence to open the Event Log preferences dialog. Letter log preferences are set in the lower half of the window in the **Log Letters to** group box.
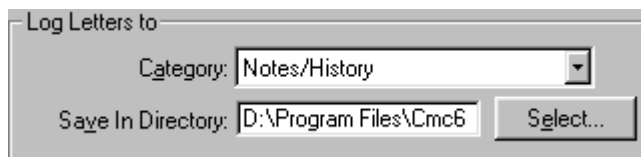
Figure 2-20: Event log preferences for logging letters

Category

The **Category** drop-down box lets you select which category to use when saving the log item in Commence. This category typically contains each of the following field types:

- *date field*: Stores the date when the letter was sent

- *time field*: Stores the time when the letter was sent

- *data file field*: Stores the path to an external data file on disk. Provides access to the merged document from within Commence.

- *text field*: Large text area to be used for entering additional comments

- *connection field*: Creates a link to the recipient item (typically a contact) in Commence

In the tutorial database, the letter log category is set to use the History category. When choosing an alternate category for the letter log, you should choose a category similar to the defaults given above so that Commence can keep proper track of the details for your log item.

Save In Directory

The **Save In Directory** box lets you enter a default path where your merged documents will be stored. This path can point to a directory on your local drive or a shared drive.

By default, this setting points to a subdirectory called "\letters" in your Commence program directory. If you want to change this selection, type the name of the new directory in the Save In Directory box. You can also use the **Select** button to browse your hard disk to find a suitable directory.

Each time you create a letter, you have the option of changing this path (in the **Custom Document Filename** box), or of discarding the letter after the merge is complete (by turning off the option to **Include merged document with log item**). See "Sending Letters" on page 3 for more information.

Chapter 3: E-Mail Logging

To configure any Commence database to log e-mail messages from Outlook, you need to follow these steps:

• *Prepare your Commence database.* You may need to modify categories and fields to support the data coming from Outlook.

• *Set Preferences in Commence.* You will also need to select the fields in Commence to use when logging e-mail. Commence's preferences allow you to map Commence categories and fields to those required for logging e-mail from Outlook.

• *Verify Commence Options in Outlook.* These options determine how incoming and outgoing e-mail messages are handled after being logged in Commence.

Preparing your Commence database

The following changes to your Commence database are required to support logging E-mail from Outlook.

Commence Category Changes

The fields in Commence should be modified to match the fields found in Outlook E-Mail messages. An overview of common changes are:

• Confirm that your personal item (containing your name and E-mail address) is stored in the same category where Contacts are stored. If your actual user record is stored in a separate category, it will be necessary to copy a minimal amount of information (your name and e-mail address) to a record in the contact category.

• Add or modify a selection field in the category where E-mail messages will be stored. This field should contain selections for "E-mail Sent" and E-Mail Received" and will be mapped to the Message Type field in Outlook.

• Confirm that duplicate items are allowed in the category where E-mail messages will be stored.

• A connection must exist between the log category and the contact category. This link will be used to lookup the contact's e-mail address when logging each message. If a match is found, the logged e-mail will be attached to that contact.

Setting Preferences in Commence

To enable E-mail logging for a Commence database you must first configure your E-mail Log preferences. You will be prompted to select the log category in Commence where E-mail messages will be stored. To complete the setup, map each Outlook field that you wish

to capture to a Commence field in the log category. Commence uses this information to ensure that the contents of the E-mail message are stored in the appropriate fields in Commence.

Mapping E-Mail Log fields

At minimum the following E-mail Log fields need to be mapped: For Contact, Message Date, Message Time, and Subject. This will keep a brief record all logged e-mail messages without using additional disk space to store the full email message.

To configure your E-mail Log in Commence:

1   Select **Edit -> Preferences -> Other Apps**. From the **Configure Commence as:** Combo Box, select **E-mail Log**.

2   In the **Category** list, select the Commence category where your Outlook E-mail will be stored. If you plan to store the entire email message in Commence including attachments, you should choose a category that has at least one data file field.

3   Highlight the "Subject" field and press **Edit**. The **Commence Field** combo box will display all fields and connections from the category you selected in the previous step. Select the Name field for this category and click OK.

4   Select the "For Contact" field and press **Edit**. Map this field to the category in Commence where E-mail addresses are stored for Contacts.

5   Select the "Message Date" field and press **Edit**. Map this field to "Date".

6   Select the "Message Time" field and press **Edit**. Map this field to "Start Time".

7   The remaining fields are not required but recommended. See the chart below for a complete list of suggested field mappings. You may continue mapping fields from the selected category as needed.

8   Map the "Body" of the mail message in Outlook to any large Text field in the log category. With this information, full text searches may be performed on the email message. If there is no corresponding field in your Commence database you may skip it. Only data from the mapped fields will appear in your Commence log item.

9   To store the message in its entirety, including attachments, map the "Message File" field in Outlook to a Data File field in the log category. The e-mail can then be viewed as it was originally sent: as HTML, Microsoft Outlook rich text or plain text with all its attachments intact.

10 When the E-mail Log mappings are completed, click **Done** to close the preferences dialog box.

11 Continue by setting the Commence preferences for Microsoft Outlook Contacts. This step is required before you can log any E-mail from Outlook.

Table 3-1: Recommended Field Mappings for Outlook E-mail Log

Outlook E-Mail	Suggested Field Type
Body	Text (large, more than 80 chars.)
For Contact (Required)	Connection to category where E-mail addresses are stored. Incoming mail will be linked to the sender(s). Outgoing mail will be linked to the recipient(s).
Message Date (Required)	Date

Table 3-1: Recommended Field Mappings for Outlook E-mail Log

Outlook E-Mail	Suggested Field Type
Message Time (Required)	Time
Message File	Data File
Subject (Required)	Name
Message Type	Selection: • E-mail Sent • E-mail Received

Attaching logged E-Mail messages to a Contact

When you log E-Mail from Outlook, Commence will automatically attempt to connect the logged message to a Contact in the Commence database. This feature requires that you also set the preferences for Outlook Contacts. You do not have to actually synchronize your Contacts with the Outlook Address Book, but at minimum you should map the required fields. This gives you the flexibility to search for a matching Contact by E-mail address, First Name, Last Name, or Company Name.

