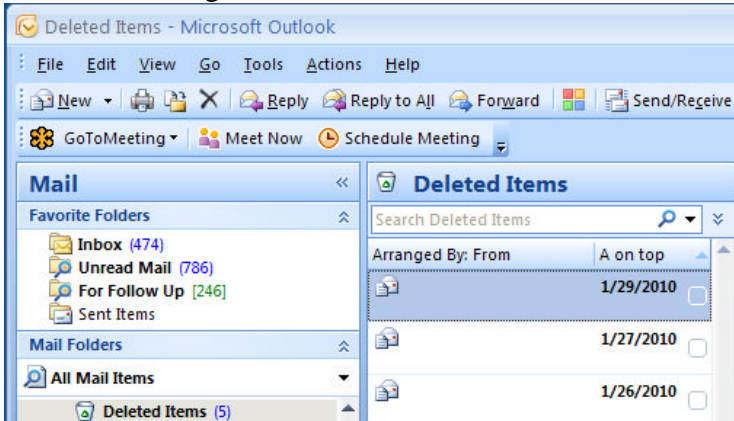
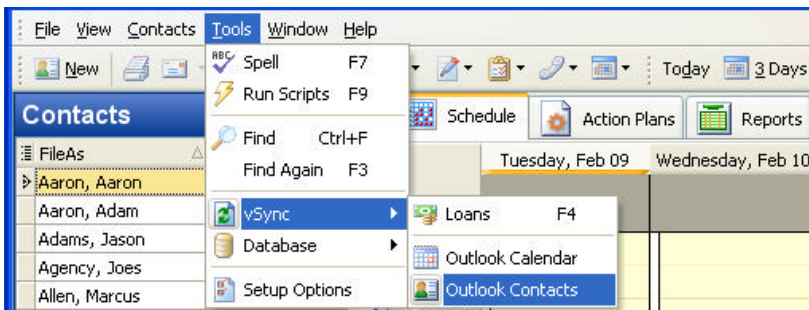


Importing Outlook Contacts: WorkCenter CRM

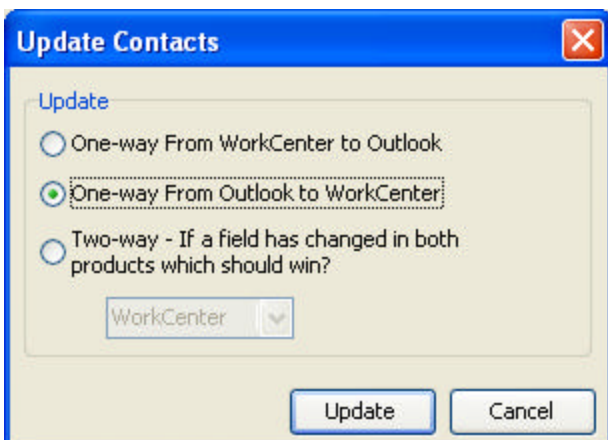
Step #1: Make sure all deleted items in your Outlook folder have been removed. If for some reason you would like to retain these items, they need to be copied and pasted into a folder on your computer and not just moved to a new folder inside Outlook. Outlook will consider these files still in the system and stop the syncing script file from running.



Step #2: Open WorkCenter, click on Tools, vSync and select Outlook contacts or Calendar Items.



For this example, we will select “Outlook Contacts”.

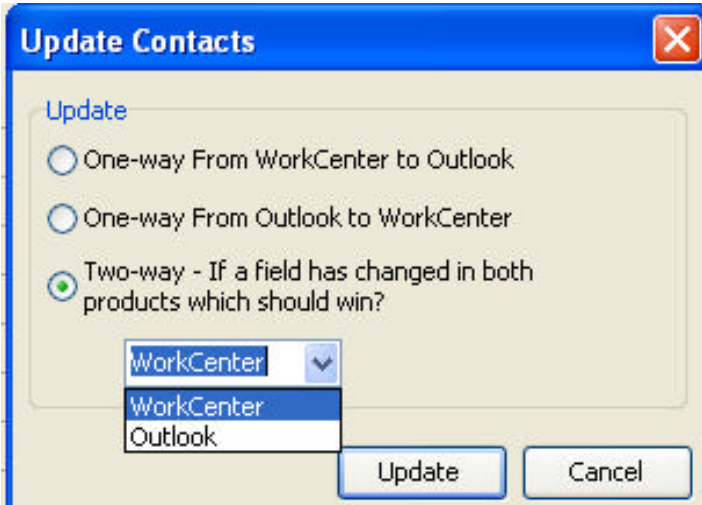


Please note the display screen to the left. If you have purchased the two way Outlook Syncing module, it will be displayed and allow you access to transferring data both directions. This add-on module is recommended if you use a PDA device such as a Treo, Blackberry or interactive telephone and wish to have data synced to that devices form Outlook. Please do not do any other function inside WorkCenter until the syncing process is complete.

If you have decided you do not need the two way syncing, your screen view will allow you to sync one directions from Outlook into WorkCenter.

