

ActiPOINT

# OutlookD

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## Introduction

*ActiPOINTOutlookD* extends the abilities of *ActiPOINT* by the teamwork with Microsoft Outlook. There are several individual scenarios configurable by you, which associate either *ActiPOINT* or Outlook the bigger meaning.

If you want to use primarily or even solely Outlook as your contact manager, choose the settings which let *ActiPOINT* working in the background. Outlook is extended by the dial of outgoing phone calls and the registration of incoming phone calls. For example, callers are identified by the help of the Outlook contact data and journal entries are generated according to the settings.

If *ActiPOINT* is your favored contact manager, then it can under the use of *ActiPOINTOutlookD* access the contact data of Outlook. Export and import functionalities of all or parts of your contacts data are made available to you.

In the following you find a brief abstract of the contents of the single chapters.

In the chapter ‚Specification and Requirements’ you find a brief extract from the list of the possibilities of *ActiPOINTOutlookD*. Furthermore, please, follow the preferences important for the use which are likewise listed in this chapter.

The chapter ‚Installation’ describes the steps necessary for the installation and gives assistance, if one or other obstacle appears.









In the chapter ‚Configuration’ the settings for the meaningful use are demonstrated. The behavior of *ActiPOINT* in the teamwork with Outlook during coming in and going out calls is determined by you. The settings which influence the import and export of contact data are also described in this chapter.

The choice and use of extension specific actions, e.g. the import treated in the chapter ‘ACTIONS’.



We wish you a lot of fun in the everyday use of *ActiPOINT*.

# Specification and Requirements

## Specification of *ActiPOINToutlookD*

-  Integration of the dial options in Outlook.
-  Use of Outlook in a single scenario. *ActiPOINT* remains in the background. Incoming and outgoing calls are registered in Outlook and the suitable contact data is searched.
-  Pop ups of Outlook contact windows and build of journal entries of the type 'call' for coming in and coming out calls. You have always a look at the past communication with a contact.
-  The use of *ActiPOINT* in a 'single scenario' permits the quiet access to the contact data of Outlook.
-  Every conceivable mix in the use of *ActiPOINT* and Outlook is possible.
-  Import and export functions from and to Outlook.
-  Choice of the target contact folder for the automatically creation of contacts. Choice of the contact folders, which is used to identify callers.
-  Intuitive and easy working.

## Requirements

-  Installed *ActiPOINT*
-  Installed Outlook (Microsoft)

# Installation

## Installation of ActiPOINToutlookD

You receive *ActiPOINTOutlookD* in form of a packed file in the ZIP format (the file has the ending .zip).

**Tip :**



Before you carry out the installation of *ActiPOINTOutlookD*, please uninstall the previous installation of *ActiPOINTOutlookD*.

In the following the installation steps are described:

1. Unpack the file in a directory of your choice.  
(Go under use of Windows Explorer to the directory in which you have filed the ZIP file. Under Windows 2000 or XP you click twice on the name of the ZIP file. Select a directory or make one. You unpack the ZIP file in this directory.)

**Tip :**



To unpack a file in the ZIP format you need an additional program using Windows 2000 or preceding Windows versions. One possibility is to use 'Winzip', which is also available in a shareware version on the Internet. Follow the documentation under 'Winzip', to unpack the installation files. Under Windows XP the functionality of pack and unpack in the ZIP format is part of the operating system. Use Windows Explorer under Windows XP to unpack the installation files.

2. Start the installation while you open *ActiPOINTOutlookD.msi*.  
(G Using the windows explorer go into the diretory, you have chosen for unpacking. Make a double click of your Mouse onto the file *ActiPOINTOutlookD.msi*)
3. There appears a window. Please, go to the next installation step.  
(In the lower line there are two buttons with the label **cancel** and **continue**. Go with the mouse over **continue** and click once or press the key Return once.)
4. A license text is indicated, which peruse carefully, please. If you can agree to the license text, choose the option 'I agree'. Please, go to the next installation step.  
(If you want to agree to the license text, please, click with the mouse on the unsatisfactory small circle on the left beside the text 'I agree'. Now the circle must be filled. Furthermore the color of the button **continue**> to be found in the lower area changes from gray too clearly black. Herewith the button gets selectable. Click **continue**> once using the mouse or press the key Return.)

