

## Synchronization

**Term: Synchronization**

The process of ensuring the data and functions of STATS on your laptop PC or desktop are the same as the STATS master database.

Synchronization to Outlook also ensures that tasks, appointments and contacts specified to be in STATS are the same between STATS and Outlook.

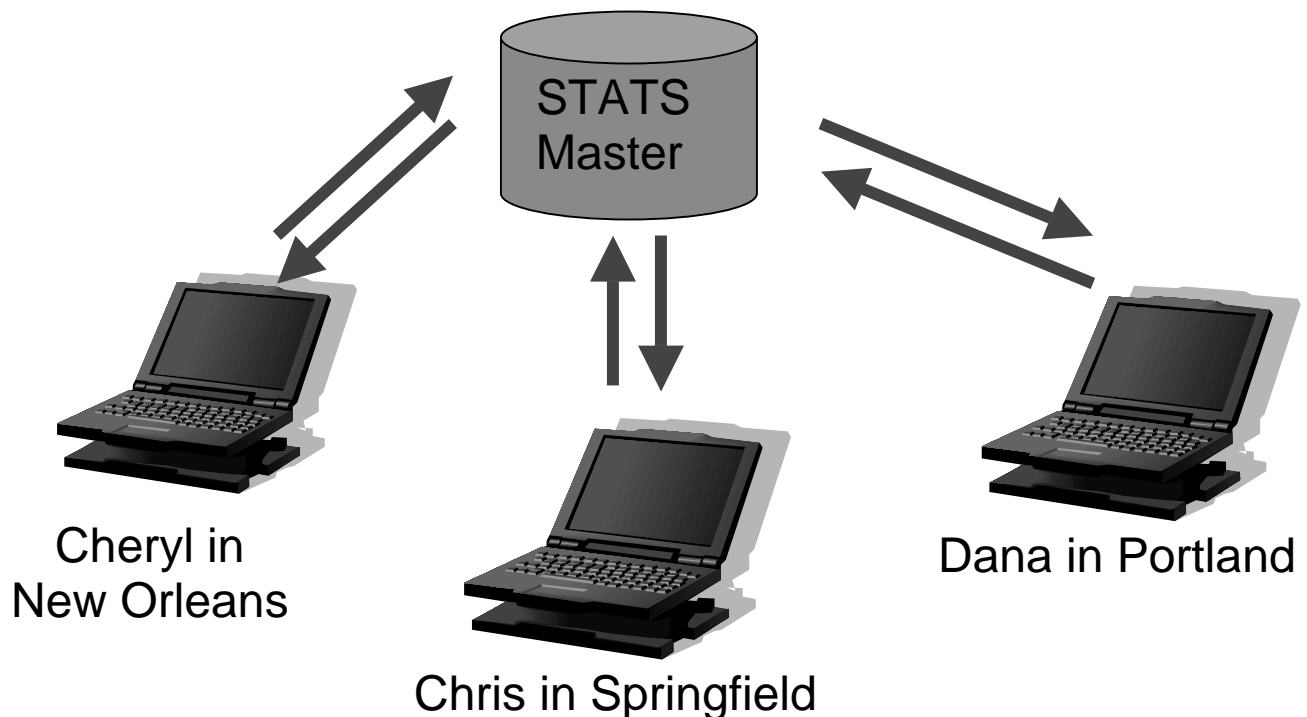
You must synchronize each day you use STATS.

## Synchronization Overview

For each salesperson, territory manager or sales manager with a laptop, STATS exists in 2 places:

- a local version on your laptop.
- a master version in the corporate office.

To ensure that both the STATS master database and your local version have the same data, you must synchronize them.



## Your Slice



**Term:** Slice

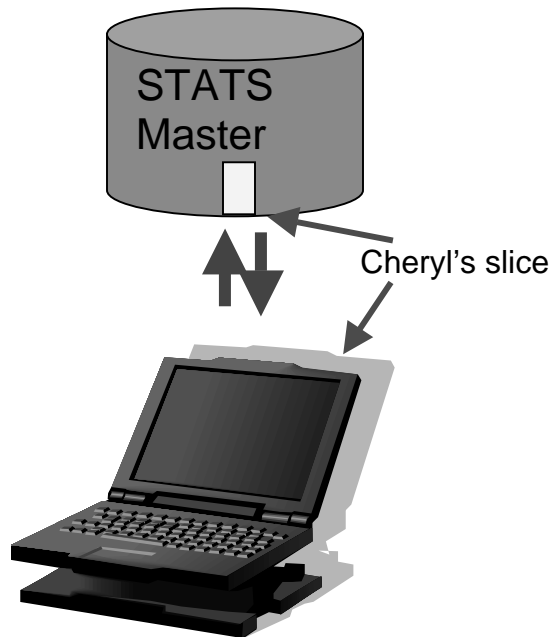
That portion of the entire STATS database a user can view and access.

For example, your slice of the database would include your contacts, account programs, opportunities and related information.