To configure preferences for Microsoft Outlook Contacts:

1 Select **Edit -> Preferences -> Other Apps**. From the **Configure Commence as:** Combo Box, select **Microsoft Outlook Contacts**.

2 Only the minimum fields listed in Table 3-2 need to be mapped. For more detail, refer to the steps for mapping fields for Outlook "Setting Preferences" on page 26.

Table 3-2: Minimum Field Mappings for Outlook Contacts

Outlook Contacts	Suggested Field Type
Company Name	Text
Email1 (Required)	E-Mail Address or Text
File As (Required)	Name
First Name	Text
Last Name	Text

Selecting a folder for storing E-Mail messages

The E-Mail Log in Commence can be used to view a copy of the entire E-Mail message, just like in Outlook. To store the full email message including any attachments, the following steps should be taken:

1 When setting the E-Mail log preferences in Commence, be sure to map Outlook's "Message File" field to the Data File field in the log category.

Note: This field mapping will be used when logging all incoming email messages (i.e. received messages addressed to you). When logging outgoing messages from your Outbox or Sent folder (i.e. messages sent from you), you may prefer to skip the attached .MSG file to minimize redundancy and disk space usage. Select **Commence Options -> Outgoing** from the **Tools** menu in Outlook to change your Outgoing Email Settings. Uncheck the preference to "Save Email as MSG file". When adding the log item, Commence will ignore the "Message File" field mapping and log all other mapped fields.

2 Confirm that the **External Data File Directory** points to a valid path. This preference is set via **Edit -> Preferences->Other**. The full E-Mail messages (.MSG files) are stored in this directory. If the directory does not exist, an error message will notify you during the logging process to correct this problem before continuing.

3 Set the Synchronize Data Files preference to determine if the email message (.MSG file) will be synchronized or not. (Workgroup only).

The E-Mail message is copied in its entirety to Commence. The logged message is not linked to your Outlook folders so deleting or modifying a message in Outlook will not affect the copy of that message stored in Commence.

In a workgroup environment, the current synchronization method is used to share and distribute the .MSG files to other clients. Synchronization of the message file is controlled by the "Synchronize Data Files" option under **Edit -> Preferences-> Database**.

Note: *Outlook 98 or 2000 must be installed on the same PC as Commence to read the .MSG file.*

Verifying Commence Options in Outlook

Outgoing Mail

By default, the content of the mail message and the original email will be copied to the specified fields in the database based on the E-mail Log mappings in Commence. When logging outgoing messages in Outlook, you can choose to store a minimum amount of detail to save space in the database.

1 Select **Commence Options -> Outgoing** from the **Tools** menu in Outlook to set the options listed below.

2 Click **OK** to close the dialog.

Note: *These settings apply to outgoing e-mail only.*

❑ *Send Email:*

This option flags the email for delivery. This option is turned on by default to simplify logging newly composed emails. The email is sent automatically after it has been logged in Commence. Messages that have already been sent will be resent.

✎ Tip Before logging messages in the Sent Items folder, turn off the "Send Email" option to prevent the messages from being resent to the recipient.

❑ *Map Email Content to Commence:*

This option reduces the size of the log entry by excluding the message contents. Checking this box will skip the **Body** field from Outlook when mapping fields to Commence.

❑ *Save Email as MSG file:*

This option reduces the size of the log entry by not saving the original email as a file attachment in Commence. Checking this box will skip the **Message File** field from Outlook when mapping fields to Commence.

❑ *Always show options with Outgoing Email:*

If unchecked, the default settings for the above options will be used for every email export. Checking this option will give you an opportunity to change your preference during each export by opening the "Commence RM Outgoing Email Settings" dialog.

Incoming Mail

Once you have logged an e-mail message from the Inbox or any folder in Outlook that contains incoming mail, the e-mail will then be accessible from the Commence database for review. You may wish to mark or delete logged e-mail messages in Outlook to distinguish them from messages that have not yet been processed.

1 Select **Commence Options -> Incoming** from the **Tools** menu in Outlook to set the options listed below.

2 Click **OK** to close the dialog.

Note: These settings apply to incoming e-mail only.

After Email Log:

By default, E-mails that have been successfully logged in Commence are moved out of the Inbox to the "Commence Archive" folder. The options listed in Table 3-3 are mutually exclusive; turning on one option automatically turns off the other.

Table 3-3: Options for handling Incoming E-mail

Option	Description
Move Email to the "Commence Archive" Folder	default
Delete Email	Flags the e-mail to be deleted from Outlook after it has successfully been logged in Commence. Logged e-mails are moved to the "Deleted Items" folder.
Mark As Read	Flags the e-mail as read after it has been logged in Commence.
Leave In Folder	Leaves the e-mail in the original folder in Outlook for further review.

❑ *Skip any Email with no Contact match:*

This option does not process e-mail messages from Contacts that are not found in the database or where the E-Mail Address does not match the address of an existing Contact in the Commence database.

❑ *Always show options with Log:*

If unchecked, the default settings for the above options will be used for every email export. Checking this option will give you an opportunity to change your preference during each export by displaying the "Commence RM Incoming Email Settings" dialog.

Database

Before you begin logging, confirm that only one Commence database is open and that the database mapping preferences have been configured properly. Launch Outlook and open any folder containing e-mail messages.

If any of the settings are blank or invalid, you should correct the preferences in Commence before attempting to export your Outlook email to Commence.

1   Select **Commence Options -> Database** from the **Tools** menu in Outlook to perform a preliminary check. A message will alert you if a problem is found with the settings in Commence.

2   Once you have verified that the settings are correct, click **OK** to close the dialog.

Commence Database:

Points to the active Commence database. Confirm that this database is the one that has been configured to receive e-mail logs from Outlook. This setting can be changed in Commence by selecting the **Edit -> Preferences -> Other Apps** command and updating the field mappings for the **E-mail Log**. See "Setting Preferences in Commence" on page 17 for more information.