5. It is offered you the possibility to choose the installation directory. If you want to change the given directory, you do it at this point. Please, go to the next installation step.  
*(If the new installation-file path desired by you is known to you completely, type the path in the field ,folder'. If not, you click on the button **search** to choose an alternative installation-file path.*

**Tip :**



It is important that you use the same Installation directory, which you have chosen for the installation of **ActiPOINT**. The installation directories of **ActiPOINT** and **ActiPOINTOutlookD** have to be identically !

6. Confirm the wish on installation of **ActiPOINTOutlookD** while you go to the next installation step.  
*(If you liked to continue the installation, please, click **continue>** once using the mouse or press the key Return.)*
7. There appears a horizontal progress bar which informs you about the proceeding of the installation. While the bar fills, the necessary files will be transferred to the hard disk.
8. The end of the installation is indicated. Now **ActiPOINTOutlookD** is available to use.  
*(Click **continue** once with using the mouse or press the key Return.)*

After the installation, please, read the chapter ,basic settings' carefully to be able to effect the necessary setting for the use of **ActiPOINTOutlookD**.

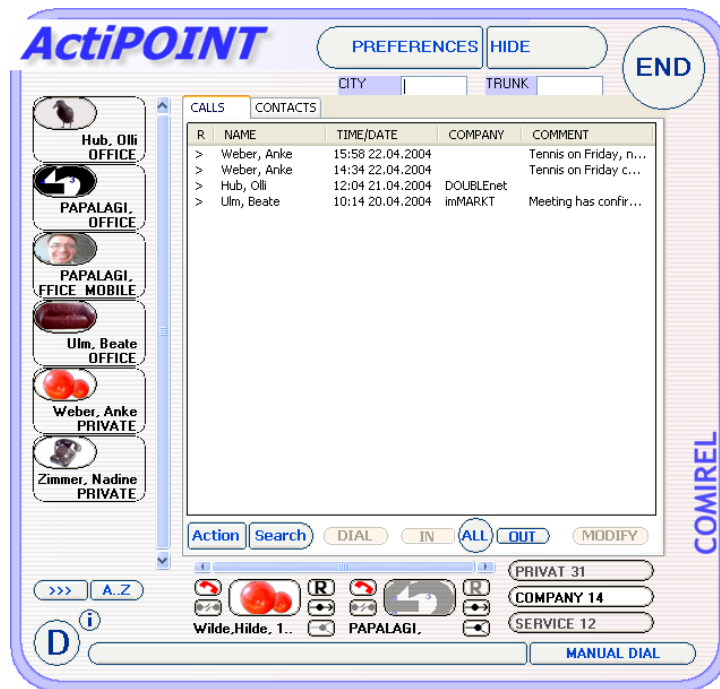
## Deinstallation

The deinstallation of *ActiPOINTOutlookD* is described in the follower:

1. Click in the left from the Taskbar on the button **start**. It opens the start menu to itself.
2. Windows XP user jump directly to point 3. , please. Select the menu point 'settings'.
3. Select the menu point ,control panel'. It opens a window of the same name to itself.
4. Please, click on ,add or remove programs'. It opens another window to itself.
5. You see a list of the installed programs. Search *ActiPOINTOutlookD* and click on the right side of the entry on the button **Change/Remove**. There appears another window, which gives further instructions to you. Follow these instructions.
6. After a successfully deinstallation of *ActiPOINTOutlookD* you close both remained windows.

## Choice of ActiPOINToutlookD

To select *ActiPOINToutlookD* as an application extension to use it in *ActiPOINT*, please open *ActiPOINT*. After opening *ActiPOINT* the main window appears. If you have already added contacts it appears like following one:



Picture 1: Main window, filing card ,CALLS'

In the upper area the button **SETTINGS** is found. Operate this button to open the dialog 'SETTINGS'. Go on the filing card 'APPLICATIONS'

On the filing card ,APPLICATIONS' you select the application extensions you want to use. These extensions are dynamically bound to *ActiPOINT* and extend it functionally.