### ***Synchronizing Your Slice***

When you synchronize your data or information with STATS, you only exchange information that pertains to your slice, not the entire STATS database.

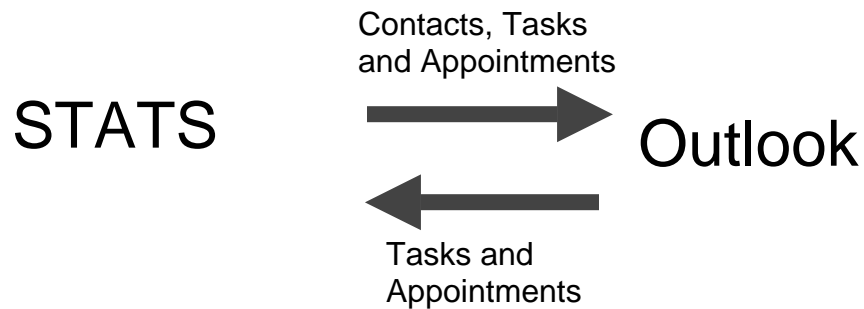
For example, a salesperson in New Orleans would have access to contacts, accounts and opportunities plus additional information related to her territory. A New Orleans salesperson does not want or need access to sales data for Michigan. So, instead of having to load and synchronize the entire STATS database (which would take hours), each salesperson only needs to load and sync his or her own slice.



Cheryl in  
New Orleans

## Synchronize with Outlook

You can synchronize Appointments, Tasks and Contacts in STATS with Appointments, Tasks and Contacts in Outlook.



To synchronize Outlook with STATS you need to:

- Set Up STATS Category in Outlook
- Configure External Device Settings in STATS



### Reminder

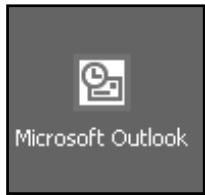
While Appointments and Tasks will synchronize back and forth between STATS and Outlook, Contacts will only transfer from STATS to Outlook.

Contacts will not load from Outlook into STATS

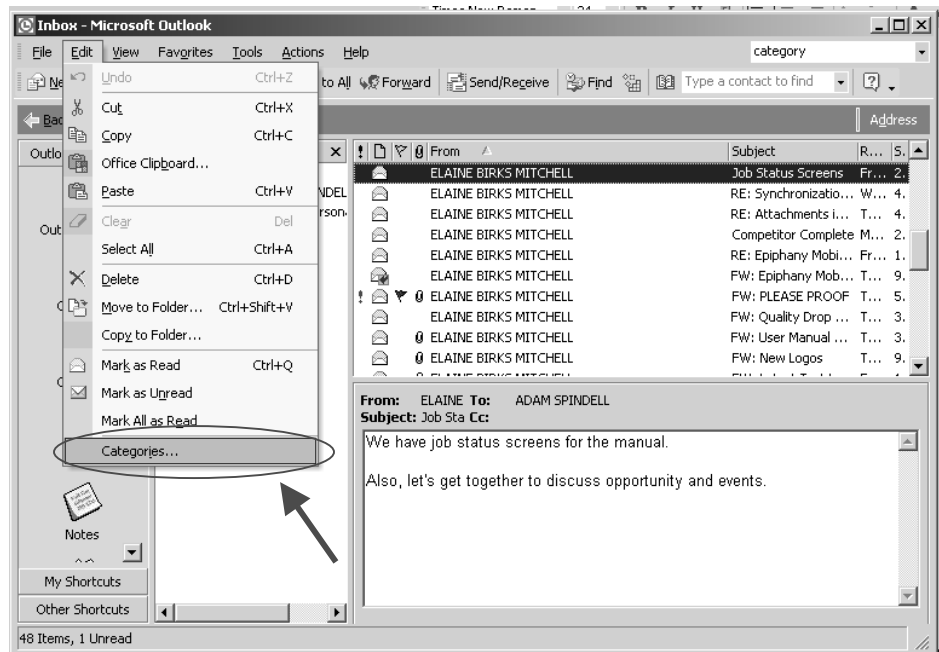
## Set Up STATS Category in Outlook

To synchronize with Outlook, you need to first create a new category called STATS in Outlook.