Contact:

Points to the Contact category in the active Commence database. The E-Mail Address in this category is used to attach the logged e-mail to the appropriate contact(s) based on the "To:/From:" address in the email message. This setting can be changed in Commence by selecting the **Edit -> Preferences -> Other Apps** command and updating the category and field mappings for **Microsoft Outlook Contacts**. See "Attaching logged E-Mail messages to a Contact" on page 19 for more information.

Outlook Email:

Points to the Log category in the active Commence database where the e-mail message will be stored. This setting can be changed in Commence by selecting the **Edit -> Preferences -> Other Apps** command and updating the field mappings for the **E-mail Log**.

External File Directory:

This points to the directory where the .MSG file will be saved. Confirm that the directory exists and that the path is valid. This setting can be changed in Commence by selecting the **Edit -> Preferences -> Other** command.

Logging E-Mail in Outlook

All e-mail logging is initiated from Outlook. To facilitate this, a new "**Log to Commence**" button is added to the toolbar in Outlook during the Commence RM installation.

New E-mail

To log new e-mail messages in Outlook to Commence:

1   Create a new mail message in Outlook. This can be done any number of ways, such as:

• double-clicking on the E-Mail address field in a contact item in Commence

• sending a letter to a contact in Commence using the E-mail option

• select **File -> New Mail Message** in Outlook. Address the message to a contact in the Commence Address Book.

2   Compose the mail message.

3   When you are finished, click the button on the Outlook toolbar in the message. This will log and send the message by default.

4 If you chose to "Always show options with Log", a dialog will be displayed. Change the options as needed. Click **OK** to continue logging.

5 A confirmation message will appear indicating the message was successfully logged to Commence.

Finding a Matching Contact

When you log E-Mail from Outlook, Commence will automatically attempt to connect the logged message with a Contact in the Commence database. One of the following messages will be displayed telling you if the match was successful or not.

Exact match found or multiple matches found: When one or more contacts in Commence contains a matching E-Mail address, one log item is created and connected to each matching contact.

No matches found: The message is not logged when *both* of the following conditions are met:

• the Email address of the contact does not match any contact in Commence

• and the option to "Skip any Email with no Contact match" is checked

Otherwise a dialog will pop-up allowing you to search the database for a matching contact. Click **Find** to start the search. If after the search there is still no matching contact, you can still log the message by clicking **Don't Match**. This will add a log item that is not attached to any contact.

Existing E-mail

To log existing e-mail messages in Outlook to Commence:

1 Open Outlook to any folder containing email messages that have already been sent.

2 Select **Commence Options -> Outgoing** from the **Tools** menu in Outlook.

3 Verify that the "Send Email" option is not selected. Disabling it prevents messages in the folder from being sent again after being logged into Commence.

4 Select one or more email messages. Up to 30 messages at a time may be selected.

Note: Multiple messages cannot be selected in Outlook 98. Open each message to log each one individually.

---

5 Select the **Tools -> Log to Commence** menu command in Outlook or click the 🔯 button on the Outlook toolbar.

6 Click **OK** to continue logging.

7 A confirmation message will appear indicating the number of messages that were successfully logged to Commence.

Chapter 4: Synchronization with Outlook

To configure a Commence database to synchronize with Outlook, you need to follow these steps:

• **Prepare your database.** To get the most out of the Outlook Sync you will need to modify your Outlook information, such as deleting duplicate items that appear in both Commence and Outlook.

• **Modify your database**. If you are using a custom database or a database that was converted from a previous version of Commence, you may need to modify your Commence Database to ensure that all required fields are available in Commence.

• **Set Outlook field mappings.** Commence's preferences allow you to map Commence categories and fields to those required for synchronizing with Outlook Contacts, Calendar and Tasks.

• **Set E-Mail preferences in Commence.** Commence can be configured as a MAPI 32-bit E-Mail client in order to work seamlessly with Outlook. Select **Edit -> Preferences** -> **Other Apps**. From the **Configure Commence as:** Combo Box, select **E-Mail client.** From the **Mail Program:** combo box, select **MS Outlook or MAPI-compatible (32-bit)**. Enter your E-Mail **User Name** and **Password**.

• **Synchronize with Outlook.** Details for using the synchronization feature and for all of the necessary setup listed above are included in this chapter.

Prepare your Database

Check Calendar times

Verify that all calendar items have the end time set later than the start time. Outlook does not support appointments with the end time set incorrectly and will prevent the synchronization from completing. A new view of the calendar category can be created and filtered on items where the Duration field is less than 0 to determine if there are any items with an invalid end time value.

Check Calendar dates

The calendar synchronization feature is designed to synchronize appointments that occurred up to 30 days ago, or are scheduled to occur within the next 90 days. This date range may be customized. For more information refer to the topic titled "Calendar Date Range" on page 41.

Make sure the required fields contain values

When adding items to the Commence calendar, the required fields are Description, Start Date, Start Time, and End Time. When adding items to the Outlook calendar, be sure to enter a value for all of the fields above, plus the End Date. If this field is blank, the data will not synchronize properly with Commence.

> **Caution:** *It is possible to add an item to the Outlook calendar with no Description filled in, however items without a Name are not supported in Commence and will cause the synchronization to stop.*

For contacts, the only required field is the Name field-type. If an Outlook contact is added with no name, Outlook will automatically assign a name of "(unknown)" to the item. This will synchronize successfully and will be filed as "(unknown)" in Commence.

Check for duplicate items

When first synchronizing between Outlook and Commence, the feature is designed to copy all information present from each application to the other. If you have been copying information manually from Commence to Outlook, or vice versa, the initial synchronization will cause duplicates to be created. You will need to delete the duplicate records in Outlook or in the Commence applications.

