

micros[®]



User Manual

Export to Outlook Manual

micros[®]
Fidelio Suite8

MICROS Fidelio Suite8 Version 8.9
Fidelio Suite8
Documentation

This document has been prepared by MICROS-Fidelio GmbH and is available to a select group of individuals for informational purposes. This is a confidential document that contains concepts, methods and other proprietary information. Readers are to treat the information herein as confidential.

Information in this document is subject to change without notice.

MICROS-Fidelio GmbH. makes no warranty of any kind with regard to this material, including but not limited to the implied warranties of marketability and fitness for a particular purpose.

MICROS-Fidelio GmbH Ltd. shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance, or use of this material.

Copyright © 2012 MICROS-Fidelio GmbH. All Rights Reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, or transmitted without the express prior written consent of the publisher.

Document Change History

Version	Date	Change
Version 8.5.0.0	July 2005	First Issue Small Business Edition
Version 8.7	May 2008	Updated for Version 8.7
Version 8.7.3.1	June 2008	Updated for Version 8.7.3.1
Version 8.8	May 2009	Updates for Version 8.8
Version 8.8	Sept 2010	Updates for Oracle 11gR1
Version 8.9	Nov 2011	Updated for Version 8.9
Version 8.9	Nov 2012	New cover page

Table of Contents

Export to Outlook	7
Export to Outlook Setup	9
Folders	9
Settings	12

1

Export to Outlook

This option may be used to export profile information to MS Outlook folders and is accessible via the option EXPORT TO OUTLOOK on the MISCELLANEOUS menu.

Information such as the following can be exported:

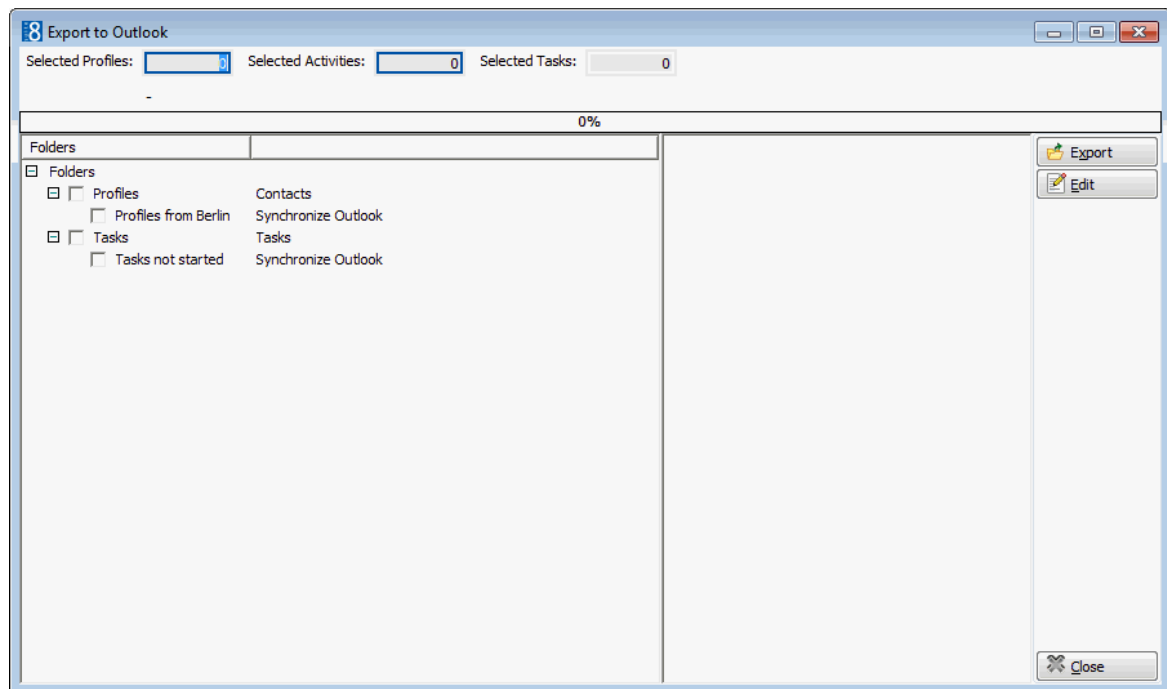
- Individual profiles, companies and all linked individuals
- Addresses and communications
- Birth dates and notes
- Linked tasks and activities

Note: The export should be run manually as often as required; it is not an automated process.