1. Open Outlook by double clicking the Microsoft Outlook icon on your desktop.

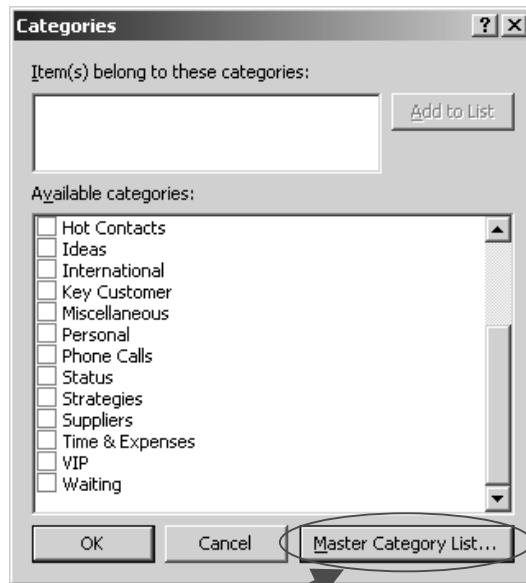


2. To create a new category in Outlook, click on the Edit Menu and select the Categories option.



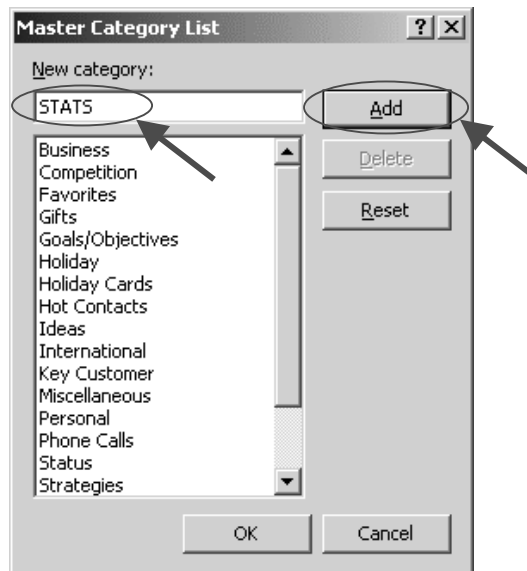
3. The Categories window pops up.

Click the Master Category List button to create a new category.



4. The Master Category List displays.

To add a new category called STATS, enter STATS into the text box at the top of the window and click the Add button.



5. The Master Category List popup refreshes and displays STATS as one of the categories.

Click the OK button.



6. The Categories pop up also refreshes and displays STATS as one of the categories.

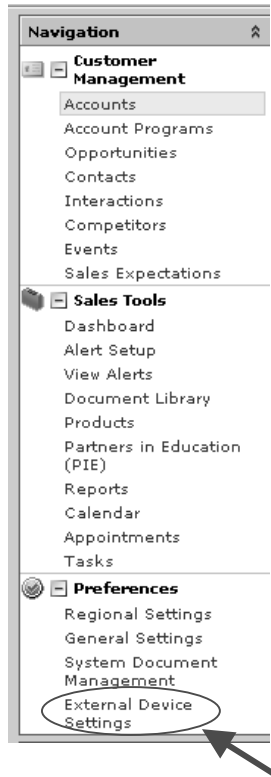
Click the OK button.



## Configure External Device Settings in STATS

1. To synchronize STATS with Outlook, you need to properly configure the External Device Settings in STATS.

Click on the External Device Settings link to continue.



2. The External Device Settings View displays.



### Laptop Users (Users with Mobile Client)

For laptop users, this is the External Device Settings view.

To synchronize STATS to Outlook set the following values in these fields.

Fields	Values
Device Settings	Select External Information Store from drop down
Export Options - Synchronize	In the Synchronize column, check the boxes for Appointments, Contacts and Tasks to have STATS synchronize Appointments, Contacts and Tasks with Outlook
Export Options – Auto Add	In the Auto Add column, check the boxes for Appointments, Contacts and Tasks to flag all appointments, contacts and tasks created in STATS to synchronize with Outlook.
Mail Service	Select Microsoft Outlook from the Mail Service drop down menu.
Profile	Select your name or profile from the drop down menu.
Category	Enter the word "STATS"
Always Add Duplicate Records	Check the box next to Always Add Duplicate Records so that any records which seem like Duplicates will be added to Outlook
Never remove deleted or unmarked items from external store	Check the box next to Never remove deleted or unmarked items from external store so STATS will never delete or remove any items from Outlook during synchronization.





## Desktop Users

For desktop users (non-laptop) users, this is the External Device Settings view.

External Device Settings [Save]

Device: External Information Store

Export Options		
Entity	Synchronize	Auto Add
Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Category: STATS

☒ Always Add Duplicate Records

☒ Never remove deleted, or unmarked items from the external store


To synchronize STATS to Outlook set the following values in these fields.

