Synchronization

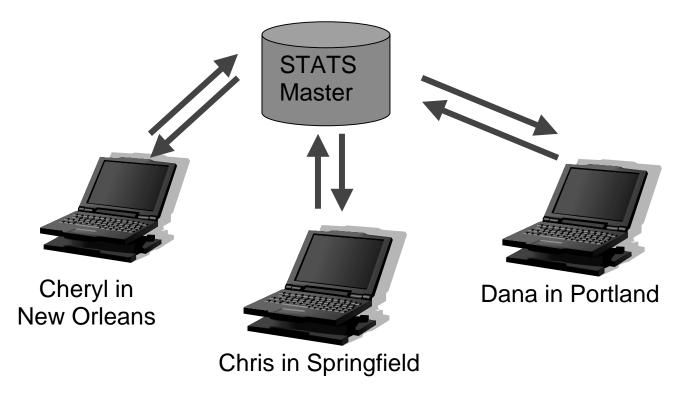
Term: Synchronization The process of ensuring the data and functions of STATS on your laptop PC or desktop are the same as the STATS master database.
Synchronization to Outlook also ensures that tasks, appointments and contacts specified to be in STATS are the same between STATS and Outlook.
You must 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

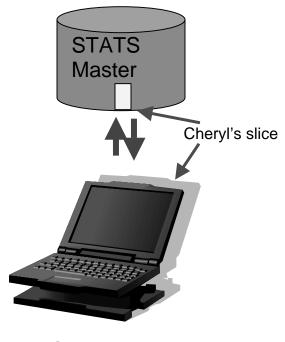
That portion of the entire STATS database a user can view and access.

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.

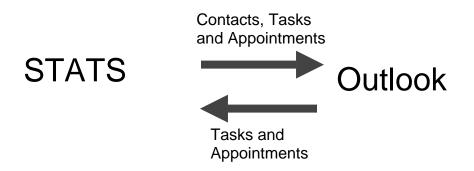
For example, a salesperson in New Orleans would have access to contacts, accounts and opportunities plus additional information related to her territory. A New Orleans salesperson does not want or need access to sales data for Michigan. So, instead of having to load and synchronize the entire STATS database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





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

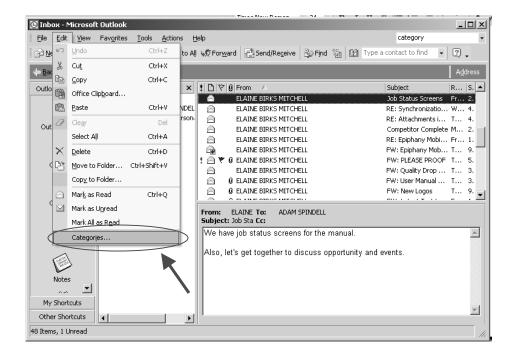
Set Up STATS Category in Outlook

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.

Categories			? X
<u>I</u> tem(s) belong t	o these categ	ories:	
			<u>A</u> dd to List
A <u>v</u> ailable catego	ries:		
Hot Contact Ideas Internationa Key Custom Miscellaneou Personal Phone Calls Status Strategies Suppliers Time & Expe VIP Waiting	l er Is		•
ОК	Cancel	Master C	Category List

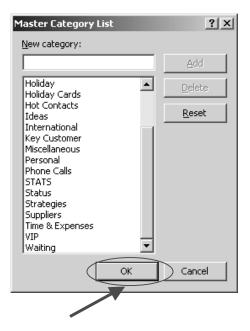
4. The Master Category List displays.

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



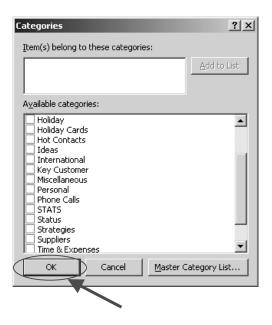
5. The Master Category List popup refreshes and displays STATS as one of the categories.

Click the OK button.



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

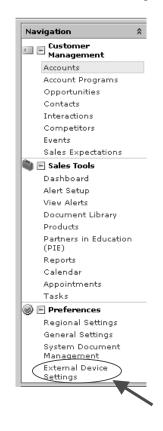
Click the OK button.



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.

~~	External Device Sett	ings*		📓 Save				
	Device:	Exter	nal Information					
	Export Options							
	Entity		Synchronize	Auto Add				
	Appointment							
	Contacts			•				
	task		V					
	Mail Service:	Micro	soft Outlook	•	[
	Profile: Adam Spindell							
	Category:	STATS	5]			
	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 -	In the Synchronize column, check the boxes for
Synchronize	Appointments, Contacts and Tasks to have STATS
	synchronize Appointments, Contacts and Tasks with
	Outlook
Export Options – Auto	In the Auto Add column, check the boxes for
Add	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	Check the box next to Always Add Duplicate Records
Records	so that any records which seem like Duplicates will be
	added to Outlook
Never remove deleted or	Check the box next to Never remove deleted or
unmarked items from	unmarked items from external store so STATS will
external store	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 Settin	gs	📓 Save				
Device:	xternal Information	n Store 🛛 🔻				
Export Options						
Entity	Synchronize	Auto Add				
Appointment	V	•				
Contacts	\checkmark	~				
task		V				
Category: S	TATS					
Always Add Duplicate Records						
✓ Never remove de	leted, or unmarked	items from th				

