

WEB and DATA Services

www.webNdata.com

TeleMagic Outlook Push

TeleMagic Outlook Push, by Web and Data Services is a TeleMagic Version 5 add in that moves data from TeleMagic to Microsoft Outlook. Once configured, it will automatically “push” contact data and activity data from TeleMagic to Outlook’s Contact data and Calendar respectively.

Once in Outlook, many hand held devices will synchronize the Outlook data allowing the users to carry their contact list and calendar with them.

Installation

To install TeleMagic Outlook Push:

- 1) Download the file **wndopush.exe** to a temporary folder.
- 2) Double-click the program icon to extract the 4 files to the **\programs** folder of your TeleMagic Installation
 - a. wndpush.app
 - b. autopush.app
 - c. wndact.app
 - d. wndinstall.exe
- 3) With everyone out of TeleMagic, run the installation file **wndinstall.exe**
- 4) TeleMagic Outlook Push is now installed for all TeleMagic users.

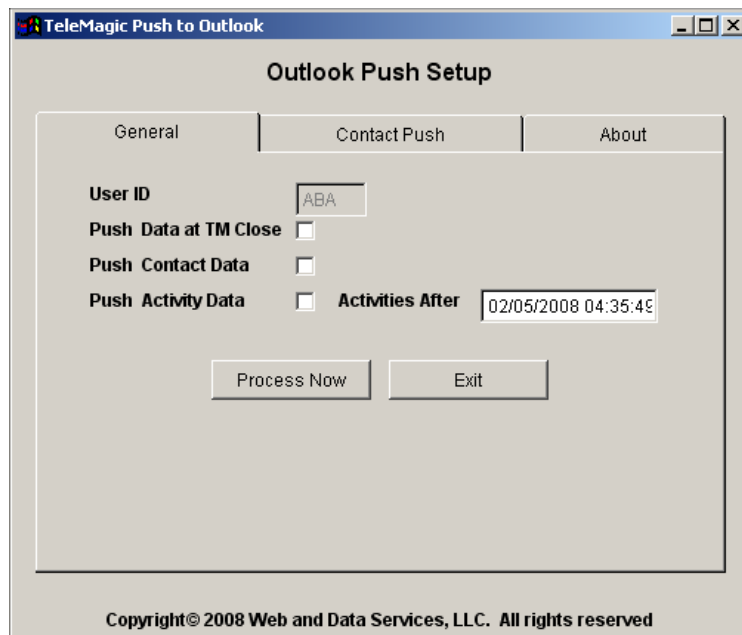
Setup

Prior to running TeleMagic Outlook Push, thought must be given to which contacts each user wishes to push to his/her Outlook installation. Each User can push contact data from one database based on a filter they select. Each time TeleMagic is closed, contact records added or changed that fall within the users filter as well as added or changed activities are moved to Outlook where they are immediately visible.

Web and Data Services, LLC
24499 Albert Lane
Beachwood, Ohio 44122

E-mail: alana@webNdata.com
Phone 216-595-9357

To begin the setup process, click on the menu selection **Office>Outlook Push**.

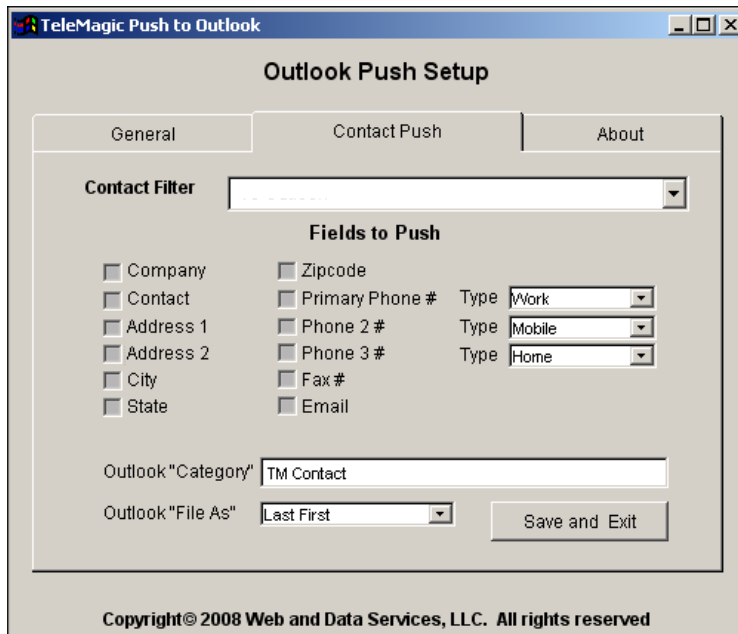


The first time a user starts TeleMagic Outlook Push, a preference record is created to track their preferences.