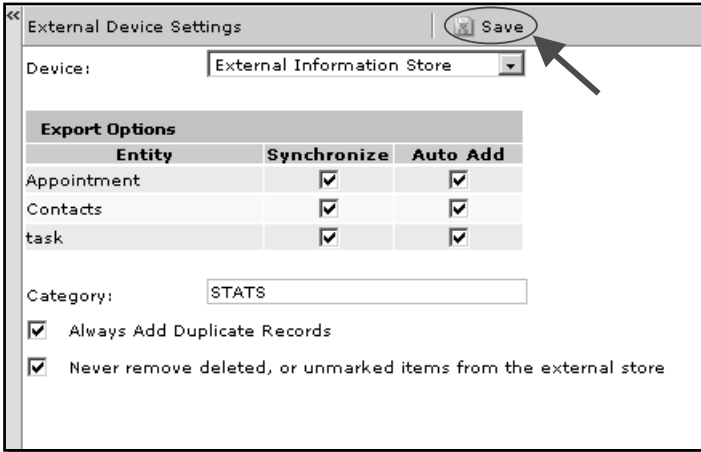
Fields	Values
Device Settings	Select external Information Store from drop down
Export Options - Synchronize	In the Synchronize column, check the boxes for Appointments, Contacts and Tasks to have STATS synchronize Appointments, Contacts and Tasks with Outlook
Export Options – Auto Add	In the Auto Add column, check the boxes for Appointments, Contacts and Tasks to flag all appointments, contacts and tasks created in STATS to synchronize with Outlook.
Category	Enter the word “STATS”
Always Add Duplicate Records	Check the box next to Always Add Duplicate Records so that any records which seem like Duplicates will be added to Outlook
Never remove deleted or unmarked items from external store	Check the box next to Never remove deleted or unmarked items from external store so STATS will never delete or remove any items from Outlook during synchronization.



### Reminder

All appointments, tasks and contacts created in STATS will not automatically sync with Outlook. All these settings must be configured properly to sync these items in STATS with Outlook. These settings should be already configured when you log in to STATS.

- When you are done updating the External Device Settings, click on the Save icon .



External Device Settings

Device:

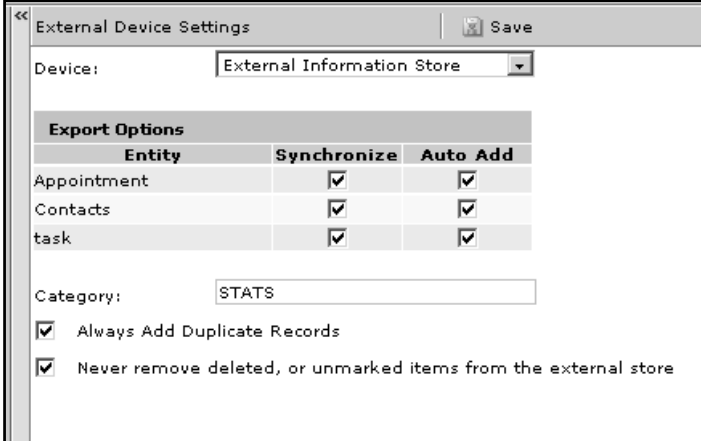
Export Options		
Entity	Synchronize	Auto Add
Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Category:

☒ Always Add Duplicate Records

☒ Never remove deleted, or unmarked items from the external store

- The External Setting View refreshes and reflects the updates.



External Device Settings

Device:

Export Options		
Entity	Synchronize	Auto Add
Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Category:

☒ Always Add Duplicate Records

☒ Never remove deleted, or unmarked items from the external store



## Synchronize to STATS Master Database and Outlook for Laptop Users (Users with the Mobile Client)

To synchronize to STATS and Outlook, you need a connection to your network or the Internet.



### Best Practice:

Due to your laptop configuration, users should always choose the "Work Offline" mode when they log in whether or not the laptop is connected to a network or the Internet.

Laptop users should sync every morning and every evening they use STATS.

1. Make sure your laptop is connected to your network or the Internet.
2. Log in to STATS.

If you're a laptop users, you should always choose the "Work Offline" mode when you log in.

**Build relationships.  
Retain and grow accounts.  
Deliver great memories.**

**STATS**

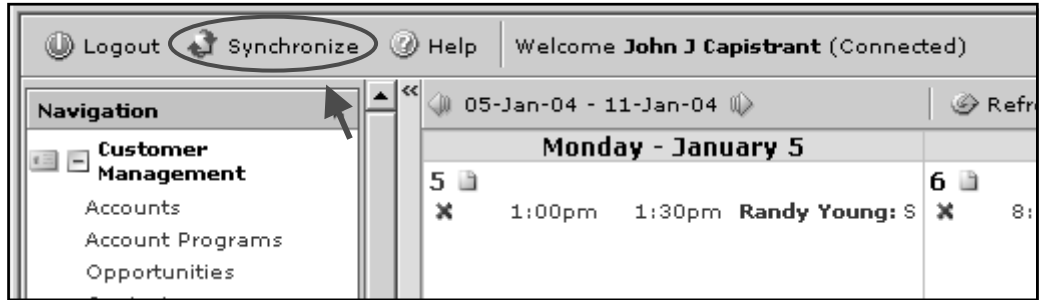
**Login**

User name:

Password:

Connection:

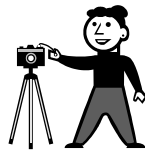
- Click the Synchronize button.