> **Note:** *A duplicate item is an item that is located in both Commence and Outlook that refers to the same information. For example, if both Commence and Outlook Contacts contain an item "Jane Smith" and both items refer to the same person, they are duplicate items. If the items refer to two different people, both named "Jane Smith", then they are not duplicate items. In either case, if the duplicate items are not deleted, you may have more items than expected after synchronization.*

Modify the Commence Database

It may be necessary to add fields or make other custom changes to the database to integrate with Outlook. To make changes to your Commence categories and fields, select **Tools -> Customize -> Database -> Category**. This dialog allows you to select the category and then add or edit fields as needed.

Prior to making any changes to your Commence database, it is important that you make a backup of your Commence database. Select **File -> Open/Manage Database** in Commence to backup the database.

If you are using the database in a Workgroup environment you may not have permissions to alter the database structure. If this is the case, contact your Commence administrator.

Special Considerations

The Title field in Outlook Contacts can optionally be mapped to a comparable selection field or text field in Commence. However, when mapping to a selection field additional steps must be taken to ensure that the choices available in the selection field match in both Commence and Outlook. When entering a new contact in Outlook, the selection field must be saved with a value, otherwise synchronization will stop.

For example, Outlook allows the following values in the Title field: **Dr.**, **Miss**, **Mr.**, **Mrs.**, **Ms.**, **Prof.** If the Outlook Title field is mapped to a selection field in Commence, be sure to modify the choices in Commence to match those values exactly. In Outlook, the Title field is left blank by default, but Commence requires a value for all selection fields. Before synchronizing with Commence, make sure all contacts in Outlook are saved with an appropriate title.

If data entry into Outlook contact fields does not follow a consistent format, these fields should be mapped to a text field in Commence ensuring successful synchronization.

Set Outlook Field Mappings

In order to copy data back and forth between Commence and Outlook, the fields in Commence must be mapped to the equivalent fields in Outlook. These field mappings will be used during the synchronization with Outlook to ensure that the data is stored in the appropriate field in each application. Only those fields that will be used need to be mapped.

The Microsoft Outlook Contact preferences are used to:

- find a matching contact when logging E-Mail messages from Outlook into Commence

- select the contact's name and address when working with the Web Companion

- synchronize your contacts in Commence with Outlook Contacts

Before you can synchronize your calendar in Commence with the Outlook Calendar, the Microsoft Outlook Calendar preferences must be set. Likewise, setting the Microsoft Outlook Tasks preferences must be completed before synchronizing your To-Do list in Commence with the Tasks in Outlook.

Setting Preferences

To select which categories will be used to synchronize data with Outlook,

1 Select **Edit -> Preferences** -> **Other Apps**. From the **Configure Commence as:** Combo Box, select either **Microsoft Outlook Calendar** or **Microsoft Outlook Contacts** or **Microsoft Outlook Tasks**.

2 From the **Category** Combo Box, select the Commence category that most closely matches the data in Outlook. To work with the Outlook Calendar, this category must contain a Date and Time field. To synchronize Outlook Contacts, this category should contain a field to store E-Mail addresses.

3 Double click on the desired **Outlook Field** on the left side of the form, or highlight the desired **Outlook Field** on the left and select **Edit**.

4 Select the corresponding **Commence Field** from the Combo Box. Select **OK** when done.

5 Repeat the steps above for any remaining Outlook fields that correspond to Commence Fields. Not all fields need to be mapped.

Caution: The NAME type field from Commence must be mapped. If a Clarify Field is defined for the category, that field should also be mapped to any equivalent field in Outlook.

---

6 When the desired Outlook fields have been mapped to Commence Fields, select **Done** to save the configuration. If Commence detects that all fields have not been mapped, you will be prompted to re-configure the settings. You may select **No** if you have finished mapping all the necessary fields.

7 Proceed with the steps to "Set E-Mail Client Preferences" on page 29.

Table 4-1: Recommended Field Mappings for Outlook Contacts

Outlook Contacts	Suggested Field Type
Sync Condition	Selection field or connection to (-Me-)
Assistant Name	Text
Assistant Phone	Telephone

Table 4-1: Recommended Field Mappings for Outlook Contacts

Outlook Contacts	Suggested Field Type
Business City	Text
Business Country	Text
Business ZIP	Text
Business State	Text
Business Street	Text
Business Fax	Telephone
Business Phone	Telephone
Company Name	Text
Email1 (Required)	E-Mail Address
File As (Required)	Name
First Name	Text
Home City	Text
Home Country	Text
Home ZIP	Text
Home State	Text
Home Street	Text
Home Phone	Telephone
Job Title	Text
Last Name	Text
Middle Name	Text
Mobile Phone	Telephone
Pager Phone	Telephone
Spouse	Text
Title	Text
Homepage	Internet Address (URL)

Table 4-2: Recommended Field Mappings for Outlook Calendar

Outlook Calendar	Suggested Field Type
Sync Condition	Selection field or connection to (-Me-)
Body	Text (large, more than 80 chars.)
End Date (Required)	Date
Start Date (Required)	Date
Subject (Required)	Name
Start Time (Required)	Time
End Time (Required)	Time

Table 4-2: Recommended Field Mappings for Outlook Calendar

Outlook Calendar	Suggested Field Type
Activity Type	Selection: • Appointment

Table 4-3: Recommended Field Mappings for Outlook Tasks

Outlook Tasks	Suggested Field Type
Sync Condition	Selection field or connection to (-Me-)
Actual Work	Text
Billing Information	Text (large, more than 80 chars.)
Body	Text (large, more than 80 chars.)
Categories	Text (large, more than 80 chars.)
Completed	Checkbox
Complete Date	Date
Date Created	Date
Due Date	Date
Priority	Selection field: • 1 • 2 • 3 • 4 • 5
Modified Date	Date field
Owner	
% Complete	
Private	
Reminder Set	
Reminder Sound	
Reminder Sound File	
Reminder Date	
Sensitivity	
Start Date	Date field
Status	
Subject	Name field
Team Task	
Total Work	
Reminder Time	

Table 4-3: Recommended Field Mappings for Outlook Tasks

Outlook Tasks	Suggested Field Type
Activity Type	Selection field: • To-Do

Using the Sync Condition

The Sync Condition allows you to specify a checkbox or connection field in your Commence category to determine whether an item is to synchronize with Outlook. The Sync Condition is found at the top of the list of Outlook Fields when using the **Edit -> Preferences -> Other Apps** menu command. For detailed steps, refer to "Set Outlook Field Mappings" on page 26. If the Sync Condition is not mapped, all items in the category will synchronize. This option is useful if you have a large number of items in Commence that you don't want to synchronize to Outlook.