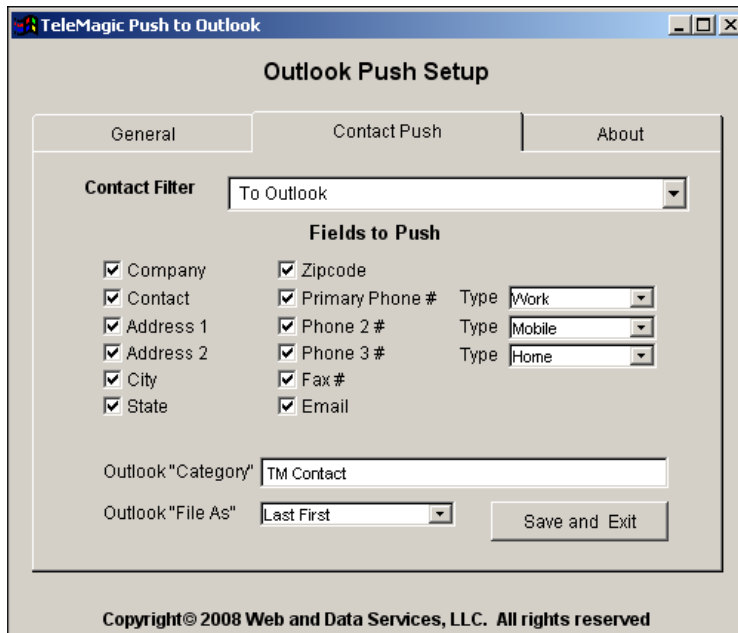
- 1) The User ID field displays the user logged into TeleMagic. Each user maintains their own preferences and must setup TeleMagic Outlook Push individually. This field cannot be edited.
- 2) Push Data at TM Close allows the user to automatically push data when TeleMagic closes. If this box is not checked, no data will be pushed
- 3) Push Contact Data allows the user to push contact data based on the filter they select. Only contact records that have changed (based on last revision date) are pushed. If this box is not checked no contact data will be pushed. The first time that a filter is selected all contact records within the filter, regardless of last revision date are pushed.
- 4) Push Activity Data allows the user to push activity data based on activities to which they are the "Owner". Only future activities are pushed. If this box is not checked no activity data will be pushed

Generally, pushing contact and activity information is a relatively fast process since only additions and changes are pushed. The first time a filter is selected and all contacts and all activities are pushed. Depending on the number of records in your filter the first push to Outlook may take longer. Sufficient time should be allowed for this process.

Selecting the second tab brings up the following screen



Each user wanting to push information to Outlook is required to select the contact filter that identifies the records they want to push.



When a filter is selected the Fields to Push selections will become active based on the key fields defined for the database. The key fields selected are based on the level definition of the Filter. If a key field is not defined the check box will be grayed out and no data will be pushed for that data field. The user may choose to push any of the fields listed depending on the level

of detail to be maintained in Outlook. Only fields that are checked will be pushed to Outlook.

Since each TeleMagic installation may have different phone types defined for each phone key field, the user is required to identify which phone type is associated with each of the three phone fields (primary, phone2 and phone3). Currently, the only phone types available are work, home, mobile. Only one of each phone type may be identified.

When all the fields are properly selected, click on the Save and Exit button to save the selections and filter information. This will close the TeleMagic Outlook Push Setup.

Each user may change any of the selections by reentering the TeleMagic Outlook Push Setup program and making the appropriate changes. They will take effect immediately.

The field Outlook "Category" corresponds to the user choice for the category designation to be found in Outlook. The default for this field is "TM Contact", however, it may be changed to whatever the user chooses.

The field Outlook "File As" corresponds to the user choice for the File As designation to be found in Outlook. The default for this field is "Last First", however, it may be changed to "First Last" or "Contact Name" depending on the users preference. Contact Name represents the full name and no attempt to parse it is made.

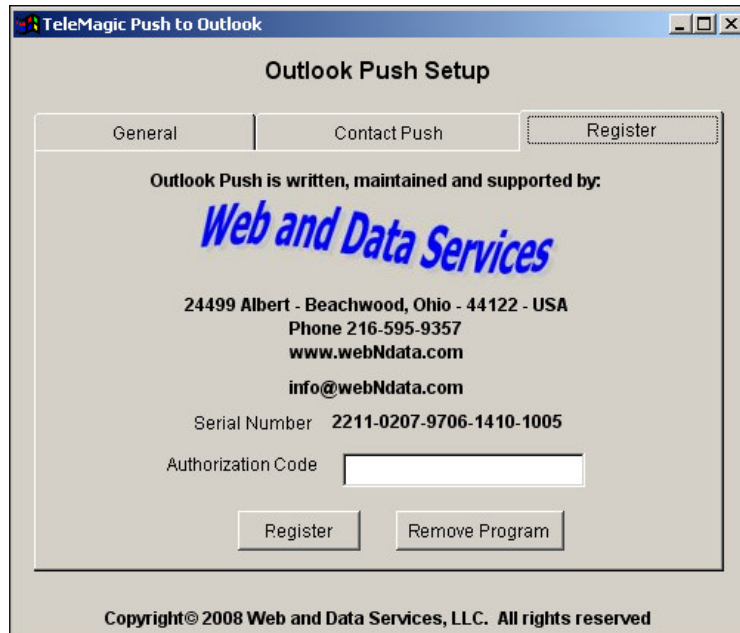
Register / About

The third tab on the TeleMagic Outlook Push Setup program is used to Register the Program and after registration, display contact information for Web and Data Services.

TeleMagic Outlook Push is originally installed for evaluation purposes. The product is fully functional on installation with a license that will expire 15 days from the date of installation.

Use of the product after that is in violation of the Terms of Use. The program is designed to terminate operation after that point.

The program may be registered by selecting the Register tab.



Each installation of TeleMagic maintains a unique Serial Number. An Authorization Code available from Web and Data Services is required to register the product.

To register TeleMagic Outlook Push, contact Alan Arons by email (alana@webndata.com) or by phone 216-595-9357. Include the Serial Number in all communications. An Authorization code will be returned to you.

Enter the Authorization Code in the text box and press the Register Button. If the code was entered correctly, you will receive a message box thanking you.

In the event that you elect not to register the program, you may remove it from processing by selecting the Remove Program button. This will remove the add-in programs from TeleMagic.

Program History

04/29/08 Initial Release of Outlook Push

06/25/08

Features Added

- Ability to enter the Outlook Category to be used with pushed records
- Ability to choose the Outlook File As order
 - Last name, First name
 - First name, Last name
 - Full Name

Corrections

- Notes were not pushing due to incorrect setting. – Corrected.

12/16/08

Feature Removed

- Ability to push notes was removed due to conflict of naming conventions between Outlook and Outlook running under Exchange Server.