priority

# Office Connectivity Script

Clip Link: http://www.priority-software.com/eshbel.com/Movie_Search/office_connectivity_clip.htm
Note: Yellow highlights indicate action instructions.

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEFORE YOU BEGIN:

SET UP PRIORITY CUSTOMERS "SILVERMEDIA" AND "BIOTEC". FROM THE CONTACTS PANE IN OUTLOOK 2007, ARRANGE THE CURRENT VIEW "BY CATEGORY". MAKE SURE SEVERAL "BUSINESS" E-MAILS APPEAR IN THE INBOX AND SENT ITEMS FOLDERS IN OUTLOOK (AND NOTHING PERSONAL). MAKE SURE THERE IS AN E-MAIL IN THE INBOX FROM A CONTACT WHO IS LINKED TO CUSTOMERS "SILVERMEDIA" AND "BIOTEC" (INBAL@ESHBEL.COM) AND ANOTHER FROM A CONTACT WHO IS NOT LINKED TO ANY CUSTOMERS (R@R.COM). ORGANIZE SUB-LEVELS OF TASKS FORM SO THAT NOTES APPEARS FIRST. SET UP SEVERAL TASKS IN PRIORITY THAT WILL BE SYNCHRONIZED WITH OUTLOOK, AND AN "APPOINTMENT" WITH MULTIPLE PARTICIPANTS, SOME OF WHOM ARE NOT INTERNAL USERS. SET UP CUSTOMER RELATIONS DATA THAT WILL SHOW UP IN EACH OF THE TABS FOR THE DEFAULT "THIS MONTH" VIEW. SET UP SOURCE X IN THE SOURCES OF LEADS/SALES OPPS FORM.

### Introduction (00:00-00:22)

Most business users consider Microsoft Office a necessary tool to fulfill their daily assignments. As such, the entire Office suite is tightly integrated into ***Priority***. In this video, we will demonstrate how to work with several of ***Priority***'s built-in Office integration and synchronization tools.

### Priority on Outlook (00:23-01:16)

Let's begin with Microsoft Outlook, widely considered to be the standard email and calendaring application. With the proper license and setup, you can run ***Priority*** seamlessly on Microsoft Outlook by means of a variety of dashboards. You can also view or update select types of data and run various dynamic BI reports directly from Outlook.
Additional details on designing and using dashboards and BI reports are provided elsewhere. For now, we're just going to look at how you can display a selection of dashboards, add-ons and BI reports in your local installation of MS-Outlook. Your choices will not affect the display of any other user in the system, or the dashboards and reports that are available in ***Priority*** menus.

### Setting Up Priority on Outlook (01:17-02:12)

Run the ***Priority on Outlook*** program, accessed from the ***Office Management***, ***Priority on Outlook*** menu item. Click the **Dashboards** tab and flag each dashboard that you want to be available in Outlook.
Next, click the **BI Reports** tab and select any BI reports that you want to be available in Outlook.
Finally, click the **Add-ons** tab and flag each item you want to include in Outlook.

**Displaying Priority on Outlook (02:13-02:37)**

Now we're going to open Outlook and click the Shortcuts icon in the navigation window to the left. Shortcuts to the add-ons dashboards and BI reports that you chose appear under the titles **Priority Add-ons**, **Priority Dashboards** and **Priority BI Reports**, respectively[POINT TO EACH]. [EXPAND ANY TITLE TO DISPLAY SHORTCUTS - MAY NEED TO COLLAPSE ONE FIRST SO YOU CAN SHOW HOW TO EXPAND IT].

**Operating Add-ons in Outlook (02:38-08:44)**

Let's begin with the **Priority Add-ons** section and click **Customer Relations** to open a tabbed report displaying several different types of customer relations management data. Click any report tab to view different types of data[CLICK THROUGH ALL]. Each report tab is fully interactive; for example, you can retrieve data in various cross-sections, click individual data fields to activate other forms, and create new records as needed, either manually or by copying an existing record.