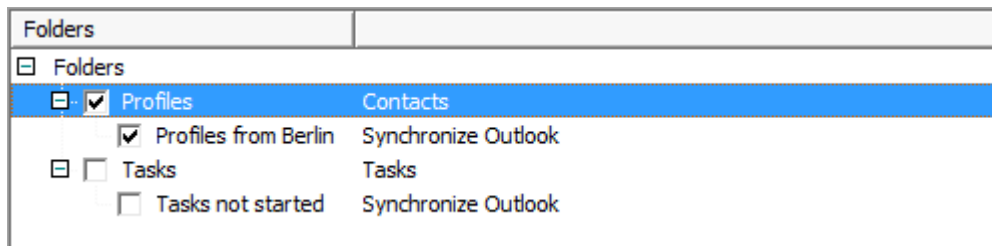
How to run the export to MS Outlook

1. Click the MISCELLANEOUS menu and select EXPORT TO OUTLOOK.

The Export to Outlook screen is displayed.



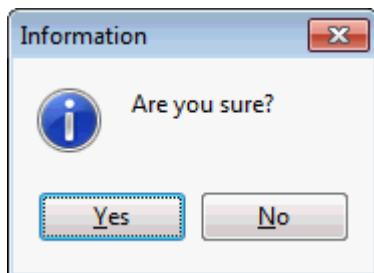
2. Select the folder and operation to synchronize so that both the folder and the operation are marked as selected .



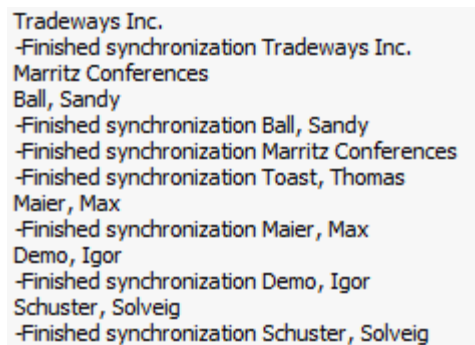
Depending on the folders selected the number of records will be displayed in the SELECTED PROFILES, SELECTED ACTIVITIES and SELECTED TASKS boxes at the top of the screen.

3. Click the EXPORT button.

A confirmation message is displayed.




4. Click YES to continue; enter the MS Outlook password if requested.
5. Depending on your MS Outlook settings, you may be prompted with a message from MS Outlook requesting access permission.
6. Select the check box ALLOW ACCESS FOR and click YES.
7. Once access is granted the export to MS Outlook starts and the export process is displayed on the Export to Outlook screen.



Tradeways Inc.
-Finished synchronization Tradeways Inc.
Marritz Conferences
Ball, Sandy
-Finished synchronization Ball, Sandy
-Finished synchronization Marritz Conferences
-Finished synchronization Toast, Thomas
Maier, Max
-Finished synchronization Maier, Max
Demo, Igor
-Finished synchronization Demo, Igor
Schuster, Solveig
-Finished synchronization Schuster, Solveig

8. The export process is finished when the message 'Finished database synchronization' is displayed in the export process window.
9. Click CLOSE to exit the Export to Outlook screen.

-  Folders and sub folders are defined via the options Folders under Setup → Configuration → Miscellaneous → Export to Outlook.

2

Export to Outlook Setup

Folders

The folders and export operations required to export information from Suite8 to MS Outlook are defined via the option FOLDERS in the configuration.