If a checkbox is used, then the checkbox must be checked for the item to transfer to Outlook. If it is not checked, the item will not be affected by the Outlook synchronization. If you change the value of the checkbox from checked to not checked, the item will be deleted from Outlook.

If a connection is used, it must be a connection between the selected category and the category used by the Personal Information or (-Me-) item. If the item is connected to (-Me-), then it will synchronize with Outlook. The (-Me-) item is set using the **Edit -> Preferences -> Personal Info** menu command. Refer to the Preferences chapter in the *Commence User's Guide* for more information.

Using the Activity Type

Activity type looks for a selection field with a value of "To-Do". This is used in cases where the Commence category that contains your to-dos is the same category used to hold your appointments. To-do items added from Commence must be set with an activity type of To-Do to synchronize with Outlook Tasks. Tasks that are added from Outlook will have the activity type automatically set to To-Do when they synchronize to Commence.

Set E-Mail Client Preferences

Commence must be configured as a MAPI 32-bit E-Mail client in order to synchronize with Outlook.

Configuring your E-Mail Login

1 Select **Edit -> Preferences -> Other Apps**. From the **Configure Commence as:** Combo Box, select **E-Mail client**.

2 From the **Mail Program:** combo box, select **MS Outlook or MAPI-compatible (32-bit)**.

3 Enter your E-Mail **User Name** and **Password**. Re-enter the password in the **Verify Password** box. For 32-bit MAPI E-mail applications, the User Name is typically contained within a Profile. Determine the Profile Name for Microsoft Outlook and enter it into the box labeled **User Name**. (e.g., Microsoft Outlook Internet Settings)

Note: *If Outlook was installed using the Internet Mail Only option, MAPI will not be available. The User Name and Password should be left blank in this case.*

---

4 When completed select **Done** to save the configuration.

Synchronize with Outlook

The Commence synchronization with Outlook can be run manually by selecting a menu command or automatically at timed intervals using an agent. This provides the Commence user with the flexibility to synchronize data at anytime or at regular intervals.

The First Synchronization

When first synchronizing between Commence and Outlook, all items are copied from one program to the other. During this process, Commence keeps track of the information present in Commence and Outlook, and stores this information in a *base* file.

Subsequent Synchronizations

All data changes in either Commence or Outlook are transferred between each other. After the initial synchronization, Commence compares the information currently in Commence to the information stored in the base file. The comparison determines if the information is new, changed, or deleted.

• *New Information*. If an item is present in Commence but is not found in the base file, it is a new item and is added to Outlook.

• *Changed Information*. If an item is in Commence but is different from the base file, the item is edited in Outlook.

• *Deleted Information*. Any items that are found in the base file but are not in Commence are items that have been deleted, and are removed from Outlook.

This process is repeated, comparing the information found in Outlook with the information in the base file in order to update Commence with the latest changes.

Synchronize On Demand

To manually synchronize information between Commence and Outlook:

1   Start Commence and open the database that is configured to synchronize with Outlook.

2   In Commence, select **Tools** -> **Outlook Sync**.

3   A dialog will be displayed showing the status of the synchronization between Commence and Outlook.

This command will synchronize all applications that have been mapped.

Note: *If both the Outlook Calendar and Outlook Contacts preferences have been mapped in Commence, they will both be synchronized using this command.*

Automatically Synchronize

An agent can be defined to synchronize with Outlook on a regular basis. It can easily be modified so the synchronization occurs at a different time.

Table 4-4: Sample agent

Set the option below...	to this value...
Trigger:	Timer
Frequency:	Daily, at 9:00am
Trigger if missed:	checked
Action A:	Outlook Sync

The Outlook Sync action allows you to select either Contacts, Calendar, Tasks, or any combination of the three. If, for example, Contacts is selected but Calendar and Tasks are not, then only the Contact information will synchronize with Outlook. If the agent is designed to synchronize just the Calendar, this setting is enforced even if all of the Outlook preferences are mapped. If all actions are selected (Contacts, Calendar, and Tasks) then the agent functions the same as if the **Tools -> Outlook Sync** menu command had been selected.

Chapter 5: Group Scheduling

Group scheduling of meetings takes into account the schedules of both Commence and Outlook users on the same screen, making it easier to find an available time for the meeting.

Note: *Because the meeting is being scheduled in Outlook, the meeting will not be displayed in the Commence calendar until after you have synchronized Commence with the Outlook calendar.*

Configuring Meeting preferences

To use Outlook's meeting scheduler:

1 Select the **Edit -> Preferences -> Meeting** command.

2 Choose "**(Use Outlook)**" from the Category drop-down list.

3 Click **Done** to save the settings.

Scheduling Meetings

To schedule a meeting with one or more attendees:

1 In Commence, select **Tools** -> **Schedule Meeting**. Microsoft Outlook starts and a meeting request form is displayed. Refer to the On-line help in Outlook for additional assistance.

2 Click the **To:** button on the Appointment screen to open the Address Book. Select attendees and resources.

3 Determine a meeting time.

4 In the **Subject:** box, type a description.

5 Select any other options you want using Outlook.

6 Click Send.

As soon as the Outlook meeting request screen is closed, Outlook will E-Mail your meeting request to all the attendees and resources that you selected so they can respond to the meeting invitation.

The next time you synchronize with Outlook, the meeting details will be copied to Commence.

Chapter 6: Microsoft Outlook Address Book

The Address Book feature can be used with Microsoft Outlook 98 and later versions. Multiple mail systems such as MS Mail, Internet Mail, CompuServe, and AOL can all plug into Microsoft Outlook in order to provide a single, consistent interface for electronic mail. Since Microsoft Outlook operates as a front-end for multiple and potentially very different mail systems, there are some associated inherent problems. As an example, each mail system typically has its own address book, which leads to difficultly in locating an individual's address, as well as potentially redundant data.