We'll demonstrate how to work with the **Customers** tab[RETURN TO THE **Customers** TAB], but the other tabs can be used in a similar fashion.

When you first open this tab, data is displayed for the default View format, called "This Month". Let's click **More** to see the criteria that determine what data are displayed for this View format, and use it as a basis for creating our own custom View format.

As you can see, the current View format is defined only by the range of dates on which customers were opened[POINT OUT **From Date** & **To Date**]. Let's click **New** to create a new View format using different criteria.

Record a name for the new View format.

Use the available fields to indicate the desired customer **Status**, the user that customers are **Assigned to**, and the relevant sales **Rep**. You can also indicate whether you'd like to include all customers that meet the above criteria, or limit the report data to active customers only. When you are done specifying the desired criteria, click **Go** to retrieve the corresponding records. The next time you enter this report tab, you will be able to use these criteria to retrieve data by simply choosing the desired View format from the Choose list.

Once data is displayed, you can click on any column title[e.g., **Date Opened**] to sort the displayed data by the values in that column.

Besides using View formats to retrieve multiple customers, you can also retrieve a specific customer by selecting them from the Choose list[CHOOSE A CUSTOMER IN THE **Cust** LIST AND CLICK **Go**].

You can also use this tool to open a new customer record [CLICK **New**]. Use the form that opens to record customer data[RECORD NAME AND ADDRESS], just as you would if you were working in the **Customers** form in ***Priority*** itself[CLICK **Details** TAB]. All Choose lists that appear[CHOOSE A **Sales Rep**] are populated with the relevant ***Priority*** data. Once you click **Save**, the new customer is automatically assigned a customer number[HIGHLIGHT] and the record is saved into the ***Priority*** database. You can also click **Save & New** to clear the form after the record is saved, in order to record another new customer.

When you are done defining customers, you can return to the previous screen by clicking **Back**.
If you want to clear the population displayed in order to display a different one, you can do so either by clicking **More**[POINT] and define the desired View format, as we did earlier, or by selecting an existing View format from the Choose list. When you are ready to retrieve the new data for display, click **Go**.
You can view additional data for any of the displayed customers by simply clicking on a customer name. The form that opens displays additional data for the customer in question[CLICK **Details** TAB] and can also be used to modify customer data. All Choose lists that appear[CHOOSE A **Sales Rep**] are populated with the relevant ***Priority*** data, just as if you were working in the **Customers** form in ***Priority*** itself. You can then save your changes[CLICK **Save**] directly to the ***Priority*** database. Click any of the provided links to view still more data, such as tasks or sales opportunities that were opened for this customer. If a valid address is defined for the customer, you can also view a map[CLICK **Map**] of the address in Google Maps. You can even send[CLICK **Send**] a link to the customer record[FLAG **Incl. Record Link**] in an email.

**The Calendar (08:45-09:04)**
The **Add-ons** section can also be used to access your appointment Calendar. You can use this Calendar to view and revise scheduled appointments, just as you would in Priority itself. Detailed information on working with tasks and appointments is provided elsewhere.

**Displaying Dashboards in Outlook (09:05-10:14)**
The first time you work with Priority on Outlook, click on My Dashboard and make sure the User Preferences window is visible. Use it to set up the data you will be viewing[SELECT A COMPANY]. For instance, if your organization maintains Priority data in several different company environments, you can select the company for which to display data.
Then click on one of the dashboards in the list. The dashboard will be displayed in the main area of the screen. You can then work with the dashboard and any of its web parts as usual. Use the vertical scroll bar[TO THE RIGHT] as needed in order to move from the upper to the lower part of the screen.
In order to display the dashboards in a wider window, press **Alt+F1** to close the navigation window to the left of the screen. To restore the navigation window, press **Alt+F1** again.

**Running BI Reports in Outlook (10:15-10:31)**
Similarly, you can run any of the available BI reports directly from Outlook, and then fine tune and view the data you need in the format of your choice.