On this filing card a uniform procedure is offered to carry out the settings of these optional, different extensions.

Furthermore you can be carried out on this filing card the application extensions own actions.



Picture 2: Sub window ,SETTINGS', filing card ,APPLICATION'

## Specific setting of application Extension

First, choose in the area ,CONFIGURATION' of the index filing card 'APPLICATIONS' on the right beside ,application' an application module. In this trap you choose the entry 'OutlookD'

*(The choice occurs, while you use the down pointing arrow on the right beside the text field for ,application'. Position the cursor of the mouse on this arrow and press the left mouse once. The text field automatically extends its size and indicates a list of the available application-modules. Please, go with the cursor of the mouse on the name of the desired application-module and click once the left mouse key. Now the name is shown inverted. Therefore you have selected this.)*

Mark now the application-extension chosen by you to the use, while you select the option ,use application'.

*(Please, lead the cursor of the mouse on the small unfilled square on the left beside ,use application'. Press the left mouse key once to select this option. The small square will be filled.)*

### Tip :



Farther specific application settings can be carried out after ending and a renewed start of *ActiPOINT*.

About the button **>>> DIALOG** you reach the application-extensions own setting-dialog, if this is made available by the application-extension. You find further instructions in the complementary documentation of the application-extension.

## Specific actions of application-extensions

To run one, from an application-extension made available action, select first in the area ,ACTION' of the index card ,APPLICATIONS' on the right beside ,application' an application-extension.

*(The choice occurs, while you use the down pointing arrow on the right beside the text field for ,application'. Position the cursor of the mouse on this arrow and press the left mouse once. The text field automatically extends its size and indicates a list of the available application-modules. Please, go with the cursor of the mouse on the name of the desired application-module and click once the left mouse key. Now the name is shown inverted. Therefore you have selected this.)*

### Tip :



Only the extensions stand for the choice which specific actions make available.

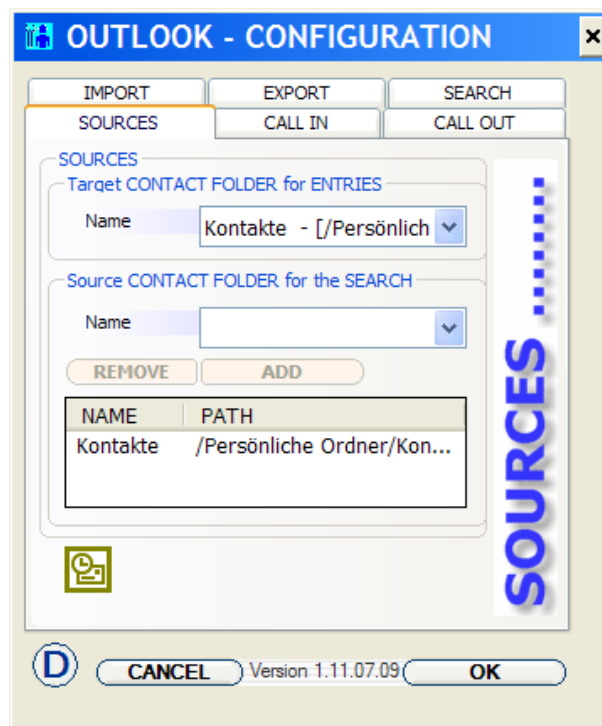
About the button >>> **DIALOG** you reach the application-extensions own action dialog, if this is made available by the application-extension. You find farther instructions in the chapter 'Actions'.

## Configuration

To configure *ActiPOINToutlookD* call on the its own configuration dialog using the button >>>DIALOG in the area 'Configuration':

Hint :

- Pressing the button **D** opens the *ActiPOINTnotesD* documentation (you just see).