For instance, if Fred has an AOL account, an Internet ID, as well as a fax machine, information about Fred must be entered into three separate address books. Ultimately, it may require searching up to three address books in order to determine all the possible means of sending him a message. Not only is this time consuming, but frustrating as well.

Commence solves this problem by providing its users with a universal address book. A selected category within Commence may now be accessed by Microsoft Outlook for use as an Address Book for such applications as addressing electronic mail messages, faxing documents, etc. This eliminates the need to enter duplicate information into both Commence and Outlook.

Configuring the Outlook Address Book

To configure Commence to be used as the Address Book in Outlook, follow the steps below:

1 *Set Commence Preferences for the Microsoft Outlook Address Book.* Commence's preferences allow you to map Commence categories and fields for use in the Outlook Address Book.

2 **Add Commence to the Outlook Profile**. Configures the Commence Address Book in the Windows Control Panel.

3 **Configure Outlook to use the Commence Address Book**. Choose Commence as the default Address Book for sending e-mail and faxes in Outlook.

Each step is described below.

Set Commence preferences

In order for Microsoft Outlook to access the correct address information within a Commence database, the fields used by Outlook must be mapped to the fields used by Commence. For example, Microsoft Outlook might use the field **Last Name** for an entry's last name, while in Commence, the corresponding field may be labeled **Name - Last**. By mapping **Last Name** to **Name - Last**, the correct information will be located. Only those fields that are to be used need to be mapped.

1 Select **Edit -> Preferences** -> **Other Apps**. From the **Configure Commence as:** Combo Box, select **Microsoft Outlook address book**.

2 From the **Category** Combo Box, select the category that is to be used as the address book. This category should have an E-Mail field. Typically, this would be the *Person/Company* category.

3 Double click on the desired **MS Outlook Type** field on the left side of the form, or highlight the desired **MS Outlook Type** field on the left and select **Edit**.

4 Select the corresponding **Commence Field** from the Combo Box. Select **OK** when done.

5 Repeat steps 3 and 4 for all remaining MS Outlook Type fields that are to map to Commence Fields. Only those fields that will be used need to be mapped.

6 When all MS Outlook Type fields have been mapped to Commence Fields, select **Done** to save the configuration.

Adding the Commence Address Book to the Outlook Profile

After you have configured your Commence preferences, you should then configure the Windows Control Panel to recognize the Commence Address Book.

1 Run the **Windows Control Panel**.

2 Double click on the **Mail and Fax** icon.

3 Select the **Add** button. A list of available services will be displayed.

4 Highlight the **Commence Address Book** selection. Select **OK** to add the Commence Address Book to the Outlook profile.

Note: Steps 5 through 14 configure the default Microsoft Outlook Address Book to be the Commence Address Book.

5 Select the **Addressing** Tab.

6 From the **Show this address list first:** pull-down menu, select **Commence Address Book**.

7 From the **Keep personal addresses in:** pull-down menu, select **Commence Address Book**.

8 Click on the **Add** button.

9 Highlight **Commence Address Book** and click on the **Add** button.

10 Click on **Close**.

11 The Commence Address Book is now shown in the list of Address Books for the **When sending mail, check names using these address lists in the following order:** option.

12 Use the ⬆ button to move the **Commence Address Book** to the top of the list.

13 Select **OK**.

14 Select **OK** again, and then close the Windows Control Panel.

Microsoft Outlook is now configured to use the information maintained within Commence as an Address Book, called *Commence Address Book*.

Using the Commence Address Book in Microsoft Outlook

Once Microsoft Outlook and Commence are properly configured as described in the preceding sections, outgoing faxes and electronic mail messages can be addressed using information found within Commence. Perform the following procedure to address an electronic mail message using the Commence Address Book.

1 If not already running, launch Commence. If Commence is not running, it will automatically run when Microsoft Outlook attempts to access the Commence Address Book.

2 Open the Microsoft Outlook Inbox icon on the desktop.

3 Compose a new mail message.

4 Click on the **To. . .** button. The *Address Book* dialog box will be displayed.

5 Select **Commence Address Book** from the **Show Names from the:** combo box.

6 Microsoft Outlook accesses and displays the information stored within the Commence Address Book. Highlight the desired recipient, and click on the **To->** or **Cc->** button. Repeat for each *To:* and *Cc:* recipient.

7 When all recipients have been included, select the **OK** button.

8 Complete all remaining areas of the mail note as usual, filling in the *Subject:* line as well as the body of the message. When done, send the message.

Chapter 7: Common Questions

General

Q: Can I synchronize Outlook with more than one Commence database?

A: No, this is not supported. Only one Commence database should be used to synchronize information with Outlook. If more than one database is used, data corruption may occur. If you need your Outlook information on more than one PC, such as at home and at work, use Commence's Sync Link function. For more information on this feature, see the online help in Commence.

Q: I only want to synchronize my address book with Outlook. How do I prevent the Calendar and Tasks from synchronizing?

A: By clearing the field mappings, you can selectively disable portions of the Outlook synchronization.

Perform the following steps to disable the Outlook synchronization for all but the Address Book:

1 In Commence, select **Edit -> Preferences -> Other Apps**.

2 Under **Configure Commence as:**, select "Microsoft Outlook Calendar".

3 Set the **Category:** to (none). This option is listed first, above all available categories.

4 Under **Configure Commence as:**, select "Microsoft Outlook Tasks".

5 Set the **Category:** to (none).

Q: Which versions of Outlook are able to synchronize data with Commence?

A: Outlook 98, Outlook 2000 and later versions.

Q: What happens if I edit the same item on both Outlook and in Commence?

A: Since information from Commence synchronizes first, changes made in Commence take precedence. If the same item has been edited in both Outlook and Commence, the changes in Commence will overwrite those in Outlook.

Q: What happens if I delete an item in Commence but edit it in Outlook?

A: Since deleted records cannot be edited, an item deletion always takes precedence.