**Synchronizing Appointments, Contacts and To-Do Items with Microsoft Outlook (10:32-11:08)**
Outlook synchronization is another powerful feature that can greatly boost efficiency. In fact, once you begin working with it, you will probably find it indispensable. ***Priority***'s bilateral

interface with MS-Outlook facilitates appointment, contact and task maintenance in and out of the office. Specifically, it can be used to:

- synchronize calendars,
- import customer and vendor contact information from Outlook to Priority,
- create new tasks and service calls based on Outlook e-mail messages, and
- update Outlook tasks with to-do items.

**Preparing for synchronization in *Priority* (11:09-11:55)**

Before running the Outlook interface for the first time, make sure your system manager has performed all the necessary setups, as outlined elsewhere. In addition to this initial setup, periodic maintenance is also required in order to control how your calendar and contacts are synchronized with ***Priority***. For example, task codes and task types must be defined to **Interface w/Outlook**[OPEN Task Codes FORM - MENU PATH CRM > Customer Relations Management > CRM Definitions - AND FLAG A CODE TO Interface w/Outlook] if you plan to export tasks from ***Priority*** to Outlook. In addition, you may want to define a source to assign to any leads that are opened automatically from Outlook[OPEN Sources of Leads/Sales Opps FORM - SAME MENU PATH - AND FLAG SOURCE X IN THE Outlook COLUMN]. Additional information on these and other maintenance requirements is provided elsewhere.

**Preparing for contact synchronization (11:56-14:08)**

You'll also need to set up a few things in Outlook[OPEN OUTLOOK] to facilitate synchronization. For instance, you'll need to set up colored categories that will be used to synchronize contacts with ***Priority***[MOVE TO THE CONTACTS PANE].

During synchronization, ***Priority*** imports any Outlook contacts that are assigned a designated category color, for instance, the color Black. So lets begin by setting up a general category[**Edit > Categorize > All Categories > New**], we'll call it "Sync"[**Name:** Sync], and assigning it the color black. If a particular contact is associated with more than one customer in ***Priority*** (e.g., in the case of a reseller that works with several different customers), you can create additional Outlook categories and use them to distinguish between the customers. To this end, you'll need to create a separate category for each customer[CREATE A CATEGORY CALLED Multiple cus.], using either their ***Priority*** customer number or a unique string from the ***Priority*** customer name. Make sure each new category is assigned a color[Black] indicating that contacts in this category should be synchronized.

Let's take a moment to understand how contacts are synchronized, in order to better understand how these categories should be used.

When contacts are imported from Outlook to ***Priority***, existing contacts are identified by name and e-mail address, as well as by customer category, where one has been assigned. If a corresponding contact is located in ***Priority***, Outlook data will be used to update that contact.

If no such contact exists in ***Priority***, a new record is generated automatically. If the contact in question is assigned a customer category in Outlook, a corresponding ***Priority*** contact is created and linked to that customer. Otherwise, the contact is imported as a lead and assigned the designated source (i.e., Source outlook).
The appropriate categories can be assigned to each contact at any time before synchronization is run, regardless of whether you are working in online or offline mode at the time. Let's go ahead and do so now[ASSIGN CATEGORIES TO SEVERAL CONTACTS - SOME "NEW" AND SOME THAT ARE ALREADY DEFINED IN PRIORITY].

**Preparing for calendar synchronization (14:09-15:04)**
Next, we'll move on to the calendar[MOVE TO THE CALENDAR PANE]. When calendars are synchronized, all of your existing appointments in Outlook are copied into your calendar in Priority, and/or vice versa. If the appointment already exists in the receiving calendar, its details are updated. If it does not, it is added. If you do not want a particular Outlook appointment to be imported during synchronization, simply flag it ahead of time as **Private**.
Here's a quick example of how this type of synchronization might be used. Suppose your secretary schedules a meeting for you in the ***Priority*** calendar, which is then synchronized with Outlook. Once the meeting is over, you can record its outcome in Outlook and then synchronize the data with ***Priority*** upon returning to the office. Additional updates can then be made directly in ***Priority***.