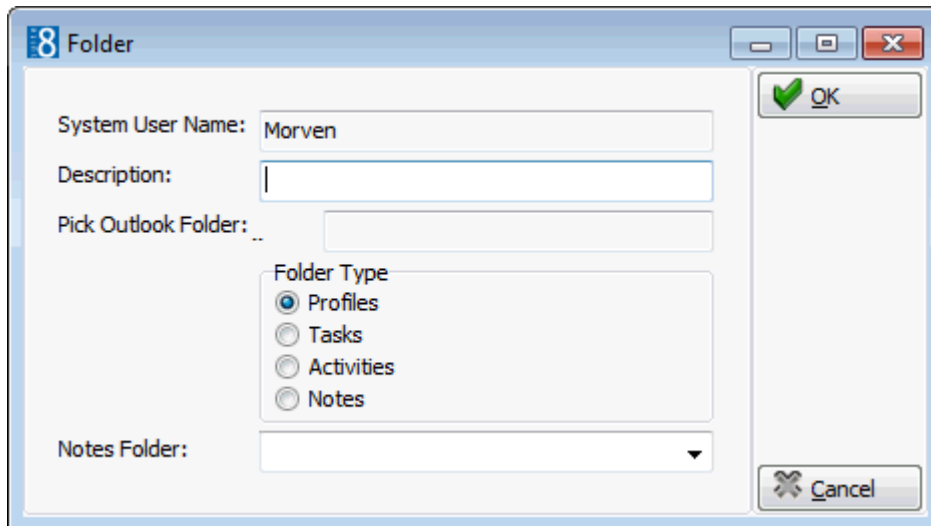
In order to define the folders and operation the folder NOTES must first be created in MS Outlook so that it can be selected when creating the folders in Suite8.

In order to pass notes to MS Outlook and enable the correct linkage of notes for each corresponding record, the folder NOTES with the Folder Type NOTES must then be created in Suite8.

How to create the notes folder

1. Create a folder with a name such as V8 NOTES in MS Outlook.
2. On the SETUP menu select CONFIGURATION to display the configuration options.
3. Click MISCELLANEOUS and select EXPORT TO OUTLOOK from the drop-down list.
4. Click FOLDERS to display the Folders screen.
5. Click NEW FOLDER.

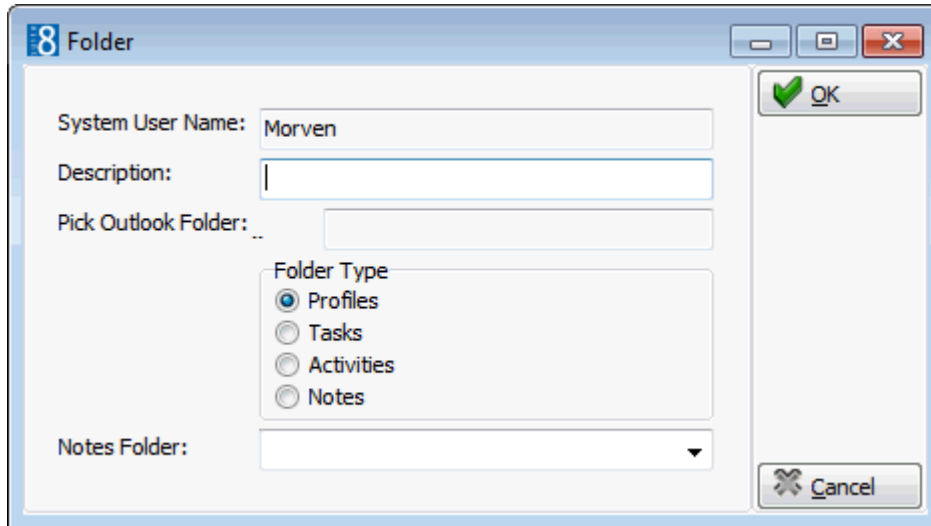
The Folder dialog box is displayed.