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 -	In the Synchronize column, check the boxes
Synchronize	for Appointments, Contacts and Tasks to
	have STATS synchronize Appointments,
	Contacts and Tasks with Outlook
Export Options – Auto	In the Auto Add column, check the boxes for
Add	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	Check the box next to Always Add Duplicate
Records	Records so that any records which seem like
	Duplicates will be added to Outlook
Never remove deleted or	Check the box next to Never remove deleted
unmarked items from	or unmarked items from external store so
external store	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.

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

~~	External Device Setti	ngs		Save			
	Device:	ce: External Information Store 💌					
	Export Options						
	Entity		Synchronize	Auto Add			
	Appointment			V			
	Contacts						
	task			V			
	Category:	STATS	3				
	Always Add Dupl	icate	Records				
	Never remove d	e external store					

4. The External Setting View refreshes and reflects the updates.

~	External Device Settin	ngs		📓 Save				
	Device:	Exterr	Store 💌	1				
	Export Options							
	Entity		Synchronize	Auto Add				
	Appointment		V					
	Contacts		V					
	task		V	V				
	_							
	Category:	STATS						
	Always Add Duplicate Records							
	🔽 Never remove de	e 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.



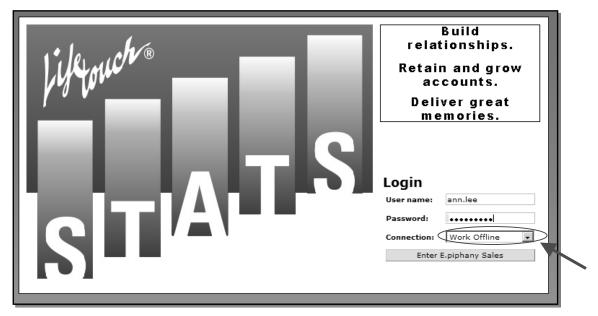
Best Practice:

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.



3. Click the Synchronize button.

U Logout Synchronize) (0	Help	Welcome	John J Ca	pistran	t (Connec	ted)	
Navigation	 	~~	🥼 os·	Jan-04 - 1	1-Jan-04	¢) © F	Refn
Customer Management			5 0	Monda	ay - Janu	iary 5		6 🗈	
Accounts Account Programs Opportunities			×	1:00pm	1:30pm	Randy	Young: S		8:

4. The Synchronize Options window pops up.

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

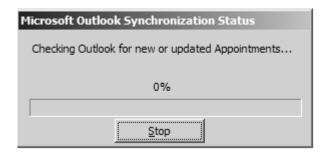
Checkboxes	Checked	Function
	or	
	Unchecked	
Synchronize	Checked	Allows you to synchronize STATS with the STATS Master
E.piphany Sales		Database and Outlook
Apply My changes to	Checked	Allows your version of STATS to sync with the STATS
the Master database		Master
Apply Master changes	Checked	Allows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

Best Practice:

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

Synchronization Options - Microsoft Internet Explorer	<u>_ </u>
Synchronization Options	
Synchronize E.piphany Sales	
Apply my changes to the Master database	
Apply Master changes to my database	
Copy a new database to my local machine	
Receive all documents under 0 KB in size	
Update system functionality	
Synchronize before closing	
Synchronize at logon	
Last Synchronized: 12/18/2003 4:39 PM	
Synchronize External Information Store	
Close SYNCHRONIZE	

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

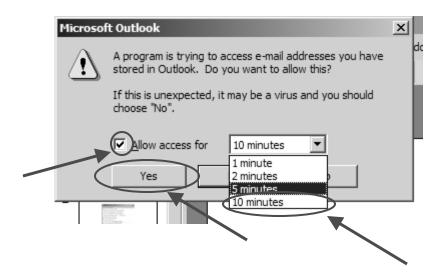


6. The synchronization process may stop and Outlook may display this pop up message window.

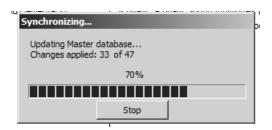
Microsof	ft Outlook	×						
	A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?							
	If this is unexpected, it may be a virus and you should choose "No".							
	Allow access for 1 minute							
	Yes <u>No</u> <u>H</u> elp							

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)

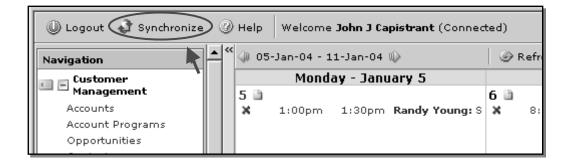
To synchronize to the STATS and Outlook, you need a connection to your network or the Internet

1. Make sure your PC is connected to your network or the Internet.

fifetouch ®	Build relationships. Retain and grow accounts. Deliver great memories.
STATS	Login User name: sfjohnc Password: Enter E.piphany Sales

2. Log in to STATS.

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.