Step #3: If you have selected the two way outlook syncing module, here is a couple of suggestions for you to consider when syncing:

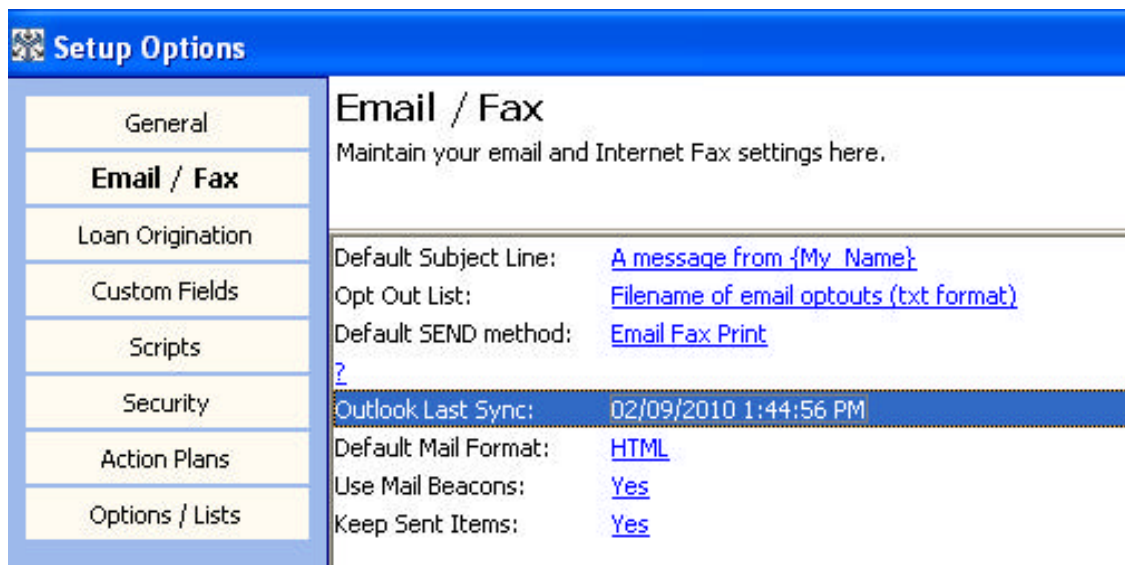
- A. We recommend that you do two one way syncing process steps. One way from Outlook to WorkCenter and the other WorkCenter to Outlook. If you elect to perform the “Two-way” sync feature as displayed on the left screen view, you as the user of WorkCenter will need to declare what software will win in the syncing process. You will need to decide if it is Outlook or WorkCenter. If there is a discrepancy in the contact data, the software that “wins” will overwrite the other data.



For example, let’s say both your Outlook and WorkCenter contact records have a different cell phone number for you client. Using the two-way syncing process, the software program you select will be dominant and overwrite the other software contact data.

Step #4: How does WorkCenter know what changed files to sync to and from the software?

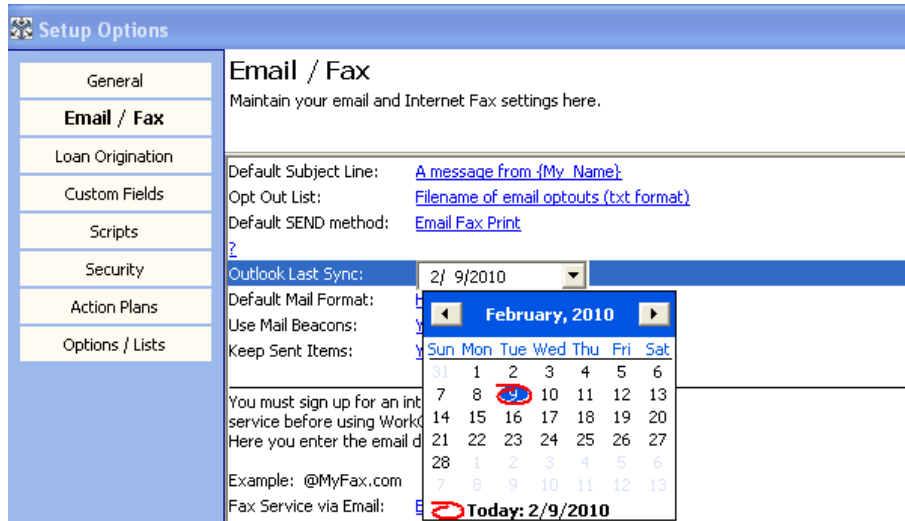
- A. Each time WorkCenter performs the Outlook syncing process on contacts, we change the last vSync date in the WorkCenter System Setup Screens. Using this technique, the next time a WorkCenter user selects to sync Outlook contact data, WorkCenter will look at the records and only sync changed or modified files from the last “vSync Date”.
- B. Inside WorkCenter, click on “Tools”, “Setup Options” and the “Email/Fax” button.



Notice the screen view above and the “Outlook Last Sync:” date being 02/09/2010 1:44:56 PM. The next time we perform contact data syncing, WorkCenter will only look at any changed or modified files from 02/09/2010.

Step #5: What the WorkCenter User should do if no contact data is synced or if you incur and error message while trying to sync contact data?:

- A. The most common failure to sync data inside WorkCenter occurs based on the user having deleted items in their Outlook deleted folder. WorkCenter will still advance the last Outlook sync date to the current date.
- B. First Step: Removed all deleted items from your Outlook deleted folder.
- C. Second Step: Inside WorkCenter, click on “Tools”, “Setup Options” and select the “Email/Fax” button. Click into the last sync date field and move that date back to your estimated last syncing date. It will be fine if you move the sync date back farther than the last date you synced. WorkCenter will just look at contacts changed or modified from that date forward.



- D. Follow the syncing steps again. If you need any assistance, please contact WorkCenter client services at their direct call back number: 425.489.7773