Picture 3: 'OUTLOOK-CONFIGURATION', filing card 'SOURCES'

## Settings for target and source contact folders

You can manufacture the access to contact folders using the filing card 'SOURCES'. If you don't do any settings, then the standard contact folder will be used for the identification of callers and for automatically produced contact entries.

## Target contact folder for entries

Choose the desired contact folder in the choice field beside 'name' in the area 'Target CONTACT FOLDER for ENTRIES', which will be used for automatically made contact entries. Don't exist a suitable Contact in Outlook for an incoming or outgoing call, you can configure OutlookD to add a new contact folder automatically.

## Source contact folders for the search

You can determine which contact folders will be used for the identification of callers.

### Add contact folder

Choose the desired contact folder in the choice field beside 'name' in the area 'Source CONTACT FOLDER for the search', which will be add to the contact folder pool used for the identification of callers. After you clicked on the button **ADD**, you found a new entry line for the folder in the list below.

### Delete contact folder

Do you want to delete a contact folder in the list, which holds the contact folders for the identification of callers, you have to chose one in the first. After you used the button **REMOVE** the entry is permanently removed.

## Settings for incoming calls

On the filing card 'CALL IN' you can carry out the settings which control the behavior of *ActiPOINT* in conjunction with Outlook in managing incoming calls.



Picture 4: 'OUTLOOK-CONFIGURATION', filing card 'CALL IN'

### Option 'search for contacts'

Do you want that *ActiPOINT* is generally looking for contact data in Outlook, you have to select the option 'search for contacts'

*(Please, lead the cursor of the mouse on the small unfilled square on the left beside 'search for contacts'. Press the left mouse key once to select this option.)*

In spite of whether a contact is found or not a call entry in *ActiPOINT* will be created always.

## Behaviors in found contacts

### Option ,open contact'

Using the option ,create/open contact' *ActiPOINT* opens the contact entry in Outlook. You have full access to the suitable Outlook contact data, for example the past calls.

### Option ,create journal'

Using the option ,create journal' *ActiPOINT* generates a new journal entry of the type call in Outlook if an incoming call arrives. The journal entry is bound to the suitable contact in Outlook.

### Option ,open journal'

Using the option ,open journal' *ActiPOINT* indicates you an incoming by opening the created journal entry. You can add or modify call data like the actual conversation content.

## Behaviors in not found contacts

### Option ,build/open contact'

Using the option ,create/open contact' *ActiPOINT* build a new contact entry in Outlook and open it in the Outlook own contact window. You can complement the contact entry by contact data like name, company and numbers.

### Option ,create journal'

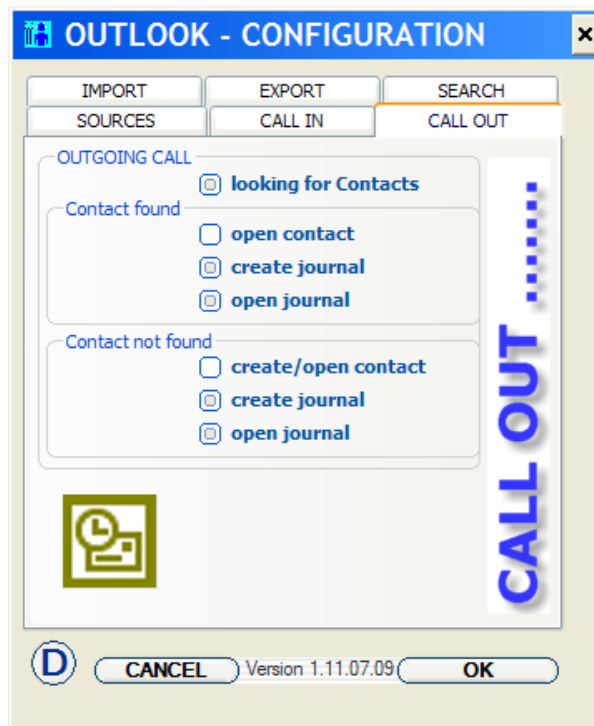
Using the option ,create journal' *ActiPOINT* generates a new journal entry of the type call in Outlook if an incoming call arrives. The created journal entry is bound to the suitable contact in Outlook.