Synchronization Options - Microsoft Internet Explorer	- O ×
Synchronization Options	
Synchronize External Information Store Options	
Close Apply	



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.

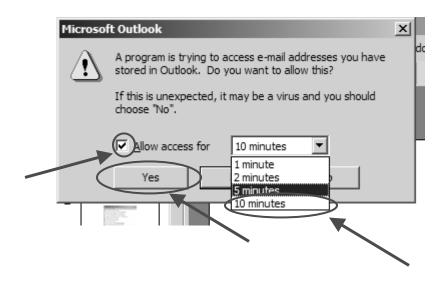
5. STATS will begin to synchronize and display pop up boxes like the one shown below.

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

Microsof	it Outlook	x	
⚠	A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?		
	If this is unexpected, it may be a virus and you should choose "No".		
	Allow access for 1 minute		
	Yes <u>No</u> <u>H</u> elp		

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.

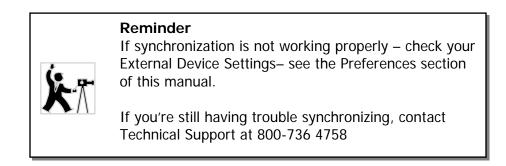


8. Synchronizing continues and STATS displays pop up windows like the one pictured below.



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

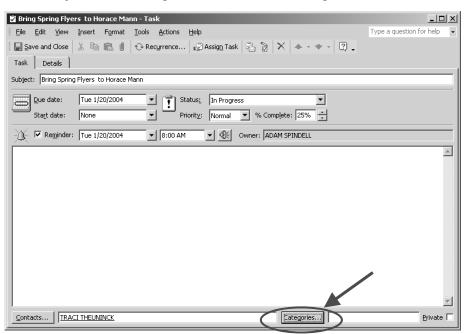




Create a Task in Outlook to Sync With STATS

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.



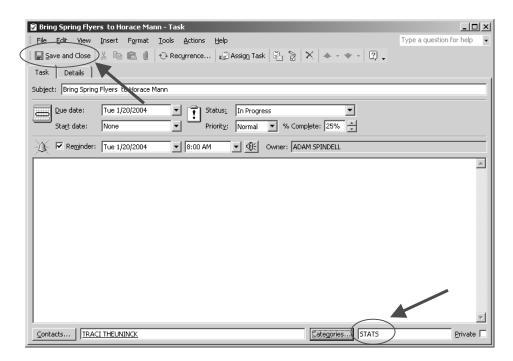
2. The Categories selection box pops up.

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

Categories	? ×
Item(s) belong to these categories:	
STATS	Add to List
Available categories:	
Gifts Goals/Objectives Holiday Holiday Cards Hot Contacts Ideas International Key Customer Miscellaneous Personal Physicellaneous Status Status Status Strategies	
OK Cancel <u>M</u> aster Ca	ategory List

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.

🔟 Yearbook Meeting - Appointment	
Eile Edit View Insert Format Iools Actions Help Type a question	for help 👻
$\blacksquare _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _$	
Appointment Scheduling	
Subject: Yearbook Meeting	
Location: White Oak High School 🔽 This is an online meeting using: Microsoft NetMeeting	7
Start time: Wed 12/3/2003 I 3:00 PM I All day event	
End time: Wed 12/3/2003 V 4:30 PM V	
- 💭 🔽 Reminder: 15 minutes 💽 💽 Show time as: 🔳 Busy 💽 Label: 🗌 None	•
Bring samples	<u>_</u>
	-
Contacts	Private 🗖

2. The Categories selection box pops up.

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

Categories	<u>?</u> ×
Item(s) belong to these categories:	
STATS	<u>A</u> dd to List
A <u>v</u> ailable categories:	
Gifts Goals/Objectives Holiday Holiday Cards Hot Contacts Ideas International Key Customer Miscellaneous Personal Kune Calls Status Strategies	
OK Cancel <u>M</u> aster	Category List

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.

📰 Yearbook Meeting - Appointment	_ 🗆 ×
File Edit View Insert Format Iools Actions Help	Type a question for help 🔹
$\begin{tabular}{ c c c c } \hline \begin{tabular}{ c c c } \hline \begin{tabular}{ c c } \hline tabula$	
Appointment	1
Subject: Yearbook Veeting	
Location: White Oak High School This is an online meeting using	Microsoft NetMeeting
Start time: Wed 12/3/2003 💽 3:00 PM 💌 🗖 All day event	
End time: Wed 12/3/2003 • 4:30 PM •	
- Reminder: 15 minutes - Show time as: Busy - Label: None	_
Bring samples	
	,
Contacts TRACI THEUNINCK	Private 🗆