**Preparing for e-mail synchronization (15:05-23:47)**
Next, you'll need to define synchronization parameters for Outlook e-mail messages, and indicate which messages to synchronize. This can be done directly in Outlook, even when working in Offline mode, provided that up-to-date ***Priority*** data (such as customer numbers) are maintained on the workstation in question.
To this end, you need to  export ***Priority*** data for synchronization with Outlook by running the[**Office Management > Mail > Synchronize With MS-Outlook**] **Update Data for Synch w/Outlook** program. The first time you run this program, you'll be able to set up periodic updates [FLAG **Update data atutomatically**], which are performed automatically each time you log in to ***Priority***.
Once all preliminary data are in place and you have restarted Outlook, you are ready to begin flagging e-mail messages for synchronization and defining synchronization parameters for individual messages.
Let's take a moment to understand how messages are synchronized, in order to understand which parameters to define and how these definitions will be used.
Each message can be imported into ***Priority***[MINIMIZE OUTLOOK TO SHOW PRIORITY] as either a task or a service call. When e-mail messages are imported as tasks, these are opened in the **Tasks** form[OPEN FORM] and assigned to you, unless another user is specified in Outlook. The contact for the task[SHOW COLUMN] is determined by the e-mail address. The customer or vendor for the task[SHOW COLUMN] is also determined by the contact, provided that this individual is directly associated with a single ***Priority*** customer/vendor. If the contact is associated with more than one customer or vendor, or if

you want to specify the customer/vendor yourself, you can indicate a particular customer or vendor directly in Outlook. The message text is copied to the **Notes** sub-level form[SHOW] and the message itself is added as an attachment to the task in the **Customer Documents for Task** sub-level form[SHOW; CLOSE FORM].

When e-mail messages are imported as service calls, these are opened in the **Service Calls** form[OPEN FORM] for a customer associated with the recipient/sender of the mail. Again, this is determined either by the customer assigned to the e-mail message or by a direct link between the contact and customer in the **Contacts** form. The message text is copied to the **Details of Malfunction** sub-level form[SHOW; CLOSE FORM].

Now that we've explained how synchronization parameters are used, let's return to Outlook and begin defining these parameters for the messages we wish to import. One way to do this is to simply right-click any item in Outlook and select **Synchronize with Priority**. In the **Synch Parameters** dialog box that opens, choose whether the current message will be imported as a task or a service call[FLAG Open Service Call] and make sure it is flagged for **Synch w/Priority**. Additional parameters can be defined from here as well.

Alternatively, you can customize the view in your Outlook messages pane to make this process quicker and easier. In Outlook 2007, customize the current view from the **View**, **Current View** menu item[**View** > **Current View** > **Customize Current View**]. In the dialog box that opens, click **Group By**, clear the **Automatically group according to arrangement** check box, and then click **OK**.

You can then use Outlook's **Field Chooser** tool[RIGHT-CLICK ANY COLUMN HEADING AND SELECT **Field Chooser**] to add user-defined fields to Outlook [CLICK TOP ARROW IN THE **Field Chooser**, SCROLL ALL THE WAY DOWN AND SELECT **User-defined fields in Inbox**], based on any of the parameters used for synchronization with ***Priority***[DRAG EACH OF THE FIELDS INTO THE HEADER BAR]. The same procedure can be used to add user-defined fields to other Outlook folders as well (e.g., Sent Items).

We're also going to enable in-cell editing in Outlook[RIGHT-CLICK ANY COLUMN HEADING, SELECT **Customize Current View**, CLICK **Other Settings**, FLAG **Allow in-cell editing** AND CLICK **OK**]. This allows you to edit or flag columns within the Messages pane, making synchronization even more efficient. That is, you can now simply define synchronization parameters for each message directly within the Messages pane, and then flag the message in the **Synchronize with Priority** column to include it in the next synchronization.