### Option ,open journal'

Using the option ,open journal' *ActiPOINT* indicates you an incoming by opening the created journal entry. You can add or modify call data like the actual conversation content.

## Settings for outgoing calls

On the filing card 'CALL OUT' you can carry out the settings which control the behavior of *ActiPOINT* in conjunction with Outlook in managing outgoing calls.



Picture 5: 'OUTLOOK-CONFIGURATION', filing card 'CALL OUT'

### Option 'search for contacts'

Do you want that *ActiPOINT* is generally looking for contact data in Outlook, you have to select the option 'search for contacts'

*(Please, lead the cursor of the mouse on the small unfilled square on the left beside 'search for contacts'. Press the left mouse key once to select this option.)*

In spite of whether a contact is found or not a call entry in *ActiPOINT* will be created always.

## Behaviors in found contacts

### Option 'open contact'

Using the option ,create/open contact' *ActiPOINT* opens the contact entry in Outlook. You have full access to the suitable Outlook contact data, for example the past calls.

#### Option ,create journal'

Using the option ,create journal' *ActiPOINT* generates a new journal entry of the type call in Outlook if an outgoing is initiated. The journal entry is bound to the suitable contact in Outlook.

#### Option ,open journal'

Using the option ,open journal' *ActiPOINT* indicates you an outgoing by opening the created journal entry. You can add or modify call data like the actual conversation content.

### Behaviors in not found contacts

#### Option ,create/open contact'

Using the option ,create/open contact' *ActiPOINT* build a new contact entry in Outlook and open it in the Outlook own contact window. You can complement the contact entry by contact data like name, company and numbers.

#### Option ,create journal'

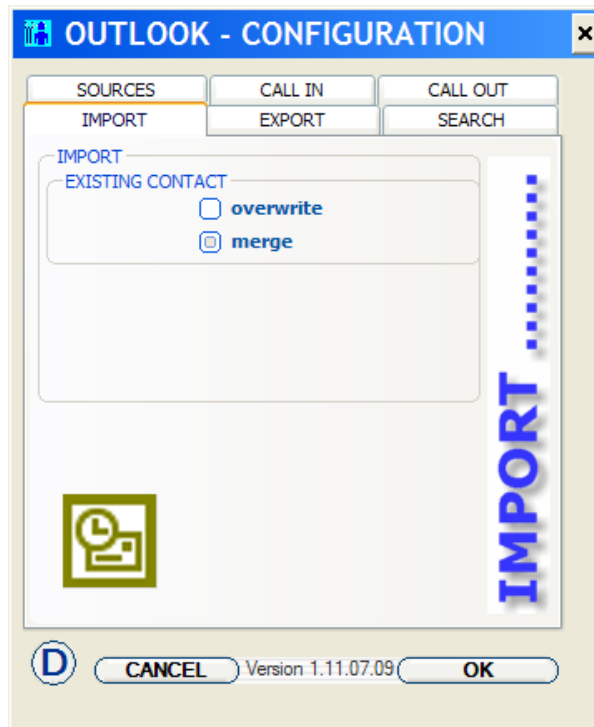
Using the option ,create journal' *ActiPOINT* generates a new journal entry of the type call in Outlook if an outgoing is initiated. The journal entry is bound to the suitable contact in Outlook.

#### Option ,open journal'

Using the option ,open journal' *ActiPOINT* indicates you an outgoing by opening the created journal entry. You can add or modify call data like the actual conversation content.

## Settings for the import

The index filing card ,IMPORT' offers settings which determine the way of import contact data from Outlook. All contact data Outlook contains but are not found in *ActiPOINT* are added. If can be found identically contact data in both applications you can give the behavior.



Picture 6: ,OUTLOOK-CONFIGURATION', filing card ,IMPORT'

### Behavior in available contacts

One of both options to be found below must be selected.