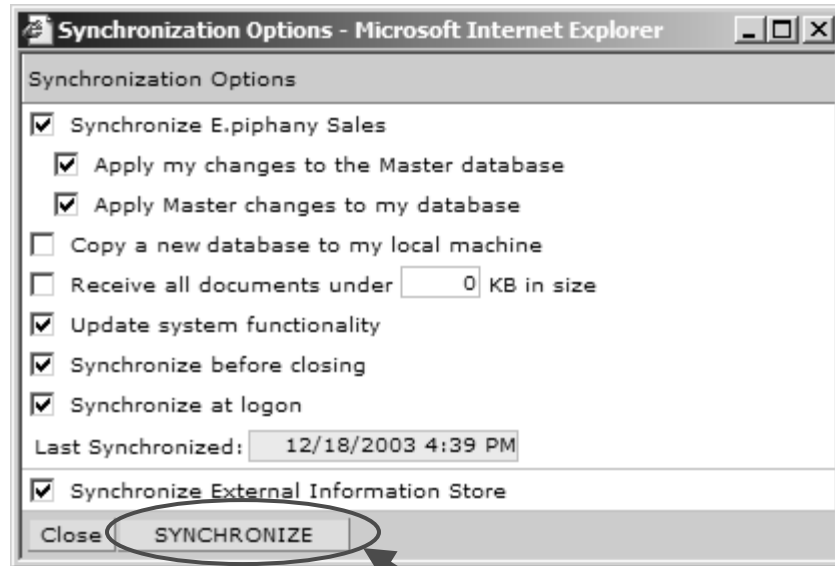
- The Synchronize Options window pops up.

The following checkboxes should always be checked or left unchecked in the Synchronization Options box.

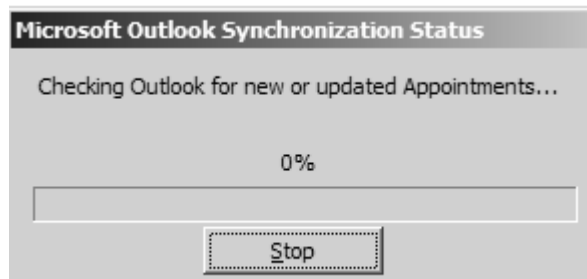
Checkboxes	Checked or Unchecked	Function
Synchronize E.piphany Sales	Checked	Allows you to synchronize STATS with the STATS Master Database and Outlook
Apply My changes to the Master database	Checked	Allows your version of STATS to sync with the STATS Master
Apply Master changes to my database	Checked	Allows the STATS Master to sync with your version of STATS
Copy a new database to my local machine	Unchecked	Copies your entire slice to your laptop everytime you synchronize. You do not want to copy an entire new database to your laptop every time you synchronize. You only want to copy the changes.
Receive all documents under KB in size	Unchecked	Receive all documents added to STATS automatically. You do not need to receive documents in synchronization. You can access them through the Document Library – see the Document Library section of this manual for more details
Update system functionality	Checked	Upgrades STATS functionality automatically when improvements and additions are made to STATS
Synchronize before closing	Checked	Automatically synchronizes before leaving or logging out of STATS
Synchronize at logon	Checked	Automatically synchronizes when logging into STATS
Synchronize External Information Store	Checked	Allows STATS to synchronize with Outlook

**Best Practice:**

Always use these settings when synchronizing. STATS will save your settings so you will only need to set them once.



5. STATS will begin to synchronize and display pop up boxes like the one shown below.



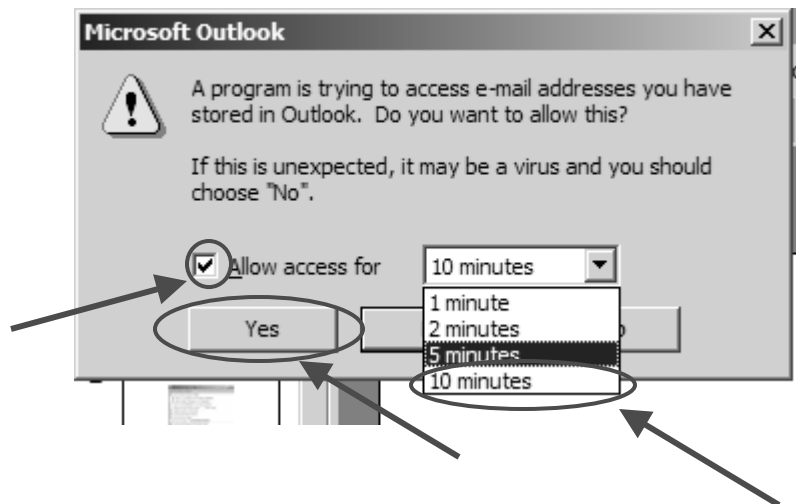
6. The synchronization process may stop and Outlook may display this pop up message window.



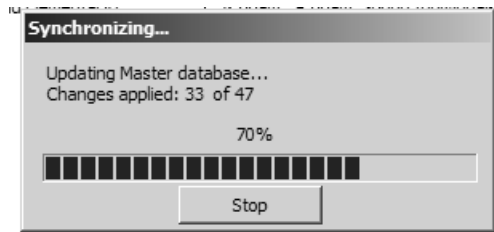
Outlook is warning you that another program is trying to read or write information to Outlook. This is okay. You want STATS to read and write to Outlook.