Q: Can I use the Outlook Sync feature in a Commence Workgroup?

A: Yes. The Outlook Sync will respect the permissions in the database. For example, if you do not have permission to delete an item, synchronizing with Outlook will not delete the item in Commence and you will be notified with an error. Note that items added within Outlook and synchronized with Commence are always added as local items. An agent can be added that will promote these items so they are shared with the workgroup.

Q: Can I map information from more than one Commence category to one of the Outlook databases?

A: No. The Outlook Calendar and the Outlook Contacts can each be mapped to a single Commence category.

Q: What will happen if an item has already synchronized to Outlook but then I set the Sync Condition to prevent that item from synchronizing with Outlook?

A: The item will be deleted from Outlook during the next synchronization, but will remain in the Commence category.

Contacts

Q: If I change the value of the Name field in Commence, will Outlook still know which item to modify when synchronizing changes?

A: Yes. The Outlook synchronization process assigns a unique identifier to every item that is synchronized. This ensures that the correct item is modified during subsequent synchronizations.

Q: I currently store my names using one Name field in the format of "Last Name, First Name". Do I have to split the Name field into two separate Last Name and First Name fields?

A: No. You can map your Commence Name field to the Outlook File As field.

Q: I currently store my names using one Name field in the format of "Last Name, First Name". Can I split them into two fields?

A: Yes, you can do this either by editing the information manually, or by using Import/Export to another program to manipulate the data.

Calendar

Q: Why don't appointments in Commence from several months ago synchronize with Outlook?

A: The Outlook Calendar link is designed to synchronize those items that have a Date value within the following range (inclusive): 30 days before today through 90 days after today. Any items that are scheduled on dates before or after that range will not synchronize. This date range may be customized. For more information refer to the topic titled "Calendar Date Range" on page 41.

Q: What will happen If I reschedule an appointment for next quarter?

A: If the appointment has already synchronized, it will be deleted from Outlook during the next synchronization. As the scheduled date approaches and the appointment is scheduled to occur within the next 90 days, the item will then synchronize with Outlook.

Tasks

Q: My tasks from Outlook are synchronizing to Commence, but none of my To-Do's from Commence are going to Outlook. Why is that?

A: If your Appointments and To-Do's are stored in the same Commence category, then make sure you have also configured your Outlook Task preferences to use the Activity Type field. Once this is set, tasks that are added from Outlook will have the activity type automatically set to To-Do when they synchronize to Commence. However, to-do items added from Commence must be set (either manually or using a script) with an activity type of To-Do before they will synchronize with Outlook Tasks. If you need assistance with customizing your database, Commence Corporation can supply you with a list of Business Partners in your area or you may contact Commence Professional Services at (877) COMMENCE.

Appendix A: Special Cases

Outlook Calendar and Tasks

Recurring dates

Recurring dates from Outlook are not supported. Only the first occurrence of the item will synchronize and appear in Commence.

For the most compatibility, is recommended that all recurring appointments and tasks are added from Commence. These items can then synchronize with Outlook.

Multiple day appointments

Commence does not support appointments that span more than 24 hours. These items will not synchronize to Commence. As a workaround, you may create a recurring appointment from Commence where the start date and end date spans the entire duration of the appointment.

Workgroup Considerations

The Outlook field mapping preferences are are synchronized to all clients in a Commence Workgroup during the initial enrollment. Afterward, any changes to the mappings will not synchronize and must be configured at each individual client. Refer to Chapter 4 to complete the necessary configuration for Outlook integration.

Appendix B: Re-starting the Outlook Synchronization

In some circumstances, you may need to re-start the link to Outlook from the beginning. Such circumstances include:

- Outlook has been uninstalled and reinstalled

- All Outlook data has been deleted

- Data in Commence cannot be found

Re-starting the synchronization is accomplished by removing all previously created base files causing Commence to treat the next synchronization as if it were the first. Follow the steps below to re-start the synchronization.

1   Open the Commence database that has been configured to synchronize with Outlook.

2   Determine the directory where the Commence database is located. Select **Help -> System Information**. From the Display list, choose **Directory Information**. Take note of the first line that shows the name of the active database followed by the path. The path shown is the location of the Commence database.

3   Using Windows Explorer, open the directory determined in step 2.

4   Below this directory will be a directory labeled Outlook.

5   Below this directory should be one or more of the following files:
    COISCal.dmt-> used for synchronizing Calendar items
    COISCon.dmt-> used for synchronizing Contacts

6   Rename each *.dmt file to *.old. If you are having problems with a specific link, such as the Contacts list only, you can rename the .dmt file for just that link.

7   When you synchronize again, it will behave as an initial synchronization and all information in Commence will transfer to Outlook and vice versa.

Note: You will need to follow the steps in Chapter 3 of this manual to remove duplicate items in Outlook before retrying the synchronization.

Appendix C: .INI File Settings

The DATA.INI file is an initialization file located in the database directory and maintained by Commence. It is automatically updated when you perform various operations using the menu commands and dialog boxes in Commence. You should only edit this file on rare occasions if you need to customize the settings stored in this file, or if instructed to do so by Commence Technical Support.

To locate the DATA.INI, first determine the path to your data. Run Commence and open your database. Then select **Help -> System Information**. Choose to Display: **Directory Information**. Find the name of your database and take note of the path to the right.

The Outlook integration feature in Commence stores various settings in the **[Outlook]** section of the DATA.INI file. Those settings are described below.

Schedule Meeting Preference

When you set the Meeting preferences in Commence to use the scheduling feature found in Outlook, this will change the value of ScheduleMeeting keyword. A value of **1**, **True**, or **On** indicates the preference is set to **(Use Outlook)**.

[Outlook]

ScheduleMeeting=1

Calendar Date Range

The calendar synchronization feature is designed to synchronize appointments that occurred up to 30 days ago, or are scheduled to occur no later than within the next 90 days. This date range can be customized as needed to increase or decrease the number of days in the range.