#### Option ,overwrite'

Using the option ,overwrite' all contact data in *ActiPOINT* which are identically found in Outlook will be overwrite. All information about a contact in *ActiPOINT* will be lost and is replaced by the contact data of the same person from Outlook.

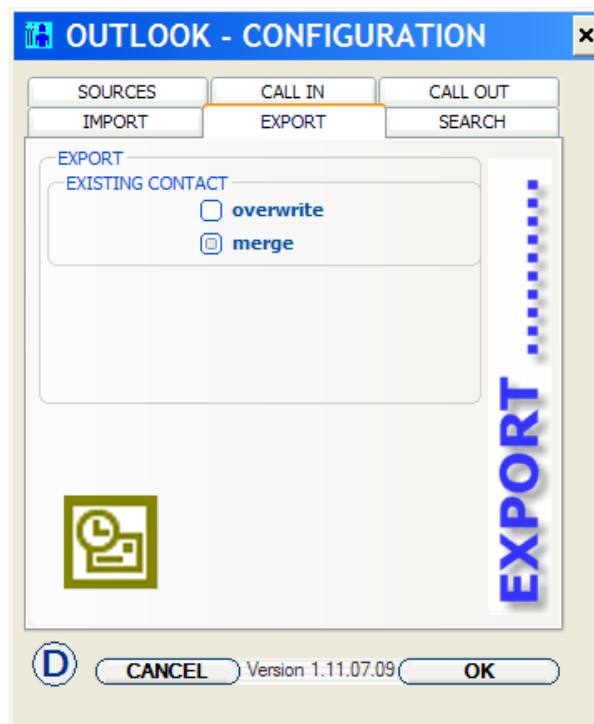
### Option ,merge'

Using the option ,merge' all contact data in *ActiPOINT* which are identically found in Outlook will be merged with the Outlook contact data. No contact information gets lost of a certain contact in *ActiPOINT* .

For example, is an email address or comment absent in a contact and this information exists in Outlook the information is complemented. Exists there contradictory information in Outlook and in *ActiPOINT* the information available in *ActiPOINT* will maintain.

## Settings for the export

The index filing card ,EXPORT' offers settings which determine the way of export contact data to Outlook. All contact data *ActiPOINT* contains but are not found in Outlook are added. If can be found identically contact data in both applications you can give the behavior.



Picture 7: ,OUTLOOK-CONFIGURATION', filing card ,EXPORT'

## Behavior in available contacts

One of both options to be found below must be selected.

### Option ,overwrite'

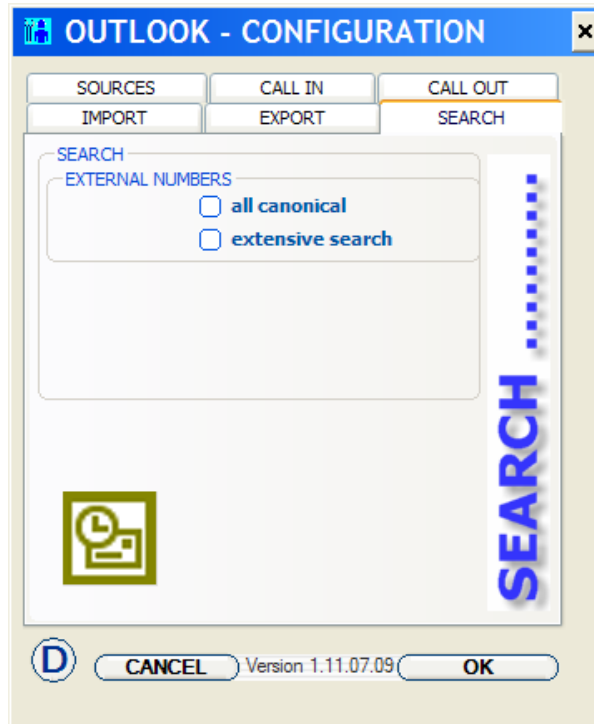
Using the option ,overwrite' all contact data in Outlook which are identically found in *ActiPOINT* will be overwrite. All information about a contact in Outlook will be lost and is replaced by the contact data of the same person from *ActiPOINT* .