- Check the allow access for checkbox
- Select 10 minutes from the drop down menu s you don't see this message for every contact, task and appointment during synchronization

7. When you are done checking the allow access box and selecting 10 minutes from the drop down box, click the Yes button.




8. Synchronizing continues and STATS displays pop up windows like the one pictured below.



9. When synchronization is complete, the synchronization window closes and STATS displays this message.





**Reminder**

If synchronization is not working properly – check your External Device Settings– see the Preferences section of this manual.

If you're still having trouble synchronizing, contact Technical Support at 800-736 4758



## Synchronize to STATS Master Database and Outlook for Desktop Users (non laptop)

To synchronize to the STATS and Outlook, you need a connection to your network or the Internet

1. Make sure your PC is connected to your network or the Internet.
2. Log in to STATS.

**LifeTouch®**

**STATS**

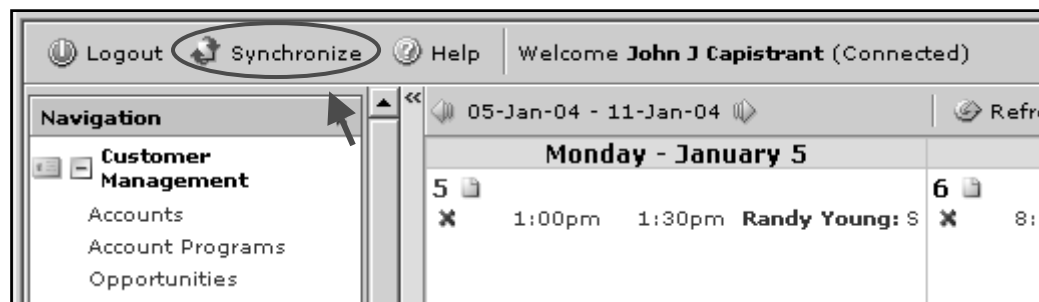
**Build relationships.  
Retain and grow accounts.  
Deliver great memories.**

**Login**

User name:

Password:

3. Click the Synchronize button.





4. The Synchronize Options window pop up displays.

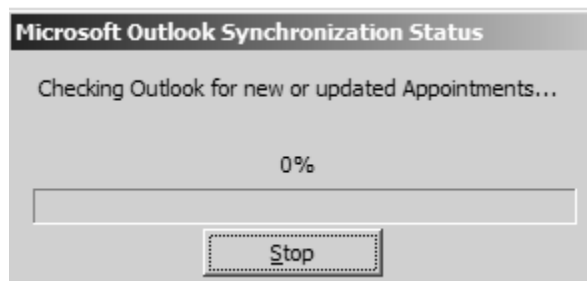
You should check the Synchronize External Information Store checkbox then click the Apply button.



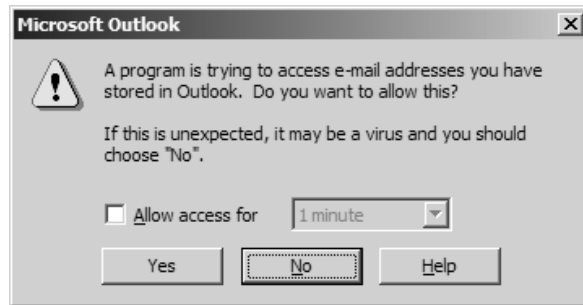
**Best Practice:**

Always check the Synchronize External Information Store checkbox when synchronizing. STATS will save your settings so you will only need to set them once.

5. STATS will begin to synchronize and display pop up boxes like the one shown below.

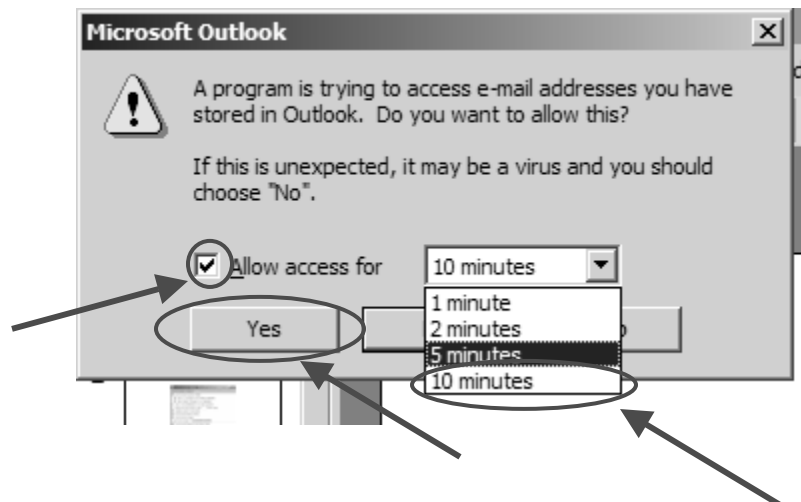


6. The synchronization process may stop and Outlook may display this pop up message window.

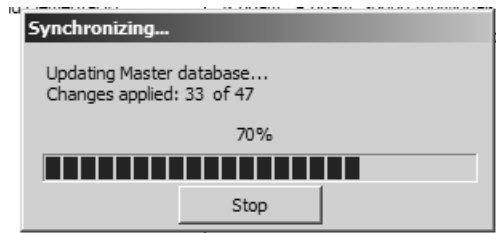


Outlook is warning you that another program is trying to read or write information to Outlook. This is okay. You want STATS to read and write to Outlook.