Let's quickly focus on two of the messages we'd like to synchronize with ***Priority***. The first message[IN OUTLOOK, HIGHLIGHT A MESSAGE FROM Inbal ] was sent from an e-mail address that's already been recorded in ***Priority***[OPEN **Contacts** FORM AND RETRIEVE BY **E-mail Address**: inbal@eshbel.com]. Note that the sender appears both as a **Customer Contact** for the BioTec company[OPEN **Customers** FORM, RETRIEVE BioTec AND SHOW CONTACT IN **Customer Contacts** SUB-LEVEL FORM] and as an **Additional Contact** for Silver Media[RETRIEVE Silver Media IN **Customers** FORM AND SHOW CONTACT IN **Additional Contacts** SUB-LEVEL FORM]. Since this contact is currently linked to more than one customer, we'll have to choose which customer this message

should be associated with when synchronization is performed. We can do so right now from within Outlook itself[RIGHT-CLICK **Synchronize with Priority**], by simply selecting the desired customer from a Choose list[OPEN **Customer** CHOOSE LIST]. This list is populated with all of the customers defined in ***Priority*** at the time the **Update Data for Synch w/Outlook** program was last run[SEARCH FOR & SELECT BioTec].
As you will shortly see, Another sender[IN OUTLOOK, HIGHLIGHT A MESSAGE FROM Jane Lin] has not yet been linked to any customers in ***Priority***[OPEN **Contacts** FORM AND RETRIEVE BY **E-mail Address**: janelin.igoyougo@gmail.com]. We can indicate right here in Outlook[RIGHT-CLICK **Synchronize with Priority**] that the email from this sender should also be linked to the BioTec Company[OPEN **Customer** CHOOSE LIST& SELECT BioTec]. Depending on how your system is set up, a new contact may also be created for the sender when synchronization is performed; this contact would then be linked to the same customer.
Note the subject for the second message: "Price Quote No. PQ12000005". Tasks created from mail messages such as this one are automatically linked to the relevant document in ***Priority*** once synchronization is performed, provided that the full document number appears in the subject line.
Use Outlook's standard grouping and sorting tools to arrange messages according to any of the user-defined fields you added. For instance, you can use these tools to easily locate all messages that are being imported as service calls, and sort them by customer[GROUP BY **Open as Service Call in Priority**, SORT BY **Customer**].

**Setting Up Synchronization Options in Priority (23:48-26:24)**
Finally, we're ready to perform the synchronization itself. The first time you run the synchronization program, you'll have to do so manually and indicate the types of data you want to synchronize. You'll also be able to set up periodic updates, which will be performed automatically, at the designated intervals.
To do so, let's minimize Outlook and open the **Synchronize with Outlook** dialogue box from the **Mail** menu on the ***Priority*** Top Bar.
In the first section, indicate whether you want to synchronize calendars and in which direction synchronization should be performed[SELECT **Update Both**].
In the next section, indicate whether to import contacts from Outlook[FLAG] and designate the category color[UNDER **Task** DEFINITIONS NEXT TO **Use Color**, SELECT "Black"] used to identify the Outlook contacts to be synchronized — black, in this case[SHOW OUTLOOK, MOVE TO CONTACTS PANE, SHOW CONTACTS THAT ARE ASSIGNED THE "SYNC" CATEGORY]. We'll also specify the color to be assigned once synchronization is complete[SELECT "NO COLOR"]. Since we define synchronization parameters for messages directly in Outlook, we can skip the rest of this section.
In the third section, indicate whether to update Outlook tasks based on your to-do list[FLAG]. If this option is flagged, any item appearing on your ***Priority*** to-do list and assigned to you (e.g., a sales order you are responsible for) will be transferred to Outlook tasks.

If you have multiple mail folders defined in Outlook, specify the Outlook Folder to be synchronized. Similarly, if you work with multiple companies in ***Priority***, you must also specify the ***Priority*** company with which to synchronize Outlook. Outlook will always be synchronized with the specified company, regardless of the ***Priority*** company in which you are working at the time of synchronization.
Finally, we're going to schedule automatic synchronization with Outlook[FLAG **Synchronize automatically...** AND INDICATE DESIRED INTERVAL]. You can also run the synchronization program manually by clicking **Sync Now**[CLICK].