### Option ,verbinden'

Using the option ,merge' all contact data in Outlook which are identically found in *ActiPOINT* will be merged with the *ActiPOINT* contact data. No contact information gets lost of a certain contact in Outlook. For example, is an email address or comment absent in a contact and this information exists in *ActiPOINT* the information is complemented. Exists there contradictory information in Outlook and in *ActiPOINT* the information available in Outlook will maintain.

## Settings for the search

The filing card ,SEARCH' offers settings, which influence the used search methods.



Picture 8: ,OUTLOOK-CONFIGURATION', filing card ,SEARCH'

## Settings for external numbers

The following described options are optional.

### Option ,all canonical'

In the case that all external numbers are in the canonical format, you can chose this option. Using this option leads to an acceleration of the searching process.

### Option ,extensive search'

The selection of this option leads to a successful search also, if the Telephone numbers of the contacts in OUTLOOK are not in ideal form. The search process is slowed down and is recommended only for smaller numbers of contacts.

## Recommendations for the format of telephone numbers

The observance of the following recommendations leads to a high search efficiency and a high hit rate. Your telephone numbers in OUTLOOK, should be in the described formats.

### External numbers (without mobile numbers)

With the term external numbers we summarize all numbers, which are used for calls to city, national or international targets.

Please state all external numbers in the canonical format. An example:

- **+49 (30) 12345678**

The used 'strict' canonical format begins with a plus sign. It is followed by the country code without any blanks. In our example the 49 for Germany was chosen. Afterwards state a blank character. The local reference number follows framed by parentheses. The closing parenthesis must be followed by a blank. Finally add the local number without any between-lying blanks or other characters than numerals.

If you should have your external numbers for the local area of your current location in one of the following forms, the caller is usually also identified. (referred to example above)

- **030 12345678**
- **03012345678**
- **12345678**
- **012345678**
- **00493012345678**

### Mobile numbers

A Mobil number should be a sequence of numerals without any between-lying characters other than numerals like blanks. An example:

- **016387654321**

### Internal numbers

An internal number should be a sequence of numerals without any between-lying characters other than numerals like blanks. An example:

- 544

### VoIP „numbers“

You have to indicate a VoIP number exactly the same, as it indicates to you by incoming call. Two examples:

- **12345678@sipgate.net**
- **01212444123456**

The second example stands for an external number assigned by the VoIP provider for coming in calls from the regularly wired based telephony net.

### Important tip:



Make sure that the settings for the telephone system in *ActiPOINT* are correctly made. In the case that you do not use *ActiPOINT* in conjunction with a telephone system, these settings could be useful also. By indication of an external number identification (for example a leading zero ) you ensure that this will be automatically used to complement telephone numbers for dialing.

An example:

External number identification (Prefix) **0** -> local number **12345678** -> automatically modified number for dialing **012345678**

## Actions

The actions which are made available by *ActiPOINToutlookD* are callable in the suitable context.

### Actions in the context settings

To use actions within the context settings, call on the *ActiPOINToutlookD* own action dialog by operating the Button >>>**DIALOG** in the area Actions like described in the chapter 'Choice of ActiPOINToutlookD'




Picture 9: ,OUTLOOK - ACTION'

The following functions can be called by using the corresponding buttons:

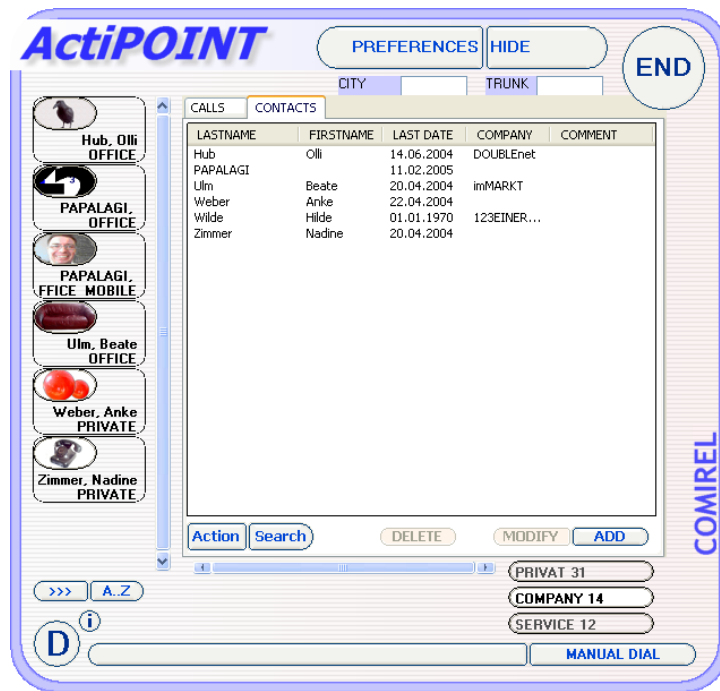
<b>EXPORT ALL CONTACTS</b>	This function enables the export of all contacts to Outlook taking into account the settings you had done.
<b>IMPORT ALL CONTACTS</b>	This function leads to an import of all contact data of Outlook. Your settings determines the way.

**Tip :**

-  Use the above possibility to match the contact data between both applications in the beginning after the installation. Of course these functions are still available to you later and also in other contexts.

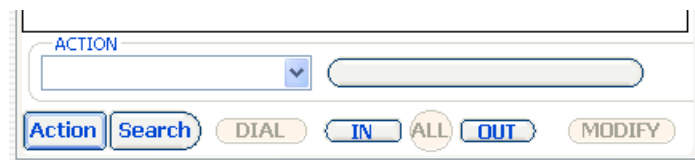
## Actions in other contexts

On the filing card 'contacts' of the main window are found actions for the import and export single, well-chosen or all contact.



Picture 10: Main window, filing card ,CONTACTS'

These operations becomes accessible after the operation of the button ACTION besides the Button SEARCH below the list representation. After use of this button the filing card changes as follows: The contact list becomes shorter and it appears a button and a choice field.



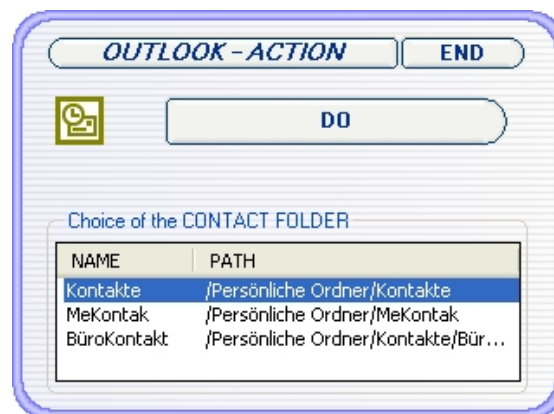
Picture 11: Main window, filing card ,CONTACTS': Cutting - ACTION -

First select an action:

<b>OUTLOOK: Import contacts</b>	This function initiates an import of all contacts of Outlook to <i>ActiPOINT</i> .
<b>OUTLOOK: Export contacts</b>	This function initiates an export of all contacts of <i>ActiPOINT</i> . If the list of contacts is limited using SEARCH only this choice is exported.
<b>OUTLOOK: export contact</b>	Only the selected contact will be exported.
<b>OUTLOOK: Export chosen contacts</b>	Only the selected contacts will be exported.

*(The choice occurs, while you use the down pointing arrow on the right beside the text field for,action'. Position the cursor of the mouse on this arrow and press the left mouse once. The text field automatically extends its size and indicates a list of the available actions. Please, go with the cursor of the mouse on the name of the desired action and click once the left mouse key. Now the name is shown inverted. Therefore you have selected this.)*

The button being on the right carries the name of the selected function. Use this button to carry out the elected function.



Picture 12: ,OUTLOOK - ACTION'

Select the OUTLOOK contact folder, which you want to use for export/import and operate the button **DO**. The running export/import process will be indicated by a dialog.

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