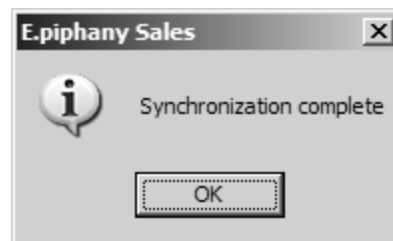
- Check the allow access for checkbox
  - Select 10 minutes from the drop down menu s you don't see this message for every contact, task and appointment during synchronization
7. When you are done checking the allow access box and selecting 10 minutes from the drop down box, click the Yes button.




8. Synchronizing continues and STATS displays pop up windows like the one pictured below.



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**Reminder**

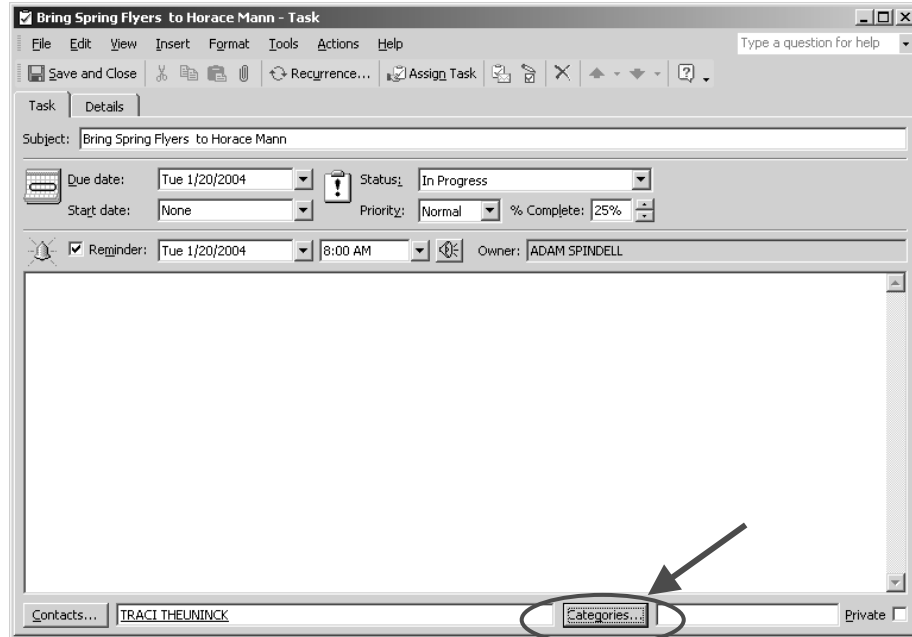
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## Create a Task in Outlook to Sync With STATS

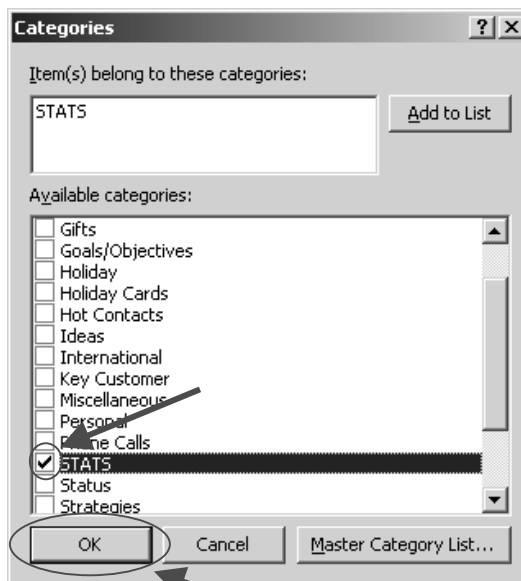
1. To synchronize a task in Outlook with STATS, you need to assign the task the category of STATS.

Open a new task window and create a new task as you would normally. Before saving the task, click the Categories button.