6. The SYSTEM USER NAME is view only and displays the name of the MS Outlook User.
7. In the DESCRIPTION box enter NOTES.
8. In the PICK OUTLOOK FOLDER BOX, click the three dots button and select the MS Outlook Notes folder created in step 1.
9. Select NOTES for the FOLDER TYPE.
10. Click OK to save the folder.

How to create a new folder

1. On the SETUP menu select CONFIGURATION to display the configuration options.
2. Click MISCELLANEOUS and select EXPORT TO OUTLOOK from the drop-down list.
3. Click FOLDERS to display the Folders screen.
4. Click NEW FOLDER; the Folder dialog box is displayed.



6. The SYSTEM USER NAME is view only and displays the name of the MS Outlook User.
7. In the DESCRIPTION box enter a name for the folder.
8. In the PICK OUTLOOK FOLDER BOX, click the three dots button and select the corresponding MS Outlook Folder.
9. Select the required FOLDER TYPE.
10. In the NOTES box, click the drop-down arrow and select the NOTES Folder.
11. Click OK to save the folder.

Note: Depending on the Folder Type, different fields will be available when defining exports under NEW OPERATION.

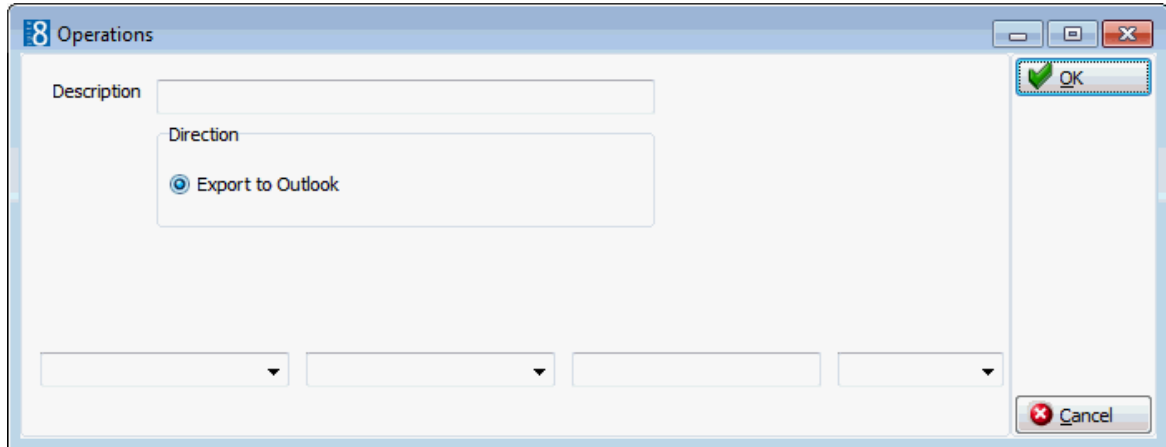
New Folder dialog box

Field	Definition	Legal Values
System User Name	The name of MS Outlook User.	Will be taken from outlook and must be completed on each workstation, for each user.
Description	Describes the contents of the folder.	Enter a valid description.
Pick Outlook Folder	Defines the MS Outlook folders.	Select the required outlook folder from folder list.
Folder Type	Defines the folder type.	Select from Profiles, Tasks, Activities or Notes.
Notes Folder	Select the folder created for notes.	Select from list box.

How to create a new operation

1. On the SETUP menu select CONFIGURATION to display the configuration options.
2. Click MISCELLANEOUS and select EXPORT TO OUTLOOK from the drop-down list.
3. Click FOLDERS to display the Folders screen.
4. Select the required folder and click NEW OPERATION.

The Operations dialog box is displayed.




5. Enter a DESCRIPTION for the operation.
6. The direction EXPORT TO OUTLOOK is automatically selected.
7. Select the fields, operators and enter values as required. Combinations of and/or may be entered.
8. Click OK to save the operation.