**Viewing Results in Priority (26:25-27:49)**
Once synchronization has been performed successfully, you can view the results in the relevant ***Priority*** form. For instance, we can open and update the tasks we just created for the BioTec customer[OPEN **Tasks** FORM TO VIEW TASKS CREATED FOR THE BioTec CUSTOMER, EDIT CONTENTS IN **Notes** SUB-LEVEL FORM. IN TASK FOR "Jane Lin", CLICK **References** TAB AND SHOW LINK TO PRICE QUOTE].
Similarly, you can open your ***Priority*** calendar[MENU PATH: **Office Management > Calendar Maint. & Office Hours > Calendar**] to view any new appointments created during synchronization, and view new or updated contacts in the **Leads** and **Contacts** forms[OPEN **Leads** FORM TO VIEW NEW LEADS, SHOW THAT THESE ARE ASSIGNED SOURCE Outlook].

**Sending Appointment Information (for Outlook) to Participants (27:50-29:14)**
You can also send appointment details to participants who may not have access to ***Priority*** (e.g., users working remotely, and customer or vendor contacts). The scheduling information recorded in ***Priority***[OPEN **Tasks** FORM AND RETRIEVE AN "APPOINTMENT"] (e.g., participants, start time, end time)[POINT TO EACH COLUMN] is sent to participants as an e-mail attachment, which can be uploaded directly into the recipient's Outlook calendar. Before you begin, make sure that e-mail addresses are defined in ***Priority*** for all participants[PRESS **F6** TO ZOOM TO A PARTICIPANT AND RECORD AN E-MAIL ADDRESS FOR THEM].
To send appointment information, return to the **Tasks** form and retrieve the desired record, then select **Send Outlook Msg to Participants** from the list of Direct Activations. Note that the e-mail attachment created by this program is not limited to use with Outlook, but may also be viewed and uploaded into other scheduling programs.

**Sending Report/Report Data to MS-Office (29:15-32:54)**
When running a report in ***Priority***,[e.g., **CRM > Customer Relations Management > CRM Reports > Tasks per Customer**] users can choose to generate a new report or access a report that was run previously, that is, a saved report. In either case, unless you specify otherwise, the finished report is displayed in an HTML page. You can then use any of the standard browser options to save or print the page. You can also use the icons that appear at the top of the report to export the report data to Excel, Word or Outlook, respectively[POINT TO EACH].

Alternatively, you can bypass the HTML page altogether and send the report directly to MS-Office. If you are running a new report, you can select the **Send to Excel** option before generating the report in order to send report data directly to an Excel spreadsheet. If you are running a saved report, you can choose to send the report to MS-Word, or attach it to an e-mail[SELECT EACH].

Similarly, all documents that are generated in ***Priority*** (e.g., **Order Confirmation**)[MOVE TO **Sales Orders** FORM AND SELECT **Order Confirmation** FROM DIRECT ACTIVATIONS] offer several print/send options, which typically include options to send the report as an e-mail attachment[SELECT **Mail**] or open and save the report in Word[SELECT **Microsoft Word**].

Moreover, ***Priority*** enables authorized users to create custom-designed Word and Excel templates for any system form, using ***Priority***'s Word Document Generator and Excel Report Generator. These templates can then be used to generate an infinite variety of documents that include select data fields, exported directly from ***Priority*** forms and reports[FROM TOP BAR, SELECT **File > Send Data to Microsoft Word** AND CHOOSE A PRE-DEFINED TEMPLATE, SHOW RESULTS IN WORD]. Such templates are particularly useful for printing checks directly from ***Priority***, using bank, vendor and payment data that have already been recorded in ***Priority***. Detailed instructions on designing and using Word and Excel templates for system data and on printing checks based on a Word template are provided elsewhere.

This concludes our tour of ***Priority***'s Office integration and synchronization tools.

**Related Documentation**

- Business Intelligence clip
- User Interface Guide
- CRM Wizard
- Check Payments Wizard