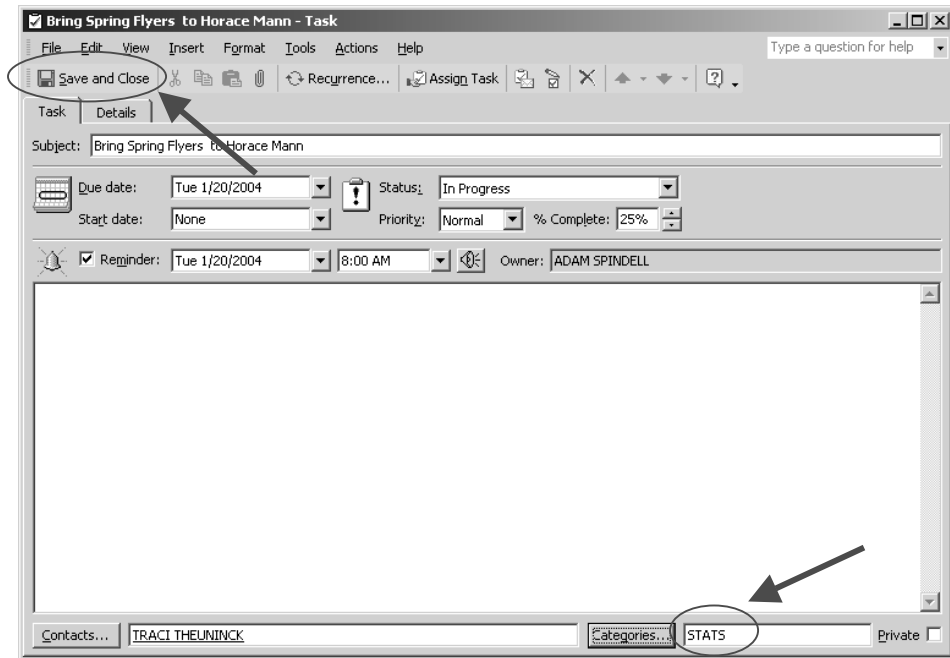
2. The Categories selection box pops up.

Select STATS by checking the checkbox next to STATS then click the OK button.



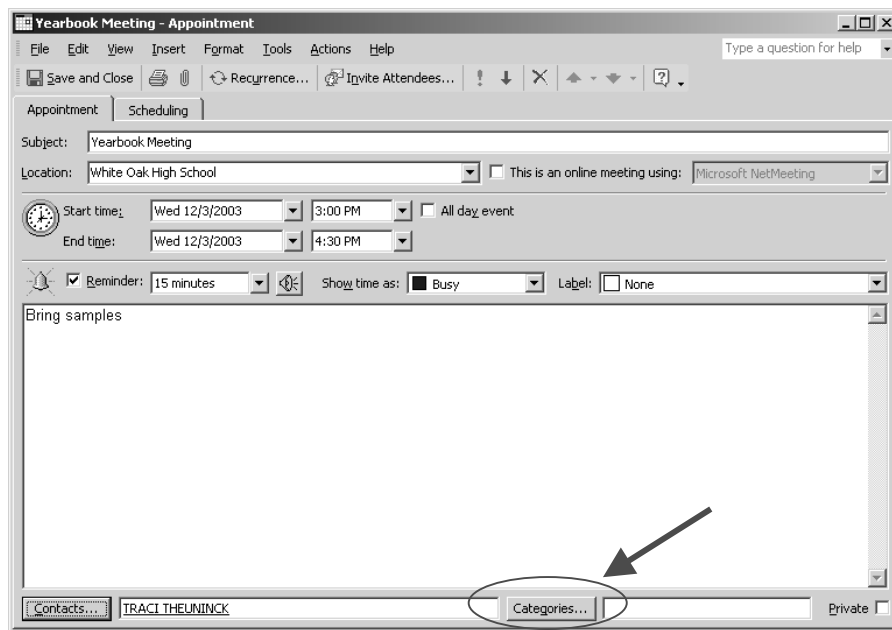
3. Notice the category of STATS now appears in the New Task window. With the category of STATS specified, Outlook will now sync this task with STATS.

When you are done entering the rest of the task information, click the Save and Close button.



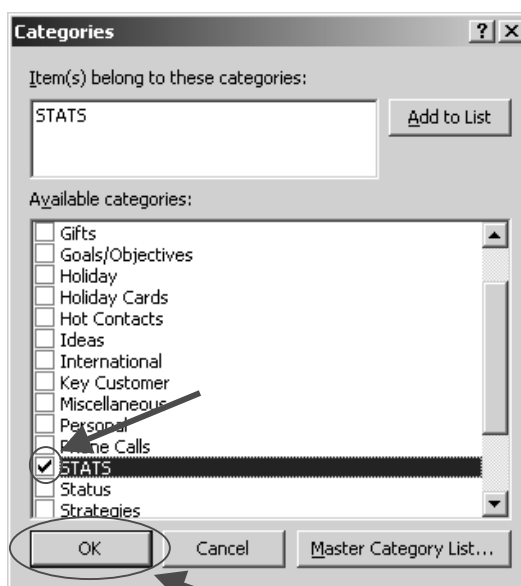
## Create An Appointment in Outlook to Sync With STATS

1. To synchronize an appointment in Outlook with STATS, you need to assign the appointment the category of STATS.



2. The Categories selection box pops up.

Select STATS by checking the checkbox next to STATS then click the OK button.



3. Notice the category of STATS now appears in the New Appointment window. With the category of STATS specified, Outlook will now sync this appointment with STATS.

When you are done entering the rest of the appointment information, click the Save and Close button.