[Outlook]

CalDaysPast=#

CalDaysForward=#

CalDaysPast

This keyword is used to specify the number of days in the past to consider when synchronizing Calendar items. Calendar items that are scheduled within that range will synchronize with Outlook. The default value is 30 (meaning 30 days before today). Allowable values are **1** to **32767**.

CalDaysForward

This keyword is used to specify the number of days in the future to consider when synchronizing Calendar items. Calendar items that are scheduled within that range will synchronize with Outlook. The default value is 90 (meaning 90 days after today). Allowable values are **1** to **32767**.

Appendix D: Outlook Error Messages

Synchronizing Calendar, Contacts, and Tasks

The following are the possible errors that can occur when synchronizing information between Commence and Outlook. All of the errors will be displayed in the active.log. When the error occurs, you can select the Message Log button in Commence, or at a later time, double-click on the active.log file located in the database directory. Each of these errors will stop synchronization from continuing. To restart synchronization, correct the problem and retry the synchronization process.

Info 805

An error occurred during synchronization with Outlook. Check the Message Log for more information. The synchronization with Outlook did not complete successfully. If you selected **Tools -> Outlook Sync**, more information about the error can be found by selecting **Help -> Message Log** from Commence. When using an agent to synchronize with Outlook, more information can be found in the ACTIVE.LOG file located in the data directory. If the log file does not contain sufficient information, close Commence and restart using a command line option of /TRACE.

Confirm that all required fields contain data. The name field in particular cannot be left blank. Review the section titled "Prepare your Database" on page 24 to make sure that the data being synchronized meets all the guidelines.

Info 806

Synchronization with Outlook was cancelled. Commence was unable to continue because the operation was cancelled by the user.

Info 807

Microsoft Outlook could not be loaded; verify that the required version of Outlook is installed. Outlook must be installed on the same PC as Commence. Review the section titled "Requirements" on page 2 for more information.

Info 808

Could not logon to Microsoft Outlook; verify that your email preferences are set correctly. Commence was unable to login to Outlook. Review the section titled "Set E-Mail Client Preferences" on page 29 for more information.

Info 809

The Outlook integration services could not be loaded. A problem was encountered while loading the program files necessary for synchronizing Commence with Outlook. Try reinstalling Commence.

Info 810

The Outlook preferences should be configured using the Edit-Preferences-Other Apps dialog before using this command. The **Tools -> Outlook Sync** command cannot be used until after the Outlook Calendar or Outlook Contacts preferences have been configured. Refer to the section titled "Set Outlook Field Mappings" on page 26 for a list of required fields that must be mapped.

Logging E-mail

Info 1700

Outlook is not running. Please start Outlook before trying to log email into Commence.

Info 1701

There is a problem with the registry settings within Commence. Please try reinstalling the latest version of Commence.

Info 1702

Outlook is running as a background process. Please start Outlook \nbefore trying to log email into Commence.

Info 1703

The following message \n\nFrom:\t%1\nSubject:\t%2\n\nhas an invalid email address.

Info 1704

The Commence database configuration has changed since the last log.

Selected Email message(s) will be logged to the following : There is a problem writing to the Commence Outlook Email Integration registry CMCDB key for ""%1"" value.

Info 1705

There is a problem writing to the Commence Outlook Email Integration registry CMCInCfg key for ""%1"" value.

Info 1706

There is a problem writing to the Commence Outlook Email Integration registry CMCOutCfg key for ""%1"" value.

Info 1707

The ""%1"" contact field must be mapped in order to log to Commence. Please map this field in Commence and try again.

Info 1708

The 'Name' field for the Commence category selected for Microsoft Outlook Contacts must be mapped. Please re-configure this in Commence by using the menu selection in Edit->Preferences->Other Apps.

Info 1709

The 'Name' field for the Commence category selected for E-mail Log must be mapped. Please re-configure this in Commence by using the menu selection in Edit->Preferences->Other Apps.

Info 1710

The directory specified for External Data Files cannot be created. Please re-configure this in Commence by using the menu selection Edit->Preferences->Other.

Info 1711

The application cannot create the Commence Archive folder in Outlook. Please try to create this folder manually under the Outlook Today folder or change the Commence Inbox options.

Info 1712   A problem was encountered writing to the category mapped for E-mail logging in Commence.

Info 1713   The following message \n\nTo:\t%1\nSubject:\t%2\n\nhas an invalid email address.

Info 1714   There is a problem retrieving the active database name from Commence.

Info 1715   There is a problem accessing the category used for Microsoft Outlook Contacts. Please verify that this is configured in Commence by using the menu selection in Edit->Prefer-ences->Other Apps.

Info 1716   There is a problem accessing the category used for E-mail Logging. Please verify that this is configured in Commence by using the menu selection in Edit->Preferences->Other Apps.

Info 1717   There is a problem accessing the directory path for External Data Files. Please verify that this is configured in Commence by using the menu selection in Edit->Preferences->Other.

Info 1718   A problem has been encountered calling the method %1.

Info 1719   A Commence category must be selected to be mapped for Microsoft Outlook Contacts. Please configure this in Commence by using the menu selection in Edit->Preferences->Other Apps.

Info 1720   A Commence category must be mapped for E-mail Log. Please configure this in Commence by using the menu selection in Edit->Preferences->Other Apps.

Info 1721   There was problem while trying to modify the '%1' field in Commence. Please check the category used for E-mail logging.

Info 1722   The Commence E-mail Log has encountered an error.

Info 1723   The field mapped to the ""Name"" field of E-mail Log has not been entered with any data, please check the email or check the configuration of E-mail Log in Commence by using the menu selection in Edit->Preferences->Other Apps.

Info 1724   The field mapped to the ""Name"" field of E-mail Log may be a duplicate name entry, please check the email or change the category mapped to the E-mail Log to allow for duplicate name entries.

Info 1725   The item that you have selected is not an email message. This item cannot be logged to Commence.

Info 1726   The items that you have selected are not email messages. These items cannot be logged to Commence.

Info 1727   Some of the items that you have selected are not email messages. These items cannot be logged to Commence.

Info 1728   There must be at least one name or distribution list in the To, Cc or Bcc box. IDS_MISSING_RECIPIENTS