New Operation dialog box

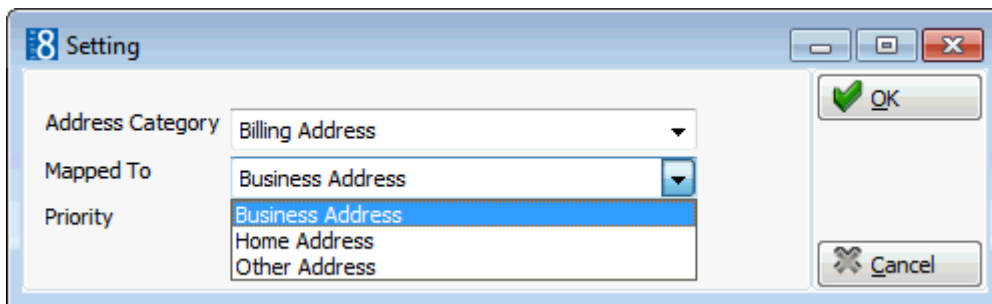
Field	Definition	Legal Values
Description	The description of the operation.	Enter a valid description.
Direction	The type of export operation.	EXPORT TO OUTLOOK selected by default.
Field List	Defines the fields for the export. The list of available fields is dependant on the Folder Type.	Select from list box.
Operators	Defines the operator to be used such as, equal, not equal, less than, greater than, is empty, etc.	Select an operator.
Values	The valid options are displayed. The choices depend on the type of field selected.	Enter or select a valid option.
And/Or	Specifies the logical operator for the next connection.	AND – the first condition and the next condition must both be true. OR – either the first or the second condition must be true.

		BLANK – no logical operator selected.
--	--	---------------------------------------

 The folders and export operations are defined via the option Folders under Setup → Configuration → Miscellaneous → Export to Outlook.

Settings

The address and communication type mappings to MS Outlook folders are defined via the option SETTINGS in the configuration. It is possible to map one or more Version 8 address or communication types to an MS Outlook address or communication type; however, all Suite8 address or communication types must be mapped otherwise information will be lost during the export.





Address and Communication Categories dialog box

Field	Definition	Legal Values
Address Category	The address or communication type.	Select from list box.
Mapped to	MS Outlook address or communication type to be mapped to.	Select from list box.
Priority	If more than one Suite8 address type is linked to the Outlook address type, the priority defines which one gets used.	Integer between 0 and 99.

How to set an address or communication type mapping

1. Select the address or communication type category.
2. Click EDIT.
3. In the MAPPED TO box click the drop-down arrow, and select the address to be mapped to.
4. In the PRIORITY box enter a priority number between 0 and 99.

 The address and communication type mappings to MS Outlook folders are defined via the option Settings under Setup → Configuration → Miscellaneous>Export to Outlook.

 The address and communication types are defined via the options Address Types and Communication Types under Setup → Configuration → Customer Relationship Management.



Find out more about what MICROS-Fidelio can do for you

For more information about our Suite8
please contact us at sales-eu@micros.com.

About MICROS-Fidelio

Serving the hospitality and speciality retail industries, we are the world's leading developer of enterprise applications. Our global presence and local support have helped us build a long list of references – hotels, restaurants, conference centres, retail, stadiums, theme parks, casinos and cruise ships. We maintain an intense dialogue with colleagues throughout these industries. The result is a wide range of integrated software, hardware and business technology solutions and services. These help to optimise your operation and increase profits by providing your guests with a personalised service.

MICROS-FIDELIO GmbH

Europadamm 2–6
41460 Neuss
Germany
Phone: +49-(0)2131-137 0
Fax: +49-(0)2131-137 777

www.micros-fidelio.eu

micros® and micros-fidelio® are registered trademarks of MICROS Systems, Inc. Certain product and company names appearing here may be the trademarks or service marks owned and/or registered by third parties. All other product and brand names are the property of their respective owners.