

Outlook Integration Manager is part of the Dialog Manager suite, which is a unique multi-channel solution enabling you to attract, retain and grow customer relationships across traditional sale-, service- and marketing boundaries.

Outlook Integration Manager,
DIALOG MANAGER

OUTLOOK EMAIL AND CALENDAR INTEGRATION

DESCRIPTION

Utilize Outlook Integration Manager and obtain the optimum automation of all dialogue through two-way integration with the company's email- and calendar system.

Working with Outlook Integration Manager

The integration between Dialog Manager and Exchange/Outlook is complete with automation with the areas of emails, tasks, contacts and calendar. Dialog Manager is integrated with Outlook/Exchange Server via OLE automation, COM and CDO. In this way, Dialog Manager is using the optimum technology for management of both the Outlook client program and the Exchange Server.

Send and receive emails

Registration of correspondence dialogue is highly important when you most need it - often when it is unexpected. Emails back and forth are saved in the central Logbook, which makes it easier to search across all emails to a specific contact - or across all emails to all contacts. The Logbook also ensures, for instance, that newsletters sent via distribution lists are registered on the individual contact.

Whether dealing with just one - or many - contacts for a certain issue the message can be tailor-made for the individual recipient. The responsible person then mail merge using relevant fields from Profile Manager, and the recipient of the email will experience data and other contents as unique and relevant.

Working with tasks

In Dialog Manager the task list is synchronized with the task list in Outlook. With the necessary rights the user can in Dialog Manager, across all users and across all contacts, see all tasks. As a result, it is possible to search in Dialog Manager across all customers and in this way create a cockpit view of e.g. active projects, meetings or activity status. Working offline with, for instance, a laptop is completely automatic synchronization when connection to the central server.

Working with contacts

Similarly as with tasks, it is possible to synchronize your contacts. As users typically have more persons registered in Dialog Manager than in Outlook the user has access to a contact subscription service in Dialog Manager. The user only needs to checkmark the individual contact for subsequent synchronization.

And not least....working with calendar

Booked meetings are automatically registered in the Logbook. This also means that minutes, in for instance MS Word, are also saved on the individual contact. In this way, the total dialogue history is saved in the Logbook. As with tasks, meetings created offline are automatically synchronized when connecting to the central server.



KEY BENEFITS

- ✓ Total electronic dialogue history on the contact through filing of received emails in Dialog Manager
- ✓ Shortcut to filing of sent emails to contacts via direct email initiation from the contact in Dialog Manager
- ✓ Work with tasks in Dialog Manager with automatic synchronization provides optimum overview of activities on the contact
- ✓ Overview of- and work with contacts via automatic and user controlled synchronization
- ✓ Configuration flexibility through active selection between client and server access to user inboxes
- ✓ Automatic creation of follow-up tasks when a meeting is completed in own- or other person's task list
- ✓ Multi-dimensional filling in of MS Outlook contact information: Private/Work/Other
- ✓ Fully automatic update of meetings/appointments in Logbook when changed outside Dialog Manager, for instance via Outlook
- ✓ Minimized Exchange Server load due to low-level integration via CDO and COM
- ✓ No adaptation on Exchange Server or MS Outlook Forms
- ✓ Support for MS Outlook Extended Security

See **FUNCTIONALITY** on back side



- ✓ Extended Enterprise Edition
- ✓ Enterprise Edition
- ✓ Professional Edition
- ✓ Small Business Edition

Outlook Integration Manager, DIALOG MANAGER

FUNCTIONALITY

This functionality is included in Outlook Integration Manager:

- ◆ Send emails from Dialog Manager with filing
- ◆ Receive emails in Dialog Manager with filing
- ◆ Work with tasks with automatic synchronization
- ◆ Work with contacts with automatic- and user controlled synchronization
- ◆ Active selection between client and server access to user inboxes
- ◆ Automatic creation of follow-up tasks in own- or other person's task list after completed meeting
- ◆ Multi-dimensional filling in of MS Outlook contact information: Private/Work/Other
- ◆ Fully automatic update of meetings/appointments in Logbook when changed outside Dialog Manager, for instance via Outlook
- ◆ Minimized server load due to low-level integration via CDO and COM
- ◆ No adaptations on Exchange Server or MS Outlook Forms
- ◆ Support for MS Outlook Extended Security

CHECKLIST

- ✓ MS Exchange Server 2000 or later
- ✓ Outlook 97, 98, 2000 or XP
- ✓ Two-way integration
- ✓ Exchange server integration:
 - Emails
 - Contacts
 - Tasks
 - Meetings
- ✓ Automatic synchronization
- ✓ Contact subscription